Public Document Pack

Committee: **Executive**

Date: **Monday 2 October 2023**

Time: **6.30 pm**

Venue **Bodicote House, Bodicote, Banbury, Oxon OX15 4AA**

Membership

Councillor Barry Wood (Chairman)

Councillor Adam Nell (Vice-Chairman)

Councillor Phil Chapman
Councillor Donna Ford
Councillor Andrew McHugh
Councillor Dan Sames

Councillor Sandy Dallimore
Councillor Nicholas Mawer
Councillor Eddie Reeves
Councillor Nigel Simpson

AGENDA

1. **Apologies for Absence**

2. **Declarations of Interest**

   Members are asked to declare any interest and the nature of that interest that they may have in any of the items under consideration at this meeting.

3. **Petitions and Requests to Address the Meeting**

   The Chairman to report on any requests to submit petitions or to address the meeting.

4. **Minutes** (Pages 9 - 20)

   To confirm as a correct record the Minutes of the meeting held on 4 September 2023.

5. **Chairman's Announcements**

   To receive communications from the Chairman.

6. **Response to Petition Received on Food Choices** (Pages 21 - 26)

Report of Corporate Director Communities and Climate Action Manager

Purpose of report

To set out the council's response to the petition received at the 17 July 2023 Council meeting asking the council to support the raising of awareness of the links between food choices, individual carbon footprints and biodiversity loss.

The wording of the petition was as follows:

"We, the undersigned, petition Council to use its website and leaflets to households on recycling and food waste to raise awareness of the links between food choices, individual carbon footprints and biodiversity loss.

We ask Council to encourage residents to consume less meat and dairy and to support local growers and farmers by choosing seasonal, local produce. "

This report sets out how the Council has considered the petition and seeks approval of Executive for its proposed resolution.

Recommendations

The meeting is recommended:

1.1 To acknowledge that the council has already taken considerable steps to support the need for changes in the way food is produced in order to reduce its impact on the climate and biodiversity.

1.2 To acknowledge that the council is continuing to support the district in reducing its carbon emissions and seek opportunities to enhance local biodiversity and is working with a range of partners on several initiatives to make this possible.

1.3 To acknowledge the work of the Food Insecurity Working Group and the development of a food strategy locally through Good Food Oxfordshire.

1.4 To ask the Corporate Director Communities to respond to the petitioner setting out the Council's position.

7. **An Action Plan Regarding the Cost of Living Crisis** (Pages 27 - 44)

Report of Assistant Director Wellbeing and Housing

Purpose of report

This report presents both the activities Cherwell District Council is currently engaged in to support residents experiencing difficulties because of the rising cost of living and provides an update on a range of new actions designed for this winter and so complete the action agreed by Full Council on 17 July,

This council notes the ongoing pressure on the budgets of local residents and calls on the Executive to draw up a cost-of-living action plan within 100 days.

Recommendations

The meeting is recommended:

1.1   To approve £100,000 investment in the additional activities programmed for winter 2023 and set out within this report as an action plan.

1.2   To approve the development of an evaluation framework that captures the impact of these actions and require officers to update the Overview and Scrutiny Committee in November 2023 and January 2024 on progress made.

8.   **Sandy Lane, Yarnton to Kidlington** (Pages 45 - 58)

Report of Assistant Director – Planning and Development

Purpose of Report

To advise the Executive of the considerations associated with the Council resolution on Sandy Lane.

Recommendations

The meeting is recommended:

1.1   To note a development brief and planning application for site PR8 (Land East of A44) will be presented to the Planning Committee for consideration in due course.

1.2   To note the wording of a formal response to an application expected to be submitted by Network Rail to the Secretary of State for Transport for a Transport and Works Act Order will involve consultation with the Planning Committee Chairman and Portfolio Holder for Planning and Development in due course.

9.   **Building Control Enforcement** (Pages 59 - 70)

Report of Assistant Director - Planning and Development

Purpose of report

To formalise an Enforcement Policy for Building Control.

Recommendations

The meeting is recommended:

1.1   to endorse the proposed building control enforcement policy (Appendix 1).

10. **OxLEP's Oxfordshire Strategic Economic Plan 2023 - 2033** (Pages 71 - 146)

Report of Assistant Director - Growth and Economy

Purpose of report

To consider Oxfordshire Local Economic Partnership's (OxLEP's) Strategic Economic Plan for Oxfordshire (SEP) 2023 – 2033, providing an update on the progress to date in drafting the document. The report will also outline the SEP's forward trajectory, explaining the path it will follow both through Cherwell District Council's democratic processes and through other organisations involved. This includes, for example, the OxLEP Board; other local authorities (reporting through their respective democratic processes) and the Future Oxfordshire Partnership (FOP).

Recommendations

The meeting is recommended:

1.1   To endorse OxLEP's Strategic Economic Plan (SEP) 2023 – 2033.

1.2   To delegate to the Corporate Director – Communities, in conjunction with the Portfolio Holder for Regeneration, to engage in the development of the detail of the SEP, including any future action plans which might emerge.

11. **OxLEP's Oxfordshire Visitor Economy Vision and Destination Management Plan 2023 - 2028** (Pages 147 - 330)

Report of Assistant Director – Growth and Economy

Purpose of report

To consider Oxfordshire Local Economic Partnership's (OxLEP's) Oxfordshire Visitor Economy Vision and Destination Management Plan 2023 – 2028.

Recommendation

The meeting is recommended:

1.1   To note OxLEP's Oxfordshire Visitor Economy Vision and Destination Management Plan 2023 – 2028.

12. **Procurement Strategy (incorporating Social Value)** (Pages 331 - 354)

Report of Assistant Director Law and Governance & Monitoring Officer

Purpose of report

To provide an overview of a new Procurement Strategy - with background context to its aims and objectives - for adoption by the Council.

Recommendations

The meeting is recommended:

1.1   To approve the Procurement Strategy.

13.   **Performance, Risk and Finance Monitoring Report August 2023** (Pages 355 - 406)

Report of Assistant Director Finance and Assistant Director Customer Focus

Purpose of report

To give the committee an update on how well the council is performing in delivering its priorities, managing potential risks, and balancing its finances during August 2023.

Recommendations

The meeting is recommended:

1.1   To consider and note the contents of the Council's Performance, Risk and Financial report for the month of August 2023.

1.2   To approve the Risk Strategy 2023 – 24 (Appendix 8).

1.3   To note the change in the reporting cycle for the five monitoring only measures from monthly to quarterly.

1.4   To approve the use of reserves in Appendix 5.

1.5   To approve the £0.108m additional grant funding for the Disabled Facility Grant Capital Project.

14.   **Urgent Business**

The Chairman to advise whether they have agreed to any item of urgent business being admitted to the agenda.

15.   **Exclusion of the Press and Public**

The following report contains exempt information as defined in the following paragraph of Part 1, Schedule 12A of Local Government Act 1972.

3 – Information relating to the financial or business affairs of any particular person (including the authority holding that information).

Members are reminded that whilst the following item has been marked as exempt, it is for the meeting to decide whether or not to consider it in private or in public. In making the decision, members should balance the interests of individuals or the Council itself in having access to the information. In considering their discretion members should also be mindful of the advice of Council Officers.

No representations have been received from the public requesting that this item be considered in public.

Should Members decide not to make a decision in public, they are recommended to pass the following recommendation:

"That under Section 100A of the Local Government Act 1972, the public and press be excluded from the meeting for the following item of business on the ground that, if the public and press were present, it would be likely that exempt information falling under the provisions of Schedule 12A, Part 1, Paragraph 3 would be disclosed to them, and that in all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information."

16.   **Town Centre House**

** This exempt report will follow **

Exempt report of Corporate Director Resources

Councillors are requested to collect any post from their pigeon hole in the Members Room at the end of the meeting.

Information about this Agenda

Apologies for Absence

Apologies for absence should be notified to democracy@cherwell-dc.gov.uk or 01295 221534 prior to the start of the meeting.

Declarations of Interest

Members are asked to declare interests at item 2 on the agenda or if arriving after the start of the meeting, at the start of the relevant agenda item.

Local Government and Finance Act 1992 – Budget Setting, Contracts & Supplementary Estimates

Members are reminded that any member who is two months in arrears with Council Tax must declare the fact and may speak but not vote on any decision which involves budget setting, extending or agreeing contracts or incurring expenditure not provided for in the agreed budget for a given year and could affect calculations on the level of Council Tax.

Local Authorities (Executive Arrangements) (Meetings and Access to Information) (England) Regulations 2012

This agenda constitutes the 5 day notice required by Regulation 5 of the Local Authorities (Executive Arrangements) (Meetings and Access to Information) (England) Regulations 2012 in terms of the intention to consider an item of business in private.

Evacuation Procedure

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Please ensure that any device is switched to silent operation or switched off.

Queries Regarding this Agenda

Please contact Natasha Clark, Democratic and Elections democracy@cherwell-dc.gov.uk, 01295 221534

Yvonne Rees
Chief Executive

Published on Friday 22 September 2023

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Cherwell District Council

Executive

Minutes of a meeting of the Executive held at Bodicote House, Bodicote, Banbury, Oxon OX15 4AA, on 4 September 2023 at 6.30 pm

Present:

Councillor Barry Wood (Chairman), Leader of the Council and Portfolio Holder for Policy and Strategy
Councillor Adam Nell (Vice-Chairman), Deputy Leader and Portfolio Holder for Finance
Councillor Phil Chapman, Portfolio Holder for Healthy and Safe Communities
Councillor Sandy Dallimore, Portfolio Holder for Corporate Services
Councillor Donna Ford, Portfolio Holder for Regeneration
Councillor Nicholas Mawer, Portfolio Holder for Housing
Councillor Andrew McHugh, Portfolio Holder for Cleaner and Greener Communities
Councillor Dan Sames, Portfolio Holder for Planning and Development
Councillor Nigel Simpson, Portfolio Holder for Sport and Leisure

Apologies for absence:

Councillor Eddie Reeves, Portfolio Holder for Property

Also Present:

Councillor John Broad, Chairman Overview and Scrutiny Committee
Councillor George Reynolds

Also Present Virtually:

Councillor David Hingley, Leader of the Opposition, Progressive Oxfordshire
Councillor Ian Middleton

Officers:

Yvonne Rees, Chief Executive
Ian Boll, Corporate Director Communities
Stephen Hinds, Corporate Director Resources
Michael Furness, Assistant Director Finance & S151 Officer
Shiraz Sheikh, Assistant Director Law and Governance & Monitoring Officer
David Peckford, Assistant Director Planning & Development
Nicola Riley, Assistant Director Wellbeing & Housing
Christina Cherry, Interim Planning Policy Team Leader
Maria Dopazo, Principal Planning Policy Officer
Natasha Clark, Governance and Elections Manager

Officers Attending Virtually:

Shona Ware, Assistant Director Customer Focus
Richard Smith, Head of Housing
James Wilson, Interim Manager Bicester Garden Town Programme
Chris Thom, Principal Planning Policy Officer

15   **Declarations of Interest**

11. Performance, Risk and Finance Monitoring Report April to July 2023.
Councillor Andrew McHugh, Other Registerable Interest, as a trustee of
Tooley's Boatyard.

16   **Petitions and Requests to Address the Meeting**

The Chairman welcomed Councillor Broad, Chairman of the Overview &
Scrutiny Committee. Councillor Broad would be speaking on Item 6 –
Cherwell Local Plan Regulation 18 Consultation; Item 8 – Tenant's Charter;
and Item 11 – the performance aspects of the Performance, Risk and Finance
Monitoring Report – April to July 2023.

The Chairman advised that he had agreed to requests from Councillor
Reynolds and Councillor Middleton to address the Executive on Item 6 -
Cherwell Local Plan Regulation 18 Consultation.

17   **Minutes**

The minutes of the meeting held on 3 July 2023 were agreed as a correct
record and signed by the Chairman.

18   **Chairman's Announcements**

The Chairman referred to the recent press coverage regarding school
closures due to safety concerns regarding the type of concrete, reinforced
autoclaved aerated concrete (RAAC) used in buildings. The Chairman
advised that Oxfordshire County Council had confirmed that it had undertaken
an audit process of all maintained schools 18 months ago and was confident
that no maintained schools in the county were affected.

19   **Cherwell Local Plan Regulation 18 Consultation**

The Assistant Director Planning and Development submitted a report to
present, for consideration, a draft of the emerging Cherwell Local Plan Review
2040 for consultation purposes.

Prior to the Portfolio Holder for Planning and Development presenting the report, the Chairman invited Councillor Reynolds, Councillor Broad and Councillor Middleton to address the meeting.

Councillor Broad, Chairman of the Overview and Scrutiny Committee, summarised the feedback from the Committee which had considered the draft Local Plan at their special meeting on 16 August. The Committee had resolved to make the following comment to Executive: In line with the motion that had been adopted at the February 2023 full Council meeting on housing affordability mix, the Local Plan should be stronger in terms of the desirability of having more affordable housing in the allocated sites.

The Overview and Scrutiny Committee had made a number of detailed comments and observations which had been published as an appendix to the Executive report. Proposed changes to the Local Plan in response to the Committee's comments had also been published as an appendix to the Executive report.

The Chairman thanked Councillors Reynolds, Broad and Middleton for their comments and thanked the Overview and Scrutiny Committee for their detailed scrutiny and subsequent feedback.

In introducing the report, the Portfolio Holder for Planning and Development explained that the council had a legal requirement to review its Local Plan every five years and update if appropriate. This current review of the Local Plan provided the opportunity to establish a new set of policies for addressing housing and other development needs, for climate action, for healthy place-shaping, for biodiversity net gain, for our urban centres, rural areas and in response to new Government policy and guidance.

Following the resolution of Executive in January 2023 to defer the consultation on the draft Local Plan at that time, officers had taken the opportunity to undertake a wide review of the scope and presentation of the draft plan. It had been redrafted with a greater emphasis on consultation, with feedback being more explicitly encouraged and with specific questions added. Where possible the language had been made more accessible and information had been presented in a simpler, more understandable, and transparent way.

The version submitted to Executive was a consultation draft of the emerging Plan under Regulation 18 of the Local Plan regulations (the issues and options stage of plan-making). The 6-week consultation was supported by a communications plan and would provide an opportunity for local communities, interest groups, statutory bodies, infrastructure and service providers, development promoters and other stakeholders to comment on emerging thinking and make suggestions on how the Plan should be developed further.

This stage was extremely important as the council still retained the flexibility to amend the emerging Plan in response to the consultation responses and further evidence. Responses to consultation at the next proposed or pre-submission stage (Regulation 19) were submitted with the Plan for Examination. In line with the Government's current proposals, Plans prepared

under the current Local Plan system should be submitted for Examination by 30 June 2025.

Resolved

(1)   That public consultation on the draft Cherwell Local Plan Review 2040 (Annex to the Minutes as set out in the Minute Book) be approved, subject to the changes presented in response to the resolution of the Overview and Scrutiny Committee of 16 August 2023 (Annex to the Minutes as set out in the Minute Book).

(2)   That authority be delegated to the Assistant Director - Planning and Development to make any minor amendments and corrections to the draft document he considers necessary prior to formal publication and in consultation with the Portfolio Holder for Planning and Development.

(3)   That authority be delegated to the Assistant Director – Planning and Development to finalise and publish supporting documents in consultation with the Portfolio Holder for Planning and Development.

Reasons

The Council has a legal requirement to review its Local Plan every five years. A new Local Plan is required to meet Cherwell's needs, protect its environment and secure sustainable development. The process for preparing a new local plan is prescribed by legislation. This current Plan is a consultation draft prepared to prompt discussion and feedback on its vision, objectives, spatial strategies, and new planning policies. When adopted, the Local Plan will guide the delivery of sustainable development across the district. The Executive is invited to approve a consultation to support further plan development.

Alternative options

Option 1: Not to progress a Cherwell Local Plan Review at this time.
The Council has a legal requirement to review its Local Plan every five years, and update it if appropriate. There is therefore an expectation that most plans will need to be updated every five years. Progressing the review of the Local Plan is required to ensure a plan-led approach to development in Cherwell.

Option 2: Delay progress on a Cherwell Local Plan Review.
The Local Plan programme has already slipped, principally due to the decision in August 2022 to cease work on the Oxfordshire Plan which was expected to set the strategic level of growth across the County. More recently, following consideration of a previous version of the draft local plan in January 2023 the Executive resolved, "…*Consultation be deferred until a later date….in light of the comments of the Overview and Scrutiny Committee and Executive to allow officers to consider these comments*". Further delay would create significant uncertainty about maintaining a plan-led approach to development in Cherwell.

Option 3: Do not consult on an emerging Plan at 'Regulation 18' stage
There is no specific requirement to publish a draft Plan under Regulation 18 of the Local Plan regulations. There have been two issues and options consultations in 2020 and 2021 and the Council could wait until it publishes a proposed / pre-submission Plan under Regulation 19. However, there is time to undertake consultation now which would provide further opportunity for community engagement, benefit Plan development and ensure as many issues as possible are considered before a proposed Plan is prepared under Regulation 19.

20   **Local Development Scheme**

The Assistant Director – Planning and Development submitted a report to seek approval of an updated Local Development Scheme (LDS) to produce the Council's key planning policy documents.

Resolved

(1)   That the updated Local Development Scheme (LDS) (Annex to the Minutes, as set out in the Minute Book) be approved.

Reasons

An updated LDS has been prepared taking into account the significant change in circumstances since the last LDS was adopted in 2021. It provides a broad programme for completion of the on-going Local Plan review and a potential Community Infrastructure Levy. The Council has a statutory responsibility to prepare and maintain an LDS. The LDS will be used by officers, the public, partners and developers and other stakeholders to monitor the production of documents and to plan for associated consultations. Approval of the LDS is needed to assist project management and ensure that the Council meets its statutory responsibilities for plan-making. The LDS will be reviewed again if there is a further, significant change in circumstances.

Alternative options

Option 1: Not to approve the LDS
The Council has a statutory responsibility to maintain an LDS. If the Council did not prepare its own LDS the Secretary of State could impose one. Aside from legal duty, not to approve the LDS could undermine the confidence of the public and stakeholders about the Council's plan-making programme. The LDS would need to be re-presented to the Executive at a future meeting.

Option 2: To reconsider the content of the LDS
The LDS has been prepared having regard to the Council's statutory responsibilities and current resources. It is considered by officers to be appropriate for the present and foreseeable circumstances.

21   **Tenant's Charter**

The Assistant Director – Wellbeing and Housing submitted a report to consider and approve the Council's new Tenants Charter for the tenants that live within its rented stock portfolio.

In introducing the report, the Portfolio for Housing thanked the Housing Team for their work, tenants who had responded to the consultation and the Overview and Scrutiny Committee who had considered the draft Strategy at their 1 August meeting.

Councillor Broad addressed Executive and advised that the Overview and Scrutiny Committee had commended the Strategy and planned publicity and promotion. The Committee had highlighted the importance of ensuring the information and language in the Charter was accessible to all. The Committee had recommended the draft Tenants Charter for adoption by Executive, subject to their comments on consideration of the language used in the Charter, ensuring the final draft was accessible to all tenants, and additional clarity on how residents could raise issues with the Council as their landlord.

Resolved

(1)   That the Tenants Charter (Annex to the Minutes as set out in the Minute Book), which sets out a new service standard that all tenants can expect to receive from the Council whilst they are living within properties the Council manages, be approved.

(2)   That the planned publicity and promotion to ensure a raising of the standards of rented properties within the District, following the motion at the Council meeting on 17 July 2023 that called on the Executive to reiterate the basic rights of tenants across Cherwell and the responsibilities of landlords and run a public awareness campaign of the Charter, encouraging tenants to be aware of their rights and where local sources of advice and support can be found, be approved.

Reasons

The Council is committed to improving the standards of accommodation and the experience of tenants within the District, and the new Tenants Charter and its commitments provide a framework for ensuring this is realised and also assists the Council in its leadership role in driving improvements in standards.

Alternative options

Option 1: Not to bring forward a Tenants Charter
This option would be contrary to a Motion from Council and a previous Executive decision.

22   **Increase service family accommodation for ARAP scheme members**

The Assistant Director – Wellbeing and Housing submitted a report to increase the delivery of housing and support for the ARAP scheme (Afghan Resettlement and Assistance Programme) in Cherwell. The original figure was to accommodate 10 families in MOD housing which has now been achieved. The request is to increase our offer of accommodation for a further 6 properties making 16 in total by early 2024.

In introducing the report, the Portfolio Holder for Housing highlighted that this was pioneering work between the council and the MOD with funding provided by the Home Officer. The Chairman reiterated the comments and asked officers to write to the Minister of State (Minister for Veterans' Affairs), the Rt Hon Johnny Mercer MP, to invite him to visit the work the council was undertaking.

Resolved

(1)   That authority be delegated to Assistant Director Wellbeing and Housing in consultation with Portfolio Holder Housing to:

   a. agree variation to existing agreement to extend the offer of accommodation from 10 properties to 16 properties for the period as deemed appropriate.
   b. agree and utilise future accommodation for the same purpose.

Reasons

The ARAP scheme offers priority relocation to eligible current or former Afghan nationals who were locally employed staff by the British military forces and who are assessed to be under serious threat to life. CDC currently leases 10 properties from the Ministry of Defence (MOD) for housing Afghan refugees under the Government's ARAP scheme. CDC has been offered a further six properties to resettle more Afghan families who worked with British forces during the war in Afghanistan.

Alternative options

Option 1: Not offer to partner the Home Office in their commitment to settle families in the UK who were part of the United Kingdom military operation in Afghanistan. Rejected because Cherwell District Council considers itself part of the UK response to supporting refugees

Option 2: Provide accommodation through our regular housing register. Rejected By partnering with the MOD we are able to provide a resource not usually available to non-service personnel and so protect the applicants on the housing register from an increase in people seeking homes through that route.

23   **Bicester Garden Town Programme - Market Square Project Business Need and Next Stages**

The Assistant Director – Growth and Economy submitted a report to provide the Executive with the background and context for this capital project; to set out the business need for the Bicester Market Square enhancement proposals; to gain approval to appoint consultants to undertake feasibility studies, further design work and consultation with key stakeholders and the wider public; and, to provide the Executive with an understanding of the governance of the project and gateways to full scheme approval.

Resolved

(1)   That the business need for transformational public realm improvements at Bicester Market Square be confirmed.

(2)   That the expenditure (up to a level of £180k) required for consultants to undertake detailed design through to planning permission and consultation with stakeholders be approved and it be noted this will include associated studies on;
-    the relocation of parking and wider impacts of parking within Bicester
-    traffic movement and flows through Market Square and around the Town Centre, including access for existing businesses/users
-    a full design of the Market Square public realm improvement project with full business case for the capital expenditure and future revenue impact from changes to car parking income and any future costs

(3)   That it be noted the governance of the project to monitor and review development of the full business case which will return to Executive for approval prior to delivery of the project.

Reasons

Significant resources (£4.25m) have been made available to progress this project through the Council's capital programme and officers are now seeking to bring forward more detailed plans in consultation with stakeholders and the public for members to approve.

Therefore, officers are seeking to have the business need for delivering this project at the market square in Bicester affirmed and for authorisation to expend up to £180k of the anticipated £900k professional fees on relevant studies, consultation and detailed design (to the point of planning application submission) to enable a further report to members recommending approval for the final scheme and how it will be delivered.

Alternative options

Options would be evaluated as part of the consultation process

24   **Performance, Risk and Finance Monitoring Report April to July 2023**

The Assistant Director – Finance and Assistant Director – Customer Focus submitted a report to update Executive on how well the council was performing in delivering its priorities, managing potential risks, and balancing its finances for 2023/24 up to the end of July 2023.

Councillor Broad, Chairman of Overview & Scrutiny Committee addressed the Executive. Cllr Broad reported that the Overview & Scrutiny Committee had asked general questions of clarification on the report but had no specific comments to make to Executive and had noted the report.

Resolved

(1)   That the Council's Performance, Risk and Financial report for the current financial year up to the end of July 2023 be noted.

(2)   That the inclusion of a capital budget under officer delegated authority of £0.160m to provide a grant to the Canal & River Trust funded through S106 developer contributions in recognition of our commitment to the canal as an important asset in the district be noted.

(3)   That £0.112m for the Digital Transformation Capital Project be approved.

Reasons

This report provides an update on progress made between April and July, to deliver the council's priorities, manage potential risks and remain within the agreed budget.

Alternative options

This report summarises the council's performance, risk, and financial positions up to the end of July, therefore there are no alternative options to consider. However, members may wish to request further information from officers for inclusion.

25   **Summary of Debt Write Offs**

The Assistant Director Finance submitted a report to provide members with a summary of the accounts proposed for write-offs and to request approval for the write-offs. These were debts where all avenues for collecting the debt have been exhausted and it is good practice to write these debts off. All of the debts proposed for write off would be funded from the Council's Bad debt Provision.

£1.042m Council Tax and £1.002m business rates were proposed for write off. These debts ranged from 2001/02 to 2023/24. Over this period bills of £1.809bn had been raised for Council Tax and £1.559bn for business rates. As a result 0.06% and 0.06% of the value billed over this time frame is recommended for write off.

The Portfolio Holder for Finance and the Chairman thanked Finance Officers for their diligent and hard work in undertaking the review.

Resolved

(1)   That, having given due consideration, the proposed bad debt write offs summarised in exempt Annex A to the Minutes (as set out in the Minute Book) which details debts recommended for write-off relating to Council Tax debts where the value exceeds £5,000, be approved.

(2)   That, having given due consideration, the proposed bad debt write offs summarised in exempt Annex B to the Minutes (as set out in the Minute Book), which details Business Rates debts recommended for write-off where the values exceeds £10,000, be approved.

(3)   That the proposed write off of debts where the value is less than £5,000.00 for Council Tax and less than £10,000. for Business Rates but all recovery methods have been exhausted, which have been reviewed by the S151 Officer and are available to be reviewed on request, be approved.

(4)   That it be noted that the constitution gives a delegation to the S151 Officer to write off bad debts for Business Rates up to the value of £10,000 and up to the value of £5,000 for non-business rates bad debt and that following this review the S151 Officer will operate under this delegation and periodically update the Executive on the actions taken.

Reasons

The Council's financial procedure rules require that recommended write offs with an outstanding balance of £5,000 and above for Council Tax, Overpayment of Housing Benefit or Sundry Debtors, and £10,000 and above for Business Rates must be approved by the Executive

Alternative options

Option 1: To not write off the debt. This old and irrecoverable debt places additional administration on the team as periodically, it is required to be reviewed and pursued. By writing off the debt, more time will be able to be focussed on reviewing debt that is more likely to be recoverable.

26   **Urgent Business**

There were no items of urgent business.

27   **Exclusion of the Press and Public**

There being no questions on the exempt appendices, it was not necessary to exclude the press and public.

28   **Summary of Debt Write Offs - Exempt appendices**

There being no questions on the exempt appendices, they were considered as agreed as detailed under Minute 25.

The meeting ended at 8.00 pm

Chairman:

Date:

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Cherwell District Council

Executive

2 October 2023

Response to Petition Received on Food Choices

Report of Corporate Director Communities and Climate Action Manager

This report is not public

Purpose of report

To set out the council's response to the petition received at the 17 July 2023 Council meeting asking the council to support the raising of awareness of the links between food choices, individual carbon footprints and biodiversity loss.

The wording of the petition was as follows:

"We, the undersigned, petition Council to use its website and leaflets to households on recycling and food waste to raise awareness of the links between food choices, individual carbon footprints and biodiversity loss.

We ask Council to encourage residents to consume less meat and dairy and to support local growers and farmers by choosing seasonal, local produce. "

This report sets out how the council has considered the petition and seeks approval of Executive for its proposed resolution.

1.0   Recommendations

The meeting is recommended:

1.1   To acknowledge that the council has already taken considerable steps to support the need for changes in the way food is produced in order to reduce its impact on the climate and biodiversity.

1.2   To acknowledge that the council is continuing to support the district in reducing its carbon emissions and seek opportunities to enhance local biodiversity and is working with a range of partners on several initiatives to make this possible.

1.3   To acknowledge the work of the Food Insecurity Working Group and the development of a food strategy locally through Good Food Oxfordshire.

1.4   To ask the Corporate Director Communities to respond to the petitioner setting out the council's position.

2.0   Introduction

2.1   Following the debate of the petition at Full Council on 17 July 2023, the petitioner was informed that their petition would be considered by the Corporate Director Communities and the Climate Action Manager, in consultation with the Portfolio Holder for Cleaner and Greener Communities, with a view to a report being submitted for consideration by Executive at their 2 October 2023 meeting.

2.2   This report sets out the council's consideration of the issues raised in the petition, in the context of wider strategic work it has done.

2.3   The council has for several years now been taking steps to improve its sustainability and that of the district. In 2019 it declared a Climate Emergency followed in 2020 by the production of the Climate Change Framework.

2.4   The Climate Change Framework commits the council to supporting the district to reduce its emissions on the way to becoming carbon net zero. This commitment includes action on the introduction of biodiversity net gain targets, supporting investment in increasing tree cover and encouraging improvements in carbon intensity of local agriculture and food consumed.

3.0   Report Details

3.1   Implicit in the commitment that the council has made to support the district to reduce its emissions, is a recognition that changes are needed across many aspects of life, including in the production and consumption of food.

3.2   It is understood that intensive animal agriculture is a significant contributor to the emissions from the food sector, and that some reductions in consumption in meat and dairy are likely to be required.

3.3   It is also understood that across the globe, the expansion of animal agriculture is having a significant impact upon natural habitats and therefore contributing to the loss of biodiversity.

3.4   The council recognises that in supporting emissions reductions in the district, it has a role to play in supporting local food growing initiatives, supporting food growers and producers and influencing food choices through information campaigns.

3.5   Information about food choices is contained on the Climate Action Oxfordshire website, which is linked to from Cherwell DC's website, where the benefits of both a vegetarian and a plant-based diet are outlined.

3.6   Cherwell District council has signed up to the principles of Bioregional's *One Planet Living* which support local prosperity and promoting a culture of sustainable living. There are three principles which are particularly relevant to this report:

- Land and Culture – Protecting and restoring land for the benefit of people and wildlife.

- Local and sustainable food – Promoting sustainable humane farming and healthy diets high in local, seasonal organic food and vegetable protein.

- Zero Waste – Reducing consumption, reusing and recycling to achieve zero waste and zero pollution.

3.7 A Climate Change Action Plan is currently being developed for the council, in which the principles of *One Planet Living* have been considered. The Action Plan is being brought to Executive on 6 November. The council will continue to examine how it can strengthen its support for the principles of *One Planet Living*, for example through their inclusion in the Local Plan.

3.8 The council is a signatory to the Oxfordshire Food Strategy whose vision is that everyone in the county can enjoy the healthy and sustainable food they need every day.

3.9 The Strategy called for the establishment of Food Action Groups across the county, and one has been set up in Cherwell. The Group is aiming to set up a Food Action Plan and is currently examining aspects such as sustainable supply chains, food justice, reductions in food waste and the creation of a sustainable food economy. Officers and councillors from Cherwell District Council continue to attend the meetings and support the work of this group.

3.10 As previously mentioned, a Climate Change Action Plan is being produced, based on the 2020 Climate Change Framework, setting out the actions needed to reduce greenhouse gas emissions from the council and the district.

3.11 The Plan contains a suite of actions designed to support and enhance the natural environment. The natural environment needs action across many areas, if a halt in biodiversity decline is to be achieved and this is reflected in the Climate Change Plan. Both enhancements to biodiversity and an increased in the ability of the natural environment to absorb carbon emissions is vital for our long-term sustainability.

3.12 The council will also be supporting the establishment of an Oxfordshire Nature Recovery Strategy, development of which will be led by Oxfordshire County Council, with support from the districts.

3.13 Furthermore, under the obligations of the Environment Act 2021, in early 2024 the council will have to produce a 5-year plan setting out how it will help meet the government's aspirations to halt the decline in biodiversity and protect 30% of land.

3.14 Both of the above activities place significant emphasis on CDC to identify tangible actions it can take in the support of biodiversity enhancement.

4.0 Conclusion and Reasons for Recommendations

4.1 This report has set out how the council already recognises the impact of food choices on the climate and the natural environment, and has already taken steps to initiate positive change.

4.2 Several policy areas contribute to this theme, including the Climate Change Framework 2020, the adoption of *One Planet Living*, council support of the Climate Action Oxfordshire website and the developing Climate Action Plan.

4.3 Changes to methods of food production and in public behaviour around food choices need action across both the public and private sectors. This includes Cherwell District Council, which will continue to work on reducing emissions, protecting the natural environment and improving the sustainability of the district of Cherwell.

5.0 Consultation

Several service areas across the council were consulted in the writing of this report, including Planning, Leisure and Environmental Services.

6.0 Alternative Options and Reasons for Rejection

6.1 The following alternative options have been identified and rejected for the reasons as set out below.

Option 1 – Take the steps to encourage all residents to reduce their consumption of meat and dairy, as sought in the petition. This option is rejected as the council is already taking several steps to encourage residents to understand the implications of their food choices and therefore meeting our responsibilities to raise awareness of these issues as part of a programme of climate change activity.

7.0 Implications

Financial and Resource Implications

7.1 There are no finance and resource implications arising from this report.

Comments checked by:
Joanne Kaye, Head of Finance, joanne.kaye@cherwell-dec.gov.uk

Legal Implications

7.2 There are no legal implications arising from this report.

Comments checked by:
Shahin Ismail, Interim Head of Legal Services, Shahin.ismail@cherwell-dc.gov.uk

Risk Implications

7.3 There are no risk implications arising from this report.

Comments checked by:
Celia Prado-Teeling, Performance and Insight Team Leader, 01295 221556, celia.prado-teeling@cherwell-dc.gov.uk

Equalities and Inclusion Implications

7.4 There are no equalities nor inclusion implications arising directly from this report. However, in line with our Equalities, Diversity and Inclusion framework, any decisions and proposals will have a correspondent Equalities Impact Assessment, to make sure any potential impact is mitigated.

Comments checked by:
Celia Prado-Teeling, Performance and Insight Team Leader, 01295 221556, celia.prado-teeling@cherwell-dc.gov.uk

Sustainability Implications

7.5.0 The report has already set out the positive work that the council is doing and committed to around food choices and biodiversity, and these make a positive contribution to the council's sustainability goals.

Comments checked by:
Ed Potter, Assistance Director Environmental Service, ed.potter@cherwell-dc.gov.uk

8.0 Decision Information

Key Decision

Financial Threshold Met: No

Community Impact Threshold Met: No

Wards Affected

All

Links to Corporate Plan and Policy Framework

Supporting environmental sustainability

Lead Councillor

Councillor Andrew McHugh, Portfolio Holder for Cleaner and Greener Communities

Document Information
Appendix number and title
- None

Background papers
None

Report Author and contact details
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Cherwell District Council

Executive

2 October 2023

An Action Plan Regarding the Cost of Living Crisis

Report of Assistant Director Wellbeing and Housing

This report is public

Purpose of report

This report presents both the activities Cherwell District Council is currently engaged in to support residents experiencing difficulties because of the rising cost of living and provides an update on a range of new actions designed for this winter and so complete the action agreed in the motion adopted by Full Council on 17 July 2023:

"This council notes the ongoing pressure on the budgets of local residents and calls on the Executive to draw up a cost-of-living action plan within 100 days."

1.0 Recommendations

The meeting is recommended:

1.1 To approve £100,000 investment in the additional activities programmed for winter 2023 and set out within this report as an action plan.

1.2 To approve the development of an evaluation framework that captures the impact of these actions and require officers to update the Overview and Scrutiny Committee in November 2023 and January 2024 on progress made.

2.0 Introduction

2.1 At the Full Council meeting on 17 July 2023, the following motion was debated and unanimously agreed.

"This council notes the ongoing pressure on the budgets of local residents and calls on the Executive to draw up a cost-of-living action plan within 100 days."

2.2 Having considered the pressures our residents are experiencing because of the increases to the cost-of-living we have shaped the action plan around the following five focus areas that will support our residents: Health and Wellbeing; Food Insecurity; Fuel Poverty; Accessing Advice; and Maximising Income.

2.3   This report has two appendices. Appendix One captures the proposed action plan and Appendix Two the current initiatives or actions Cherwell District Council will be taking this winter to help residents tackle the cost of living crisis. Progress and impact will be reported to the Overview and Scrutiny Committee.

3.0   Report Details

3.1   The action plan is shaped around the following five focus areas:

- Health and Wellbeing
  We know that our physical and emotional wellbeing can be impacted detrimentally when our basic needs are not being met. The emerging Cherwell wellbeing strategy 'Everybody's Wellbeing' uses insight and research to identify how we can build stronger, more resilient individuals and communities through a range of interventions and preventative measures.

- Food Insecurity
  High levels of inflation have impacted the cost of food and non-alcoholic beverages over the last 12 months. It is critical that emergency food provision remains accessible to those experiencing crisis through members of the Cherwell Community Food Network while longer term interventions are explored to reduce dependency on foodbanks, such as the growing spaces projects we have supported across the district. The work of the Food Insecurity Working group and the development of a local food strategy frames this work.

- Fuel Poverty
  Drastic increases in the cost of fuel mean households in fuel poverty will not heat their homes consistently, and possibly sufficiently, this winter, leaving them at an increased risk of health complications. The warm welcome network of community spaces assists this, while longer term support is provided to improve energy efficiency. Better Housing, Better Health is one way we assist. The County Council has a resident support fund for people to apply for assistance. Front line customer service and c are upskilled to identify customers at risk and refer for further support.

- Accessing Advice
  The cost-of-living crisis is constantly evolving, it is crucial that households can access specialised advice to navigate the assistance available and identify solutions to prevent and alleviate crisis. We will be working with partners to make sure advice is in a range of places and through trusted sources. We fund Citizens Advice locally to offer a broad spectrum of support and advice to people living with debt. Our customer service and housing team teams regularly signpost residents for targeted support. We produce a 'Who can help?' booklet with local connections and information.

- Maximising Income
  With increases to living costs seen across the board it is important that households have the tools they need make their money go further. This can mean accessing emergency financial assistance to alleviate a crisis, as well as opportunities to grow household income over the longer term. Working with Age UK Oxfordshire and Citizens Advice to ensure that residents are benefitting from

pension credits, Sure Start vouchers and accessing any benefits they could be entitled to. Our revenues and benefits team deliver support and advice on Council Tax reduction scheme and Discretionary Housing Payment. Most Residents receive the practical help and support when they need it.

3.2 Additionally, £100,000 of funding has been ringfenced to provide district wide support for residents to reduce social isolation and reduce food waste. Scheme details will be launched at the end of October in line with Food Insecurity Working Group (FIWG) workplan.

3.3 An evaluation framework will be developed and expanded to monitor the impact of the work programme and reported to the Overview and Scrutiny Committee. The Food Insecurity working Group currently review a data dashboard covering topics, such as the number of food grants given, the number of growing spaces and yield, the number of participating spaces in the Cherwell Warm Welcome network. This will be used as a basis to monitor the action plan.

4.0 Conclusion and Reasons for Recommendations

4.1 Working in partnership across the district with statutory and voluntary sector organisations, both strategically and on a hyperlocal basis, officers will continue to ensure that Cherwell residents can access support and secure help when needed.

4.2 The council recognises that the response to the cost of living crisis is iterative and will need to be flexible to best meet changing needs of residents.

4.3 The broad range of everyday activity currently running is intended to support residents' wellbeing across the five key themes identified, recognising the interplay between them and their respective impact on the lived experience of residents.

5.0 Consultation

With stakeholders, through conversations on particular programme elements, we have been able to co-produce schemes and projects designed to suit the needs of residents.

6.0 Alternative Options and Reasons for Rejection

6.1 The following alternative options have been identified and rejected for the reasons as set out below.

Option 1: To review all programmes and reduce expenditure to statutory levels only. Rejected: The Council takes its community leadership role seriously and works in partnership with voluntary organisations, charities, and other administrations to provide help and support to residents at their most vulnerable and challenging times. Cutting services and support at this time would not be in that interest.

Option 2: To expand the provision of support.

Rejected: The Council would have to use reserves to commit to a wider support package which is not prudent in the current financial climate

7.0   Implications

Financial and Resource Implications

7.1   This programme of actions can be delivered within the allocated budget. The additional £100k will be funded from resources held within Policy Contingency.

Comments checked by:
Michael Furness, Assistant Director of Finance (S151 Officer), 01295 221845, michael.furness@cherwell-dc.gov.uk

Legal Implications

7.2   There are no legal implications arising as the programme is within the council's remit to deliver and all grant aid will be subject to a robust process with appropriate monitoring.

Comments checked by:
Shahin Ismail, Interim Head of Legal Services, 01295 221808, shahin.ismail@cherwell-dc.gov.uk

Risk Implications

7.3   The risks involved in this programme will be captured at an operational level and the data dashboard will assist in highlighting where non delivery or over supply is happening.

7.4   The Overview and Scrutiny Committee will provide oversight of this. The risk in not engaging this programme would impact on residents not managing to cope with additional financial pressures which would in turn produce additional demand for statutory services.

Comments checked by:
Celia Prado-Teeling, Performance and Insight Team, 01295 221556
Celia.prado-teeling@cherwell-dc.gov.uk

Equalities and Inclusion Implications

7.5   These actions are line with our Equalities, Diversity and Inclusion framework, seeking to ensure that all residents who are experiencing difficulties because of cost-of-living pressures will be enabled to take action to minimise that impact. The risk register will capture the risks of this investment not reaching intended recipients.

Comments checked by:
Celia Prado-Teeling, Performance and Insight Team, 01295 221556
Celia.prado-teeling@cherwell-dc.gov.uk

Sustainability Implications

7.6   The co-promotion of Better Housing Better Health and Insulation and retrofitting programmes sit alongside the provision of support for warmer homes and heating.

Comments checked by:
Jo Miskin, Climate Action Manager, Tel; 07900 227103
Jo.miskin@cherwell-dc.gov.uk

8.0   Decision Information

Key Decision

Financial Threshold Met: **Yes**

Community Impact Threshold Met: **Yes**

Wards Affected

All

Links to Corporate Plan and Policy Framework

Support our most vulnerable residents.
Work with partners to address the causes of health inequality and deprivation

Lead Councillor

Councillor Phil Chapman, Portfolio Holder for Healthy and Safe Communities

Document Information
Appendix number and title
- Appendix One - Cherwell District Council Cost of Living action plan Winter 2023/2024
- Appendix Two - Cherwell District Council Cost of Living Current activity grouped by focus / theme.

Background papers
None

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Appendix One - Cherwell District Council Cost of Living action plan Winter 2023/2024

Initiative begins	Activity	Area of focus	Key delivery partners	Progress
October	Relaunch the Cherwell Warm Welcome Network, encouraging more partners	Fuel Poverty	Various community partners (38 in 22/23)	
	International Older Peoples Day stalls in Banbury, Bicester and Kidlington and promoting the community pop up @ Castle Quay	Advice and support Health and wellbeing	Age UK Oxfordshire, Trading standards, Citizens Advice,	
	Additional Food Grants for Community Food Provision	Food Insecurity	Community food Network Partners	
	Activate and Eat Club Half term provision	Food Insecurity	Schools in Cherwell	
November	'Who can help?' booklet refresh and promotion	Advice and Support	All Voluntary Sector Partners and statutory provision	
	Expanded winter warmers programme	Health and wellbeing Food Insecurity	The Hill, Cherwell Collective, BYCE	
	Expand Fuel support programme. Extra Warmth	Fuel Poverty	Citizens Advice	

Initiative begins	Activity	Area of focus	Key delivery partners	Progress
	Reduced membership fees for Oil Co-op for rural residents with oil heating	Fuel Poverty	Community First Oxfordshire	
December and January	Debt and money advice; linking with partners on scam awareness and Loan sharks, domestic abuse	Money Maximisation	Trading Standards, Citizens Advice, CDC (Cherwell District Council) Revenues and Benefits team, Reducing the risk	
	Additional support to distribute surplus festive food	Food Insecurity	Cherwell Community food network, Oxford Food Hub	
	Healthy Eating recipe swap	Food Insecurity Health and wellbeing	Cherwell Community food network	
February and March	Activate and Eat Club available in Half term	Food Insecurity	Schools in Cherwell	
	Cookery skills and shared cooking programme	Health and wellbeing Food insecurity Fuel Poverty	The Hill Parish Councils Cherwell Collective Good Food Oxfordshire	

Appendix Two - Cherwell District Council Cost of Living Current activity grouped by focus / theme

Health and Wellbeing			
Area	**What are we doing**	**Who does it impact**	**Team responsible**
Brighter Futures programme	A partnership approach to support our 3 wards of highest deprivation in Banbury, delivering a variety of initiatives and services to support residents.	Residents living in Ruscote, Neithrop and Grimsbury Wards	Community Development
Community Centre programmes and opportunities across the district	Supporting community centres across the district to develop engaging programmes of activity for all ages at low cost to support their communities they sit in – building stronger communities.	All residents	Community Development
UKSPF funded projects	Delivering a number of initiatives across the district under the levelling up agenda. Focus on improving community facilities to allow residents to access low cost activities to bring communities together and arts and culture to make opportunities accessible for all.	All residents	Community Development /Growth and Economy
You Move	Countywide Family programme developed due to the good practice of the FAST programme initiated in Cherwell.	Families across the district who are eligible for Free School Meals. currently 2100	Sport and Physical Activity

	Families who are eligible for free school meals can access free activities at schools, local parks, community centres along with free resources, activity packs and more. Every family receives a You Move card which enables them to access incentives such as 75% off family swims, clip n climb, local sports clubs and many more.	individuals and 575 families have signed up.	
Ward Profiles	Delivering a community insight programme to three wards in Banbury (Ruscote, Grimsbury & Neithrop) with residents and local organisations being consulted on what they need in their local area. £75k grant scheme (funded externally) for organisations to apply for funding to deliver provision along with a post (funded externally) for 2 years to provide support in these wards	Three wards in Banbury - Ruscote, Grimsbury and Neithrop)	Sport and Physical Activity
Growing Spaces	Supporting community gardens and growing spaces to bring people together to learn new skills, grow food and share good practice.	All residents living close to a community garden or growing space	Community Development and Healthy Communities

Appendix Two - Cherwell District Council Cost of Living Current activity grouped by focus / theme

Bridge Street Gardens	Support the development of the community garden working with the Banbury CAG as a showcase of good practice to work with a variety of local community groups to learn new skills and encourage a social interaction to create a strong community.	Banbury residents and community groups	Community Development
Electric Blanket testing partner	Free electric blanket testing delivered in partnership with OCC Trading standards and Fire & Rescue. This service promotes health and safety, staying well in winter and provides other info on local services.	All residents	Community Development
Volunteer driver scheme	Initiative working with Citizens Advice to link residents to low cost (price of fuel) transport for appointments across the county	All residents	Community Development
12 Weeks Winter Wellbeing Activity Sheets	Free activity sheets focussing on health and wellbeing, free/low-cost activities, and useful contact numbers to help older residents stay well and active over the winter	All residents	Community Development

Appendix Two - Cherwell District Council Cost of Living Current activity grouped by focus / theme

Food Insecurity			
Food Vouchers	Provided a food voucher scheme to residents on housing benefits last winter and continued to work with Cherwell Community Food Network to support individuals in need.	Residents on housing benefits	Healthy Communities
Food Vouchers 2	Supplying 30K food vouchers across CDC for foodbanks to hand out at £50 each. 200 vouchers per foodbank.	Residents in Cherwell visiting the 3 foodbanks covering the district	Healthy Communities
Food support grants	Created a community food grant for local organisations to apply for up to £750 to support residents focussing on food provision.	All CDC groups who want to or already provide food or food storage. For constituted groups with organisation bank accounts.	Healthy Communities
Harvest @Home and The Cherwell Collective	Weekly Thursday sessions in Exeter Hall where locally grown food and surplus food is available to residents to take away. Cooked meals are also provided for residents who visit.	Residents in Kidlington and the surrounding villages.	Healthy Communities
Good Food Oxfordshire – Food support services map	Supporting GFO to have an updated map showing where residents can find food support. Encourage	Residents and food groups.	Healthy Communities

	local groups to sign up to the map.		
Winter Warmers	Winter Warmers initiative delivers hot food to vulnerable older residents by volunteers. It promotes health and wellbeing, encourages people to stay well during the winter months. Not only is food provided, additional information on support services, community groups, food options and a weekly wellbeing check in is provided.	Selected vulnerable older residents across Cherwell. Residents are selected through local organisations such as Age UK and promoted to the local community	Community Development
Play: Full	Encouraging holiday activity providers to link a food offer to all sessions delivered and to follow the Play: Full pledge.	Young people and families focused on 3 wards of deprivation in Banbury	Community Development
Activate and Eat	Providing children aged 5 - 11 years old who are eligible for Free School Meals with FREE physical activity and food holiday clubs during school holidays. There are clubs in Banbury, Bicester, and Kidlington with 4500 FREE places available across Easter and Summer holidays	Children and families across the district who are eligible for free school meals	Tom Gubbins Sport and physical activity
Fuel Poverty			

Appendix Two - Cherwell District Council Cost of Living Current activity grouped by focus / theme

Warm Welcome network	During the autumn/ winter months the warm welcome initiative encourages community spaces to make themselves available to offer a warm welcome for all during the cold months and where possible link to free or low cost activities	All residents	Community Development
Better Housing Better Health	Help and advice with energy efficiency and affordable warmth, and cold unsafe homes. Includes home visits by NEF.	All residents	David North / NEF / Oxfordshire County Council Housing
Cherwell Energy Efficiency Project (CHEEP)	The grant is available to all private sector landlords for the improvement of existing privately rented properties and does not have to be repaid (provided all grant conditions are met). However, to help encourage the move towards renewables, we no longer offer contributions towards new or replacement gas or oil boilers. Instead, we offer bigger contributions for electric and renewable heating systems and have increased the maximum total grant to £5000.	Private Sector Landlords	Housing standards team
Eco4	A new programme to support better insulation of homes run in conjunction	Residents referred to Better	Housing standards team

	with Better Housing Better Health	Housing, Better Health	
Home Efficiency Hub	Free, independent service to help residents of Bicester West improve their home heating energy systems with heat pumps, solar panels and other efficiency upgrades. Includes a Free Home Efficiency Plan (worth £500), £5k off a heat pump.	Bicester West residents	Climate Action
Sustainable warmth Grants	Grant scheme administered by OCC to provide a range of energy efficiency improvements to be retrofitted to Oxfordshire homes, available to owner occupiers and private tenants (landlords expected to contribute a minimum of one-third of the cost) • For homes **connected** to the mains gas grid, the grant available is up to £10,000 • For homes **not connected** to the mains gas grid, the grant available is up to £25,000	All residents	Climate Action
Accessing Advice			
Debt and Money advice contract	Provide funding to the Citizens Advice North Oxfordshire and South	It is a universal general information and	Strategic Housing team

	Northamptonshire for the provision of money advice services	money advice service for anyone living with debt in the Cherwell area.	
CDC Who can help resource booklet	A resource to sign post residents to key services across Oxfordshire	All residents	U79oCommunity Development
Age UK Oxfordshire - support for older residents	Supporting local older residents and groups to live well. Provide pop up info events, support to vulnerable people and communities, community activities, information, and advice as well as signposting to other support services.	All residents	Community Development
Local group support – Baby Banks, School uniform swaps etc	Supporting local community groups to deliver services to support residents – Hanwell Fields Community Centre central location for service	Local residents	Community Development
Senior & Voluntary Sector Forum	CDC host an annual forum for senior and voluntary sector partners and groups to provide info and support around topics for cost-of-living crisis, agenda included topics on entitlements, food, funding, volunteering and loneliness and isolation.	Cherwell senior voluntary sector groups and organisations	Community Development

Appendix Two - Cherwell District Council Cost of Living Current activity grouped by focus / theme

Maximising Income			
Council Tax Reduction Scheme	Applying the CTRS scheme in line with the Council's Policy which gives reductions in Council Tax Bills to those in need depending on their earnings and circumstances	Working age, working age with children and over 65s via means test.	Revenues and Benefits team
Discretionary Housing Payments	Applying DHP policy to help those in financial hardship	Depends on individual circumstances – but must demonstrate financial hardship and means test.	Revenues and Benefits team
Household Support Funding	Funding from central government devolved to councils, with local discretion on distribution. Tranches 1,2 & 3 in Cherwell have been in the form of hardship grants to individuals and households, distributed in partnership with Citizens Advice. Tranche 4 is yet to be determined, but likely to be support to VCS organisations delivering cost of living services and support as Oxfordshire County Council has centralised grant giving to individuals.	All residents	Healthy Communities

Appendix Two - Cherwell District Council Cost of Living Current activity grouped by focus / theme

Grants and Assistance for Landlords	A range of help and support for homeowners and tenants to make sure residents are living in safe and energy efficient homes	All residents	Housing Standards

Cherwell District Council

Executive

2 October 2023

Sandy Lane, Yarnton to Kidlington

Report of Assistant Director – Planning and Development

This report is public

Purpose of Report

To advise the Executive of the considerations associated with the Council resolution on Sandy Lane.

1.0   Recommendations

The meeting is recommended:

1.1   To note a development brief and planning application for site PR8 (Land East of A44) will be presented to the Planning Committee for consideration in due course.

1.2   To note the wording of a formal response to an application expected to be submitted by Network Rail to the Secretary of State for Transport for a Transport and Works Act Order will involve consultation with the Planning Committee Chairman and Portfolio Holder for Planning and Development in due course.

2.0   Introduction

2.1   On 17 July 2023, Council considered a motion relating to the closure of Sandy Lane; a three-tonne weight restricted country lane without footpath, connecting Yarnton and Kidlington, including an unmanned at-grade level crossing with the Cherwell Valley Line railway.

2.2   It was resolved to adopt the motion and the Council asked the Executive to, "…*give careful consideration to keeping this vital link open, especially knowing that Oxford University Developments are proposing to fund and build a new road bridge on their site as part of their overall vision.*"

2.2   The report discusses the issues involved.

3.0   Report Details

Location

3.1   Sandy Lane is highlighted on the map below.
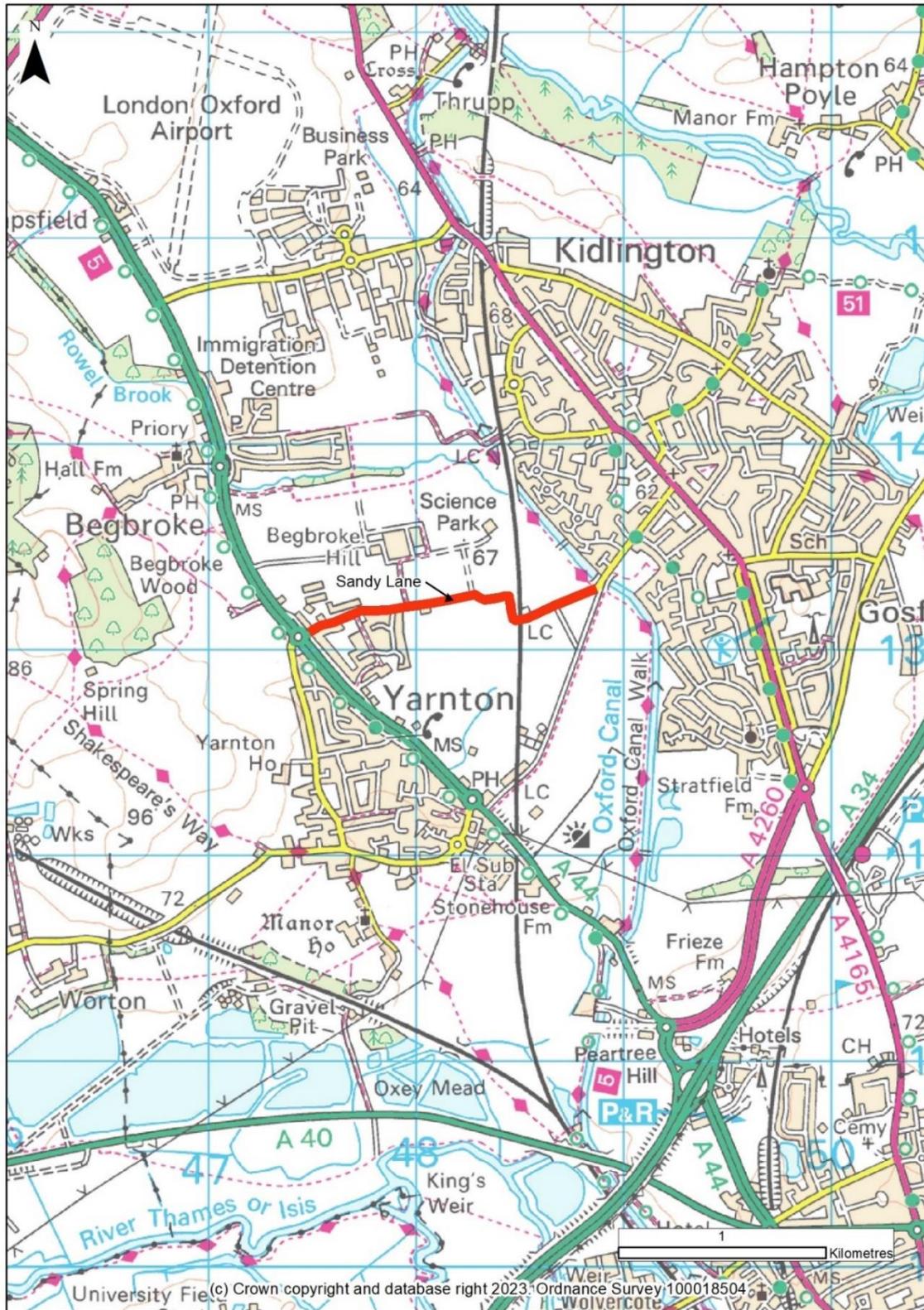
3.2   The Council resolved,

"*Cherwell District Council has acknowledged the Climate Change Emergency.*

A major contributor to excessive CO2 output are unnecessary car journeys. The proposal by Network Rail to shut the vital link between Yarnton and Kidlington by closing the rail crossing at Sandy Lane will result in a significant increase in carbon emissions.

Permanent closure would see drivers forced to use Frieze Way or Langford Lane resulting in an average extra distance travelled of nearly two miles per journey.

Based on current trends this is estimated to result in an extra 4750 miles travelled on weekdays and an additional 3800 at weekends, resulting in 1.5 million unnecessary miles per year.

The cost of such surplus miles in money is hundreds of thousands of pounds to residents and businesses who rely on their cars; and extra pollution in the form of many tonnes of carbon emissions, contrary to the Council's environmental objectives.

This would go directly against the council's ambition to reduce CO2 output generated by transport and very significantly degrade the network of contacts that currently underpins the ancient and vital community nexus around the parishes of Yarnton, Begbroke, Kidlington and Gosford and Water Eaton.

The Council therefore asks the Executive to give careful consideration to keeping this vital link open, especially knowing that Oxford University Developments are proposing to fund and build a new road bridge on their site as part of their overall vision."

Local Plan Policy Background

3.3   The Partial Review of the Local Plan was adopted by Council on 7 September 2020. The Plan was prepared to align with the County Council's Local Transport Plan (LTP4) and its A44/A4260 Corridor Study objectives for Rapid Transit, bus, cycle and pedestrian movements with connectivity improvements along the A44, Langford Lane and the A4260 through Kidlington.

3.4   Policy PR8 of the Local Plan requires a comprehensive development brief to be prepared to support a planning application for a new urban neighbourhood for some 1,950 homes and associated development on 190 hectares of land to the east of the A44.

3.5   The brief is required to include, "*In consultation with Oxfordshire County Council and Network Rail, proposals for the closure/unadoption of Sandy Lane, the closure of the Sandy Lane level crossing to motor vehicles (other than for direct access to existing properties on Sandy Lane), and the use of Sandy Lane as a 'green' pedestrian, cycle*

and wheelchair route between the development and the built-up area of Kidlington including the incorporation of a bridge or subway".

3.6 A development brief for Land East of the A44 is in preparation for public consultation and expected to be taken to CDC Planning Committee for consideration this year. The brief must be in general conformity with the Local Plan.

3.7 The Local Plan explains the policy context:

"*SUSTRANS notes that the A44 (Woodstock Road) is also a designated cycle route but that its appeal to cyclists is presently limited. It advises that the Woodstock Road could potentially form part of a link between Kidlington and Oxford if cycle routes were to be developed between Kidlington and the A44 via Sandy Lane (including the Begbroke Science Park) and/or Green Lane and/or the Oxford Canal and/or Frieze Way*" (5.56),

"*More specifically, with the County Council, we are seeking to help deliver….(2) linear 'greenway' through Land East of the A44 (policy PR8) along Sandy Lane to connect new housing/community facilities with the A4260 (and Super Cycle way) via a pedestrian/cycle bridge over the railway line. This is further supported by improvements and new provision of Shared Use Paths along the A44 enabling good cycling and pedestrian*" (5.62)

"*...We consider that the necessary housing development to help meet Oxford's needs can be accompanied by fully integrated sustainable transport infrastructure and services, landmark public open space, a comprehensively designed and substantial green infrastructure integral to the development and the achievement of modern, high-quality design that will benefit not only the new residents but the wider communities*" (5.111).

3.8 A Statement of Common Ground was agreed between this Council, Network Rail and Oxfordshire County Council for the Local Plan Examination on 5 February 2019. It summarises the consultation and engagement that informed the Plan, Network Rail's strategic aims for the closure of the Sandy Lane level crossing to highway traffic and its support for a replacement bridge for pedestrian cycle and wheelchair use.

3.9 The community concerns regarding the closure of the level crossings and Sandy Lane were discussed during the Examination of the Local Plan and its public hearings. Transport assessment evidence and representations submitted were reviewed by the Inspector. Following the hearings and the consideration of transport evidence, an informal consultation was undertaken which included consultation on a Transport Technical Note. The consultation responses received and the Council's written response to them were submitted to the Inspector who found the Plan to be sound with the modifications adopted.

3.10 People travelling between Begbroke / Yarnton and the Kidlington local centre via Sandy Lane would gain a largely traffic-free 2-mile walking/cycling route that affords a 10-12 minute cycle ride. It would also benefit anyone cycling to Oxford Parkway / Water Eaton Park & Ride or using the planned cycle route into Oxford.

3.11 Existing residents would have two alternative driving routes (via Langford Lane and Frieze Way) that add 1-1.5 miles of distance and 5-10 minutes of peak-hour journey time. The new active travel route would be further complemented by improved bus services along both the A44 and A4260 corridors, which will enhance connectivity for new and existing communities travelling between Yarnton, Begbroke, Kidlington, Woodstock and Oxford. Improvement works on A44 have commenced.

Process for Closure

3.12 The proposal to close the Sandy Lane and Yarnton/Green Lane level crossings became part of 'Oxfordshire Connect' – a joint strategy to transform the railway across Oxfordshire and beyond and related to the Oxfordshire Rail Corridor Study (2021). This report assessed the impact of planned growth in jobs and housing on Oxfordshire's rail system and identified the role that rail can play to support the delivery of that growth:

"*Commissioned and funded jointly by the Department for Transport and the former Oxfordshire Growth Board (now Future Oxfordshire Partnership), the Oxfordshire Rail Corridor Study was produced by Network Rail, with oversight from the Growth Board, in collaboration with industry partners and the County and City Councils, to help develop an overarching strategy for rail development*"

3.13 This information and details of the Network Rail proposals are available at: https://www.networkrail.co.uk/running-the-railway/our-routes/western/oxfordshire/oxfordshire-level-crossings/#:~:text=Sandy%20Lane%20Level%20Crossing&text=We%20propose%20to%20close%20this,pedestrian%20bridge%20in%20its%20place.

3.14 It is understood that a 'Minimum Works Proposal' (for the closure) will be submitted as a Transport and Works Act (1992) submission to the Secretary of State (i.e. the decision does not rest with this Council).

3.15 On 27 April 2023, the Secretary of State for Transport advised Network Rail that the proposed application for a Transport and Works Act Order associated with the intended closures of the Sandy Lane and Yarnton Level Crossings (together with Tackley in West Oxfordshire) would not likely have a significant effect on the environment and therefore would not need to be accompanied by an Environmental Impact Assessment (EIA). Network Rail explains, "*To secure land required for the alternative solutions proposed, Network Rail may need to apply for a Transport and Works Act Order to the Secretary of State*".

Network Rail Public Consultation

3.16 Network Rail undertook a public consultation on the proposals from 5 June to 17 July 2023. It's proposals for Sandy Lane and Yarnton Lane are shown below.

Sandy Lane

Sandy Lane level crossing will be closed and the road stopped up at the railway. We are proposing the **installation of a ramped pedestrian and cycle bridge** to keep the community connected.

In addition, we will be installing turning circles either side of the railway.

Through traffic will be diverted along the A44 and A4260/A4095, but a new restricted access link road is also proposed to allow residents and landowners on the east of the railway access to their property. The surface of Green Lane will also be improved.

A temporary construction compound will be required to deliver these works.

Third party land will be needed both temporarily and permanently for the proposals.
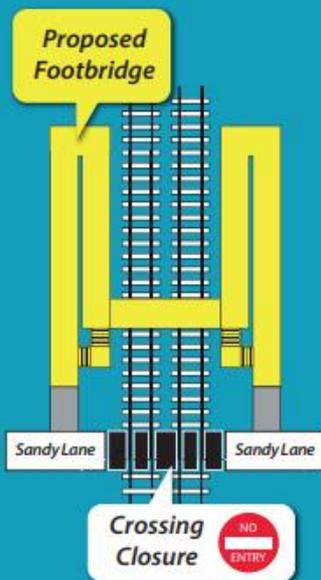
(source: Network Rail)

Yarnton

Yarnton Lane, Green Lane level crossing will be closed and the road stopped up at the railway. We are proposing the **installation of a stepped footbridge** with wheeling ramps for cyclists for access over the railway. This bridge will have passive provision for ramps to be added later if required.

Through traffic will be diverted along the A44 and A4260/A4095, but a new restricted access link road is also proposed to allow residents and landowners on the east of the railway access to their property. The surface of Green Lane will also be improved.

The current footpath over the level crossing will be diverted over the footbridge.

A temporary construction compound will be required to deliver these works.

Third party land will be needed both temporarily and permanently for the proposals.
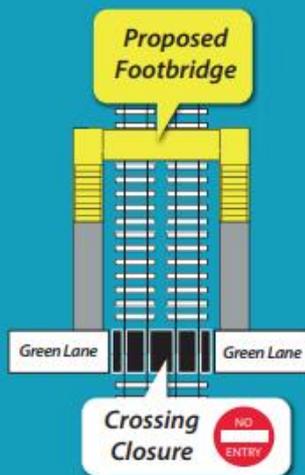
(source: Network Rail)

3.17 On 2 June 2023, Network Rail consulted the Council. The consultation letter stated,

"The Oxfordshire Level Crossings project is a sub-phase of Oxfordshire Connect, a joint strategy to transform the railway across Oxfordshire and beyond, increasing capacity and journey flexibility between Birmingham and Oxford.

The Oxfordshire rail corridor is a key freight route from the port of Southampton to the Midlands and the north. Every freight train removes 76 lorries from our roads, so increasing the number of rail freight services is good for the environment. But more trains on the line would increase the risk at two level crossings along the route, Sandy Lane and Yarnton.

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Therefore, to reduce level crossing risk, improve safety and reduce instances of misuse, these level crossings need to be permanently closed.

It is proposed that some elements of the Oxfordshire Level Crossing programme will rely on Network Rail's Permitted Development Rights. But where we need to seek powers to close level crossings, stop up streets, powers to construct, as well as powers to acquire land and rights in land and planning permission, we may make an application for a Transport and Works Act Order (TWAO) to the Secretary of State for Transport".

3.18   The stated timeline was:

- August 2023 – submission of application for Transport and Works Act Order *(not yet submitted at the time of writing)*
- Mid September – Objection Period
- Summer 2024 – Secretary of State Decision

3.19   The letter stated that its proposals for Sandy Lane were:

- Permanent closure of level crossing
- Stopping up of Sandy Lane at the railway
- Third party land required for a ramped cycling and pedestrian bridge
- Vehicles diverted via the A44 and A4260/A4095
- Residents at the east of the level crossing will be able to use the proposed restricted access link road from the A44 to Green Lane.

3.20   And, that this would contribute to achieving:

- capacity for an additional two freight trains per hour, with the potential of removing hundreds of HGVs from the roads
- additional Birmingham to Oxford passenger services
- improved safety.

The Council's Response to Consultation

3.21   An officer response was provided on 20 July 2023 following consultation with the Chair of Planning Committee and a delay to allow the consideration of the above motion by Council. The response included:

- noting of the timescales for the project - submission in August 2023 with construction commencing in 2024;
- the Local Plan position;
- full reference to the motion of 17 July 2023;
- reference to delivery of Local Plan requirement including linkages between Yarnton and Kidlington, the delivery of green links and wildlife corridors;
- the need for the proposed bridge to meet Local Plan objectives;
- recognition that Network Rail is progressing options in relation to the potential for an enhanced bridge solution as part of Oxford University Development

(OUD) proposals for site PR8 (Land East of the A44) to be submitted separately as a planning application by Network Rail to the Council;

- noting a need to align proposals with planning applications for the PR8 site which will be required to submit a Transport Assessment including consideration of the effect of vehicular and non-vehicular traffic including on the railway level crossings. The likely effect of the closure of the crossings at Sandy Lane and Yarnton/Green Lane on those traffic movements/impacts will need to be considered but it is possible that the closures (if approved) may happen before the application is determined;
- noting an understanding that OUD were exploring the opportunity for future public transport use of an enhanced bridge and/or future use by autonomous vehicles but that this would require careful consideration in light of constraints including expected recreational and nature enhancement;
- in this context, the need for clarification on the timescale for implementation.

Planning Application 23/02098/OUT – Land East of the A44

3.22 A planning application by Oxford University Development (OUD) for outline permission for comprehensive residential-led mixed including up to 215,000 square metres of residential floorspace (or c.1,800 homes) was registered on 2 August 2023.

3.23 The Planning Statement includes:

"*Separate to this Application, Network Rail have secured funding to close and replace the Yarnton Lane and Sandy Lane level crossings. Network Rail are proposing that the Yarnton Lane level crossing is to be replaced with a pedestrian bridge and the Sandy Lane level crossing is to be replaced with a ramped cycle/pedestrian bridge. These proposals will be subject to a separate application(s) to be submitted in Autumn 2023 by Network Rail. OUD are currently working with Network Rail to prepare an alternative design for a bridge over the railway that could accommodate cyclists, pedestrians and public transport vehicles. Further information on this is set out in Section 5 of this Planning Statement. To be clear, neither the Network Rail cycle/pedestrian bridge nor the alternative bridge design are part of the scheme for which planning permission is being sought*" (3.32)

"*Network Rail are intending to close the level crossing at Sandy Lane, subject to securing the necessary consents for reprovision of an access over the railway. As such, Sandy Lane will be access-only for vehicles, and will become primarily a green pedestrian and cyclist movement corridor. Through the extensive public engagement it has undertaken, the Applicant understands the importance of the east-west connection that Sandy Lane currently provides to local communities. The Applicant has been working closely with Network Rail to explore the potential for delivering a bridge over the railway that would replace the level crossing, and provide connectivity for cyclists, pedestrians and public transport vehicles. This work with Network Rail is ongoing and as such does not form part of this Application. Land has been safeguarded, however, to ensure that such a bridge could be delivered in the future.*" (5.40)

3.24 The submitted Design and Access Statement includes:

"*The Railway bridge is not part of this proposal, however, it is the intention of the proposal to integrate it into its design*"

"*Network Rail is proposing to replace the level crossing with a ramped cycling and pedestrian bridge over the railway. As a result of community feedback, OUD has explored a pedestrian, cycle and public transport bridge, well-integrated with the rest of the masterplan in consultation with Network Rail*"

3.25 The Development Specification Document states:

"Separate to this outline planning application, Network Rail ('NR') are developing proposals to close the existing level crossing at Sandy Lane. NR are seeking planning permission and the relevant consent to deliver a bridge capable of accommodating cyclists, pedestrians and wheelchair users, along with the potential to accommodate a future public transport route. The application for that scheme has not yet been submitted, but the indicative alignment is shown on PP4 for illustrative purposes. If delivered, this connection would connect into the movement network proposed by the Applicant and function as a secondary route, providing a connection to Kidlington" (4.5)

3.26 The Environmental Statement states:

"The Yarnton Lane and Sandy Lane level crossings are proposed to be replaced by Network Rail bridges, subject to the necessary consents. The Yarnton Lane level crossing is proposed to be replaced with a stepped only pedestrian footbridge by Network Rail and the Sandy Lane level crossing is proposed to be replaced with a ramped footbridge, suitable for pedestrians and cyclists. Given that Sandy Lane is to be closed to vehicular traffic within Local Plan policy and that Network Rail's application for the closure of the level crossing is imminent, the traffic modelling, which forms the basis for the assessment in this chapter includes the closure of Sandy Lane to through vehicular traffic" (9.4.28)

3.27 Although the bridge is not part of the development proposals, the planning application indicatively shows a location for a bridge slightly further north than the existing crossing location. This is likely to require revision to the intended Transport and Works Act Order if granted by the Secretary of State.

3.28 Any 'enhanced' solution would also need a separate planning application to this Council for the development involved.

The Council's Decision-Making Process

3.29 The Council could, if it so desired, choose to revise or replace Policy PR8 of the Local Plan through the on-going Cherwell Local Plan Review process. This would give the Executive the opportunity to consider planning policy affecting Sandy Lane. However, officers consider the policy to be 'fit for purpose' and do not recommend its revision. To do so would create significant uncertainty for the local community and the developer at a time when a development brief is being finalised and a planning

application has been made. It is unlikely to affect Network Rail's intention to submit a Transport and Works Act Order application to the Secretary of State.

3.30   Other points of decision and potential input are:

a)   the Transport and Works Act Order (TWAO) application process

The formal six-week objection period. The application will be made publicly available by the applicant and prescribed notices issued. The Council could make a formal objection or raise concerns. If an application has objections, the Secretary of State is required to decide, within 28 days of the end of the objection period, whether to hold a public inquiry or a hearing, or whether to carry out exchanges of written representations.

Appropriate representation would need to be determined in light of the Council's adopted Local Plan position which supports closure and having regard to the possibility of a hearing or public inquiry.

b)   The Planning Committee's consideration of the development brief for site PR8 in Autumn 2023.

This is not a policy document. This non-statutory guidance must generally conform with the Local Plan. It must also be prepared in consultation with Network Rail and the County Council as Local Highway Authority. The brief will be finalised in 2023 potentially before the Secretary of State's decision on the TWAO.

c)   The consideration of planning application 23/02098/OUT

This is likely to be in 2024 but possibly before the Secretary of State's decision on the TWAO application. Timely consideration will be expected and housing delivery without undue delay will be important. The proposed bridge does not form part of the application and therefore the scope of consideration would be limited to master-planning in the vicinity of Sandy Lane and the consideration of traffic, transport and active travel issues in the context of expected closure. Should the Secretary of State not grant the TWAO, the implications would need to be considered through future planning applications.

d)   Consideration of a potential 'enhanced' bridge option allowing limited vehicular access

The planning application for site PR8 refers to *OUD '....currently working with Network Rail to prepare an alternative design for a bridge over the railway that could accommodate cyclists, pedestrians and public transport vehicles.'*

This will require close technical consideration by Network Rail. The planning implications, including for Local Plan policy, would then need to be considered by way of a future planning application by either Network Rail or OUD and would be considered by the Planning Committee. Officers would consult with the County Council on the likely highway and transport implications.

4.0   Conclusion

4.1   The Council has a clear and tested Local Plan position for development in the vicinity of Sandy Lane. It is not the decision-maker for the closure of the level crossing.

4.2   However, there is an opportunity for the Planning Committee to give careful consideration to the planning of development to the east of A44. A development brief and major planning application will be presented to the Committee in due course. Consideration of the application by this Council and the County Council will involve close examination of transport, travel and accessibility issues and the mitigation required. This provides the most appropriate opportunity to consider the acceptability of proposals for new residents and the potential impacts on existing residents and businesses.

4.3   The TWAO process provides an opportunity for the Council to present concerns and objections, albeit potentially in contradiction to Local Plan policy. The precise wording of a response, in the context of development proposals, can be discussed with the Planning Committee Chairman and Portfolio Holder in due course.

4.4   The applicant for site PR8 has recognised that future Network Rail proposals may emerge and has made some accommodation. Any future proposals would need to be considered on their own merits in due course.

5.0   Consultation

5.1   Councillor Dan Sames – Portfolio Holder for Planning & Development

6.0   Alternative Options and Reasons for Rejection

6.1   The following alternative options have been identified and rejected for the reasons as set out below.

Option 1: The Council could, if it so desired, choose to revise or replace Policy PR8 of the Local Plan through the on-going Cherwell Local Plan Review process. This would give the Executive the opportunity to consider planning policy affecting Sandy Lane.

This approach is not recommended for the reasons set out at para. 3.29 of this report

7.0   Implications

Financial and Resource Implications

7.1   Responding to consultation on the Transport and Works Act Order application and considering planning applications are funded through existing budgets including planning application fees.

Comments checked by:
Kelly Wheeler, Business Partner - Finance
Kelly.Wheeler@cherwell-dc.gov.uk

Legal Implications

7.2   Officers would respond to consultation on a Transport and Works Act Order application and consider planning applications as required by relevant legislation and guidance for those statutory processes. The Council's position on Sandy Lane is set out in the adopted (2020) Cherwell Local Plan Partial Review. A different adopted position, outwith of the Local Plan process, would be material in making planning decisions and in responding to consultations.

Comments checked by:
Patricia Bramwell, Planning Solicitor
Patricia.Bramwell@cherwell-dc.gov.uk

Risk Implications

7.3   The Council's position on Sandy Lane is set out in the adopted (2020) Cherwell Local Plan Partial Review. A different adopted position, outwith of the Local Plan process, would affect on-going planning discussions and create significant uncertainty. Officers would need to manage a different planning context with stakeholders. These and any further arising risks will be managed within the service area and escalated to the Leadership Risk Register as and when deemed appropriate.

Comments checked by:
Celia Prado-Teeling, Performance and Insight Team Leader
Celia.Prado-Teeling@Cherwell-dc.gov.uk

Equalities and Inclusion Implications

7.4   The adopted Local Plan was supported by an Equalities Impact Assessment. Should the Council wish to consider a different policy position outwith of the Local Plan process, it is recommended that such a decision be supported by a Health and Equalities Impact Assessment before that decision is taken.

Comments checked by:
Celia Prado-Teeling, Performance and Insight Team Leader
Celia.Prado-Teeling@Cherwell-dc.gov.uk

Sustainability Implications

7.5   The adopted Local Plan was supported by a Sustainability Appraisal which considered the economic, environmental and social effects of the Plan including the

proposals for Land East of the A44 (Policy PR8). Should the Council wish to consider a different policy position outwith of the Local Plan process, it is recommended that Members are advised on the potential implications for achieving sustainable development before that decision is taken.

Comments checked by:
David Peckford, Assistant Director – Planning and Development
David.Peckford@Cherwell-dc.gov.uk

8.0   Decision Information

Key Decision:

Financial Threshold Met: No

Community Impact Threshold Met: No

Wards Affected

All

Links to Corporate Plan and Policy Framework

Business Plan Priorities 2023-2024:

- Housing that meets your needs
- Supporting environmental sustainability
- An enterprising economy with strong and vibrant local centres
- Healthy, resilient and engaged communities

Lead Councillor

Councillor Dan Sames – Portfolio Holder for Planning & Development

Document Information
Appendix number and title
- None

Background papers
None

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Cherwell District Council

Executive

2 October 2023

Building Control Enforcement

Report of Assistant Director - Planning and Development

This report is public

Purpose of report

To formalise an Enforcement Policy for Building Control.

1.0 Recommendations

The meeting is recommended:

1.1 to endorse the proposed building control enforcement policy (Appendix 1).

2.0 Introduction

2.1 The Building Safety Act 2022, which will come mainly into force on 1 April 2024, is set to fundamentally change how Building Control is administered and undertaken. The Act addresses in full the recommendations of Dame Judith Hackitt's inquiry and report into the reasons for the Grenfell Tower fire in 2017. There will be equally far-reaching implications for public and private sector Regulators alike.

2.2 The industry has been told that all Building Control Bodies (BCBs) should expect OFSTED-style inspections from time to time and one area of focus will be enforcement. As a BCB the Council already has the power to enforce where there are non-compliances with Building Regulations that are not being remedied. In practice, such circumstances are nearly always resolved through discussion and the need for formal enforcement action is avoided. Nevertheless, it would assist if we formalise current practice so there are clear expectations for the building industry and those affected by building work.

2.3 Secondary legislation is expected to supplement the Building Safety Act which, in time, is likely to require us to review our Policy. If so, a further report will be brought to the Executive. In the meantime, it is important we have a clear and unambiguous policy which both the public and any future Inspector of the Building Control Service will be able to understand.

3.0 Report Details

3.1 The Building Safety Act received Royal Assent in April 2022 and its detail is now emerging. It will significantly alter the way in which national Building Control is carried out and will affect private and public sector Building Control Bodies (BCBs) equally. BCBs are the organisations that are responsible for ensuring that developments are compliant with the Building Regulations.

3.2 Cherwell does not currently have a formally endorsed Building Control Enforcement Policy which the Building Safety Act will require. However, we do have established practice and process which align very closely with what is currently set out in the guidelines of LABC, our umbrella organisation.

3.3 Appendix 1 presents a proposed policy to formalise our current approach (note: Planning has a separate, adopted Local Enforcement Plan). The Council's joint CDC/SNC corporate enforcement policy (2016) will also need revisiting in due course –(https://www.southnorthants.gov.uk/enforcement-policy). In doing so, Planning and Development Officers will liaise with other teams involved in enforcement activities to assist coordination.

3.4 A much stronger degree of enforcement is expected from changes that will arise from the Building Safety Act's secondary legislation. When these are known a further report to the Executive will set the policy and budgetary implications. A more proactive approach to enforcement is likely to be required. At present, most BCBs enforce only against the most serious breaches - those that pose a high risk to life safety and personal injury. The messages coming from the Building Safety Regulator indicate that the threshold at which action is taken could be considerably lowered. Additionally, the tight time constraints in force through the current legislation are to be considerably relaxed enabling BCBs to act against long-standing breaches which is not currently possible.

3.5 The Building Safety Regulator (BSR), which is part of the Health and Safety Executive (HSE), has been set up by Government to oversee the performance of all BCBs. Its powers are very wide ranging. It will carry out OFSTED-style service inspections throughout the sector. Its powers include potentially placing poorly performing BCBs into special measures and in the last resort suspending or closing down their operations.

3.6 The BSR has stated it will carry out its inspection according to a risk-based approach. Cherwell's Building Control Service has 'ISO: 9001' accreditation and no buildings that currently fall into the Building Safety Act's high-risk category. ISO accreditation is achieved through an external audit of our management and operational processes which have been deemed fit for purpose. Regular internal audits are used to review processes and cases of non-conformance can resolved prior to external audit. Nevertheless, preparation for the new inspection regime is important.

3.7 Dame Judith Hackitt in her Review of the Grenfell Tower fire was particularly critical of the reluctance of Local Authorities to enforce against breaches of the Building Regulations. This has led to stronger legislation. There can be little doubt that A BCB's Enforcement Policy and its enforcement record will carry significant weight at a BCB inspection.

3.8 Recognising that Cherwell currently has no official Building Control Enforcement Policy and that one may soon be mandated, there is a need to take positive steps. The adoption of current practice as policy would be an appropriate, proactive first step notwithstanding the current uncertainty about future secondary legislation and the potential to review wider, corporate enforcement policy.

Legal Context

3.9 The Council's Building Control enforcement powers lie under section 35 (as now supplemented by section 35A) and section 36 of the Building Act 1984.

3.10 Under sections 35 and 35A we have powers to bring proceedings for prosecution against non-compliant work through the Magistrates Court. Under section 36 we can serve notices to have non-compliant work taken down or corrected. However, our powers are currently time-limited:

- Under sections 35 and 35A, we have two years from the day a breach was committed, to be able to implement proceedings. However, where the Council has sufficient evidence to commence proceedings, action must be taken within 6 months (and before the expiry of the two year period). A successful prosecution can only result in fines against those in breach, and not the correction of non-compliant work.

- Under section 36, to one year after the completion of the works that are in breach. A failure to make an application for notifiable work is itself a breach. A successful Notice would result in the correction of non-compliant work.

3.11 Through secondary legislation, not yet published, it is anticipated these time restrictions will be removed altogether or significantly extended. The BSR will then expect Local Authorities to pursue many more breaches with much more vigour. It is not yet known whether the time extensions will apply to breaches where the existing time limits have already expired.

3.12 Private sector BCBs are not empowered to take enforcement action. However, they will be expected to pursue breaches with equal vigour and their recourse will be to refer or "revert" cases to the Local Authority. We may therefore expect many more enforcement cases to come not only from applications made to us but also from those made to Approved Inspectors.

Our Current Process and Practice

3.13 The costs of enforcement of enforcement are wholly irrecoverable which is one of the main reasons why all Local Authorities currently use their powers very sparingly. We are in a competitive commercial environment and our Building Control income can only cover our work in administering the applications we receive. There is no headroom for enforcement coverage and we cannot afford to raise our fees. Enforcement costs cannot therefore be subsided by the income we receive from applications and must therefore be borne by Councils' own revenue budgets.

3.14 Cherwell's current approach to enforcement is consistent with that of the vast majority of Local Authorities nationally.

3.15 Non-compliances with the Building Regulations can occur in two ways. Firstly, the work is the subject of an application but during its course does not proceed

compliantly as approved. Secondly, notifiable work proceeds without an application, which is itself a non-compliance, and then proceeds non-compliantly.

3.16   In the first instance in the vast majority of cases surveyors will successfully negotiate the rectification of the non-compliances with the applicant.

3.17   We are implementing a procedure whereby when we have had no contact about an application for 90 days we will contact the applicant to request a visit or a progress report. This should materially reduce the number of cases where a development proceeds non-compliantly without our knowledge but under an application.

3.18   Under the legislation (s.32 Building Act 1984) an application becomes invalid if work has not started on the project within 3 years of the application. Where an application has been lodged and there has been no subsequent contact we write to the applicant formally cancelling the application. This also flushes out cases where work has started and we have not been informed.

3.19   The second instances generally come to light when a property is being sold and the purchaser's solicitor requests sight of a Completion Certificate which does not exist. Where there is a good prospect that the work can be deemed compliant or easily made to be so we will invite a Regularisation application (in effect a retrospective application). We will then work closely with the applicant so that we can issue our Completion Certificate and everyone is satisfied.

3.20   However, there are instances when the work cannot be made compliant and we cannot take action because of the time limitations listed above. In those circumstances we cannot do anything except advise the property owner what should be done. Sometimes there is no practical prospect of compliance even when life safety issues, such as fire management, emerge. We have no powers currently to ensure such matters are resolved.

3.21   When we take enforcement action it is always open to challenge. We have to take a proportionate approach in all cases and we always regard legal enforcement as the last resort. Where there are life safety breaches that cannot be resolved by negotiation and we can enforce, we always will.

Recommended Policy

3.22   Appendix 1 presents a draft policy which might be finalised and adopted to formalise current practice.

4.0   Conclusion and Reasons for Recommendations

4.1   The need to formalise our enforcement process and practices has been brought sharply into focus by the emergence of the Building Safety Act 2022. To have a Policy will not only help the public but also our officers who come across breaches or have to respond to requests that enforcement is taken. Additionally, having a formal policy is very likely to become a requirement of the Building Safety Regulator.

5.0   Consultation

5.1   Councillor Dan Sames – Portfolio Holder for Planning & Development.

6.0   Alternative Options and Reasons for Rejection

6.1   The following alternative options have been identified and rejected for the reasons as set out below.

Option 1: To continue without a formal policy. This would undoubtedly attract criticism from the Building Safety Regulator. It is also not equitable that the public continues to have no reference to the circumstances under which enforcement will be triggered.

7.0   Implications

Financial and Resource Implications

7.1   There are no financial or budgetary implications as a result of this Report as it is not expected that the formalising of current process and practice would lead to more enforcement work. However, once the details of a new national enforcement regime is known, a review of resource needs will need to be undertaken having regard to any cross-Council support and efficiencies on enforcement activities.

Comments checked by:
Kelly Wheeler, Business Partner - Finance
Kelly.Wheeler@cherwell-dc.gov.uk

Legal Implications

7.2   There are no legal implications arising from this Report. The proposed policy seeks to formalise current process and practice in the interest of ensuring compliance with the Building Regulations.

Comments checked by:
Patricia Bramwell, Planning Solicitor
Patricia.Bramwell@cherwell-dc.gov.uk

Risk Implications

7.3   There is a risk that by not having a formally endorsed policy we could be successfully challenged if using our powers. Conversely, having a formal policy might increase public expectation that we will use our enforcement powers more widely. However, the over-riding factor is that it is likely that the BSR will expect us to have a formally endorsed Enforcement Policy and without one we could be heavily marked down when we are inspected. These, and any further arising risks, will be managed within the service area and escalated to the Leadership Risk Register as and when deemed appropriate.

Comments checked by:
Celia Prado-Teeling, Performance and Insight Team Leader

Equalities and Inclusion Implications

7.4   There are no implications for equalities and inclusion. We treat all our stakeholders in the same fair and proportionate manner and will continue to do so. Our proportionate approach necessarily has regard to parallel legislation, particularly the Equality Act 2010 and is aligned with our Equalities, Diversity and Inclusion Framework.

Comments checked by:
Celia Prado-Teeling, Performance and Insight Team Leader
Celia.Prado-Teeling@Cherwell-dc.gov.uk

Sustainability Implications

7.5   One of the drivers behind the Building Regulations is the provision and promotion of safer and more sustainable homes and workplaces. A formally endorsed policy would place greater weight behind that.

Comments checked by:
Jo Miskin, Climate Action Manager
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8.0   Decision Information

Key Decision

Financial Threshold Met: No

Community Impact Threshold Met: No

Wards Affected

All Wards

Links to Corporate Plan and Policy Framework

Business Plan Priorities 2023-2024:
- Housing that meets your needs
- Supporting environmental sustainability
- An enterprising economy with strong and vibrant local centres
- Healthy, resilient and engaged communities

Lead Councillor

Councillor Dan Sames, Portfolio Holder for Planning and Development

Document Information
Appendix Number and Title
- Appendix 1 – Proposed Cherwell Building Control Enforcement Policy

Background papers
None

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Appendix 1

Proposed Cherwell Building Control Enforcement Policy

1.   Overview of our Enforcement Policy

We will not sign off (issue a Completion Certificate for) any development which in our opinion is not fully compliant with all the Building Regulations covering it. However, that does not necessarily mean we will use our powers of enforcement against every non-compliance. We recognise that enforcement is resource intensive and can be stressful for all concerned. We will consider each case on its merits and take an approach that is proportionate, makes the best use of our resources and is in the best interests of the public.

Where we elect not to use our enforcement powers (see below) we will give the applicant a full list of the non-compliances and the remedial measures he/she will have to undertake to achieve compliance. We will also point out that our not being able to issue a Completion Certificate may have consequences such as difficulties achieving a future sale of the property or raising a loan or mortgage against it.

We will not enforce against minor technical breaches that could affect only the occupiers' use of the property, cause no harm and have no life-safety implications.

Life-safety, structural stability and weather-proofness are pre-requisites of any reasonable use of a building and are matters which will warrant our intervention and ultimate enforcement. However, we will only enforce after all other means of achieving compliance have been exhausted.

We will consider each non-compliance according to its effect on who might occupy or use the development and also have regard to parallel enforcement legislation. Our Housing and Environmental teams and the Fire Service team with whom we work closely have their own powers which in certain circumstances may be more appropriate.

2.   The Reasons for Enforcement

The Building Regulations exist to ensure that all buildings which people occupy, live in and work in are safe and sustainable. The Regulations cover many aspects from structural and fire safety to effective access and sanitation and increasingly to the use and conservation of essentials such as water and energy.

For the benefit of all the community the Council has a duty under Section 91 of the Building Act 1984 to ensure, as far as reasonably practicable, that the Regulations are met.

3.   Your Responsibilities as a Building Owner

When developing or altering a building you as its owner have the primary responsibility to ascertain whether the Building Regulations apply to what you propose and if so to design and detail the work so that it is compliant. In these circumstances your responsibility extends to making a Building Regulations application.

If you are in any doubt whether what you are proposing falls within the Regulations come to us and we will advise. We will also help you make your application.

4. Enforcement as a Last Resort

The Council has a General Enforcement Policy which requires a proportionate sensitive and helpful approach by us at all times. We will always do our utmost to avoid formal enforcement by negotiation and giving advice.

Where we have had no contact about an application for 90 days we will contact the applicant to request a visit or require a progress report. This should materially reduce the number of cases where a development proceeds non-compliantly without our knowledge but under an application.

Where timescales are agreed to correct work that has been carried-out in breach of the Building Regulations these will be reasonable having regard to the practicalities of what needs to be done to secure compliance and the seriousness of the breach.

We will clearly set out the non-compliances so that you can engage with your builder or advisor on how to achieve compliance. We will always be on hand to respond to any queries.

When negotiations do fail, or when you fail to take our advice we will always let you know whether we intend to escalate the matter and what the next step in the escalation process will be.

We always want to avoid taking action.

5. When we will take Enforcement Action

We recognise that most people want to obey the law and not put any occupants of their properties at risk or to inconvenience. However, if negotiations to correct non-compliances have failed we will consider enforcement action having regard to the following circumstances

- The seriousness of the breach, and particularly if it gives rise to a life safety risk or may cause personal injury
- If the breach could cause a serious risk to the environment
- If the breach is the result of a blatant or foreseeable breach of the Regulations
- If prevarication occurs that gives rise to no prospect of a serious breach being corrected in a reasonable timescale
- If there is a history of similar or other breaches
- If we have been deliberately given misleading information to cover up a breach
- The intent where a breach has knowingly occurred

6. How we take Formal Enforcement Action

When we decide we must enforce we will do so by serving upon you a Statutory Notice under sections 35, 35A or 36 of the Building Act 1984. The Notice will set out in unambiguous detail what the breach is or breaches are, what you must do to comply with it and the timescale for doing so. Your failure to comply with the Notice will result in the Council prosecuting you through the Courts.

Prosecution is an expensive and resource intensive process for both the Council and those being prosecuted but will follow if a Statutory Notice has not been complied with.

The penalties following a successful prosecution are set out in the legislation.

7.   Your Right of Appeal

Following the service of a Statutory Notice you have the right to appeal it under s.40 Building Act 1984. This will be set out in the Notice we serve on you along with how to appeal and the period in which you have to make an appeal.

8.   Summary

Our approach to enforcement will be fair and reasonable at all times having regard to all the circumstances of the matter. It will be based on the following values:

- It will be proportionate, risk-based and targeted
- It will be equitable
- It will be open
- It will be consistent

We will address all non-compliances of "notifiable work" in a consistent proportionate and fair way having regard to the circumstances of each case and in particular whether the non-compliance could result in life safety issues or lead to injuries. What is "notifiable work" under the Building Regulations is clearly defined within them

- Our clear priorities will be where the non-compliances have led to risks of life safety

- We will address all cases of non-compliance in a sensitive manner using from the outset all means of encouragement to have them corrected

- For all applications we receive we will try to keep in contact at appropriate intervals with the applicant to minimise the risk of non-compliant work progressing to the point where it has to be dismantled or corrected

- We will use our powers of enforcement wherever we believe it is proportionate and in the public interest to do so.

- We will follow the national guidance on Building Regulations enforcement contained in
  https://www.members.labc.co.uk/sites/default/files/Enforcement%20Policy.pdf

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Cherwell District Council

Executive

2 October 2023

OxLEP's Oxfordshire Strategic Economic Plan 2023 - 2033

Report of Assistant Director - Growth and Economy

This report is public.

Purpose of report

To consider Oxfordshire Local Economic Partnership's (OxLEP's) Strategic Economic Plan for Oxfordshire (SEP) 2023 – 2033, providing an update on the progress to date in drafting the document. The report will also outline the SEP's forward trajectory, explaining the path it will follow both through Cherwell District Council's democratic processes and through other organisations involved. This includes, for example, the OxLEP Board; other local authorities (reporting through their respective democratic processes) and the Future Oxfordshire Partnership (FOP).

1.0 Recommendations

The meeting is recommended:

1.1 To endorse OxLEP's Strategic Economic Plan (SEP) 2023 – 2033.

1.2 To delegate to the Corporate Director – Communities, in conjunction with the Portfolio Holder for Regeneration, to engage in the development of the detail of the SEP, including any future action plans which might emerge.

2.0 Introduction

2.1 The new Strategic Economic Plan (SEP) has been led by the Oxfordshire Local Enterprise Partnership (OxLEP) to *"update and replace Oxfordshire's previous economic strategies. Informed by a county-wide conversation, it provides a post-pandemic statement of economic priorities for Oxfordshire. It charts a positive economic future for the county, and it sets out a strategy to 2033."*

2.2 OxLEP sought to engage, both with the business community and public sector partners, via a series of workshops between March and June 2023. The Council's officers attended workshops at Oxford Brookes, Milton Park and Kidlington in order to input and contribute to the formulation of the draft SEP.

2.3

2.4 Throughout this period, a series of monthly 'working groups' were also attended by the Council's officers and comments were submitted to the consultants, in order to

ensure that the interests of the Council and the businesses and residents of Cherwell were relayed. Stakeholders also included universities, colleges, health bodies and departmental representatives of Government.

3.0   Report Details

3.1   The guiding principle for the Strategic Economic Plan (SEP) is provided by the Future Oxfordshire Partnership's **Strategic Vision**:

'*We want Oxfordshire's people, places and environment to thrive so that the lives of current and future generations are enhanced.*'

3.2   The SEP will be one of a suite of strategies supporting the Future Oxfordshire Partnership's Strategic Vision.

3.3   The SEP provides an evidence base to understand Oxfordshire's post-pandemic economy, exploring opportunities and understanding challenges.

3.4   The evidence base has informed the creation of (i) an ambition; (ii) objectives; and (iii) themes:

- The **ambition** is that through the SEP:

"…by 2033, people and communities across Oxfordshire will be benefitting from new opportunities which are created sustainably, supporting the journey to Net Zero through investment in local enterprise and innovation. These will enhance further their well-being in an outstanding local environment. They will also underpin, complement and support a wider innovation ecosystem which will continue to be of global significance, transforming for the better the lives of people across the world."

- The **objectives** are to:
- *Enable Oxfordshire's **businesses to thrive** and encourage **pervasive innovation.***
- ***Widen access** to current opportunities and **equip people and places** as jobs change over the next decade.*
- ***Secure resilient infrastructure** for planned growth, consistent with Oxfordshire's commitment to net zero carbon by no later than 2050.*
- *Ensure that Oxfordshire's **places are sustainable, distinctive and inclusive**, and that **local communities flourish.***

- The **themes** are:
- *Recognising our assets and using them well (productivity)*
- *Creating new horizons (innovation)*
- *Advancing Oxfordshire globally*
- *Strengthening our communities globally*

3.5   The **delivery** of the SEP over the next decade is expected to focus upon four main routes:

- *attracting private sector investment.*

- *working collaboratively across (and beyond) Oxfordshire and through wider partnerships.*
- *leveraging the development processes.*
- *bidding effectively for funding when opportunities present themselves.*

3.6 The **governance and oversight** of SEP will be for OxLEP's Board to**:**
- Oversee the SEP and Action Plan delivery.
- Provide regular updates to the FOP on progress.

3.7 The future of Local Enterprise Partnerships (LEPs) is currently being reviewed by Government, with an indication that core funding will cease and responsibility be transferred to upper tier levels of local government (i.e. Oxfordshire County Council locally). Typically, in the past, the Government (top-down) has requested that LEPs produce economic plans/strategies for their area (e.g. the Local Industrial Strategy). The drivers for this SEP are manyfold - most of which are 'bottom-up' rather than 'top-down' – because the partners want to do this for their own localities, rather than being instructed to do so by Government.

3.8 The resultant Plan will be considered at a future meeting of the Future Oxfordshire Partnership. It is anticipated that action plans will follow the adoption of the SEP and it will be necessary to understand the resources required to deliver the proposed actions.

3.9 The recent and imminent timeline for the Strategic Economic Plan is:

September
- Present draft Final SEP to OxLEP Board for endorsement (19/09/23).
- Present draft Final SEP to FOP for consideration only (14/09/23 to Scrutiny, then to Partnership on 26/09/23) .

October
- Review feedback/comments received form meetings.
- Revise content.

November
- Produce a draft final document.
- Further Board review workshop.

December
- Final SEP approval by OxLEP Board (23/12/23).

4.0 Conclusion and Reasons for Recommendations

4.1 The SEP will contribute to the delivery of the Future Oxfordshire Partnership's Strategic Vision. It provides a ten-year framework to maintain the conditions for growth, regeneration, attracting new inward investment and enabling opportunities for jobs to be created for local residents.

4.2 In proposing a collective vision for the future of the County's economy, the SEP is currently in draft form. The Council's officers have been engaged as a consultee during its development.

4.3   A draft version of the SEP is attached as Appendix One. For any matters arising, please contact the Council's economic growth officers (details below).

5.0   Consultation

5.1   Relevant Council officers have attended each of the OxLEP strategy development workshops and have subsequently provided additional feedback to ensure that the interests of Cherwell-based businesses and residents are included.

6.0   Alternative Options and Reasons for Rejection

6.1   The following alternative options have been identified and rejected for the reasons as set out below.

Option 1: To adopt the emerging Oxfordshire Strategic Economic Plan. This was rejected, because it would be premature at this stage and it is possible, despite officers' best efforts, that the final version of the Plan might not sufficiently address issues and opportunities relating specifically to Cherwell district.

Option 2: Not to endorse the emerging Oxfordshire Strategic Economic Plan. This was rejected because it would contradict the Council's interests to support the broad partnership framework proposed by the Plan.

7.0   Implications

Financial and Resource Implications

7.1   At this stage, there are no financial implications arising directly from this report. Any costs arising from this report will need to be contained within the services budget.

Comments checked by:
Michael Furness, Assistant Director – Finance, 01295 221845,
Michael.Furness@cherwell-dc.gov.uk

Legal Implications

7.2   At this stage, there are no legal implications arising directly from this report.

Comments checked by:
Shahin Ismail, Interim Head of Legal Services, 01295 221808,
shahin.ismail@cherwell-dc.gov.uk

Risk Implications

7.3   There are no significant risks arising directly from this report. Any strategic risks arising through commitment to deliver actions will be managed corporately and any local operational risks will be managed within the service area.

Comments checked by:
Celia Prado-Teeling, Performance Team Leader, Tel: 01295 221556,
Celia.prado-teeling@cherwell-dc.gov.uk

Equalities and Inclusion Implications

7.4   There are no equalities issues arising from this report. Collective action guided by the Strategic Economic Plan could enhance the Council's leadership on inclusivity matters.

Comments checked by:
Celia Prado-Teeling, Performance Team Leader, Tel: 01295 221556,
Celia.prado-teeling@cherwell-dc.gov.uk

Sustainability Implications

7.5   The Strategic Economic Plan recognises the key importance of a sustainable economy and therefore could provide the framework for collaborative action to follow.

Comments checked by:
Jo Miskin, Climate Action Manager, 07900 227103
jo.miskin@cherwell-dc.gov.uk

Wellbeing Implications

7.6   The Strategic Economic Plan has the potential to provide positive support for the wellbeing of individuals and households through skills development and work. It has the potential to assist OxLEP and other strategic partners to engage further with district initiatives – for example, the Brighter Futures in Banbury programme.

Comments checked by:
Nicola Riley, Assistant Director - Wellbeing and Housing Services, 01295 221724,
nicola.riley@cherwell-dc.gov.uk

8.0   Decision Information

Key Decision

Financial Threshold Met: No

Community Impact Threshold Met: No

Wards Affected

All

Links to Corporate Plan and Policy Framework

The OxLEP Strategic Economic Plan closely aligns with the strategic, corporate and local priorities contained within both the Council's Business Plan and Delivery Plan

2022-2024, in particular the Council's key priorities of: 'An enterprising economy with strong and vibrant local centres' and 'Supporting environmental sustainability'. This would more specifically help to 'Support business retention & growth', 'Work with partners to support skills development & innovation', 'Work with others to support growth', 'Promote the green economy', and 'Work with partners to promote the district as a visitor destination and attract investment in our town centres'.

Lead Councillor

Councillor Donna Ford - Portfolio Holder for Regeneration

Document Information

Appendix number and title

- Appendix 1 - Oxfordshire Strategic Economic Plan – Draft v2

Background papers
None

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Oxfordshire Local Enterprise Partnership

Strategic Economic Plan

Draft V2
September 2023

OxLEP
driving economic growth

Contents

Status	Version	Audience	Date
Draft	V0	• OxLEP Officers	21/08/2023
Draft	V1	• Strategic Economic Plan Working Group	24/08/2023
Draft	V2	• OxLEP Board • Future Oxfordshire Partnership Board	12/09/2023

Introduction

Selection of images of Oxfordshire
to be inserted in final version

1. Introduction

> **Our new Strategic Economic Plan (SEP) updates and replaces Oxfordshire's previous economic strategies**. Informed by a county-wide conversation, it provides a post-pandemic statement of economic priorities for Oxfordshire. It charts a positive economic future for the county, and it sets out our strategy to 2033.

An economic strategy developed at our own behest

This document sets out Oxfordshire's new Strategic Economic Plan (SEP), which looks ahead to 2033. It is the county's fourth major statement of economic strategy over the last decade. It follows various iterations of the original Strategic Economic Plan (the latest from 2016), the Oxfordshire Local Industrial Strategy (2019) and Oxfordshire's Economic Recovery Plan (2021).

This Strategy is different. It has not been prompted by central government. Nor is it a short term response to an economic shock created by a health crisis.

Instead it has been initiated by Oxfordshire Local Enterprise Partnership (OxLEP) working closely with the five district councils in Oxfordshire, with Oxfordshire County Council and with Oxfordshire's two universities (Oxford Brookes University and University of Oxford), all of which are members of the Future Oxfordshire Partnership (FOP).

Locally instigated, it has sought to take a step back, to consider the progress Oxfordshire has made and the opportunities that lie ahead, and to chart an appropriate route forward, given the changing mix of opportunities and imperatives.

The progress that has been made

On many measures, Oxfordshire has made substantial progress over recent years. When the SEP was published in 2016, *Oxford Science Enterprises* had just been formed; subsequently there have been more than 100 spin-outs from the University of Oxford which have secured £billions of early-stage investment. There have also been some phenomenal success stories with regard to individual businesses. Oxford Nanopore Technologies was a small business at the time of the first SEP; it is now a recognised 'unicorn' with a market capitalisation of around £2bn. Oxford Bioescalator had just secured seed funding in 2016 (brokered by OxLEP via BEIS); now it is fully occupied and there is surplus demand for small business provision, particularly from small life science firms. Oxfordshire has also attracted significant interest from international investors and demand for (particularly) laboratory space has increased rapidly.

On a different front, the Oxfordshire Inclusive Economy Partnership (which was identified as a priority action in the Economic Recovery Plan) is now very well established, bringing together well over 100 organisations to create a more equitable place, and establishing an Oxfordshire Inclusive Economy Charter which now has many signatories.

In addition, there has been significant progress in relation to wider developments. Oxford West End is being advanced through an ambitious vision for a well-connected, green, mixed-use neighbourhood that is a place of innovation; once completed it will provide 260,000 sq. ft. of employment space and 1,850 residential and student accommodation units[1]. Bicester has seen significant housing and population growth, and Bicester Vision has become a Community Interest Company. Development at North East Didcot has progressed while in West Oxfordshire, plans for Salt Cross are now well advanced.

However, some of the challenges identified a decade ago certainly remain. Transport issues – particularly those associated with the A34 – have made limited headway and the quest for active travel is ongoing. The affordability of housing continues to be an acute challenge county-wide; and Oxford has been ranked as the least affordable city nationally by Centre for Cities[2]. In addition, the challenges linked to environmental sustainability have grown since the earlier SEP was completed.

There is, in particular, heightened awareness of the imperatives surrounding a transition to net zero carbon, and its urgency.

The overall assessment of recent years is therefore a mixed one – but perhaps inevitably so.

Changing foundations for an economic strategy

Against this backdrop, there has been increasing recognition that – in and of itself – economic growth (usually measured in terms of gross value added (GVA)) is both unsatisfactory as an indicator of effective local prosperity and flawed as a statement of purpose. **Most would agree that GVA growth is desirable (because it helps people improve their standard of living); but we are increasingly recognising that it must be done well.**

Critical questions surround the processes through which economic growth is achieved, and the consequences that follow, socially and environmentally. There is increasing interest in broader interpretations of wellbeing. Economic growth needs to be accompanied by real scope for progression and social mobility – such that the life chances of a child are not predetermined by those of his or her forebears. In similar vein, the importance of inclusivity is consistently recognised: economic growth should not create areas of affluence and poverty, and instead wealth should be broadly held, such that there can be opportunity, dignity and

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[1] Oxford's Economic Strategy 2022-32, Oxford City Council

[2] City Outlook, Centre for Cities, 2023

Oxfordshire's Strategic Economic Plan – 2023-33

wellbeing. And the importance of the foundational economy – with a focus on the activities and infrastructures that make civilised everyday life possible – is also increasingly understood.

In parallel, there is far greater awareness of the environmental costs and consequences of different forms of growth, and this has informed the SEP's preparation. In this context, insights have been drawn from Doughnut Economics and its vision of an ecologically safe and socially just space in which humanity can thrive. Concepts such as the circular economy have gained considerable traction too, particularly as the wider costs of consumption are acknowledged.

In advancing the SEP, we are committed to greater efficiency in resource use and to supporting the county's response to the climate emergency. But we also recognise that within Oxfordshire, we have the science and innovation capacity and capability to develop solutions that should literally be game-changers. Echoing key themes from *Mission Zero*[3], this represents a substantial opportunity. We also have a growing population and we need to ensure that Oxfordshire continues to be a place where people can progress, flourish and enjoy a good quality of life; and where businesses can thrive.

Using our science, technology and innovation assets well…

We have significant science, technology and innovation assets and we recognise our responsibilities in relation to them.

We are therefore ambitious for our economy, and for the infrastructure investment that is needed to enable our economic potential to be realised fully and well.

Oxfordshire needs to be a place where innovation and creativity can be unleashed and enterprise can thrive, benefitting people and places around the world, and delivering better environmental and social outcomes.

…and with the foundational economy at the forefront

Within the context of this new Strategic Economic Plan, we have also paid particular attention to the foundational economy.

This focuses on those parts of the economy that provide basic goods and services, upon which wellbeing largely depends. It includes 'material' (i.e. the structures and networks that connect households to daily essentials) and 'providential' (e.g. health, education) elements, and it accounts for well over half of the jobs in the county. Oxfordshire is a place where wages are typically high, housing is expensive, and labour and skills are in short supply. For all three reasons, the foundational economy has been under substantial pressure – with vacancies unfilled and service delivery very stretched. For these reasons it merits attention.

However it is also important to recognise that these pressures have created

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[3] Mission Zero: Independent review of Net Zero. Authored by Rt Hon Chris Skidmore MP and published by DBEIS and DESNZ, 2023

consequential challenges in relation to those parts of the economy for which Oxfordshire is best known — whether the world class science at Harwell Campus; or the research and learning that occurs through University of Oxford; or the visitors to Blenheim Palace. Without an effective foundational economy, these other elements will struggle to function — let alone thrive.

How the SEP has been developed

The new SEP has been developed through a consultative process that has included:

- an Independent Economic Review — which involved an open call for evidence[4] and has focused on key themes for Oxfordshire:
  - ➢ enabling progression and achieving more inclusive economic growth
  - ➢ advancing Net Zero and sustainability in shaping future economic growth
  - ➢ securing the future of the foundational economy
  - ➢ accelerating innovation and diffusion — both within Oxfordshire and beyond.
- a participative process which has involved stakeholder engagement, particularly a series of workshops which were held during spring 2023 in different parts of Oxfordshire.

The preparation of the SEP has been supported by a Working Group — with representation from Oxfordshire's local authorities and universities — which has met monthly. It has also benefitted from a dialogue with the Future Oxfordshire Partnership and with the Board of Oxfordshire Local Enterprise Partnership.

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[4] Some 21 different organisations responded to the call for evidence

Oxfordshire's Strategic Economic Plan – 2023-33

Oxfordshire: Economic Snapshot

The Oxfordshire economy is home to world leading science, innovation, technology and a wide variety of R&D clusters.

Oxfordshire is

1 of **4**

county areas which are net contributors to the UK exchequer

Oxfordshire generates

£23.5 billion
of GVA

in real terms each year

Population and Skills

Resident population aged 16-64:

465,700

The number of people employed in professional occupations is almost

10%

higher than nationally

53%

of Oxfordshire's working age population are qualified to degree-level or above

compared to 43% nationally

Oxfordshire has a traditionally tight labour market, with an unemployment rate of 2%, nearly half the national rate (3.7%)...

however, some sectors have been impacted following the pandemic by more, including a number of sectors within the foundational economy.

Earnings within Oxfordshire are 9% above the national average, with the average full-time worker earning

£700 per week

However, there are pockets of deprivation, with 14 neighbourhoods in Oxfordshire among the 20% most deprived nationally

There are currently

9,540

people across Oxfordshire claiming Universal Credit and required to look for work, 47% higher in July 2023 than in March 2020

Oxfordshire is also experiencing...

Skills shortages in higher value-added roles

Labour shortages mainly in lower value-added roles

Local strategic context

Selection of images of Oxfordshire to be inserted in final version

2. Local strategic context

Oxfordshire's Strategic Vision

Within Oxfordshire, the **strategic context** for the new SEP is summarised through the **Strategic Vision** developed by the **Future Oxfordshire Partnership (FOP)**:

Oxfordshire is a unique location: what we do here matters, not just for the benefit of our residents and communities, but also for the wellbeing of the UK and communities across the globe.

We are at the frontier in addressing and solving the most pressing challenges facing humanity. We want Oxfordshire to thrive so that the lives of current and future generations are improved.

To achieve this will require bold, collaborative, and inclusive thinking to deliver real and lasting change in ways that build resilience and enhance environmental, social, and economic wellbeing. We will draw on our world class economy, our spirit of discovery and Oxfordshire's global reputation to power this change through the adoption of clean and sustainable technology.

At the core of this Vision are principles of sustainable development. The Vision is supported by **nine objectives** (and eleven accompanying **guiding principles**). These are presented in a summarised form in Figure 2-1 (overleaf).

Some of the objectives are economic in focus. Some are predominantly social and/or focused on communities or places within Oxfordshire; wellbeing is implicit throughout. Several are concerned with the environment — whether the built environment, the natural environment or imperatives linked to resource use or carbon neutrality.

The key point, however, is that all nine objectives are critical in relation to the pursuit of the Vision set out by the Future Oxfordshire Partnership.

Pursuing all nine will create some tensions and — at times — a need for choices and trade-offs. But the overall imperative is for partners to work together to achieve a thriving Oxfordshire, both now and in the future. Partners and stakeholders from across the county have signed up to this Vision and are committed to it.

The scope of the FOP's Strategic Vision is substantial and well beyond that of the SEP — which is focused on Oxfordshire's economy. However the SEP is determined to play its part in relation to all nine objectives.

Delivering the Strategic Vision

In practice, the delivery of the FOP Vision will be advanced through a whole suite of Oxfordshire strategies.

Some of these are still being developed, but alongside the SEP they include county-wide:

- **Pathways to Net Zero Carbon Oxfordshire (PAZCO)** — which outlines technological, societal and

behavioural shifts needed to achieve net zero carbon.

- **Oxfordshire Infrastructure Strategy (OXIS)** – which identifies major infrastructure investments needed within Oxfordshire (e.g. A34 improvements, congestion measures linked to the A40, redevelopment of Oxford railway station).

- **Oxfordshire's Local Transport and Connectivity Plan (LTP5)** – which sets out a vision to deliver a net-zero Oxfordshire transport and travel system involving less car-based travel and more sustainable/active travel.

- **Oxfordshire Energy Strategy** – which considers energy innovation and the need for a smart, modern, clean energy infrastructure.

- **Oxfordshire Local Skills Improvement Plan (LSIP)**[5] – which identifies skills needs in relation to seven priority sectors (four of which are within the foundational economy); it builds on the earlier **Local Skills Report and Plan** developed by OxLEP.

- **Oxfordshire Visitor Economy Vision and Destination Management Plan** – which sets out a shared commitment to develop, manage and market Oxfordshire in a way which brings benefits to business, local communities, visitors and the environment.

- **Oxfordshire's Local Nature Recovery Strategy (LNRS)** – which is under development but will identify priority species and habitats for Oxfordshire as well as what actions we need to take to support them.

- **Oxfordshire's Health and Wellbeing Strategy** – which is also under development but will set out how different organisations and communities in Oxfordshire can work together to support the health and wellbeing of all residents.

In addition, the Vision will be achieved through the suite of **district-level Local Plans** that exist across Oxfordshire. These are critical in relation to assumptions linked to future housing and jobs growth, and the provision that needs to be made for both. Local Plans are refreshed regularly, and they are underpinned by a substantial body of evidence and by democratic processes. The SEP will be delivered within the planning assumptions set out in these documents.

The Vision will also be delivered through other district-level strategies and plans – both the Economic Strategies that have been developed locally (e.g. Oxford's Economic Strategy, 2022-23) and the strategies that have been prepared in response to other key themes (e.g. Climate Change Strategy for West Oxfordshire, 2021-25).

The SEP will be delivered in conjunction with these other strategies and plans. In combination, these will deliver the Strategic Vision agreed by the Future Oxfordshire Partnership.

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[5] See Oxfordshire Local Skills Improvement Plan (oxfordshirelsip.co.uk)

Figure 2-1: Key routes to delivering the Vision developed by the Future Oxfordshire Partnership (FOP), and its nine supporting objectives

By 2050, we will…

…have transformed movement and connectivity

…be a globally competitive economy

…be the first generation to leave the natural environment in a better state than we found it

Nine objectives from the FOP Vision

…be a more equal place supported by more inclusive growth

…have achieved carbon neutral status and accelerating towards carbon negative

We want Oxfordshire to thrive, ensuring future well-being…

…enjoy a built and historic environment …with high quality places

…have flourishing, diverse and vibrant communities

…have sufficient energy-efficient, well designed homes… to meet the needs of the economy… and young people

…have a healthier and happier population

Oxfordshire's Local Transport and Connectivity Plan (LTP5)

Oxfordshire Health and Well-Being Strategy (forthcoming)

Pathways to Net Zero Carbon Oxfordshire (PAZCO)

Oxfordshire Strategic Economic Plan

Oxfordshire Energy Strategy

Local Plans (prepared by Local Planning Authorities)

Visitor Economy Vision and Destination Management Plan (DMP)

Oxfordshire's Local Nature Recovery Strategy (forthcoming)

Oxfordshire Local Skills Improvement Plan (LSIP)

Oxfordshire Infrastructure Strategy

Note that the diagram summarises various statements of objectives contained within the FOP Vision.

Understanding Oxfordshire's economy

Selection of images of Oxfordshire
to be inserted in final version

3. Understanding Oxfordshire's economy

Oxfordshire has a **world class innovation ecosystem**, and its knowledge economy is of international renown. Its key sectors can be more broadly stated – from creative industries through advanced manufacturing to the visitor economy and farming and food. But its overall effectiveness is linked to a wider foundational economy – and this accounts for the majority of jobs across the county. **The foundational economy is therefore critical in terms of the extent to which Oxfordshire thrives**. It is key to the future prospects of many people and businesses across Oxfordshire.

Introduction

Oxfordshire's economy has many different dimensions. Its overall output sums to **£23.5bn** in terms of gross value added (GVA). It is home to over **32,000 businesses**, most of which are small – although within its business population are start-ups, spin-outs, high growth businesses, a handful of new 'unicorns' (with a market capitalisation in excess of £1bn – e.g. Oxford Nanopore Technologies) and major companies that have shaped Oxfordshire's economy for decades (e.g. BMW, Unipart, Elsevier, Siemens). Oxfordshire has strengths across sectors including: health and life sciences; space; future mobility (connected and autonomous vehicles (CAV), automotive production and motorsport); robotics and AI; quantum; energy; creative industries; food and farming; and visitor economy. It is, genuinely, diverse.

There are currently about **430,000 jobs** county-wide, reflecting jobs growth (particularly between 2010 and 2020) at a rate that exceeded the national average. These jobs vary in terms of the skills and qualifications on which they depend and the earnings they are able to command. **Life chances vary substantially across Oxfordshire and understanding how these are shaped through the county's economic make-up is critical in relation to the SEP**.

Oxfordshire's innovation ecosystem

The evolving narrative

Oxfordshire's assets in science, research translation, technology, and innovation achieved further expression during the pandemic. The county's role both in developing an effective vaccine, and making it available quickly and at scale, achieved global recognition and impact.

The last decade has seen considerable investor interest of different forms across Oxfordshire's innovation ecosystem[6]; this preceded the pandemic but was accelerated by it.

[6] An account of progress over the last decade is provided in **Oxfordshire's Innovation Engine 2023: A scientific super-cluster, looking back, looking forward**. Produced by Advanced Oxford, this updated SQW's initial report on the Oxfordshire Innovation Engine which was published ten years earlier.

Public sector investment into the science and innovation infrastructure has continued apace – including, for example, through the Rosalind Franklin Institute, Nucleic Acid Therapy Accelerator, the National Quantum Computing Centre and additional investment into the Diamond Light Source synchrotron[7] on Harwell Campus; and through an 8,000 sqm R&D facility at Culham (supported by UKAEA).

Oxfordshire has also attracted substantial institutional investment. Oxford Science Enterprises (OSE) was set up in 2015 and it has subsequently increased investment in university spinouts *"from an average of £125m per year (2011-15) to £1.4bn in 2021"*.[8] Some of these have subsequently grown at the Bioescalator, and then at locations including Oxford Science Park, Begbroke Science Park and Milton Park. Oxfordshire in general – and Oxford in particular – has also attracted significant interest from overseas investors in office and laboratory space; GIC (Singapore) for example acquired a 40% stake in Oxford Science Park in 2021[9]. On a different front, Oxfordshire has attracted inward investment: in March 2023, Moderna announced its intention to establish a substantial Innovation and Technology Centre at Harwell Campus and more recently again, BMW announced plans to invest £600m in the MINI plant at Cowley in Oxford, focused on the manufacturing of electric cars[10].

Taken in the round, the last decade might be understood as a virtuous circle of investment of different forms. The consequence has been a rapid growth in the stock of high tech businesses[11] and associated employment[12].

One cause has been a 'big bang' of spinouts from University of Oxford, much of it propelled by OSE, as illustrated in Figure 3-1 below; and some of these businesses have grown very quickly. A second has surrounded the wider economic impacts of major science facilities which have been animated more actively than hitherto. Harwell Campus, for example, has developed and delivered cluster strategies relating to energy, space, quantum computing, and health. As well as housing major scientific facilities, it is therefore supporting commercialisation and business growth at scale. A third relates to the scale of international investment, as described above[13]. A fourth relates to the maturing of the wider ecosystem – whether through angel investment networks (noting for example that Oxford Angel Network merged with OION in January 2020 to create a unified angel network for Oxfordshire and beyond[14]) or the strong network of innovation centres county-wide.

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[7] Funding for a £500m upgrade was announced in September 2023 (see UK science facility that kickstarted Covid drug development granted £500 million upgrade fund - GOV.UK (www.gov.uk))

[8] See We found, fund and build for tomorrow's challenges, today - Oxford Science Enterprises

[9] See tps://www.savills.co.uk/insight-and-opinion/savills-news/326070/oxford-sees-record-breaking-levels-of-investment-as-it-continues-to-gain-ground-as-global-science-hub

[10] See Statement on BMW's plans to invest £600 million in MINI Plant Oxford (oxfordshire.gov.uk)

[11] On a narrow definition developed by Eurostat – it is estimated that numbers doubled between 2013 and 2021, to almost 3,000

[12] Knowledge intensive employment across Oxfordshire grew from about 16,000 jobs in 2011 to almost 29,000 in 2021, an increase of over 80% (based on data from BRES)

[13] Oxfordshire's Internationalisation Plan (to 2025) has been important in this context

[14] See About Us | Oxford Innovation Finance

Figure 3-1: University of Oxford spinouts

Source: Oxford Science Enterprises

The pressures of success…

The pace of investment has created some pressures. Rental levels for city centre office space and for accommodation on the major science parks across Oxfordshire doubled between 2016 and 2023[15]. There is a significant shortfall in the availability of laboratory space[16], particularly within Oxford (where demand is highest), while available office space is often of a poor quality.

There are major schemes within the development pipeline — and on one estimate, up to 1.9 million sq ft of office and laboratory space is due to be delivered between 2023 and 2025[17]. Examples of major schemes include Oxford North (almost one million sq ft); 135,000 sq ft of space for commercial/

University research at Begbroke Science Park; 625,000 sq ft of R&D facilities at Oxford Science Park; and an 80,000 sq ft venture at Milton Park. Longer term, there are plans for a science and technology park at Salt Cross in West Oxfordshire. The provision of commercial space should then increase — albeit with concerns surrounding its affordability.

In parallel, there are substantial pressures in relation to labour and skills supply. Evidence within Oxfordshire's Local Skills Report and Plan (which preceded the Local Skills Improvement Plan) indicated that employers are reporting shortages of high-level technical skills, particularly in (what it describes as) the 'innovation sector'. In this context, labour shortages have been amplified by settlement

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[15] Oxfordshire's Innovation Engine 2023, Advanced Oxford
[16] This is recognised as a constraint in relation to the UK government's ambitions to become a science superpower. See Howard T, Science superpower dreams

thwarted by lack of laboratory space, The Times 14 February 2023
[17] Savills UK | Oxford sees record breaking levels of investment as it continues to gain ground as global science hub

challenges following the UK's departure from the EU.

For Oxfordshire, however, a key question surrounds the extent to which investment in science and technology – and in the growth of knowledge-based businesses – is effecting economic transformation, both within Oxfordshire and beyond. Here the evidence is complicated.

Cluster strategies linked, for example, to Harwell Campus ought to be helping. Similarly the emergence of innovation districts ought to be consistent with broader processes of diffusion; the growth of Oxford West End should, for example, be significant in this context.

With the rise – and persistence – of home-based working in some sectors[18] since the start of the pandemic, stakeholders within Oxfordshire are seeing what they describe as '*diffusion by stealth*' – as the spatial reach of labour markets grow and the opportunity to participate in Oxfordshire's innovation economy extends across a broader geography. The consequences are, as yet, unknown: larger labour markets *might* ease recruitment and retention challenges, and working from home *might* ease congestion (at least on some days), but what are the consequences in terms of the processes of innovation, and in terms of carbon consumption (as homes become workplaces which need to be heated all day during the winter months)?

Figure 3-2: Businesses in Oxfordshire showing 'Growth Signals'
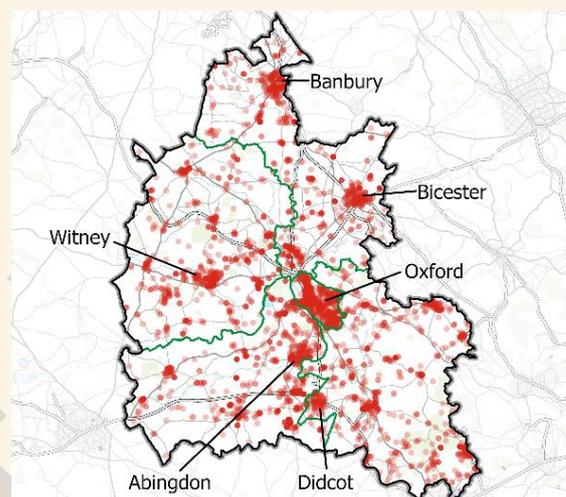
Source: Source: Produced by SQW 2023 based on data provided by glass.ai. Licence 100030994
Data: Esri, Ordnance Survey © Crown copyright and database right 2023
Note: 'Growth Signals' have been identified through a web-crawl of Oxfordshire businesses, with a business tagged when its company website refers to one of: new offices, funding, collaborations, product launches and hiring. 6,129 out of 18,240 Oxfordshire-based businesses with a web presence were identified as having a 'growth signal'.

In sum: the global importance of the local

Oxfordshire's innovation ecosystem has evolved – and is evolving – quickly, and in some respects, it is unrecognisable from a decade ago. Yet as Box 3-1 demonstrates, global competition is intense and benchmarks are shifting too.

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[18] In practice, the shift to home-based and/or hybrid working is complicated. Patterns vary hugely by sector – and for many involved in manufacturing activities, retail and many public services – it is simply not an option. Even where it is possible, employers – and their staff – are still working through different formulations. However a recent report by McKinsey Global Institute (July 2023) suggested that office attendance has stabilised at 30% below pre-pandemic norms in major cities. It noted that cities and buildings need to adapt to hybrid approaches – with more mixed use neighbourhoods, more adaptable buildings and more multiuse office and retail space. (see The impact of the pandemic on real estate | McKinsey)

Box 3-1: Global perspectives on investment into Oxfordshire

Oxfordshire's horizons in relation to science and technology are, rightly, global. But this means that the bar is set very high. Recent comparator data suggest that Oxfordshire's international footprint is compelling relative to European benchmarks but still well behind those from North America. There are many reasons for this (not least spatial scales), but in aspiring to be a top three world class innovation ecosystem (the ambition set out in Oxfordshire's LIS), there is no scope for complacency. As the data below demonstrate, across key knowledge intensive sectors, North American comparators continue to attract more early stage investment than Oxfordshire.

Capital invested* over 2010-2023 in selected sectors**, Oxfordshire vs international comparators

Source: SQW analysis of PitchBook Data, Inc. Data as at March 2023. Note that data have not been reviewed by PitchBook analysts
* Capital invested in: Pre/Accelerator/Incubator, Angel, Seed, Early Stage VC, Later Stage VC, Other VC Stages (including grants), Private Equity Growth/Expansion, PIPE. Excluding failed/cancelled deals.
**Note that values refer to investment tagged with the above sector keywords – as many deals are tagged with more than one keyword, the sectors (and therefore investment amounts) are not mutually exclusive.

Looking ahead, the future effectiveness of the innovation ecosystem will depend in large part on the character of Oxfordshire as a place – particularly in terms of affordability (of both housing and workspace), congestion, labour and skills supply, and the area's quality of life (in all senses).

Oxfordshire's foundational economy

Most people in Oxfordshire work in sectors that are 'foundational': in other words, their jobs are concerned with responding to locally-generated demand (and *need)*, and the services they deliver generally have to be based locally.

Across Oxfordshire, **some 228,000 people – 60% of all people in employment in 2021 – worked in the 'foundational economy'.** This includes people working in public services such as health and social care (45,000 people) and primary and secondary education (31,000 people). But it also includes a wide range of retail and leisure activities and the transport and utilities infrastructure that underpins the county's economy[19].

The **foundational economy** plays a critical role: **it ensures that Oxfordshire 'works', with viable services, a good quality of life and a happier, healthier population.** As demand rises over time for services that need to be provided locally with

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[19] Justin Bentham *et al* (2013), *Manifesto for the Foundational Economy*, CRESC Working Paper 131, University of Manchester

significant personal input (for example, in social care), the resilience of the foundational economy is becoming more and more important.

This is true generally across Oxfordshire. But it is also true in relation to those organisations and individuals within the innovation ecosystem. These are major consumers of foundational economy services – and without those services, the innovation ecosystem simply could not function.

Oxfordshire's foundational economy is however facing some challenges. These include the cost of living (including housing costs), reinforcing the consequences of low pay and relatively low margins in some sectors (especially personal service-related activities). There are also major challenges in staff recruitment and retention. These were exacerbated by the pandemic and also through settlement challenges following the UK's departure from the EU. Long term labour shortages are described as acute in the LSIP (and OxLEP's earlier Local Skills Report and Plan), particularly in foundational economy sectors such as hospitality, health and social care and logistics.

However, within Oxfordshire, these issues are widely recognised. There is a strong platform on which to build a more resilient foundational economy. Businesses increasingly see the value of social and environmental sustainability as a route to recruiting and retaining staff and building more resilient local supply chains, as evidenced in the growth of the B Corp movement locally and the development of

the Oxfordshire Social Enterprise Partnership [**see Box 3-2**]. Spearheaded by business, local government and the universities, work is underway to increase the share of local public procurement spent locally, where it can provide greater reliability in public service and greater 'rootedness' in the local economy.

Box 3-2: Oxfordshire Social Enterprise Partnership

Oxfordshire Social Enterprise Partnership (OSEP) CIC is a social enterprise set up to support social entrepreneurs, Social Enterprises, enterprising charities and purposeful business across Oxfordshire.

OSEP has supported place-based approaches to promoting a local economy within Oxfordshire that is more inclusive, reduces inequality and promotes community wealth through proactive social enterprise infrastructure development in Oxfordshire. With support from OxLEP, it has recently delivered eScalate, a three-year project (which ended in April 2023) to support over 500 businesses to grow, through grant funding, peer support, workshops and 1-2-1 mentoring.

Progress is also being made in harnessing the value of Oxfordshire's large rural economy in developing a food strategy that will reduce food miles, increase opportunities for healthier living and create a closer connection between production and consumption [**See Box 3-3**]

Box 3-3: Oxfordshire's rural economy and its strategy for farming and food

Oxfordshire is a relatively rural county, being the least densely populated in south east England. Rural Oxfordshire encompasses a wide variety of settings, including the Cotswolds the Vale of White Horse, and numerous rural market towns to isolated hamlets. These rural communities have suffered in recent years with the decline of retail and other services from these villages, and the decline in public transport links. This combined with rising fuel and transport costs (which adversely impact rural communities) has led to challenges in accessing work, education and services.

Farming continues to play an important role in Oxfordshire's rural economy. Oxfordshire's Food

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Strategy (developed by Good Food Oxfordshire) sets out aspirations to ensure that 'everyone in Oxfordshire can enjoy the healthy and sustainable food they need every day'. This includes developing more sustainable food supply chains locally, ensuring that healthy and sustainable food is more affordable and accessible for everyone, encouraging local food businesses, and raising awareness of the importance of 'Good Food'.

Social inclusion in Oxfordshire…

Overall, employee earnings in Oxfordshire are relatively high. But across the county, there are substantial disparities in relation to income and wealth.

Data from ONS point to average household incomes of £48,500 in North Central Oxford compared to £26,300 in Blackbird Leys. In this context, the Centre for Cities ranks the City of Oxford as the second most unequal city in the UK in terms of income, housing, affordability and life expectancy. Similar patterns are apparent elsewhere in the county; in Cherwell, average household income ranges from £25,400 in Banbury's Ruscote Estate to £43,600 in Bicester South[20]. These differences are substantial.

County-wide, housing affordability continues to be a challenge for many. The housing affordability ratio (the ratio between average house prices and residence-based incomes) was 11.1 in 2021; this had increased by 3.2 since 2003[21]. There are currently (July 2023) 9,540 people across Oxfordshire claiming Universal Credit and required to look for work (47% higher now than in March

2020). Overall, it is estimated that around 8-10% of households in Oxfordshire experience food insecurity[22].

According to the Indices of Multiple Deprivation (IMD), Oxfordshire is the 10th least deprived of the 151 upper tier local authority areas in England. However, the IMD points to the scale of inequalities within the county. One area in Oxford is within the 10% most deprived areas nationally; and a further 16 areas (in Banbury, Abingdon and Oxford) are among the 20% most deprived nationally (compared with 13 in 2015). Data gathered in the context of Oxfordshire's forthcoming Health and Wellbeing Strategy provide further insights. They suggest that there are 15,900 children and 8,200 older people living in poverty within Oxfordshire. They also point to substantial differences in life expectancy across different parts of the county[23].

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[20] Income Estimates for Small Areas, ONS, 2020
[21] Housing and Economic Needs Assessment, Cherwell District and Oxford City Councils, 2022
[22] A Food Poverty Action Plan for Oxfordshire, Good Food Oxford, 2021

https://res.cloudinary.com/ddcqlg6tr/image/upload/v1673222496/c42mfpgswd27nonmdypv.pdf
[23] Oxfordshire Health and Wellbeing Strategy, 2024-30 (draft dated 01.09.23)

Figure 3-3: Deprivation in Oxfordshire[24]
(green is least deprived, red most deprived)
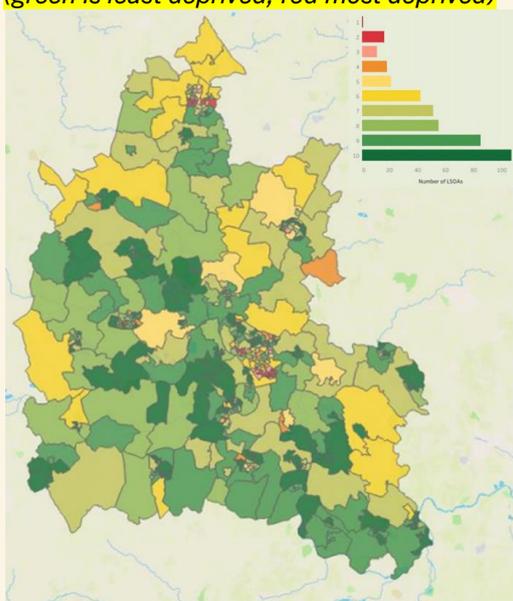
Source: Local Transport and Connectivity Plan – Baseline Report. Oxfordshire County Council, July 2022

Data from the IMD provide some insight into the extent of deprivation in rural Oxfordshire. Overall, some 21% of the county's population lives within areas that are ranked within the worst 10% of areas nationally on the 'geographical barriers to services deprivation' domain. This suggests real challenges for those without access to private transport and it also points to the ongoing importance of local service provision in rural areas.

In the context of a county that can genuinely claim some of the world's foremost science and technology assets – and entrepreneurs and investors who have driven successful commercialisation processes and built unicorn businesses – this juxtaposition sits very uncomfortably.

Growth within Oxfordshire needs to be inclusive. It needs to be *"distributed fairly across society and create opportunities for all"*[25]. This is a key goal for Oxfordshire. Within this context, the challenges surrounding the delivery of affordable housing are uppermost, as is the provision of key public services – and the link to the pressures on the foundational economy outlined above are clear. There is, in addition, a need for higher levels of educational attainment within Oxfordshire's most in-need communities; and pathways to better employment opportunities for people who face barriers in accessing employment.

The imperatives surrounding inclusive growth are increasingly recognised. One part of the county's response is through the work of the Oxfordshire Inclusive Economy Partnership [**see Box 3-4**].

Box 3-4: Oxfordshire Inclusive Economy Partnership

The Oxfordshire Inclusive Economy Partnership (OIEP) is a county-wide group that brings together employers, business, education, community groups and local government – to share knowledge, expertise and resources, and create links between different areas of work. Its aim is to work together to create a more equal region that creates opportunities and benefits for all people within the county. OIEP's focus is on tackling areas that really need attention, which will have impact and will really make a difference.

OIEP has set up four action focused working groups to deliver their vision:

- **Educational attainment** - focuses on early years, educational attainment of GCSE English and Maths and better links between business and education to provide volunteer classroom support and help shape career choices.

- **Inclusive Employment** - focuses on both employers and employees. Looking at how organisations can create better pathways into work whilst understanding the barriers people face to accessing employment.

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24 Based on the Indices of Deprivation – sourced from Local Transport and Connectivity Plan – Baseline Report. Oxfordshire County Council, July 2022

25 https://www.oecd.org/inclusive-growth/

- **Social value and procurement** - Spending money locally puts money back into the local economy and creates opportunities for local businesses – we are looking at how we can grow the amount of money that is spent within our county, for our county. We are also looking at how the businesses that benefit from this are investing into our local communities, through jobs, training or improving our environment.

- **Place shaping** - Investing in places that need it most. Communities need to be part of our work to ensure that money spent in our county helps address some of our biggest challenges – health, environment, housing – we need to ensure that we can answer these questions - what are the benefits that can be created for local people? How are the benefits of economic activity and growth shared locally?

There is an OIEP Delivery Plan 2023-24 which sets out how the actions of the partnership for the next 12 months. However, the ambition of the OIEP goes beyond the delivery plan and will require a long-term focus on the key areas identified therefore OIEP has developed an OIEP Strategy 2023-26 which sets out the long-term vision and how it will reach its goals and objectives.

…and opportunities for progression

Inclusive growth needs to be an ongoing commitment and priority. There is a need to ensure that all residents have the skills and connections to be able to take advantage of the opportunities that are available locally – recognising that these opportunities are themselves changing (as new investment comes into the county, and as jobs and roles are changed through, for example, automation). Yet Oxfordshire's employers are experiencing a tight labour market with chronic and acute skills shortages across many sectors. The challenges have been exacerbated by a rise in economic inactivity since the pandemic[26]:

Oxfordshire's economic activity rate has been high but it has declined by four percentage points (or around 17,000 people across the County) since 2019[27].

Net zero carbon, and wider sustainability issues

Cutting across all the observations set out above is a set of overarching imperatives linked to the climate emergency and related legal commitments to achieve net zero carbon. In policy terms, Oxfordshire has made wide-ranging commitments. County-wide, the publication of *Pathways to Net Zero Carbon Oxfordshire* has been influential, as has the work of Future Oxfordshire Partnership. At a local level, every council in Oxfordshire has committed to exacting targets [**see Box 3-5**].

Box 3-5: Local commitments to net zero

- **Oxfordshire County Council** declared a climate emergency in 2019. It developed a Climate Action Framework in response, with short, medium and long term actions.[28] It has committed to being carbon neutral by 2030.

- Zero Carbon Oxford is the goal for Oxford City to achieve zero carbon emissions across the city by 2040.[29] **Oxford City Council** has committed to reducing carbon emissions and becoming a Zero Carbon Council by 2030.[30]

- **South Oxfordshire District Council** declared a climate emergency in April 2019, and in April 2021 declared an ecological emergency. As a result, it has set out targets to be carbon neutral within its own operations by 2025, and to be a carbon neutral district by 2030.[31]

- **Vale of White Horse District Council** declared a climate emergency in February 2019. It committed to be carbon neutral within its own operations by 2030, with an aim for a 75%

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[26] Local Skills Improvement Plan Oxfordshire, 2023
[27] Annual Population Survey, ONS, 2023
[28] Net-zero by 2030 | Oxfordshire County Council
[29] Zero Carbon Oxford Partnership, Oxford City Council https://www.oxford.gov.uk/info/20011/environment/1486/oxford_to_zero/3

[30] Zero Carbon Council, Oxford City Council https://www.oxford.gov.uk/info/20011/environment/1486/oxford_to_zero/2
[31] Climate Action Plan for South Oxfordshire District Council, 2022-2024 Available: https://www.southoxon.gov.uk/wp-content/uploads/sites/2/2022/02/South-Climate-Action-plan-2022-2024.pdf

reduction in carbon emissions in operations by 2025. Vale of White Horse District Council has also committed to be a carbon neutral district by 2045, with a 75% reduction in carbon emissions in the district by 2030.[32]

- **Cherwell District Council** has declared a climate emergency and will ensure its operations and activities are Net Zero by 2030. It has also committed to achieve a Net Zero carbon district by 2030. Since 2008/09 Cherwell has reduced carbon emissions by just over 49%. In 2020/21 Cherwell District Council's annual emissions were down 22% to 3220 tonnes of CO_2e.

- **West Oxfordshire District Council** has declared a climate and ecological emergency and made a pledge to become a carbon-neutral council by 2030.[33] It has committed West Oxfordshire to being a Net Zero district by 2050.[34]

Emissions of carbon dioxide are difficult to measure and influence at a local level. They reflect national transport infrastructures; an inherited stock of dwellings; and long-established sectoral structures. But what is important is that *progress* is being made towards net zero carbon. In the context of the SEP, the business dimension is a central concern.

The evidence suggests that Oxfordshire's businesses have started to adopt net zero commitments. However progress is patchy and the available evidence suggests that public sector organisations and those in the energy/environment sector are leading the way. Encouraging more SMEs to consider emissions — and the steps that might be taken to reduce them — will be crucially important looking ahead. Potentially this will impact on many different business operations — from the nature and geography of supply

chains (and here the scope for local sourcing is important), to the extent and form of business travel, to the way commercial premises are heated. These imperatives apply to every SME in Oxfordshire — whatever the sector and wherever its location.

Box 3-6: Businesses in Oxfordshire and the journey to net zero

The business transition to net zero has already begun within Oxfordshire. To identify current activity, web-crawling was undertaken by glass.ai on Oxfordshire-based businesses/organisations to identify what proportion of businesses mentioned net zero on their websites and/or had related ISO standards in environmental adoption on their websites. Just over 5% of the businesses identified through the web-crawling exercise had made clear their commitment to net zero through their company websites (either by referring to net-zero and/or having related ISO accreditations). Larger businesses and those in the energy/environmental sector and public sector were the most likely to show adoption of net-zero practices.

% of Businesses (by Sector) showing Adoption of Net-Zero Practices
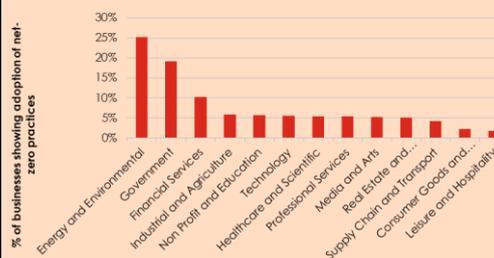
Source: glass.ai data analysed by SQW
Number of Business Records: 18,240

The pathways to a zero carbon Oxfordshire (PAZCO) (2021) report provides detail on the current environmental contributions from the non-domestic sector. It notes significant variation in the design, fabric, and usage of buildings, as well as the business activity taking place.

There are a wide variety of resources identified which are available to help organisations develop plans to achieve net zero. This includes the SME Climate Hub (a repository of advice and resources)

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[32] Climate Action Plan for Vale of White Horse District Council, 2022-2024 Available: https://www.whitehorsedc.gov.uk/wp-content/uploads/sites/3/2022/02/Vale-Climate-Action-plan-2022-2024.pdf
[33] Climate Action and What we are doing, West Oxfordshire District Council

https://www.westoxon.gov.uk/environment/climate-action/climate-action-and-what-we-are-doing/
[34] Sam Hampton, Lewis Knight, Hannah Scott, Hannah Budnitz, Gavin Killip, Scot Wheeler, Alison Smith and Nick Eyre Pathways to a Zero Carbon Oxfordshire, 2021 https://www.eci.ox.ac.uk/publications/downloads/PazCo-final.pdf

and Energy Solutions Oxfordshire (a new energy services company launched by the Low Carbon Hub and Oxford Brookes University to provide a one-stop shop for businesses looking to reduce their energy wastage).

In addition, there are key issues linked to energy in Oxfordshire. Currently, the energy supply network is under pressure. As set out in the Energy Strategy, there is a need for increased electricity grid capacity to support planned housing, industrial and commercial growth, and to reflect changing energy requirements.

At the same time, the energy sector could potentially play a critical role in the medium/long term as a growing sector [**see Box 3-7**]. It is a major national focus for innovation and investment currently – and it is a key part of Oxfordshire's wider innovation ecosystem with critical nodes on Harwell Campus, Culham Campus, on Milton Park and within Oxford. Equally, there are a range of ventures progressing at more local levels, some of them community-led.

> **Box 3-7: Energy innovation in Oxfordshire**
>
> *Fusion Technologies*
>
> Key to Oxfordshire's energy innovation landscape is the fusion technologies being developed at Harwell Campus and on the UKAEA's Campus at Culham.[35]
>
> While fusion is likely to play a large role in the future of clean energy, commercially viable products are unlikely to be readily available until after 2050 – so it is a long term commitment.
>
> However, there are economic opportunities for Oxfordshire stemming around spillovers and spinouts from technology developed as part of fusion research (for example, the magnets used for fusion are also used in healthcare, some crossovers

between the space industry and developing AI control systems).

Some Oxfordshire companies have attracted substantial investment in this context. One example is Tokamak Energy. It is pursuing fusion through the combined development of spherical tokamaks with high temperature superconducting magnets. Currently based on Milton Park, Tokamak now employs 200 people and it is on track to deliver grid-ready power by the 2030s. The ST80-HTS spherical tokamak will be built at UKAEA's Culham Campus, and a new facility is due to open in 2026.

Separately, in early 2023, UKAEA and First Light Fusion (currently in Kidlington) signed an agreement for the design and construction of a new purpose-built facility to house First Light's Machine 4 at UKAEA's Culham Campus. This strengthens further the suggestion that Culham is the leading location for public-private partnerships in fusion energy development

However, while R&D remains firmly in Oxfordshire, the site of the first fusion energy plant is set to be in Nottinghamshire.[36]

Energy Systems Accelerator pilot

At a smaller scale, the Energy Systems Accelerator pilot – better known as Mini TESA – is a multi-disciplinary hub, championing technical and services innovation in the energy systems transition. The hub is based at Osney Mead in Oxford and began operating in Spring 2022. The hub accommodates two University research groups, the Low Carbon Hub (a social enterprise), and a team from Scottish and Southern Energy Networks (the local distributor)[37].

Community Energy Projects

It is also important to note that community energy is flourishing in Oxfordshire. The Low Carbon Hub has been central to securing funding and facilitating new community energy projects. The Ray Valley Solar project may be the largest community owned solar ground mount in the UK. Community approaches to renewable energy generation have the advantage of being able to access and raise different types of financial investment (such as community share offers), while building community support for large infrastructure projects.

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[35] Towards fusion energy: the UK fusion strategy, UK Government, 2021 https://www.gov.uk/government/publications/towards-fusion-energy-the-uk-fusion-strategy; Fusion energy in Oxfordshire 2021, UK Government https://www.great.gov.uk/international/content/investment/opportunities/fusion-energy-in-oxfordshire/

[36] Site of UK's First Fusion Energy Plant Selected, 2022, https://www.gov.uk/government/news/site-of-uks-first-fusion-energy-plant-selected
[37] Oxford's Economic Strategy, 2022-32. Oxford City Council

Conclusions

Oxfordshire's economy is complicated: it is highly innovative and has seen major investment and business growth (including much-prized unicorns), and yet there continue to be major challenges and some threats.

It has seen substantial investment in key assets and the organisations/businesses that use them are achieving impacts which are global – economically, environmentally and in relation to healthcare and wellbeing. **Looking ahead, those global impacts will not be achieved well – if at all – unless Oxfordshire as a place also thrives**.

A thriving Oxfordshire has many different facets. The effectiveness of the foundational economy will be critical, yet it is under enormous pressure currently. And those same pressures are the corollary of a place that is permeated by socio-economic inequalities which are increasingly and consistently recognised to be morally unacceptable as well as economically inefficient. A thriving Oxfordshire also needs an effective and resilient infrastructure, and this in turn needs investment.

All of this plays out in a place that includes an historic medieval city which is surrounded by Green Belt and is home to some of the best and most impactful science and learning worldwide; a series of historic market towns that are a primary focus for planned housing and employment growth; some major campus/business park locations which are known around the world and distributed across the Oxfordshire countryside (creating challenges in terms of accessibility); and an extensive rural area which has its own socio-economic character. Much of rural Oxfordshire is within the Cotswolds, Chilterns and North Wessex Downs Areas of Outstanding Natural Beauty and/or one of seven Special Areas of Conservation (SACs). Oxfordshire is also home to one World Heritage Site, Blenheim Palace (located south of Woodstock in West Oxfordshire).

Oxfordshire's infrastructures – particularly transport, but also energy, utilities and digital – are all under pressure and in need of investment. The transport system is congested and the supply of energy is under pressure – partly because Oxfordshire is home to 'big science' and other research facilities which are significant energy users[38] and partly because of the pace of growth more generally. Digital connectivity has improved in recent years and is now reasonably good compared to national benchmarks – albeit demands for it are growing apace[39].

Within this context, there are concerns about the nature of future economic growth. The SEP is developed within the planning assumptions set out in Local Plans and hence the quantum of development is not for the SEP to determine. However the *quality* and *process* of economic growth – socially

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[38] *Oxfordshire Energy Strategy,* OxLEP, 2019

[39] Local Transport and Connectivity Plan – Baseline Report. Oxfordshire County Council, 2021

and environmentally — is a central concern.

Overall, Oxfordshire's 'efficiency' as an economy is mid-ranking, compared to elsewhere in the UK [**see Box 3-8**]. This leaves little room for complacency and instead demands an effective and incisive SEP, supported by targeted investment to increase productivity and efficiency. This must navigate the interdependencies described above — and do so in a way that contributes to the Future Oxfordshire Partnership's Strategic Vision for Sustainable Development.

Box 3-8: Productivity in Oxfordshire

Oxfordshire's foundational economy is intertwined with its science and technology-based activities and with other parts of its 'exogenous' economy (e.g. creative, industries, visitor economy, automotive manufacturing, etc.), and there is a strong sense of symbiosis. All of these different elements are important in relation to the county's overall economic performance and in this context, measures of productivity constitute a key indicator.

Nationally, the UK's productivity gap (i.e. the shortfall compared to other countries) and productivity puzzle (i.e. the failure of productivity growth rates to return to pre-credit crunch levels) continue to be major concerns. They comprise a central theme within *Build Back Better: Our Plan for Growth* which was published in 2021. This continues to provide the most comprehensive statement of UK economic policy. It provides a framework for various 'daughter' documents — including the *UK Innovation Strategy (2021)*; the *Levelling-Up White Paper (2022)*; and the *Ten Point Plan for a Green Industrial Revolution (2020)*.

Productivity is important. It relates to the efficiency of growth and is concerned with how well the economy turns inputs of labour, capital and raw materials into outputs. It therefore has both environmental and social dimensions, as well as narrowly economic ones. It is determined by many factors, some more easily influenced than others. But it matters because it links to standards of living, and the scope to improve them. It should therefore benefit local communities.

Oxfordshire's performance on the main productivity metrics is mid-ranking (when compared to other local economies in the UK). This is explained by its sectoral structure; its business demography (and the high incidence of SMEs); and by its geography and settlement structure, recognising that much of Oxfordshire is rural.

The data suggest that — if anything — Oxfordshire's underperformance may be increasing. Given the supply side constraints under which Oxfordshire's businesses operate — both in the foundational economy and across other sectors and activities — this observation is important. Through the delivery of the SEP, steps need to be taken to enhance productivity, recognising that greater efficiency could also help to support the journey to net zero carbon.

Productivity in Oxfordshire — county, districts and comparators

GVA per hour worked (current prices), smoothed, 2004-2020
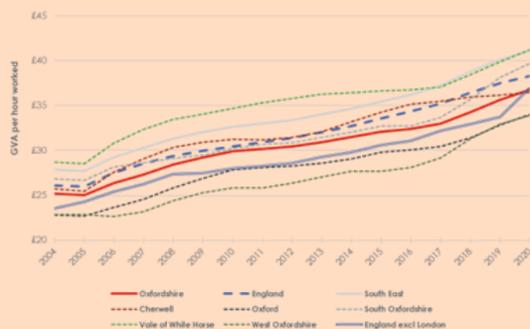
GVA per filled job (current prices), smoothed, 2002-2020, £
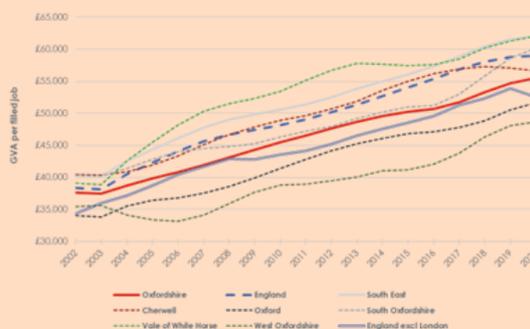
Source: SQW analysis of ONS Subregional productivity data

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Approaching 2033: Key trends and drivers

Selection of images of Oxfordshire to be inserted in final version

4. Approaching 2033: Key trends and drivers

Looking ahead over the next decade, there are wider trends and drivers – social, technological, economic, environmental and political – which will affect businesses and communities across all parts of Oxfordshire. Read alongside the description of Oxfordshire's economy (in the previous chapter), these help to define a series of opportunities and threats to which the SEP must respond.

From both the Independent Economic Review and feedback from the stakeholder workshops held whilst developing the SEP, a series of critical trends and drivers were identified. Some of these are generic – insofar as they will affect most local areas in the UK. However, **how they will affect Oxfordshire – and the businesses, people, communities and places within it – is unique, determined in large part by the county's characteristics** (as described in Chapter 3).

Social Drivers

Social drivers relate fundamentally to people and communities. In Chapter 3, the diversity of lived experience across Oxfordshire was described – from those who are clearly struggling to make ends meet and are in food poverty (even if they are in work), to others who are, on any measure, affluent.

In the near term, the **cost of living crisis,** compounded by **rising interest rates**, is a major concern, particularly for those who were anyway struggling to cover the costs of housing (whether servicing a mortgage or paying rent). These issues are affecting many in Oxfordshire, including those working in the foundational economy;

those working in the visitor economy (which includes tourism, culture, arts) and the creative industries; and many of those in lower paid jobs within the innovation ecosystem (e.g. post-doctoral students, lab technicians, etc.).

Looking ahead, the challenges of **labour market progression** are real – particularly given housing affordability pressures. In the future, **job changes** will be frequent and 'progression' may well assume different meanings, but transferable skills are likely to be very important.

Commentators have written about the rise of 'guppies' – young professionals in their 20s and 30s who have 'given up on property' (in contrast to their parents in the 1980s and 1990s). A **new relationship to home ownership** is associated with all sorts of lifestyle changes, typified by those within Gen Z (i.e. born in the 1990s and early 2000s). Described as 'digital natives', this cohort includes the younger part of the current workforce – and it is characterised, perhaps, by **greater demands for purpose and accountability from employment** (particularly in relation to environmental concerns), and greater recognition of – and sensitivity to – **diversity**. There is also likely to be a **greater interest in**

wellbeing, especially given pressures linked to **social media**. These observations are generalisations, but as the younger members of the workforce move to more senior positions, their motivations are likely to move with them, shaping in time the future of economic life across Oxfordshire.

Another major social driver relates to the process of **population ageing** which is being seen across much of the UK (outside of major cities). Deficiencies in **pension provision** – particularly among those who are not homeowners – and a **rising state pension age** will compel people to work for longer; jobs may well need to change to accommodate workers well into their 70s.

In addition, as the age profile shifts, the **dependency ratio** will grow – and so will demand for key local services, particularly health and social care; in the future this will have a major bearing on the foundational economy, both in terms of the scale of demand for it and the associated funding issues linked to it.

Technological drivers

Over the ten years of this SEP, there are likely to be further technological shifts, linked to **artificial intelligence (AI) and the use of data.** The consequences are likely to be wide-ranging and profound. Many activities will be **automated** and jobs will therefore be redefined. At the same time, **data security** is likely to become more and more problematic and better/stronger solutions will need to be found. The threat linked to **cyber security** will constitute a major risk. While it will

represent an opportunity for businesses which are specialised in the field (including some major firms in Oxfordshire), it will mean that every business and household in the county will need to be far more digitally literate.

AI is likely to **transform service delivery**. It will affect both healthcare and education, and 'routine' functions like logistics. It will also affect connectivity and mobility (including, potentially through autonomous vehicles, etc.).

Another major technological driver is likely to be in the sphere of **regenerative and personalised medicine.** Again, there are real potential prizes here for some of Oxfordshire's life sciences businesses, but the implications for healthcare are likely to be substantial.

Economic drivers

Over the next decade, economic drivers are – perhaps – even more uncertain. They will be shaped in part by geopolitics, but also by shifting patterns of international trade.

Over the recent past, the growth of the **Chinese** economy appears to have faltered while the performance of **Emerging Market** economies has been inconsistent. As **North America** and **Europe** adjust to higher interest rates, the possibility of slow (or even no) growth appears much more likely. Economists are concerned about the prospect of **stagflation** (high inflation and high unemployment) – although the USA in particular appears to be achieving a 'soft landing' after the Fed's interventions.

The **cost of capital** has increased with higher interest rates, and the inference – in general – ought to be reduced investor confidence. It could be that Oxfordshire bucks the national picture, but the wider backdrop must be one of financial uncertainty.

Over the next ten years, the expectation also should be a series of new **trade deals**. These may open new opportunities for businesses in Oxfordshire, whilst closing others.

The '**war for talent**' looks set to continue over the next decade, recognising that new and different skills will be required. **This 'war' will need to be seen as an international one, particularly amongst younger workers**. As Oxfordshire aspires to retain and grow its world class knowledge economy, the implications of competition for talent are likely to be very important (including, for example, through the need to provide schooling for the children of highly qualified international migrant workers).

Environmental drivers

Over the next decade, imperatives around **transitions to net zero**, including with regard to energy infrastructure, will be crucially important. Whilst national targets are set for the 2050, significant progress will need to be made during the lifetime of this SEP.

This will (or should) have wide ranging implications – including, for example, in respect of energy production and consumption; air travel; use of private cars; the construction and insulation of buildings; use of plastics; dependence on data centres; and so on. For Oxfordshire's businesses, an important question will be whether international competitors gain/lose a temporary competitive advantage through differential national approaches to – and rates of – climate change adaptation.

Whatever the pace of change, it seems probable that there will be **more extreme weather events** – and businesses will need to both plan and adapt as part of their more general approach to mitigating and managing the effects of **climate change**. Measures to enable business continuity are likely to be important, and the threat of extreme events could help precipitate a transition to re-shoring (especially given the disruption caused to global supply chains through the pandemic).

Potential **biodiversity loss** and the consequences for local (environmental) ecosystem services (e.g. with regard to flood mitigation) will also need to be recognised as a risk and possible driver[40]. Important implications will follow, particularly with regard to the use of agricultural land and the management of water (and other) resources.

Political drivers

In a domestic context, the UK will see a general election at some point before January 2025. This could mean a wholesale shift in domestic priorities. In

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[40] Within Oxfordshire, the Local Nature Partnership is developing a nature recovery strategy, consistent with these broader trends and drivers

practice, there seems to be implicit agreement across the main political parties with regard to some key concerns (however they are described in detail). These include:

- using science and innovation assets and capabilities well, including to drive wider economic benefits across the UK

- enhancing productivity, including through the use of digital technologies

- supporting clusters and place/area-based economic assets

- achieving net zero and green growth

- addressing the housing crisis

- advancing opportunities for devolution (albeit at different rates and to different extents across local areas within the UK)

- levelling up, and addressing spatial disparities across the UK

- redefining the UK's role and profile internationally.

However it is important also to consider political drivers that are international in character. These include: geopolitical instability (notably with regard to war in Ukraine); the possibility of emerging bilateral alliances, particularly given levels of debt in some less developed nations; the structures put in place to deal with misinformation, including in relation to cybercrime; and the range and effectiveness of global responses to climate change mitigation and adaptation.

Conclusion

The next ten years are laced with uncertainty. In one sense, this is obvious, but the degree of risk is perhaps unprecedented. Unpredictable and extreme events – which are sometimes described as 'black swans' – appear to be growing in both frequency and severity. In the aftermath of a pandemic, the fragilities of a highly interdependent world are there to see.

For Oxfordshire's SEP, this means that the risks of the next decade need to be recognised and understood. The aim, essentially, is to build the county's economic resilience and to do so in a manner that aligns with the FOP's Strategic Vision for long term sustainable development.

SEP ambition, objectives and themes

Selection of images of Oxfordshire
to be inserted in final version

5. SEP ambition, objectives and themes

Ambition

Consistent with the Future Oxfordshire Partnership's Strategic Vision for long term sustainable development, the **ambition** which sits at the heart of our Strategic Economic Plan may be summarised as follows:

By 2033, **people and communities** *across Oxfordshire will be benefitting from* **new opportunities** *which are* **created sustainably** *through* **local enterprise and innovation**. *These will enhance further their* **wellbeing** *in an* **outstanding local environment**. *They will also underpin, complement and support a wider* **innovation ecosystem** *which will continue to be of* **global significance**, *transforming for the better the lives of people across the world.*

Our emphasis therefore is on *Oxfordshire's people and communities* – both those who live and/or work here now, and those that are likely to do so by 2033.

We recognise that *new opportunities will be created and new jobs will be formed*. Some of these will involve roles and occupations that do not yet exist and for which we will need to be prepared. But in readying ourselves, the *process of enterprise and innovation* will be encouraged actively, across all parts of our economy.

We will continue to emphasise the importance of *wellbeing* in an *outstanding local environment*. This is wellbeing for everyone and in all senses – recognising that being equipped for, and contributing to, a changing economic life is a critical element in terms of agency, dignity and self-esteem. We also want to emphasise our cultural assets in this context, and the importance of creative places to support social and economic health and well-being. This relates to all places across Oxfordshire – Oxford itself, the historic market towns, and the villages within our extensive and beautiful countryside.

We also intend to ensure that *Oxfordshire continues to thrive in relation to its global roles* – particularly those concerned with its *innovation ecosystem* – and that it secures the infrastructure investment which is needed to allow it to do so. We are in the business of conducting outstanding research and commercialising the findings effectively, such that wellbeing can be improved around the world.

Objectives

In order to achieve our ambition, we have identified **four key objectives**. These are generally stated, but they are critical as delivery priorities. The SEP will seek to advance all four, working in concert with other strategic processes across and beyond Oxfordshire:

- Enable Oxfordshire's **businesses to thrive**, and encourage **pervasive innovation.**

  We will support businesses in Oxfordshire – from across the

foundational economy, from within the innovation ecosystem, and from other key sectors and clusters (e.g. visitor economy and creative industries). Within this context, we especially recognise the need for innovation – by which we mean adaptation and change with regard to what is produced and how it is produced.

- **Widen access** to current opportunities and **equip people and places as jobs change** over the next decade.

  We will work to ensure that the breadth of current and emerging opportunities across Oxfordshire are widely available. In this context, neither the age of individuals nor the places in which they live should be seen as barriers to access.

- **Secure resilient infrastructure** for planned growth, consistent with Oxfordshire's commitment to net zero carbon by 2050.

  We will work with our partners to make the case for infrastructure investment of many forms – notably transport, digital infrastructure and energy infrastructure. We will emphasise the importance of this investment in realising future growth potential – and in enabling Oxfordshire to continue to fulfil its wider roles, globally and nationally. In so doing, we will support the delivery of the Oxfordshire Infrastructure Strategy. We will also work alongside other key groups, notably the Fast Growth Cities (FGC) group[41] and the Sub-Regional Partnership (discussed later) in making the case for appropriate investment.

- Ensure that Oxfordshire's **places are sustainable and inclusive**, and that **local communities flourish.**

  We will support the lead role of our local authorities in realising the full potential of our places. Specifically we will work with the District and City councils and local communities, to ensure that all of Oxfordshire's places are sustainable and vibrant, and that they provide the range and scale of both market and affordable housing and workspace (of different forms) that have been identified through Local Plans.

Themes

The four delivery objectives will be shaped through **four cross-cutting themes**:

1. **Recognising our assets and using them well**

2. **Supporting innovation across Oxfordshire**

3. **Advancing Oxfordshire globally**

4. **Strengthening our communities locally**

These themes cut across the objectives and their purpose is to help to avoid siloed thinking, ensuring that synergies are

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[41] The FGC group – which consists of the city councils of Oxford, Cambridge, Milton Keynes, Norwich and Peterborough – published a report which showed that targeted investment could increase the cities' economic contribution to £150bn by 2043, up from £42bn in 2020. This would result in additional tax contributions to the exchequer of up to £1bn.

captured and progress is made. They are explained in detail in subsequent chapters.

We will also make a critical contribution to **achieving the Future Oxfordshire Partnership's wider Strategic Vision.**

SEP Vision, Objectives and Themes

Through the delivery of our **objectives** and **themes**, we will achieve the **ambition** of the SEP.

Figure 5-1: The SEP's objectives and themes — and their contribution to the FOP Strategic Vision

By 2050, we will...

Nine objectives from the FOP Vision

...have transformed movement and connectivity

...be the first generation to leave the natural environment in a better state than we found it

...be a globally competitive economy

...have achieved carbon neutral status and accelerating towards carbon negative

...be a more equal place supported by more inclusive growth

We want Oxfordshire to thrive, ensuring future well-being...

...enjoy a built and historic environment ...with high quality places

...have flourishing, diverse and vibrant communities

...have sufficient energy-efficient, well designed homes... to meet the needs of the economy... and young people

...have a healthier and happier population

Theme 2: Supporting innovation across Oxfordshire

Theme 3: Advancing Oxfordshire globally

Objective 1: Enable Oxfordshire's businesses to thrive, and encourage pervasive innovation

Objective 2: Widen access to current opportunities and equip people and places as jobs change over the next decade

Objective 3: Secure resilient infrastructure for planned growth, consistent with Oxfordshire's commitment to net zero carbon by 2050

Objective 4: Ensure that Oxfordshire's places are sustainable and inclusive, and that local communities flourish

Theme 4: Strengthening our communities locally

Theme 1: Recognising our assets and using them well

Theme 1 — Recognising our assets and using them well

Selection of images of Oxfordshire to be inserted in final version

OxLEP
driving economic growth

6. Theme 1 – Recognising our assets and using them well

Theme 1 is concerned with **productivity in Oxfordshire**.   It relates fundamentally to the effectiveness and efficiency of economic activity across the county. The imperative is to use resources and capital well – human capital, natural capital, investment capital. In so doing, the aim is to build economic resilience that can enable wellbeing for people and communities across Oxfordshire.

Introduction

Theme 1 is concerned with **productivity in Oxfordshire**. There is a strong link between productivity and standards of living. **Increased productivity must be achieved sustainably and in a way that improves overall wellbeing (linked, for example, to reduced inequality and greater economic inclusion)**; it therefore has many different dimensions. In focusing on productivity we are not advocating accelerated growth in overall output beyond that which is consistent with current planning assumptions; instead, **we are encouraging better, smarter and cleaner economic activity to benefit both current and future generations**.

Productivity and the foundational economy

Businesses and organisations operating within the foundational economy are under pressure in Oxfordshire, particularly in respect of labour supply and skills: many are struggling to recruit and retain the staff needed to deliver key local services (such as health and social care, public transport, retail and visitor economy more generally). In this context, measures to increase economic activity levels, and to support (re-)entry to the workforce are likely to be important, particularly in relation to older workers (many of whom left the labour market during the pandemic).

Within this context, there are particular challenges facing SMEs. These vary substantially in character. They include sole traders, new businesses, long-established family-owned firms, and social enterprises, and many play a key role within the foundational economy. During the stakeholder workshops which underpinned the preparation of the SEP, two key elements were flagged consistently:

- **Continuing low levels of digital literacy and adoption among Oxfordshire's SMEs:** Those working locally with SMEs noted the challenges of online application processes for support during the pandemic, in part because many SMEs appeared to lack basic financial software for managing their businesses. The imperatives surrounding digital literacy will grow

over the next decade, and Oxfordshire's SMEs need the tools and the confidence to respond, improving their own efficiency in the process.

- **Affordability and supply of workspace**: Oxfordshire is expensive and as sites are redeveloped, whether for housing or high-end commercial premises (particularly at the moment laboratory space), locally-focused SMEs are often displaced. Some have been able to adapt by working from home and/or by moving to smaller premises, but this is not always possible and the provision of appropriate affordable workspace is a county-wide challenge [**see Box 6-1**]. There are examples of local solutions — particularly as town centres adapt to the restructuring of retailing — and it will be important these continue to be supported [**see Box 6-2**].

Box 6-1: Provision for employment and affordable workspace

Employment space within Oxfordshire, particularly around key business locations, is on an upward trajectory, with prime office rents currently at an average of £60 per sq ft[42] and rental values for 4-5 Star[43] office stock having risen by 25% between 2020 and 2023[44].

More generally, the supply of employment space has become increasingly constrained in recent years, with Oxfordshire's businesses struggling to find affordable workspace to meet the needs and/or growth aspirations of their businesses.

The provision of affordable workspace is important in providing local businesses and organisations with security to stay in spaces and lowers risks to growth, therefore encouraging more investment in capital and people. It is also important in ensuring the Oxfordshire retains businesses which are of

economic, social and community value, particularly those within the foundational economy, and voluntary and social enterprises.

There are examples in other employment space-constrained environments of policies to ensure that some level of workspace is available to meet the needs of local businesses, particularly those which are integral to the function and character of a place. The Greater London Authority and London Boroughs have put in place planning policy to ensure that there is a sufficient supply of affordable workspace across the Capital, with a focus on providing space for those businesses which add to the sense of place, community and environment of the City.

Box 6-2: Meanwhile in Oxfordshire…[45]

A county-wide initiative to reanimate underused space in our urban centres. The £1.9m project was developed by Oxford City Council, is being run by social enterprise Makespace Oxford, with the funding having been secured by OxLEP from the central government's Getting Building Fund.

The project 'Meanwhile in Oxfordshire…' is seeing vacant retail units in local high streets transformed into independent shops, cultural venues, creative studios and co-working spaces.

Good progress is being made towards the aim providing affordable premises to accommodate more than 100 organisations, which will create or secure at least 300 jobs.

'Meanwhile in Oxfordshire…' is reducing the number of vacant units in the county's high streets by enabling entrepreneurs to fill them with new and innovative enterprises and organisations. This is diversifying the offer in Oxfordshire's town and city centres, giving people more reasons to visit and to keep on returning.

Makespace Oxford has formed a consortium with other local organisations to combine the expertise and knowledge needed to deliver results across the county. This partnership includes Wild Property, Transition by Design, Soha Housing, Fusion Arts, Aspire Oxfordshire and Independent Oxford, alongside national experts in this field, Meanwhile Space CIC.

In aggregate, the loss of less productive SMEs and the reallocation of assets linked to them might be seen as part of a natural

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[42] Bidwells Office Report, 2023
[43] 4-5 star office stock is high-quality office space that is new or refurbished to a high standard. Full description available here:
https://www.costar.co.uk/docs/librariesprovider5/knowledge-centre-documnets/ratingsytem.pdf
[44] Oxford Market Report, CoStar, 2023
[45] See "Meanwhile in Oxfordshire…" project | Meanwhile in Oxfordshire project | Cherwell District Council

economic evolution. But – again in aggregate – these businesses are central to Oxfordshire's overall economic fabric, and they deliver important local services. Encouraging investment in both people and core business processes is therefore important.

Productivity and automation

Over the lifetime of the SEP, automation will be a major driver, including in relation to the foundational economy. Analysis by PwC suggests that internationally, around 50% of jobs linked to transport could be displaced by automation by the mid-2030s and about 20% of those linked to health[46]. Given labour market pressures within Oxfordshire, there may be some upsides although its consequences are unpredictable. PwC also notes that 44% of those with low skills are at risk from automation – suggesting that those consequences will be experienced unevenly. The implications are substantial – both for the way key services within the foundational economy are delivered and the job prospects of the people who work in them.

For Oxfordshire to become more productive – particularly in the context of technological change and automation – workforce skills will be very important. A strong link with local schools will be essential, recognising the critical role of schools in shaping much of Oxfordshire's future workforce. At the same time, it will be important to recognise that learning must not stop when compulsory education ends. As noted in

Oxfordshire's Local Skills Improvement Plan (LSIP), the aspiration has to be to '*train people for careers not jobs',* with transferable skills (including, but not restricted to, digital skills).

Productivity and progression

A more productive economy is likely to require a more highly skilled and better-paid workforce. This implies progression within work, where low paid roles can act as the 'first step' to better paid jobs in the longer term[47]. The risk, however, is that some low-paid workers remain 'stuck' in jobs that do not realise their full potential, often due to a lack of development opportunities to enable them to progress, or due to caring responsibilities and other life circumstances.

In a tight labour market, it is important that we make best use of all our resources: this will also be important in achieving our goals in relation to 'inclusive growth'. This reinforces the ambitions set out in the LSIP, and there should be opportunities for employer leadership.

Productivity and home working

The pandemic led to an immediate switch to working from home for many people. The 'return to work' has been slow and patchy and there is evidence to suggest that the pandemic helped crystalise demand for a permanent shift to working from home and/or hybrid office-home working. How this will affect productivity in Oxfordshire is currently unknown and unknowable, but the extent of the change

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[46] See How will automation impact jobs: PwC UK

[47] Social Mobility Commission (2017), The Great Escape? Low pay and progression in the UK's labour market

in working arrangements will have some level of impact – both directly (e.g. through the process of work) and indirectly (e.g. through potentially reduced congestion).

Productivity and congestion

In part because of its rurality, levels of car use and car ownership are high across Oxfordshire. Located at the core of the national transport network, the evidence points to growing road congestion over much of the last decade. In Oxfordshire, the M40 and A34 are both part of the Strategic Road Network, and both saw speeds decrease in the years before the pandemic. The decrease in road speeds was however greater on the county's A roads (in line with the national average); and within this, the greatest deterioration was seen on the A4185 and the A4130. In parallel, the reliability of frequent bus services in Oxfordshire has decreased in recent years, in part because of congestion, whilst movements of freight were affected by – and contributors to – growing congestion[48].

Congestion within Oxford is part of the challenge. Oxford is effectively a 'central hub' in relation to public transport across the county. Projects such as the Cowley Branch Line could reduce the number of private vehicle journeys and increase access to jobs, education and training. It could therefore help to tackle inequality in the county and improve opportunities for local people[49].

There is much evidence to suggest that congestion affects productivity – because of the time absorbed through travel. It also affects environmental performance. In Oxfordshire, transport is responsible for a larger proportion of greenhouse gas emissions than the national average, producing 36.5% of all emissions in the county and within this, road travel is the major contributor[50]. The inference is that reduced congestion is important in terms of the county's ambitions with respect to net zero, as well as its productivity performance.

Productivity and net zero

There are potentially synergies in terms of measures to increase productivity and those to achieve net zero carbon. A recent report identified, *inter alia*: a shared focus on the efficiency of resource use; the need for investment on both fronts (net zero will be a driver of investment that should also influence productivity growth); a shared dependence on processes of innovation; and a common link to new jobs and new skills[51]. The opportunity to increase productivity whilst effecting the transition to net zero is one that the SEP is seeking to harness.

Productivity and resource use

Productivity also has important links to wider patterns of resource use – water, land, energy, utilities, minerals, etc. All of these are under pressure to varying degrees – partly as a result of the scale of

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[48] Local Transport and Connectivity Plan – Baseline Report, Oxfordshire County Council, July 2022
[49] Local Transport and Connectivity Plan, 2022-2050 Oxfordshire County Council, July 2022

[50] University of Oxford Transport Studies Unit: Pathways to a zero-carbon Oxfordshire, 2019
[51] Climate for growth: productivity, net zero and the cost of living. Green Alliance/Nesta, May 2022

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population growth, and partly as a corollary of some of Oxfordshire's distinctive assets and specialisms. Its 'big science' facilities at Harwell and Culham are, for example, major users of energy. The imperative to achieve resource use efficiency is therefore clear.

Key areas for action

In response to the issues identified above, a wide range of areas for action have been identified. These include:

- **Supporting Oxfordshire's SMEs to navigate the transition to net zero and enhance productivity, particularly through the use of digital solutions.**

  As discussed above, many SMEs are late adopters on the digital front and much could be gained by accelerating progress. Progress towards net zero carbon ought also to be possible if a series of operational improvements is encouraged. Across these different elements, business support and access to finance will be key to improving outcomes for SMEs. Oxfordshire's Growth Hub will have an important role to play.

- **Learning about the relationships between productivity, innovation and remote working, and disseminating best practice.**

  The post pandemic 'new normal' is still being defined and the consequences in terms of long term productivity are still a matter of conjecture. Through Oxfordshire's research community, steps should be taken to gather and benchmark relevant evidence.

- **Working with partners to improve social mobility for young people and ensure that they have greater access to career pathways within Oxfordshire.**

  Recognising that many of the jobs/occupations that will define young people's working lives do not yet exist, there is a need to support future skills initiatives, identified through the LSIP and through other routes.

- **Providing better coordinated support for people getting (back) into the labour market.**

  Levels of economic activity declined during the pandemic and there is a need/opportunity to encourage more people to return to the labour market. For older workers, this may be especially important as the deficit in relation to pensions provision becomes clearer.

- **Working with schools, and then with employers and providers, to equip people for a working life in which job roles will change frequently (through automation, etc.).**

  There is much uncertainty in relation to future job roles, etc., but it is widely expected that the next decade will see significant changes. Working through the LSIP process and more generally, there is a need for an ongoing dialogue, including with Oxfordshire's schools, to ensure that people are equipped for careers rather than jobs, and therefore able to adapt as the demands of employers change. Services like those supported through the Careers and Enterprise Company will be very important in this context.

- **Raising awareness of the Oxfordshire Inclusive Economy Partnership's Charter and encourage more employers in Oxfordshire to commit to it**.

  The challenges and responsibilities in relation to inclusive growth have become clearer and within Oxfordshire, there is a high level of commitment to it. Encouraging more employers to support this objective ought to be a priority.

- **Working with partners to facilitate sustainable travel to major employment locations.**

  Some of Oxfordshire's major employment sites have challenging locations vis-à-vis public transport and they are relatively inaccessible. Developing and delivering sustainable solutions is an ongoing priority.

- **Working with partners to use existing employment land well, recognising different sectoral needs and the imperative for affordable workspace whilst acknowledging links to housing.**

  Employment land supply is limited and there are significant demands for it. In delivering the SEP, it will be essential to recognise the requirements of key growth sectors whilst also making appropriate space available for lower value uses, recognising that these are a key element of the foundational economy on which Oxfordshire relies. Key strategic employment sites will need to be used effectively (and they will need infrastructure investment to

make this possible). In this context, there are clear links to housing provision. Homes must be built with links to employment in mind – whether this is working from home (which should affect the design of dwellings) or proximity to major employment locations.

- **Levering more of the economic potential from Oxfordshire's military sites.**

  Military sites in Oxfordshire (e.g. RAF Brize Norton) are an important part of the local economy and there is scope to build on this through, for example, the development of local supply chains. In addition, military leavers have important and valuable skills. Some establish their own businesses within foundational economy sectors, whilst others can support knowledge economy activity (e.g. through advanced manufacturing). Oxfordshire LEP has supported military leavers previously, and similar interventions will be important looking ahead. In using our assets well, the importance of Oxfordshire's military assets – both people and sites – should be recognised fully.

- **Recognising the importance of Oxfordshire's rural economy and links to both food production and land use.**

  The rurality of Oxfordshire is one of its principal – and most valued – characteristics. Its countryside is important in terms of the amenity it provides, but also in terms of the land resources associated with it. These need to be used effectively and well.

Theme 1 — and links to other strategies within Oxfordshire

Strategy	Connections with Theme 1
Oxfordshire Local Skills Improvement Plan (LSIP), 2023	• They key priorities for change identified within the LSIP complement the areas for action identified in the SEP, with the ambition to ensure that the County has the right mix of people, skills and opportunities. The LSIP looks to: ➢ Provide inclusive, accessible education and training that meets the needs of learners, helps employers to develop their existing workforce and help individuals move up the career ladder. ➢ Promote aspirations career routes in priority sectors and identifying suitable pathways and/or skills for young people to progress in these careers. ➢ Train people for careers, and not jobs, so that individuals have the right transferable skills to be flexible and adaptable in their career choices.
Pathways to a zero carbon Oxfordshire (PAZCO), 2021	• The PAZCO sets out how Oxfordshire's economy will eliminate carbon emissions by 2050, which includes rethinking the way in which existing assets and infrastructure are used within the economy. The PAZCO seeks to improve existing assets by: ➢ Retrofitting Oxfordshire's existing homes and non-domestic buildings ➢ Phasing out gas boilers and fossil-fuelled modes of transport in favour of greener alternatives ➢ Innovating in food production to maintain or increase output while agricultural land makes way for development and Oxfordshire grows its fair share of biofuels. ➢ Restoring ecosystems and natural capital for enhanced sequestration and increased biodiversity
Oxfordshire Energy Strategy, 2019	• Complements ambitions within the SEP to improve the usage of exiting assets, and to reduce County-wide emissions by 50% by 2030. This includes reducing energy demand (by increasing energy efficiency of housing and businesses), growing the low carbon economy (through the provision of the right skills and business support offer) and encouraging modal shift towards more sustainable transport options.
Oxfordshire Food Strategy, 2022	• The Food Strategy aims to better use the existing food assets that Oxfordshire already has, so that 'everyone in Oxfordshire can enjoy the healthy and sustainable food they need every day'. This includes strengthening short, transparent local food supply chains that improve Oxfordshire's resilience to external shocks and supporting the growth of the local food economy.

Theme 2 — Supporting innovation across Oxfordshire

Selection of images of Oxfordshire to be inserted in final version

7. Theme 2 – Supporting innovation across Oxfordshire

> **Theme 2** is concerned with innovation across Oxfordshire and, specifically, with the scope to create new horizons. It relates to the continuing pre-eminence of the innovation ecosystem and its global ambitions – recognising that the challenges and risks are growing. it also relates to the need for innovation across Oxfordshire, particularly given the imperatives linked to the county's overall environmental performance and the need for a strong focus on wellbeing.

Theme 2 is concerned with **innovation**. This includes innovation linked to the commercialisation of scientific and other research – with the recognised (although non-linear) phases of discovery, invention, development, and adoption. It also needs to be understood more broadly, relating simply to change and improvement. This may reflect new or improved products/services and/or to the processes/approaches through they are produced.

Innovation is important across all sectors, including those which are concerned with service delivery. It is key to longer term productivity improvements, and to sustaining Oxfordshire's competitive advantages, both within the UK and internationally. It is also crucial in relation to wider ambitions linked to wellbeing.

In parallel, Oxfordshire has a key role to play in relation to the UK government's ambitions in respect of the UK Science Superpower[52], especially in the context of Mission Zero[53].

Processes of innovation in Oxfordshire

As described in detail in Chapter 3, Oxfordshire is a global player in terms of science and technology. The innovation ecosystem in which these are ensconced – and through which their wider potential impacts are unlocked – has developed substantially over the last decade. This is evident particularly with regard to the supply of early stage equity and the pipeline in relation to the provision of commercial property (particularly laboratory space).

However there is more to do, in two key respects:

- the **global societal challenges and risks which need solutions from world class science and technology are becoming ever more complicated and urgent;** the 'place' dimensions of associated innovation ecosystems will need to continue to evolve in response

- the **imperative for innovation is growing at a local level**: given skills

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[52] See Science and Technology Framework: taking a systems approach to UK science and technology, DSIT 2023

[53] Mission Zero: Independent review of Net Zero. Authored by Rt Hon Chris Skidmore MP and published by DBEIS and DESNZ, 2023

and labour market pressures, environmental constraints, and commitments with regard to the climate emergency, Oxfordshire needs better solutions in relation to key aspects of service delivery within the county.

Box 7-1: Creative Industries in Oxfordshire

The UK is a global leader in creative industries generating £108 billion a year, and is one of the Government's five priority sectors in the 2023 Spring Budget to deliver future growth (Creative Industries Sector Vision: 2023).

Oxfordshire is home to 5,000 creative industries businesses; has one NESTA Creative Cluster (areas with higher rates of innovation and economic growth in the Creative Industries); is identified as a high growth cluster in the Creative Industries Sector Deal (2018); has 11 microclusters (Creative Industries Radar Mapping the UK's creative clusters and microclusters (2020)); and three rural clusters[54].

Oxfordshire's strengths include: IT software/computing services (1st), music and performing arts; film/TV, gaming, and publishing; and home to the country's largest centre of publishing outside of London.

A notable gaming spin-out was Natural Motion which was acquired for US$500m. Rebellion, which invested £78m in Rebellion Studios (Didcot), creating 500 new jobs, is now redefining the industry by bringing together cutting-edge film and TV production and stages, 30 years of game production and two decades at the forefront in Performance Capture technology.

Key areas for action

Progress will be made in relation to Theme 2 by advancing the following action areas:

- **Advancing a series of Oxfordshire living labs and/or test beds to create and implement solutions for tomorrow** – **with foci including:**

  - **digital transformations**
  - **wellbeing in later life**
  - **transformation in service delivery**
  - **transitions to sustainable energy.**

Living labs are user-focused and they tend to be characterised by open innovation (meaning that ideas and insights are drawn from a wide range of sources, not 'guarded' within corporate structures). Through living labs, the expectation is that research organisations, businesses, public sector organisations, citizens and others will come together to find solutions to problems. These might be defined with regard to key themes (e.g. generating sustainable energy sources whilst putting in place an infrastructure to make it usable through a system-wide response[55]) and/or across particular places (as some challenges are best defined at a county, city or town level, or perhaps in relation to specific landscape types).

As part of the commitment to living labs, steps will also be taken to encourage major organisations (particularly from within the public sector) to explore different approaches to procurement. Major organisations in Oxfordshire have substantial 'buying power' yet are very risk averse. One of the purposes of living labs could surround the management (and understanding) of

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[54] Rural Enterprise: Mapping and examining the determinants of England's rural creative microclusters, Policy Evidence Centre & National Innovation Centre (May 2022)

[55] Note the parallels here with national proposals with regard to R&D linked to net zero. See Mission Zero: Independent review of Net Zero. Authored by Rt Hon Chris Skidmore MP and published by DBEIS and DESNZ, 2023

risk in the context of seeking out alternative, and potentially better, solutions.

- **Supporting students and young people across the county to develop business propositions and forge connections across the innovation ecosystem.**

    Oxfordshire's innovation ecosystem might appear impenetrable – or at least daunting – for many local people, particularly those who are not well networked within the major institutions/businesses. In seeking to support innovation – across sectors ranging from creative industries to life sciences and business services as well as those within the foundational economy – steps should be taken to widen access to it. Actions linked to the living labs could be helpful in this regard, but the imperative also will be for key organisations to reach out locally particularly to those with an interest in enterprise and innovation across many different sectors.

- **Developing a county-wide response to the sectoral possibilities surrounding retrofit.**

    The construction sector is one where the process of innovation has been relatively slow and many traditional methods/approaches persist, yet the potential gains through the use of different materials and/or modular approaches could be substantial. Within Oxfordshire, many buildings – residential and commercial – fall short in terms of environmental performance. In responding to the climate emergency, a solution is needed. Retrofit may face viability issues, but progress must be made.

- **Developing an integrated response – particularly in relation to start-up and move-on space, and appropriate workforce skills – to support the formation and scale-up of high growth potential businesses.**

    The 'big bang' of University of Oxford spinouts – alongside the growth of inward investment in knowledge economy sectors – is creating demand for highly skilled people; for growth finance; and for appropriate commercial premises. The development industry has responded – albeit there are concerns about affordable workspace – and new routes to securing equity finance have developed, but there is a need for wider solutions, perhaps most especially surrounding the supply of skilled people. Alongside the delivery of the LPIP, there is a need for a bigger, ecosystem-level, response – focusing for example on supporting businesses in securing relevant visas, providing accommodation for those on short term contracts, and perhaps putting in place appropriate schooling for the children of skilled workers from abroad. The private sector has a key role to play in this context, but much could be achieved through some level of co-ordination.

- **Advancing a wider 'future skills' initiative involving key Oxfordshire**

employers, further education colleges and higher education institutions.

In recognition of the cross-cutting imperatives surrounding innovation, we will work through the LSIP process and more generally to support a wide-ranging conversation about future skills needs county wide. This should inform – and be informed by – the strategies and plans of employers and skills providers.

- **Working with Research and Innovation (R&I) partners to advance cluster strategies linked to emerging and low carbon technologies and actively seek to secure wider impacts at different scales; these should include evidence of tangible progress regarding pathways to net zero**

carbon, including through low carbon innovation and low carbon energy.

Within Oxfordshire, some of the major science and technology campuses/parks have invested in developing cluster strategies. These are defined around key technologies and their purpose is to support wider commercialisation and associated business growth. The cluster strategies are important in terms of achieving wider impacts – environmental and social, as well as more narrowly economic. These should benefit people in Oxfordshire, but they should also benefit other parts of the UK (particularly if production functions are seeking lower cost locations). The current suite of cluster strategies needs to be recognised and supported.

Oxfordshire's Strategic Economic Plan – 2023-33

Theme 2 — and links to other strategies within Oxfordshire

Strategy	Connections with Theme 2
Pathways to a zero carbon Oxfordshire (PAZCO), 2021	• The PAZCO report identifies opportunities to foster enterprise and innovation in Oxfordshire's low-carbon economy, looking at existing and planned Living Labs, which are large-scale, placed-based, collaborative and innovative pilot projects, and Oxfordshire's leading low carbon businesses. • Oxfordshire expertise in energy innovation is identified as a major opportunity for changing the course of energy production globally. Harwell and Culham science parks have both grown out of the United Kingdom Atomic Energy Authority's (UKAEA) nuclear research dating back to the 1940s, with ongoing activity to develop nuclear fusion technology.
Oxfordshire Local Skills Improvement Plan (LSIP), 2023	• The LSIP aims to deliver the skills needed by employers to equip people for a working life in which job roles will change (through automation, etc.) and so that people are able to adapt to innovative practices that may come in the future. The LSIP identifies the priority transferable skills as being leadership & management, skills for a net zero economy, digitalisation and business & professional skills.
Oxfordshire Local Transport and Connectivity Plan, 2022	• Innovation has the potential to improve some of Oxfordshire's current transport challenges by helping to make walking, cycling, public and shared transport more attractive. Although technology alone will not solve many of Oxfordshire's current challenges, it will play a role in contributing towards the ambitions of the Local Transport and Connectivity Plan. Examples of innovations include passenger micro-mobility (e.g. e-scooters), car clubs, connected and autonomous vehicles, unmanned aerial vehicles, open data and Living Labs, all of which are already being trailed in Oxfordshire.
Oxfordshire Energy Strategy, 2019	• The Energy Strategy has ambitions 'for Oxfordshire to be at the forefront of energy innovation to foster clean growth', building upon Oxfordshire's history of energy research and generation, and projects already being delivered across the County, including the Bicester Eco Town, energy masterplanning for Didcot Garden Town, Oxford's zero emission zone and Low Carbon Oxford.

Theme 3 — Advancing Oxfordshire globally

Selection of images of Oxfordshire to be inserted in final version

8. Theme 3 – Advancing Oxfordshire globally

Although it is a relatively small county, Oxfordshire has a global reach. Its universities and research, development and innovation assets have international recognition and attract talent from across the world – and through this, Oxfordshire plays a major role in the UK's global 'offer'. This theme focuses on how we can sustain and grow Oxfordshire's international presence – and how the county can work collaboratively both internationally and with other parts of the UK.

International footprint

Oxfordshire has a genuinely global footprint and an ambition to be a top 3 global innovation ecosystem. University of Oxford is ranked as the world's leading university on the 2023 World University Rankings, and has the second highest proportion of international students of any university in the global top 20[56], with its annual £15 billion economic impact substantially driven by internationally-relevant research[57].

The county is also a magnet for international investment; and many associated priorities are captured within Oxfordshire's Internationalisation Plan to 2025. In life sciences and medical technologies, key investors include Siemens Healthineers (long-established in Oxfordshire and currently reinvesting in a new facility at Bicester), Abbott Diabetes Care (also long-established and with a facility at Witney), Novo Nordisk and Ipsen Pharmaceuticals, as well as Moderna's recent investment in vaccines R&D and BMW's investment in MINI Plant Oxford (as highlighted in Chapter 3). Reflecting the county's strengths in a diverse range of technologies, other recent international investments in research and development include electric vehicles, space and satellite applications and artificial intelligence[58].

However, as Chapter 3 observed, there is no room for complacency in considering Oxfordshire's international position. Global investment and talent are mobile, and will depend on – and be reinforced by – the effectiveness of the wider innovation ecosystem highlighted in Theme 1. Within the context of our focus on the foundational economy and the need for productivity growth in those firms that are not at the county's leading edge of technology, there should also be scope to enhance Oxfordshire's export potential.

Global visitor destination

Beyond international investment, **Oxfordshire is also an important global visitor destination**, securing some £425 million in annual visitor spend and *"performing well in the league table for international visits"*[59].

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[56] Times Higher Education (2023), World University Rankings
[57] University of Oxford/ London Economics (2021), Economic impact of the University of Oxford
[58] OxLEP, Invest in Oxfordshire: The UK's high-growth innovation ecosystem
[59] OxLEP/ Blue Sail (2023), Oxfordshire Visitor Economy Vision and Destination Management Plan, 2023-28

This attractiveness to visitors also supports vibrant towns/places allowing local communities and local businesses to flourish. The Destination Management Plan will minimise environmental impacts thus protecting and enhancing natural assets, whilst reinvesting in infrastructure and the quality of the experiences across Oxfordshire [**see Box 8-1**].

Box 8-1: Visitor Economy Vision & Destination Management Plan (DMP) for Oxfordshire

Oxfordshire's 5-year Visitor Economy Vision and DMP sets out a shared commitment to destination management and marketing Oxfordshire. This will bring benefits to businesses, local communities, visitors and the environment. It aims to achieve sustainable visitor economy growth through encouraging longer stays, year-round tourism and generating more value from visitors coming to Oxfordshire.

The DMP's ambitions include growing the annual economic impact of tourism by £250m to £3.2bn against 2019 levels; increasing the proportion of staying visits from 9% to 12% of the total, increasing the value of each visit to the County; and improving perceptions of Oxfordshire and propensity to visit, as well as supporting tourism amongst local communities.

The De Bois review, commissioned by Government and published in 2021, highlighted the challenge of a highly fragmented DMO landscape across England. As a result, a new tiered structure of DMPs was proposed with a pilot structure in NE England and VisitEngland rolling out a national network of second tier Destination Management Organisations (DMOs) called Local Visitor Economy Partnerships (LVEPs) to which Experience Oxfordshire and Cotswolds Tourism are accredited.

The DMP will also assist National Government priorities for tourism outlined in the national Tourism Recovery Plan; to be a more accessible and inclusive destination, improve sustainability, and grow Business Events, all whilst maximizing benefits for Oxfordshire. To ensure a future proofed, and vibrant Visitor Economy a wide range of key stakeholders will take forward the aims in the DMP, with both LVEPs, taking a significant lead in delivery, and championing the sector.

Supporting the UK ecosystem

Oxfordshire's global role and its concentration of world-class assets means that it plays a central role in the UK's wider innovation ecosystem, as research and innovation generated in the county supports investment elsewhere in the country. This makes a significant contribution in the context of the UK government's commitments to levelling-up[60] [**see Box 8-2**].

Box 8-2: Oxfordshire's contribution to innovation and wellbeing elsewhere in the UK

Oxfordshire is a home for world class research and innovation – and many of the organisations that are part of this ecosystem need to be in Oxfordshire. Some cluster around the specialist scientific infrastructure that has been established at Harwell and Culham. This is a national infrastructure, albeit much of it is located in Oxfordshire. Most of these businesses also draw on Oxfordshire's specialist labour market.

However there are many examples of commercialisation processes occurring elsewhere in the UK – even if the science continues to be concentrated in Oxfordshire. One example was provided earlier in Box 3-7 (linked to fusion energy).

Another example is YASA Motors. YASA is a spin-out from University of Oxford which was founded in 2009. In 2018, YASA officially opened a 100,000 unit per annum e-motor serial production facility in Kidlington near Oxford. This was followed by specialist Controller development team, based in Welshpool, Wales. In 2021, it was acquired by Mercedes-Benz.

More locally, Oxfordshire should also be seen in the context of its wider region. The county's location is a key asset: it is at the 'centre of the South', with good access to London and its infrastructure and to the Midlands. The county is a 'magnet' for employment, but distances to other concentrations of innovation (such as the

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[60] Levelling-up the United Kingdom – White Paper, HMG 2022

area around Cambridge) are relatively short, at least in international comparative terms, and travel movements in and out of Oxfordshire are complex.

However, Oxfordshire needs to make more of its central location and its proximity to neighbouring labour markets and other centres of activity. More sustainable transport links connecting the **Oxford-Cambridge Pan-Regional Partnership** will be part of this, although better connections south and west to Swindon and Bristol and northwards to Birmingham will be important as well. By working closely with neighbours through a better coordinated approach to infrastructure planning across Oxfordshire's wider economic footprint, there should be an opportunity to relieve pressures on infrastructure and the wider environment and realise the benefits of southern England's unique concentration of economic assets.

> **Box 8-3: The Oxford-Cambridge Partnership**
>
> A group of leaders from local government, local enterprise partnerships, local universities and England's Economic Heartland formed a new partnership for the Oxford to Cambridge region which received formal support from government in early 2023.
>
> This Partnership will champion the Oxford to Cambridge region as a world leader of innovation and business, acting to achieve environmentally sustainable and inclusive growth that brings benefits to communities now and in the future.
>
> The new Partnership builds on earlier work, including the production of an Economic Prospectus. This set out a vision to 2050 for the area to be:
>
> **…the world leading place for high-value growth, innovation and productivity. A global hub where ideas and companies are generated and thrive, home to exemplary models of 21st century development, with a high quality environment and outstanding quality of life, and with a strong economic focus that drives inclusive clean growth.**

[61] See www.supercluster.org.uk

> Oxford and Cambridge will be linked by the reinstated 'Varsity Railway' to which the Government recommitted in autumn 2022.
>
> Latterly, an Oxford-Cambridge **Science Supercluster** Board has been established, led by businesses and the universities (with the participation of OxLEP). The intention is that industry leaders, universities, and investors come together to drive innovation, unlock investment, and shape policies to propel the UK towards its Science Superpower ambition[61].

Key areas for action

To deliver against the goals of Theme 3, the Strategic Economic Plan seeks to recognise the value of Oxfordshire's global role – both to the county itself and in terms of the contribution it makes internationally and to the prosperity of the UK. Realising its potential and securing its sustainability means working closely alongside its neighbours.

Key areas for action include:

- **Attracting, welcoming and supporting responsible international investors and investment to Oxfordshire.**

  The county is a place with a powerful investment proposition: investment in Oxfordshire's life science, artificial intelligence and other technology sectors depends on its unique concentration of assets and would otherwise be lost to the UK. However international competition is fierce – and some other countries offer significant tax breaks and other forms of support. Ensuring that Oxfordshire's offer to investors remains attractive (in terms of access to talent and quality of life, as well as 'hard' infrastructure) will be very

important in retaining Oxfordshire's competitive position.

- **Welcoming international talent.**

Oxford's research and innovation strengths depend on its openness to talent from across the world – which in turn depends on access to housing and services, as well as the ease of accessing the UK labour market. The international workforce is important to Oxfordshire's foundational economy as well: the health and care sector (for example) is an important employer of staff from overseas. The visitor economy also employs many international workers.

- **Driving international entrepreneurship.**

Oxfordshire already has a relatively high propensity to export – partly linked with the very high value of its innovation core. Exporting typically correlates with higher productivity: working from a strong starting-point, there is scope to ensure that the right services, support and networks are in place to enable Oxfordshire businesses to expand their international activity.

- **Growing the visitor economy sustainably.**

Oxfordshire's visitor economy is an important driver of local employment and business activity in its own right; in 2019, it accounted for 10% of employment in the county. It provides vital entry level jobs for young people; flexible employment for people returning to the labour market; and it employs large numbers of female

workers. It also makes a key contribution to the 'quality of life' offer and to the county's investment proposition. The aim is to increase the *value* of the visitor economy over time, within the context of the need to preserve and enhance the key assets that make Oxfordshire special. This means building back better, with a more productive, resilient and innovative visitor economy supporting digital innovation and skills and labour needs. These issues are being addressed through the Visitor Economy Vision & Destination Management Plan (DMP) for Oxfordshire [**see Box 8-1**]; and through the wider activities of the Local Visitor Economy Partnerships.

- **Collaborating with neighbours.**

Oxfordshire's infrastructure needs will not all be addressed within Oxfordshire itself: the county relies on critical infrastructure beyond its borders, and better connectivity with surrounding counties will help unlock the potential of 'England's economic heartland'. Working together to deliver the Oxford-Cambridge Pan-Regional Partnership and the 'Supercluster' will be a priority over the coming decade[62]. In addition, Oxfordshire needs to look north (recognising links to the Midlands); south (towards Berkshire and London); and west (recognising, for example, potential links to the cyber cluster at Cheltenham and agritech at Cirencester).

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[62] See www.oxford-cambridge-partnership.info

- **Working with partners elsewhere in the UK to <mark>support levelling up and sustainable growth</mark> outside the Greater South East.**

  Despite the assets and potential of Oxford and its neighbours, there isn't capacity locally to accommodate all the opportunities and demand that these

generate. Increasingly, it will be important to think of the UK as a whole as an 'innovation ecosystem', in which Oxfordshire plays a leading role alongside the capabilities of other parts of the country.

Theme 3 — and links to other strategies within Oxfordshire

Strategy	Connections with Theme 3
Oxfordshire Visitor Economy Vision & Destination Management Plan (DMP) 2023-2028	• The DMP aims to deliver sustainable growth by encouraging longer stays, year-round visits and creating more value from visitors already coming to Oxfordshire. <mark>In line with the Tourism Recovery Plan and Visit England's key themes (to be more accessible and inclusive and to ensure the tourism industry contributes to the enhancement and conservation of the county's cultural, natural and historic heritage), there</mark> are ambitions to make tourism in Oxfordshire more sustainable. This will be achieved through a sustainable destination task force, and supporting initiatives to reduce waste, conserve energy, support biodiversity and support local supply chains.
Oxfordshire Energy Strategy, 2019	• Oxfordshire's history of energy research and generation, combined with its universities and research assets, means it is a global centre for advancing energy technology. This world-class innovation ecosystem, combined with the Energy Strategy, 'will inform a much wider picture of energy and the transition to a low carbon energy system in England'. Although Oxfordshire lacks <mark>some of</mark> the geographical features to produce renewable energy (e.g. off-shore wind farms, tidal river estuaries), it has an important role to play in unlocking energy innovation, both nationally and globally.

Theme 4 — Strengthening our communities locally

Selection of images of Oxfordshire to be inserted in final version

9. Theme 4 — Strengthening our communities locally

The first three themes will strengthen Oxfordshire's economy as a whole — by supporting innovation, productivity and investment in the context of the significant changes that will need to be made as we respond to the challenge of climate change. But success will depend on the extent to which we can improve the quality of life for current and future residents in all parts of the county, rural and urban. Our fourth theme therefore focuses on how we can make sure that the benefits of growth are captured locally and our diverse communities are able to thrive. It recognises the importance of inclusivity, accessibility, and connectivity at a local level, and the role of district councils across Oxfordshire in curating sustainable places.

'Curating places' across a diverse county

Oxfordshire is a diverse county. The city of Oxford itself accounts for around 22% of the county's total population, with a network of towns (such as Abingdon, Banbury, Bicester, Didcot, Henley and Witney) making a substantial contribution to the county's economy. Beyond the main settlements, Oxfordshire is the least densely populated county in the South East, with its smaller towns, villages and rural communities contributing to a large land-based and visitor economy, as well as accommodating some of Oxfordshire's key innovation assets.

Oxfordshire also welcomes newer communities, whether within the 'footprint' of older settlements or in newer developments. Over time, these will develop distinctive identities as well and will contribute to Oxfordshire's diversity: the Strategic Economic Plan must help to ensure that they can thrive.

Much of the county's local distinctiveness is linked with the quality of its natural and built environment, much of which is protected. As Oxfordshire's economy grows, it is vital that these key assets are preserved and enhanced — recognising that they contribute to the county's success and quality of life.

Box 9-1: Oxfordshire's outstanding environment

Oxfordshire benefits from the infrastructure of one of the world's greatest city-regions, with easy access to London and good strategic connectivity to the rest of the UK.

But within this complex and highly networked regional context, it contains areas of deep rurality and great environmental significance. These include three Areas of Outstanding Natural Beauty (the Cotswolds, the Chilterns and the North Wessex Downs), as well as four National Nature Reserves and 109 Sites of Special Scientific Interest.

This environmental quality sets much of the context within which sustainable economic growth will take place.

Building 'social capital'

Oxfordshire benefits from a strong network of community organisations. There are over 3,400 charities registered in the county, a relatively dense concentration of organisations which ranges from major international bodies such as Oxfam to smaller local groups. There is also an

extensive network of locally-based business groups, complementing the structures that exist at county-wide level. These are important in building 'social capital' – the links between individuals and communities that help to 'get things done' locally, build business relationships and supply chains (including within the foundational economy), share ideas and enable communities to become more resilient. Developing a stronger and more 'locally embedded' economy means building these networks and enabling more to happen organically at community level. The good news is that Oxfordshire is *relatively* well-placed to do this, through the community assets that it has in place.

Box 9-2: Zero Carbon Oxford Partnership

Zero Carbon Oxford is a partnership that brings together universities, hospitals, councils, large businesses, and communities that has committed to achieving net zero carbon emissions for the city of Oxford by 2040. It has set out a detailed roadmap to reducing its emissions, focusing on a pipeline of actions to build momentum and galvanise local communities to support better practices and new projects to help the transition to net zero. These actions are themed around five key sectors: domestic, commercial, industrial, transport and institutional.

Quality of life everywhere, and for everyone

However, as explored in Chapter 3, not all communities are equally placed to enjoy Oxfordshire's relative prosperity and future economic opportunities. While there are relatively few concentrations of deprivation in Oxfordshire, inequalities are high, and are compounded by high living costs. Alongside the actions set out in Theme 2, which include a focus on developing individual opportunities for skills and progression in work, the Strategic Economic Plan also

takes a community-based approach to building wealth and capacity locally, and particularly in this context, it recognises the critical role of Oxfordshire's district councils.

Across the county, **access to housing** is a key issue underpinning people's quality of life. Median house prices are over 10.5 times resident earnings in Oxfordshire (compared with around eight times resident earnings in England as a whole). Within this context, the picture in the city of Oxford is especially challenging. Securing a supply of housing to meet identified need will also be crucial in underpinning Oxfordshire's investment 'offer'.

In parallel, it is essential that there is a **supply of affordable workspace**. The challenges are acute across Oxfordshire – there are commercial pressures and employment land is in danger of being lost, yet local employment sites and affordable workspace are critical if Oxfordshire as a whole – and the villages and towns within it (including Oxford) – are to continue to function effectively.

In addition, there is a need for **local infrastructures** which can enable sparsely populated areas to thrive. Villages in Oxfordshire need to be places where people can work if they are to function as anything other than dormitory settlements. The food and farming sectors, and the visitor economy, will both make an important contribution.   In addition, working from home increasingly has a role to play – albeit well-performing digital infrastructures are important. Various initiatives have been developed in this context, and it is

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important that these continue to be encouraged [**see Box 9-3**].

Box 9-3: Oxfordshire's 'Gigahubs'

The 'Gigahub' project aims to install full fibre broadband infrastructure into a range of public service sites in Oxfordshire. Oxfordshire County Council has agreed to add investment to DCMS' original funding, extending the scope to include a number community centres, additional schools, GP Practices and libraries.

Over 175 sites across Oxfordshire (including schools, libraries, leisure centres and community centres) will be connected with gigabit capable broadband. This improved connectivity is vital for ensuring that communities are connected to the internet (e.g. through public Wi-Fi connections, public computers and for local services) and provide the connectivity needed for enabling future innovation (e.g. drone corridors, connected autonomous vehicles and other internet services for residents and businesses.

Key areas for action

To capture the goals of Theme 4, the Strategic Economic Plan seeks to **recognise and nurture the distinctive economic roles and contributions of all of Oxfordshire's places**. While Oxfordshire is diverse, economic assets are quite widely distributed and a balanced approach to economic activity across the county ought to support Oxfordshire's long-term sustainability.

In this context, key areas for action – most of which will continue to be led by local authority partners – include:

- **Advancing the network of innovation hubs across different places in Oxfordshire**.

  There is high demand for innovation space within the existing stock, and increased remote working creates new opportunities. Local authorities, universities and developers will work together to expand access to the innovation network, wherever firms are based in the county.

- **Championing social entrepreneurship across Oxfordshire.**

  Increasingly, charities, social enterprises and purposeful businesses are building businesses that trade for environmental and social objectives, as well as to make a financial return – and a commitment to wider objectives is of growing importance in attracting and retaining staff. Oxfordshire is 'leading the way': building on the work of groups such as Aspire, Sofea and OSEP CIC, social entrepreneurship will become an increasingly prominent feature of the business landscape.

- **Building capacity in the voluntary and community sector**.

  As set out above, Oxfordshire has a large charity sector and a dense network of local community groups. But the VCS also plays a critical role in the foundational economy and in the resilience of many public services – increasingly so in the context of pressure on public sector budgets. The aim is to enable growth while retaining and nurturing local roots.

- **Encouraging 'community wealth building'.**

  Linked with the growth of social entrepreneurship and the expansion of the voluntary and community sector, 'community wealth building' is about exploring ways in which more of the returns from economic growth can be sustainably retained locally and put to community use. This often involves

community ownership of assets, which may include local amenities, but could also include local energy generation schemes or goods and services in the 'sharing' economy. This is likely to be easier to achieve in those parts of the county that are more affluent and enjoy more 'social capital' in the first place: it will be important to drive these principles forward across Oxfordshire.

- **Building local supply chains**.

  Substantial work has already been done via the Oxfordshire Inclusive Economy Partnership to opportunities for local suppliers from some of Oxfordshire's key public sector purchasers, including the universities. Linking this with efforts to build the density of local business networks should increase the ability of firms to respond. Shorter supply chains will also yield environmental benefits, with initiatives such as the **Oxfordshire Food Strategy** supporting health, environmental and economic outcomes.

- **Unlocking the 'circular economy'.**

  The concept of the circular economy seeks to reduce inputs and waste, by re-using goods as far as possible, and recycling the residual. This is a key driver of innovation, both in new ways of using and adapting materials and in developing new services that help to reduce overall consumption. But there is also an important community dimension, which can also help to reduce costs and create community-based business models.

- **Supporting businesses and communities in rural Oxfordshire.**

  Much of Oxfordshire is rural and there is a need to support rural businesses and the communities that rely on them (for employment, for local economic vibrancy, and for service delivery). In this context, we need to ensure that provision is made for affordable workspace in rural areas, including through meanwhile uses. We also need to build on the learning from recent programmes (e.g. LEADER, Businesses in Rural Oxfordshire) and those that are emerging (e.g. Rural England Prosperity Fund).

- **Planning for sustainable housing growth, in the context of coordinated plans for place-shaping.**

  Planning for places is complex. The right quantum and distribution of housing will be determined through the planning process. The sensitive nature of much of Oxfordshire's landscape, the need for significant change to achieve net zero and the need to deliver identified housing need mean that a coordinated approach to housing, infrastructure and the economy is vital.

  In the shorter term, advancing community employment plans for new developments will also help to ensure that local communities benefit from new developments.

Theme 4 — and links to other strategies within Oxfordshire

Strategy	Connections with Theme 4
Oxfordshire Local Skills Improvement Plan (LSIP), 2023	• People are at the core of the LSIP, with a key ambition being to provide inclusive, accessible education and training for all in Oxfordshire. This includes ensuring that education and training opportunities better reflect the needs of the Oxfordshire workforce- for example, more accessible training opportunities and take-up for existing workforce.
Oxfordshire Food Strategy, 2022	• In ensuring that everyone in Oxfordshire can enjoy healthy and sustainable food they need every day, the Food Strategy identified a number of initiatives, including supporting Community Wealth Building approaches to preventing food poverty, building resilient communities and developing skills, jobs and enterprises that retain wealth locally.

Delivering the SEP

Selection of images of Oxfordshire
to be inserted in final version

10. Delivering the SEP

The SEP provides an **overall ambition** for the economy of Oxfordshire. The Action Areas that need to be advanced to achieve this ambition will be guided by a series of **objectives** and **themes**.

Routes to delivering the SEP

At this stage, we envisage **four main routes** to delivering the SEP over the next decade.

First, we will seek to continue to attract private sector investment.

Oxfordshire has done well over the recent past in attracting investment of different forms. This has included equity investment, some of which has been 'recycled' from within Oxfordshire, but also investment through a growing number of business relocations and wider corporate investment. These are processes that we will continue to encourage where they are aligned with the major themes of the strategy.

As a partnership, we can help de-risk investment decisions – through the development of networks and the provision of relevant information – and our intention is to continue to engage with investors in this manner.

Second, we will endeavour to work collaboratively with partners within (and beyond) Oxfordshire.

Greater collaboration is a key theme within the FOP Vision and it will be similarly critical in relation to the delivery of the SEP. Resources are limited but their impact will be greater if partners across (and beyond) Oxfordshire work together. The SEP is a partnership document, and we would like to see its contents taken into account as Local Plans are refreshed and as local organisations consider their own investment priorities.

Third, we intend to lever development processes.

Oxfordshire is attracting substantial developer interest currently – in relation to house building but also for some forms of commercial development (particularly laboratory space). We welcome this interest. It is critical that development processes are aligned with the SEP (and indeed the FOP Vision) and that through the s106 agreements and the Community Infrastructure Levy, resources are found for investment in critical supporting infrastructures – whether junction improvements, community assets, or provision linked for example to skills and workforce development.

Finally, where opportunities present themselves, we will seek to bid for funding from government.

Politically, commitments to levelling up will tend to favour other areas in relation to economic development and regeneration funding. However, recognising the scale of infrastructure and other challenges facing the county – and

the impacts that could be achieved through public funding investments (including in relation to levelling-up outcomes across the UK) – we intend to bid for funding, where the opportunities arise. Oxfordshire is committed to using its assets well, and there are market failures in this context which need to be addressed. We therefore expect a constructive, close and creative partnership with government in investing in Oxfordshire and driving our SEP forward.

Delivering the FOP Vision

In delivering the SEP, we will have full regard to the wider FOP Vision within which the SEP is nested (as explained in Chapter 2).

In delivery, we will recognise that projects coming forward must have regard to, and address/support where possible, the nine FOP objectives. As a partnership, we will develop a methodology for project/programme assessment which demonstrates this commitment.

More generally – as explained in Chapter 2 – we will support the delivery of the FOP objectives through the wider partnership. Specifically, we will make a commitment to work within the whole system and across respective "sister" strategies to work together to support and respond to Oxfordshire's opportunities and challenges as they arise.

Governance and oversight

The Board of Oxfordshire LEP will oversee the delivery of the SEP. It will want to see progress in relation to all four Themes – whilst recognising that the detail of implementation remains to be agreed.

In addition, there will be regular reporting to the Future Oxfordshire Partnership. The contribution of the SEP should be considered alongside those of Oxfordshire's other strategic processes in delivering the county's overall vision for sustainable development.

Oxfordshire's Strategic Economic Plan – 2023-33

Measuring progress in delivering the SEP

Selection of images of Oxfordshire
to be inserted in final version

11. Measuring progress in delivering the SEP

Through the SEP, **we will deliver economic growth more efficiently, more equitably and more sustainably.** We will do so **within existing county-level ambitions with regard to net jobs creation and housing delivery (**==as set out in the Local Plans developed by the Local Planning Authorities==**), whilst enabling progress towards net zero carbon**.

Within this context, the **progress of the SEP** will be measured in terms of five key indicators, and we will develop targets in relation to these. All five are relevant in terms of the growth narrative for the next decade, and whilst inevitably partial, they will collectively provide a good and useful insight into the progress that is being made.

Indicator/target 1: Increasing effective labour supply by returning to pre-pandemic activity rates

As noted in Chapter 3, Oxfordshire's activity rate has declined by four percentage points (or around 17,000 people) since 2019[63]. We will monitor progress against this indicator, recognising that employers are experiencing labour shortages and more workers are therefore needed; and also that participation in employment often goes hand-in-hand with other aspects of inclusion and well-being. ==Following the pandemic, finding early routes back into the labour market will be important. This is important as – looking further ahead – people will generally need to work for== ==longer because of changing pension arrangements.==

Indicator/target 2: Raising median earnings compared to mean earnings across Oxfordshire (on a residence-based measure)

This second indicator is concerned, fundamentally, with progress in relation to equality across Oxfordshire. There are affluent people in Oxfordshire but Oxfordshire among the most unequal places across the UK. We would like to see less disparity as a more general indicator of wellbeing.

Indicator/target 3: Achieving productivity levels that exceed the national average

Overall, Oxfordshire's productivity levels are below the national average and over recent years, the shortfall has increased. Productivity is important – partly because of what it can signal about the efficiency of resource use and partly because it allows standards of living to rise.

Indicator/target 4: Achieving wider knowledge economy impacts of global significance

We will develop a series of indicators linked to the vibrancy of the innovation ecosystem and the success of the knowledge economy more generally. These will focus on securing investment,

[63] Annual Population Survey, ONS, 2023

Oxfordshire's Strategic Economic Plan – 2023-33

developing a skills pipeline, and nurturing businesses.

Indicator/target 5: Businesses adopting net zero carbon targets (including procurement and supply chain)

As set out earlier in this document, it is vital that Oxfordshire's business population commits to making progress towards net zero carbon. Currently the proportion of businesses with formal targets is low, but we want to see this increase.

Wider monitoring of Oxfordshire's economy

For contextual purposes, we will track progress in relation to a broader basket of indicators, linked to the wider themes within the FOP Strategic Vision.

Some of these would normally sit with our local authority partners – and any commitment to them should be a wholly joint venture – but we would like to understand changes within Oxfordshire, particularly with regard to the supply of affordable workspace, the delivery of affordable housing and measures linked to congestion and transport (particularly in relation to key employment locations, but also more generally).

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Cherwell District Council

Executive

2 October 2023

OxLEP's Oxfordshire Visitor Economy Vision and Destination Management Plan 2023 – 2028.

Report of Assistant Director – Growth and Economy

This report is public

Purpose of report

To consider Oxfordshire Local Economic Partnership's (OxLEP's) Oxfordshire Visitor Economy Vision and Destination Management Plan 2023 – 2028.

1.0   Recommendation

The meeting is recommended:

1.1   To note OxLEP's Oxfordshire Visitor Economy Vision and Destination Management Plan 2023 – 2028.

2.0   Introduction

2.1   Earlier this year OxLEP commissioned consultants Blue Sail to develop and deliver a Visitor Economy Vision and Destination Management Plan (DMP) for Oxfordshire (the Vision and DMP are provided at Appendix One). The DMP has been developed alongside OxLEP's new Strategic Economic Plan (SEP) for Oxfordshire and it aligns to the approaches articulated in that Plan. The SEP is being considered through a separate report at this meeting of the Executive.

2.2   OxLEP will seek to get sign off for the Visitor Economy Vision and DMP from the OxLEP Board via their written procedures format, at a point subsequent to the Board's September 2023 meeting. The Visitor Economy Vision and DMP will also be presented to a Future Oxfordshire Partnership (FOP) meeting for information this autumn.

2.3   It should be noted that at this stage the DMP sets out a strategic direction and defines priority areas for action. OxLEP has commissioned a supporting Funding Strategy and has yet to work through operational delivery responsibilities with its lead partners, including the Future Oxfordshire Partnership; the two Local Visitor Economy Partnerships (LVEPs) working in Oxfordshire; and the local authorities. In particular, the status and relationship between the two LVEPs working in Oxfordshire needs further clarification because, at the moment, the DMP is giving

equal emphasis to both, whereas Experience Oxfordshire has hitherto operated throughout the whole county, whilst, by comparison, in Oxfordshire, Cotswolds Plus only covers West Oxfordshire.

3.0 Report Details

3.1 The visitor economy is a vital component of Oxfordshire's economy, with a key role to play in supporting well-being for residents, as well as for visitors. In 2019, the year preceding the pandemic, Oxfordshire attracted over 30 million visitors, generating £2.5 billion for the local economy and supporting 42,000 jobs. For Cherwell district in 2019, visitor numbers were 8.2 million visitors, generating £495 million for the local economy and supporting 8,789 jobs.

3.2 The equivalent 2021 figures, whilst improved from 2020, demonstrate that the sector was still recovering from the impact of COVID-19. Visitors to Oxfordshire were 23.3 million, generating £1.6 billion for the local economy and supporting 28,830 jobs. Visitors to Cherwell were 6.2 million, generating £352 million and supporting 6,714 jobs. *The sources for the figures quoted in paragraphs 3.1 and 3.2 are "The Economic Impact Report for Tourism in Oxfordshire (2021); and "The Economic Impact Report for Tourism in Cherwell (2021)" – https://www.experienceoxfordshire.org/partner/partner-benefits/research-and-insights*

3.3 The development of a Visitor Economy Vision and DMP for the county comes at a time, therefore, when the visitor economy sector is not only still recovering from the impact of the pandemic but also when economic challenges are adversely affecting both businesses and visitors. Furthermore, the climate crisis and environmental issues are critical and the tourism sector must help address these.

3.4 In addition, the DMP's development coincides with the recent roll-out by Visit England (the Government-sponsored national tourist board) of a national network of Destination Management Organisations (DMOs) called Local Visitor Economy Partnerships (LVEPs). Both Experience Oxfordshire and Cotswolds Plus, the two DMOs currently operating within Oxfordshire, received LVEP accreditation.. Cherwell District Council has been an Ambassador Partner of Experience Oxfordshire since 2016, working closely with the organisation to promote the district's tourism offer. Members will recall that as part of the budget proposals approved at Council on 27 February 2023, it was decided that there would be a tapered reduction of funding to the organisation over the next three financial years.

3.5 The DMP's Vision is to achieve sustainable growth through encouraging longer stays, year-round tourism and generating more value from visitors coming to Oxfordshire. The focus on economic impact, rather than footfall, is central to the ambition of driving sustainable tourism through an emphasis on longer visits which create more opportunities to spend, while minimising carbon impacts from visitor travel.

3.6 In order to support this Vision, the proposed market development for Oxfordshire is not about reaching new audiences, but instead about maintaining and consolidating its existing domestic and international markets, aiming to grow the economic value of each visit.

3.7 The three key targets identified by the DMP for 2028 are as follows:
   i. Greater Economic Benefit – the annual impact of tourism to grow to £3.2 billion;
   ii. High Value Visitors – the proportion of staying visits to rise from 9% to 12% of the total; and
   iii. Improved Sentiment – perceptions of Oxfordshire and propensity to visit to increase significantly among key visitor segments, as well as support for tourism among local communities.

3.8 The DMP acknowledges that tourism generates significant impacts from travel and the consumption of experiences and accommodation and proposes the establishment of a public/private sector Sustainable Destination Task Force to make tourism in Oxfordshire more sustainable and support initiatives to reduce waste, conserve energy, support biodiversity and local supply chains.

3.9 In order to support delivery of the DMP and maximise opportunities for the county,. OxLEP advocates a renewed partnership approach to managing, marketing and developing the destination, with the LVEPs, private businesses, public sector partners and others all playing their part. A new role is proposed for the FOP in convening the different partners, with the DMP being nested within the Partnership's Strategic Vision. It is also suggested that the FOP provides overall insight and monitoring of the DMP within Oxfordshire, helping to identify funding and resources to support implementation, with OxLEP supporting the FOP in this role.

3.10 A detailed baseline and technical report accompanies the DMP and contains background information including tourism data, policies, consultation and engagement findings, market data, trends and forecasts, and marketing analysis (the baseline report is provided at Appendix Two).

4.0   Conclusion and Reasons for Recommendation

4.1 The Council has been engaged as a consultee in the development of OxLEP's Visitor Economy Vision and DMP and, together with the FOP; the LVEPs; and the other Oxfordshire local authorities, the Council has been identified as a lead partner within it.

4.2 It is recommended that Executive notes OxLEP's Visitor Economy Vision and DMP, with the understanding that at this stage the document sets out a strategic direction and defines priority areas for action, without identifying clear operational delivery responsibilities and funding resources.

5.0   Consultation

The consultants appointed by OxLEP undertook an engagement programme in order to tease out the ambitions and requirements of a pan-Oxfordshire Vision and DMP. Their programme included meetings and workshops with partners and stakeholders from both the public sector and private businesses. An online workshop was held with teams from each of the local authorities, with officers from Growth and Economy; Planning and Development (Planning Policy); and Wellbeing

and Housing Services attending the workshop held for Cherwell District Council. The Council's officers were also given the subsequent opportunity to comment on a draft version of the Vision, DMP and Baseline Report.

6.0   Alternative Options and Reasons for Rejection

6.1   The following alternative option has been identified and rejected for the reason as set out below.

Option 1: Not to note OxLEP's Visitor Economy Vision and DMP. This is rejected because it would contradict the Council's objective to "work with partners to promote the district as a visitor destination and attract investment in our town centres". (Cherwell District Council Business Plan 2023 – 2024).

7.0   Implications

Financial and Resource Implications

7.1   There are no financial implications arising directly from this report, although local authorities are identified as partners for some of the DMP's proposed Development Actions. At this stage no indication is given as to what funding might be requested from local authorities, however, there is "no default assumption that partners can absorb the actions and priorities identified in this plan" meaning and it is noted that OxLEP has commissioned a supporting Funding Strategy.

Comments checked by:
Michael Furness, Assistant Director – Finance
01295 221845 michael.furness@cherwell-dc.gov.uk

Legal Implications

7.2   There are no legal implications arising directly from this report.

Comments checked by:
Shiraz Sheikh, Assistant Director Law and Governance
01295 221651   shiraz.sheikh@cherwell-dc.gov.uk

Risk Implications

7.3   The DMP's proposed Development Actions are ambitious in their reach and there is a risk that they may fail to be fulfilled if it transpires that funding is unavailable, or if lead partners do not provide the collaborative support identified as being required. This risk will be managed within the service area and escalated to the Leadership Risk Register as and when deemed appropriate.

Comments checked by:
Celia Prado-Teeling, Performance and Insight Team leader
Tel: 01295 221556 celia.prado-teeling@cherwell-dc.gov.uk

Equalities and Inclusion Implications

7.4　There are no equalities and inclusion issues arising directly from this report at this stage. If operational delivery responsibilities are subsequently allocated to the Council, it will be necessary to screen the projects involved against the Council's statutory duties to promote equality and the Equalities, Diversity and Inclusion framework.

Comments checked by:
Celia Prado-Teeling, Performance and Insight Team leader
Tel: 01295 221556 celia.prado-teeling@cherwell-dc.gov.uk

Sustainability Implications

7.5　The DMP's focus on sustainability, with its particular emphasis on economic impact and the ambition to promote longer visits which create more opportunities to spend, as opposed to concentrating on footfall, is welcomed. If operational delivery responsibilities are subsequently allocated to the Council, it may be necessary to complete Climate Impact Assessments for the projects involved.

Comments checked by:
Jo Miskin, Climate Action Manager
Tel: 07900 227103　jo.miskin@cherwell-dc.gov.uk

8.0　Decision Information

Key Decision

Financial Threshold Met:　　　　**No**

Community Impact Threshold Met:　**No**

Wards Affected

All

Links to Corporate Plan and Policy Framework

OxLEP's Visitor Economy Vision and DMP align with the priorities identified within the Council's Business Plan 2023 – 2024, particularly the priority "An enterprising economy with strong and vibrant local centres" and the objective to "work with partners to promote the district as a visitor destination and attract investment in our town centres".

The DMP also aligns with the Adopted Cherwell Local Plan, 2011 – 2031, notably Policy SLE 3: Supporting Tourism Growth, which states: "The Council will support proposals for new or improved tourist facilities in sustainable locations, where they accord with other policies in the plan, to increase overnight stays and visitor numbers within the District"; and Objective SO5: "To encourage sustainable tourism".

Lead Councillor

Councillor Donna Ford - Portfolio Holder for Regeneration

Document Information
Appendix number and title
- Appendix One – OxLEP's Oxfordshire Visitor Economy Vision and Destination Management Plan 2023 – 2028.
- Appendix Two – OxLEP's Oxfordshire Visitor Economy Vision and Destination Management Plan Baseline Report.

Background papers
None.

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BLUE SAIL▸

VISITORS PLACES DESTINATIONS

OXFORDSHIRE VISITOR ECONOMY VISION
& DESTINATION MANAGEMENT PLAN 2023-2028

REPORT FOR THE DMP STEERING GROUP/OXLEP

AUGUST 2023

CONTENTS

1 ABOUT THIS PLAN

This is the Visitor Economy Vision and Destination Management Plan (DMP) for Oxfordshire.

This 5-year Vision and DMP is a shared commitment to develop, manage and market Oxfordshire in a way which brings benefits to business, local communities, visitors and the environment. It has been commissioned by OxLEP through the Visitor Economy Renaissance Programme which was established to respond to the challenges of Covid-19, but this is a DMP for the whole of Oxfordshire and all those who collectively support and work within it.

The DMP is built on a detailed market and trend analysis, consideration of the strategic local, regional and national priorities, and extensive engagement. It is not everything that will happen, instead it is focussed on the actions and approaches that will have the greatest impact.

This is an important moment for Oxfordshire in deciding where it wants to take its visitor economy. The sector is still recovering from the impacts of Covid-19, economic challenges are impacting both business and visitors and tensions between visitors and communities in high-demand areas contrast with other locations that feel they are missing out and could welcome more visitors and the benefits they bring. The climate crisis and impacts on the environment are critical issues that the tourism sector must help address.

The De Bois review, commissioned by Government and published in 2021, highlighted the challenge of a highly fragmented DMO landscape across England. As a result, a new tiered structure of DMPs was proposed with a pilot structure in NE England and VisitEngland rolling out a national network of second tier Destination Management Organisations (DMOs) called Local Visitor Economy Partnerships (LVEPs) to which Experience Oxfordshire and Cotswolds Tourism are accredited. While Oxfordshire has two LVEPs within the county boundary, only Experience Oxfordshire covers the entire county area with Cotswolds Tourism covering a large section of the west of the county. Both therefore are important partners in the delivery of this DMP.
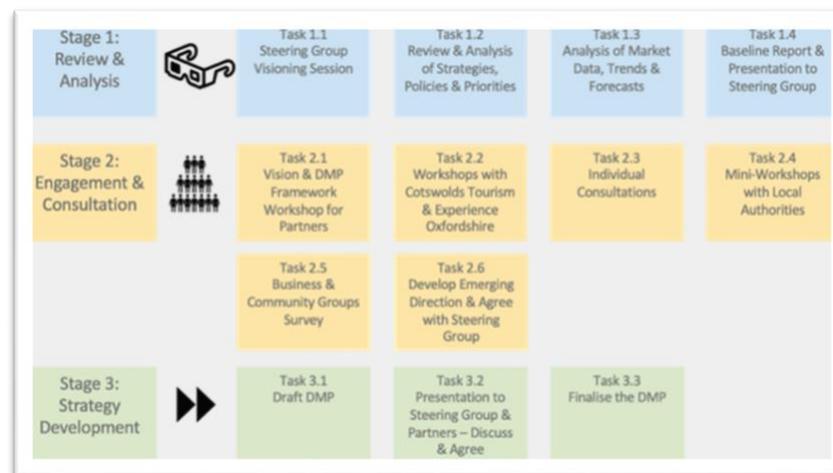
Figure 1 DMP Development Process

However, given the geographic coverage, it is expected that Experience Oxfordshire will lead on the majority of the priorities for Oxfordshire in which both LVEPs have a role to play and collaboration, particularly in areas of geographic overlap, will be critical to the successful delivery of this DMP.

While boundaries are important to local stakeholders, they mean very little to visitors. Where brands and thematic experiences cross from Oxfordshire into neighbouring areas (e.g. Chilterns, Thames, Cotswolds, motoring heritage), it is entirely reasonable to expect that activity such as marketing will also work across county boundaries and with partners and stakeholders outside Oxfordshire.

The DMP is for all stakeholders with an interest in tourism in Oxfordshire. It will only succeed with a renewed commitment to work together to tackle the issues and opportunities that exist across the county. Tourism is a very broad sector so it justifies having this dedicated plan – but it also operates in a wider economic and social context. Labour market, net zero or transport issues for example will share similarities with other sectors of the economy. So this plan has been developed alongside the new Strategic Economic Plan for Oxfordshire and it aligns to the approaches articulated in that plan. This DMP will need direct investment in time and resources but can also be used to positively influence investment elsewhere for the benefit of the visitor economy. It is a 'live' document which should be periodically reviewed and updated to take account of the changing context.

2 SHARED VISION & OBJECTIVES

The aim of this Destination Management Plan is to achieve sustainable growth through encouraging longer stays, year-round and generating more value from visitors coming to Oxfordshire.

Over the five-year lifetime of the DMP, the county will see an increase in how long people stay in the area and how much they spend. This will be achieved by taking a market-focused approach: managing, developing and marketing the area's tourism assets more actively, with decisions made through the lens of the target markets.

Oxfordshire - its places, spaces and residents - will provide a great welcome to visitors from across the world, developing its reputation as a destination that delivers high quality experiences year-round and is worthy of spending more time in, exploring more of, and returning to. It will be known as a responsible destination which is celebrated for including visitors in the innovative yet practical actions it is taking against climate change.

This will only happen through stronger partnership working and better collaboration between the county's many stakeholders, led by its two Local Visitor Economy Partnerships (LVEPs) and with the involvement of all the key players. And a recognition, through suitable investment of resources, that tourism is a significant part of the wider economy which is ultimately for the benefit of Oxfordshire's local communities and must enhance their quality of life.

Success will result in profitable businesses and provide quality jobs in which staff are valued, trained, retained and rewarded with fair wages. It will support local infrastructure and cultural and leisure facilities. It will enhance the county's credentials as a place to live, to invest, to do business and to study.

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5 ▶

TARGETS

Given the objective to drive sustainable growth through improved visitor value, the focus when setting targets will be about economic impact measured by visitor spend, which will lead to increased prosperity, profitable businesses and ensure quality jobs across Oxfordshire. Increased economic impact will come from generating more value from visitors – by encouraging people to experience more of the county across the year and stay longer. The focus on economic impact, rather than footfall, is also central to the ambition of driving sustainable tourism given the emphasis on longer visits which create more opportunities to spend while minimising carbon impacts from visitor travel. The Future Oxfordshire Partnership's vision for sustainable development highlights the importance of ensuring that economic outcomes are matched by ones which improve environmental and social wellbeing.

The targets outlined here provide a means of monitoring progress and evaluating proposed investments and interventions designed to develop the visitor economy by changing visitor behaviours and perceptions. By 2028 the Oxfordshire visitor economy will deliver:

▶ Greater Economic Benefit – The annual economic impact of tourism to grow by £250m to £3.2bn against 2019 levels[1]

▶ High Value Visitors – The proportion of staying visits to rise from 9% to 12% of the total[2]

▶ Improved Sentiment – Perceptions of Oxfordshire and propensity to visit to increase significantly among key visitor segments as well as support for tourism among local communities[3]

In addition to the above, this is also an ideal time to establish baseline measures around destination sustainability against which future targets can be set. Carbon calculations of the impact from visitors and the proportion of local sourcing by visitor economy businesses are the kinds of measures which would inform carbon reduction plans. Monitoring progress, alongside other measures such as clean air or water quality, will highlight the contribution that is being made by the tourism sector.

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[1] All monetary values are 2023 prices. Baseline is 2019 Cambridge economic model data inflated to 2023 using Bank of England calculator

[2] Staying visits as a proportion of total trips taken in Oxfordshire. Baseline is 2019 Cambridge economic model data

[3] Commission survey research to establish a baseline around visitor sentiment and track progress over time

3 OXFORDSHIRE NOW

Oxfordshire is an important international visitor destination with the potential to achieve much more for its communities.

A detailed baseline and technical report accompanies this DMP and contains all of the background information relating to the visitor offer, policies, tourism data, engagement findings, market data, trends and forecasts, and marketing analysis. A summary of the most relevant findings is highlighted below.

OXFORDSHIRE OFFER

Oxfordshire has an impressive visitor offer and a reputation that reaches globally. The City and University, The Cotswolds, Blenheim Palace, Bicester Village, The Thames & Chilterns have iconic status in the minds of many overseas and domestic visitors. There is a breadth to the offer that is enviable – towns, villages and a city with strong heritage, quintessential English countryside, historic waterways, family attractions, museums, culture, arts and events, outdoor and active experiences including a number of national trails, plenty of independent hospitality, food, drink and retail experiences alongside international brands. Visitors have a familiarity with the destination given the frequency it features on film and television.

While Oxford has a good supply of visitor accommodation, performance suggests there is the potential to increase the supply of accommodation especially if the destination is to get more value from the visitors that it attracts. While some data pre-dates Covid, it still provides a reasonable snapshot and shows that Oxfordshire has:

▶ 1,000 visitor accommodation providers with around 36,000 bedspaces (Source: VisitEngland 2016)

▶ 3,000 active rentals via short term rental websites of which around 42% are available full-time (Source: AirDNA)

▶ Seasonal peaks in accommodation occupancy of just under 90% across June-August and lows of around 60% during January and that it had recovered to within 2 percentage points of pre-Covid performance by 2022 (Source: STR)

Oxfordshire's business visits and events offer is predominantly supplied through the county's larger hotels, Oxford University's colleges and larger capacity venues that include the King's Centre, Kassam Stadium, Oxford Town Hall, Sheldonian Theatre and New Theatre. Much of this is driven by academic associations as well as non-discretionary business tourism.

The visitor offer continues to change and significant pipeline projects in the county include:

▶ Great Wolf Lodge, a £200m family-orientated indoor waterpark resort near Bicester

▶ Oxford United FCs plans for a new stadium between Oxford and Kidlington

▶ Stephen A. Schwarzman Centre for the Humanities, a £175m state of the art academic, exhibition and performance venue

▶ Mullin Automotive Experience at Enstone

▶ Bicester Motion masterplan and plans for an Experience Quarter at the former air force base in Bicester

▶ Various town centre and market development plans including Banbury Vision 2050 and Oxford Covered Market regeneration

▶ Accommodation development proposals including The Store Hotel, Oxford (former Boswells department store) and Estelle Manor (Eynsham Park)

▶ Wilder Spaces Oxford, a potential £40m visitor attraction featuring wildlife-friendly show gardens

POLICY CONTEXT

The baseline contains a wide range of relevant policies and strategies that impact this DMP. While national strategies are largely concerned with recovery from Covid (and a return to pre-Covid levels of tourism by 2024), better dispersal of tourism across the country and improved productivity, county-wide and local authority strategies within Oxfordshire highlight policy areas that are more closely attuned to local circumstances and local need. These mostly fall under a heading of building a more 'Sustainable Future' for the county in which a better balance is struck between the economic contribution of tourism and its impact. Key policy areas that emerge strongly and which have relevance to the DMP include:

▶ Addressing climate change, preserving and protecting nature and green space

▶ Strengthening Oxfordshire's global reputation and creating an innovative and pioneering economy

▶ Infrastructure to support development including better connectivity, integrated and sustainable transport

▶ Tackling inequalities and building fairer, healthier and stronger communities, addressing the impact of short-term lettings on local housing

▶ Skills and pathways for the tourism workforce including young people

▶ Ambitions to spread the benefits of tourism across the county and across the year

▶ Getting the basics right, creating stronger towns, developing accommodation, improving welcome, ensuring high quality countryside, quality public realm and improving street scene

VALUE OF TOURISM

Tourism is an important sector in Oxfordshire's economy. Worth around £2.5bn (at 2019 prices) and employing around 42,000 people it brings many economic benefits. But when you look a bit deeper you find that some visitors are more beneficial than others. According to the Economic Impact Assessment, and backed up by the national data sources, it is apparent that staying visitors bring the greatest benefits and, of these, overseas staying visitors are even more valuable. Staying visitors account for 12% of visits and 48% of spend while day visitors account for 88% of visits and 52% of spend.

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When you look at overseas visitors they account for 4% of visits and 29% of spend, highlighting their importance to Oxfordshire. The DMP will succeed if it can grow the impact without adding to concerns of over-tourism and a drive to grow staying visits could help achieve this.

When comparisons are drawn between Oxfordshire and other English destinations it is clear that the county performs well in the league table of international tourism visits (7th for holiday , 10th for 'visiting friends & relatives' or VFR, 8th for business and 2nd for study) while among domestic tourist visits it is at best mid-table (32nd for holiday, 15th for VFR and 21st for business). This not only indicates the importance of overseas visitors, which as we have seen bring the greatest benefits, but also where there is room for improvement in relation to domestic staying visitors.

Covid-19 and the resulting restrictions on visitor movement and on business had a dramatic effect on tourism in Oxfordshire. The 2021 Economic Impact Study for the county, commissioned by Experience Oxfordshire, showed a reduction in the value of tourism from £2.47bn to £1.01bn between 2019 and 2020. This had recovered to £1.58bn in 2021 and anecdotally recovered further in 2022 with hotel occupancy recovering to within 2 percentage points of the 79% average occupancy that had been the norm until the pandemic. VisitBritain are forecasting (July 2023) that inbound visits will reach 37.5m in 2023 which is approximately 92% of the 2019 level. Employment dropped significantly over this period going from a peak of 42,144 in 2019 to 25,524 in 2020 and building further to 28,830 in 2021 according to economic impact studies.

SWOT & ENGAGEMENT

There has been extensive engagement as part of the development of this DMP with a series of workshops with stakeholders, the DMOs, the local authorities and the DMP steering group as well as individual consultations and a business and community survey. The views expressed have been remarkably consistent and are summarised alongside conclusions from the analysis of the data and evidence in the following SWOT table.

STRENGTHS	WEAKNESSES
▶ Internationally recognisable brands in Oxford and the Cotswolds with strong experiences and good destination marketing	▶ 'Final Mile', rural sustainable transport and coach travel issues
▶ Strong secondary brands in the Chilterns and Thames	▶ 'Hot Spots' leading to tensions between visitors and residents
▶ Robust visitor numbers and 42,000 jobs in tourism (2019)	▶ 'Not Spots' missing out e.g. market towns especially at night
▶ Proximity to London and large source markets (domestic and international)	▶ AirBnB concerns and impact on housing
	▶ Limited investment currently in destination management

STRENGTHS	WEAKNESSES
▶ High in league table for inbound (international) visitors	▶ Visitor welcome far from world-class
▶ High quality marketing activity	▶ Labour market pressures and workforce skills
▶ Ageing UK demographics with high disposable income	▶ Collaboration and partnership not hardwired – too much activity driven by administrative boundaries than visitor brands
▶ Policy support for tourism development	▶ 'Oxford<u>shire</u>' brand means little to visitors
▶ Strong thematic experiences (Heritage, History, Culture, Gardens, Countryside, Landscape and Waterways)	▶ Visitors seen as an inconvenience – 'too many not spending enough'
▶ Strong demand for visitor accommodation	▶ Middle to bottom of league table for domestic holidays and business visits
▶ Visitor economy underpins wider inward investment to the county by helping make it a great place to live, work, study and invest	▶ Inconsistent quality within the countryside and rural spaces
	▶ Visitor satisfaction levels lower in some areas (transport and retail)

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OPPORTUNITIES	THREATS
▶ Packaging experiences and itineraries to join up the offer	▶ Unable to identify investment to support better visitor management
▶ Visitor dispersal (across the year/destination) including city neighbourhoods	▶ Lack of focus – trying to do too much
▶ Business tourism potential	▶ Delayed recovery from some international markets
▶ Oxford University more directly involved in the visitor experience	▶ Business resilience (post-Covid) and increased operating costs (attractions 22% down in 2022 v 2019)
▶ Pipeline projects strengthening the offer	▶ Cost of living crisis and visitors spending less
▶ Reputation as a sustainable destination	▶ Sustainability and responsibility balanced with economic growth
▶ Making more of the market towns, local food & drink, and waterways	▶ Businesses not engaging with travel trade
▶ Increased accommodation provision (12% visits = 48% spend)	▶ Workforce development and labour supply
▶ Collaborative LVEPs bringing the industry together with partners	▶ Residents lack understanding about the value that visitors bring
▶ Arts, culture and events strategic planning	
▶ Making more of the National Landscapes and National Trails	
▶ Slow Travel – spend longer, explore more, travel sustainably	
▶ Improved visitor data and insights	
▶ Signature events to influence visits (esp. off-peak)	
▶ New funding sources e.g. Accommodation Business Improvement District (ABID), Visitor Levy etc	

4 MARKETS

To support the vision, market development for Oxfordshire is not about reaching new audiences, rather it is about maintaining a spread across the domestic and international markets it currently attracts, improving the value of their visits.

Initially, this will come through a better understanding of visitors' motivations to travel and developing new ways of linking up and communicating the experiences on offer to encourage longer stays during which people do more. In time, a sustained focus on improving the quality of a visit and nurturing deeper and more meaningful connections with visitors, will foster loyalty and lead to an increase in repeat visits.

There are six key leisure market segments on which Oxfordshire should maintain focus – three domestic and three international – dialling propositions up and down in marketing activity according to motivations and behaviours. These segments which are mapped out in the table below, have been identified because of their likelihood to deliver value via longer overnight stays and engagement with a range of activities across the county. They have been selected following an analysis of current visitors to the county and drawing on research by VisitEngland and other national tourist boards.

Key Market Trends (source: Blue Sail)
- Changing behaviours in a changing climate – *seeking out responsible destinations*
- Activity, health & well-being – *fresh adventures in the fresh air*
- Bleisure – *blurring boundaries between work time and leisure time*
- The certainty of uncertainty – *flexibility is key*
- All about value – *getting the biggest bang for your buck*
- Going digital – *digitalisation to enhance the experience*

Domestic Segments

MARKET SEGMENT	WHO THEY ARE & WHAT THEY DO	RATIONALE	WHERE'S THE OPPORTUNITY?
Country-Loving Traditionalists	▶ Couples aged 50+ travelling without children ▶ Mid-affluence, skew towards living in South East England ▶ Countryside break takers ▶ Enjoy heritage, outdoors & experiencing local culture – including food & drink	▶ Propensity to spend if the quality is right ▶ Likely to do a lot particularly in more rural areas of the county ▶ Will visit outside of peak times	▶ Use of established rural Oxfordshire brands – Cotswolds, Chilterns – and cross-border brands such as Shakespeare's England to attract them and then encourage further exploration of lesser-known market towns and villages within Oxfordshire through showcasing quality experiences to spur repeat visits.
Young Actives	▶ Younger (pre-family) couples and groups of friends ▶ Enjoy spending time outdoors ▶ Looking to escape the everyday and do something different ▶ Capture and share moments on social media ▶ Long days of activity need to be rewarded by good night-time experiences	▶ Frequent trip takers and will pack a lot in ▶ Will spend on unique experiences including unusual accommodation ▶ Advocates for destinations they love ▶ Consciously support independent businesses	▶ Encourage deeper exploration by showcasing independent businesses doing innovative things ▶ Evening activity development to encourage night-time spend ▶ Showcase the county's long distance walking paths and inclusion in National Trails as well as profiling its range of National Landscapes.
Aspirational Family Fun	▶ Families with school-aged children ▶ Affluent, skew towards living in London & SE ▶ City break takers – but also looking for rural locations with outdoors activities ▶ Enjoy family-friendly activities – especially entertainment, culture & events	▶ Will convert from day to overnight/s ▶ Propensity to spend on activities that keep the children happy ▶ Building loyalty with the destination from a young age ▶ Want to make sustainable choices	▶ Entice out of the city by showcasing range of outdoor-based activities, public and active travel options and family-entertainment options, particularly those in West Oxfordshire ▶ Events development as a means of encouraging repeat visits

International Segments

MARKET SEGMENT	WHO THEY ARE & WHAT THEY DO	RATIONALE	WHERE'S THE OPPORTUNITY?
Explorers	▶ Typically 45+ travelling without children ▶ Mid-affluence; overseas trips a priority ▶ Like a relaxed pace in small cities/countryside ▶ Enjoy heritage, outdoors & experiencing local culture – including food & drink	▶ Largest segment in Germany & Netherlands, and significant in France, Canada, Australia & USA ▶ Will spend ▶ City + rural ▶ Active travel	▶ Use of internationally recognisable brands in Oxfordshire (e.g. Oxford, Cotswolds) and cross border (ego Stratford-upon-Avon & Shakespeare) to attract them and then to encourage further exploration of the county, showcasing quality experiences to spur repeat visits
Experience Seekers	▶ Under 35s travelling without children ▶ Travel frequently, will spend on shopping and experiences while travelling ▶ Looking for cities & rural locations that offer 'only here' experiences (e.g. active outdoors, events) ▶ Choose quality accommodation and food & drink ▶ Looking for good digital connectivity and public transport connections	▶ Largest segment in USA, Canada, Australia & France ▶ City + rural ▶ Will travel by public transport ▶ Bicester Village appeals	▶ Enticing them out of their likely arrival point (the city) through showcasing some of the county's authentic experiences, quirky places to stay and local food and drink. ▶ Events development
Culture-Buffs	▶ Under 40, travelling in social groups (no kids) ▶ Predominantly from China & GCC ▶ Image & brand-conscious – travel is a status symbol ▶ Looking for cities with 'kudos' and 'iconic' experiences to gain social media status	▶ Significant spend ▶ Oxford and Bicester Village appeal	▶ In the longer term, convincing them (via travel trade) that Oxford, with its broad proposition and travel connections, can be the UK travel hub over London and extending stays from day/half day (London+) visits to multiple overnights.

Business Tourism

As highlighted in a study by Oxford Brookes Business School in 2019, domestic and international business tourism is also a significant opportunity for Oxfordshire given its international profile in education, technology and science. As well as individuals and corporate meetings and conferences, larger associations present an opportunity given the Universities and academic links to research, science and industry.

MARKET SEGMENT	WHO THEY ARE	RATIONALE	WHERE'S THE OPPORTUNITY?
Business Travellers – UK & International	▶ Travel for work or professional services including for meeting, events, association conferences, exhibitions etc, often with family members ▶ Seeking quality facilities with flexible space ▶ Looking for leisure-based things to do outside of work hours ▶ Evening and social programmes ▶ Domestic and International	▶ Reinforce county's cutting edge reputation ▶ Aligns with national policy to address opportunities within the Business Events market ▶ Good seasonal spread (autumn/spring) ▶ High value (spend) ▶ Relate to academic strengths and research at Universities	▶ Leveraging benefits (via a newly created countywide convention bureau) from: • extending business trips to take in leisure activities • returning leisure breaks • social programmes • incentive proposition ▶ Maximising the opportunities presented by pipeline developments for larger venue facilities

5 MARKETING THE REGION

Destination marketing activity is generally strong and well established but from a visitor perspective, complex and often disjointed. The aim is to maintain quality but to simplify for the visitor through greater collaboration and more connected experiences that resonate with target markets.

Oxfordshire's official destination marketing is delivered by its accredited LVEP Experience Oxfordshire which is the trading arm of the parent charity, the Experience Oxfordshire Charitable Trust, a not for profit public and private sector partnership organisation covering the whole of the county. Cotswolds Tourism, as a local authority-led LVEP for the Cotswolds, leads and coordinates the marketing of the Cotswolds as a visitor destination. So, there is some overlap in the official marketing of the western part of the county which falls both in Oxfordshire (Experience Oxfordshire) and in the popular regional tourism destination of the Cotswolds (Cotswolds Tourism). And then there are several marketing organisations representing geographic areas that straddle all or parts of Oxfordshire e.g. Visit Thames and Tourism South East. Finally, there are smaller, local marketing organisations/entities operating within the county delivering activity of varying quality. The diagram to the right shows the current set up.

The opportunity to elevate Oxfordshire's profile amongst its target markets lies predominantly in simplifying this set up, bringing Experience Oxfordshire and Cotswolds Tourism to the fore as THE

The Current Picture…

Cotswolds Tourism (promoting the whole of the Cotswolds)

Visit the Cotswolds

Oxfordshire Cotswolds (temporary campaign promoting the western part of the county run by Cotswolds Tourism using VERP marketing budget)

Experience Oxfordshire (promoting the whole of the county)

Visit Oxford City (& others)

Visit Southern Oxfordshire

Visit Thames

Chilterns AONB

Visit SE England

Large circle — Accredited LVEP/DMO

Smaller, local marketing organisation

Cross border marketing organisation

Oxfordshire county boundary

N.B. there is no local marketing organisation in the north of the county. Instead, a number of different organisations – private, public and voluntary – deliver activities.

destination voices, increasing collaboration between them at a campaign level and developing more connected experiences which showcase the critical mass of tourism assets within the county and surrounding areas. As LVEPs they should also look to support and encourage collaboration amongst those smaller, local marketing organisations. The diagram below illustrates broadly how this might work.
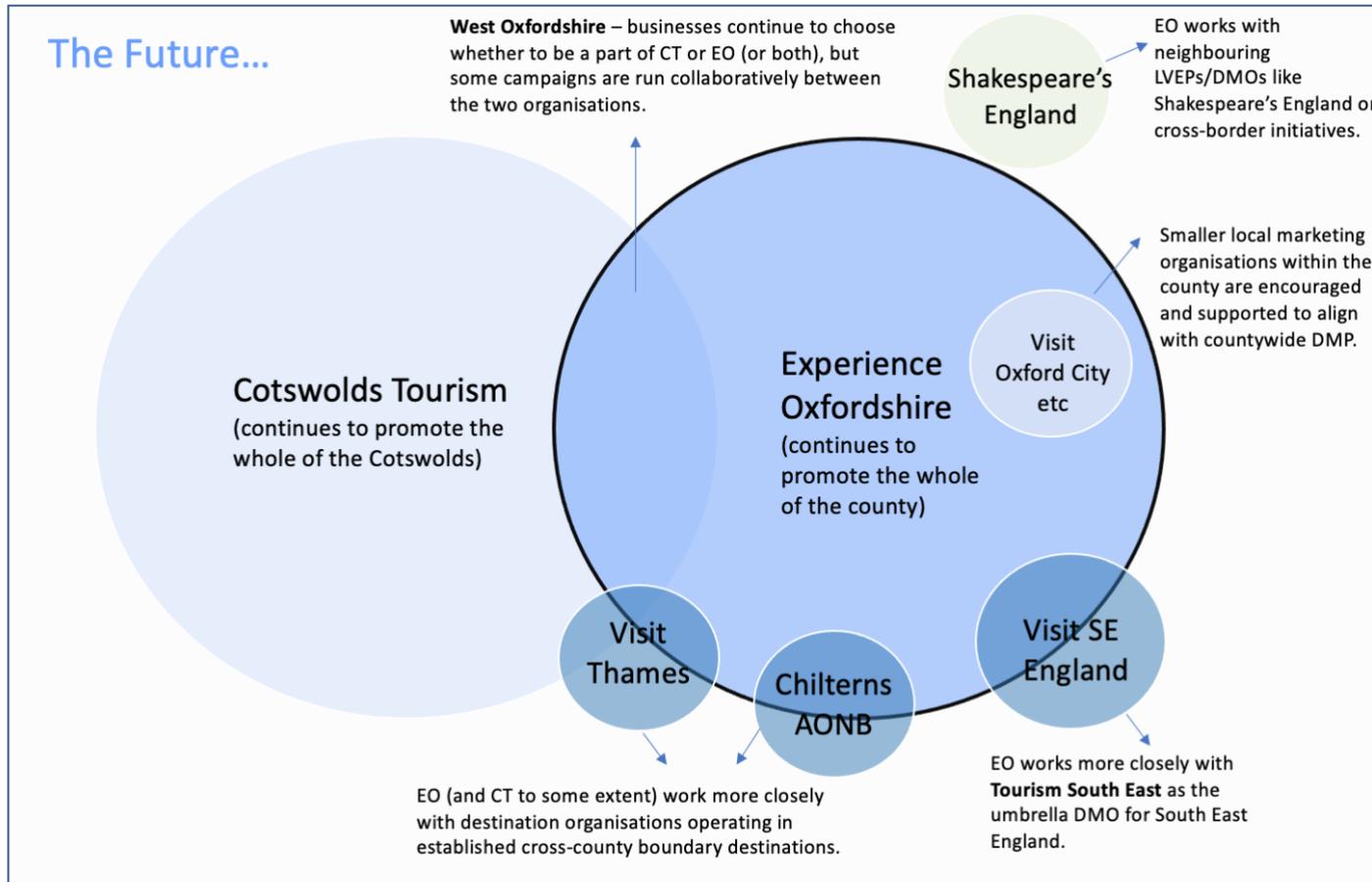
Despite this DMP being of and for the county of Oxfordshire, marketing of the destination must be done in a way that resonates most with prospective visitors, rather than abiding by county boundaries. Oxfordshire does not have a meaning in the marketplace in the same way that individual destination brands such as Oxford, the Cotswolds, the Chilterns and the Thames have. These established brands – three of which fall in multiple counties - should lead the way in Oxfordshire's destination marketing content with more cross-border collaboration happening to promote the wider visitor offer.

MARKETING ACTIONS

ACTION AREA 1.1: MAXIMISING POTENTIAL WITHIN THE MARKETING LANDSCAPE		WHO *	TIMELINE
This action area is two-fold: 1) showcasing established destination brands as part of the county's tourism offer to help elevate its position within the marketplace. 2) fulfilling the role of LVEPs as support and supporting organisations collaborating locally and regionally.	**Carry out an audit of the local marketing organisations/entities** that exist across the county and create a plan to encourage and support them to align with official destination marketing activity.	EO & CT	2023-2024
	Continue to work with TSE as the umbrella DMO for South East England and with VisitEngland/VisitBritain as the national tourism agency to raise the profile of Oxfordshire to national and international target markets and to enhance its tourism offer by connecting experiences geographically and/or thematically. Look to take advantage of more of the opportunities that exist via TSE to promote the county's business tourism offer more widely.	EO	2023 and ongoing
	Establish closer working relationships with Chilterns AONB and Visit Thames, ensuring that these destination brands are featured prominently in Oxfordshire destination marketing material where appropriate.	EO/CT as appropriate	2023 and ongoing
ACTION AREA 1.2: CONNECTING EXPERIENCES – PACKAGES & ITINERARIES		WHO	TIMELINE
Packaging products and experiences into suggested itineraries is an effective way of showcasing the critical mass of product available related to a theme. It allows visitors to see the types of things they could do including those more off-the-beaten-track, authentic experiences and can encourage them to travel to places they may not otherwise, in ways they may not have thought about.	Where gaps in knowledge exist **carry out an analysis of existing experiences** across the county by theme. Themes should be selected based on distinctiveness and appeal to target market segments. Recommended themes include: ▶ History & Heritage ▶ Art & Culture ▶ Literary, film and TV ▶ Artisan food & drink – breweries, distilleries and vineyards ▶ The great outdoors – countryside, waterways, walking and cycling trails ▶ Market towns & villages ▶ British motoring heritage	EO & CT	2024-2025

		WHO	WHEN
	Review existing itineraries to ensure the above themes are included. Where there are gaps, **develop a flagship itinerary for each theme** that can be used across existing marketing channels. The itinerary should include several complementary experiences as unearthed in the audit and could lead with a hero product as the jumping off point e.g. Bicester Heritage for British Motoring Heritage. Itineraries should include logical routes and sustainable transport options between experiences and encourage spend by giving suggestions for travel, food & drink and accommodation.	EO & CT	2025–2026
	Explore the use of OTAs and travel trade as a vehicle to take these new itineraries to market – the online marketplace is important for target markets to gather information and ideas and also for booking so working through these channels will be a useful and targeted route to market. The travel trade is particularly significant for Culture Buffs in some international markets – China being a key one.	EO & CT	2024 onwards
ACTION AREA 1.3: COLLABORATION AND COLLABORATIVE WORKING		WHO	WHEN
Countywide campaigns and messaging developed and delivered collaboratively between Oxfordshire's LVEPs are more likely to resonate with and have impact on a prospective visitor than multiple campaigns which may duplicate, contradict, or complicate messages.	**Launch a series of 'Year of…' marketing campaigns** using each of the chosen flagship itinerary themes as a headline act for the campaign each year. Though there is no correct order in which to run the series, it would make sense to develop a programme which leads with the most well established cross-county themes/itineraries, giving time for product and market development in those areas that may require it.	EO & CT taking turns to lead as appropriate to the spotlight theme.	Beginning 2025 and launching one theme per year
	Create an annual plan that plots key events or likely issues that require joined up communications between the two organisations e.g. University open days. Define key messages for each.	EO	Beginning 2024 and then annually

* Note: EO (Experience Oxfordshire), CT (Cotswolds Tourism)

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6 SMART AND SUSTAINABLE DEVELOPMENT

The drive for smart and sustainable development will come from strengthening and adding to the already outstanding offer in a way which gets visitors to stay longer, explore widely and spend more.

Oxfordshire is not short of visitor experiences and attractions of national and international repute. But getting visitors to stay longer and spend more means the offer needs to work well across the day, into the evening as well as across the year. The towns and hubs where visitors stay need to offer a rounded experience with outstanding art and culture, food and drink, interesting accommodation and other essential services. So this DMP doesn't advocate creating lots of new experiences – rather it is about making more of what the county already has. Adding to it in a focussed fashion so the visitor experience is more 'rounded'.

The priority areas which can deliver smart and sustainable development are:

▶ Vibrant Tourism Towns and Local Culture

▶ Active Outdoors

▶ Business Tourism – Convention Bureau and Conference Centre Feasibility

There is also an underpinning priority to encourage the development of a stronger 'local' food and drink scene, develop visitor accommodation, support the introduction of planned pipeline projects and enhance the role and relationship with Oxford University as a major draw for visitors. While all of these developments will lead to a more robust visitor economy, they also create the conditions in which wider inward investment is supported by helping to make the county a great place to live, work and invest in.

Each of these priorities are described below with case study examples of good practice, followed by specific actions.

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VIBRANT TOWNS & LOCAL CULTURE

Vibrant tourism towns & local culture is all about creating strong hubs for tourism activity outside of Oxford. While some of the county's towns are flourishing others are struggling to attract or keep visitors despite their physical attractiveness. Towns that work well for visitors also work well for local communities. Quality public realm, welcome, signage & orientation, culture by day and night, interesting accommodation and food and drink, interpretation and animation, independent retail as well as basic services are all things that each town needs to look at and plan for. Visitors seek places that are authentic and unusual and different to what they can experience at home.

ACTIVE OUTDOORS

Active outdoors is all about the county as a playground for different visitor markets. Walking, cycling and being active on water are all things which can be enjoyed in Oxfordshire with the breadth of landscapes, trails and routes. The greenways and blueways of the county are well connected, close to major markets and offer an antidote to the stresses of modern life. Creating strong and coherent itineraries (2-5 days) and developing the offer along major routes with investment in the infrastructure that supports active travel will create reasons to visit and support leisure and tourist activity by local communities.

BUSINESS TOURISM

Business Tourism is an area of potential for Oxfordshire. With the reputation of its two Universities, scientific research, good connectivity and wider economic activity, there is potential to drive up business tourism. A countywide convention bureau to develop and convert enquiries is one way to help unlock potential, alongside the development of conference Ambassadors and further exploration of how to progress the feasibility for a purpose-built conference facility in Oxfordshire.

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BEST PRACTICE EXAMPLES

VIBRANT TOWNS & LOCAL CULTURE	ACTIVE OUTDOORS	BUSINESS TOURISM

Frome, a traditional market town in Somerset, has invested in a series of community, cultural and environmental projects that have injected vitality into town. The historic Catherine Hill has been transformed from a rundown shopping street with 60% vacancy levels to what National Geographic describes as "Frome's beating heart ... where you can stock up on life's beautiful things". Some of the town's success is also attributed to the growth of the Frome Independent – a monthly market and street entertainment event that transforms the town centre into a festival-like atmosphere on the first Sunday of every month from March to December.

Herefordshire has successfully packaged its outdoors experiences into a coherent visitor offer under the banner of 'Scenic Spots'. As a rural county, Herefordshire is rich in natural landscapes that visitors can navigate either by walking, cycling or on water. The Visit Herefordshire website enables visitor to plan their routes, encouraging them to stay and explore the county and the best it has to offer in terms of local food, culture, countryside and accommodation. With clear signposting to sustainable transport options, the website includes cycling itineraries, inspiration for family outdoors experiences and walking guides for visitors of all abilities.

Meet Bristol & Bath is the official Convention Bureau (CVB) for the two cities and surrounding areas. Part of the LVEP, Visit West the CVB provides sales, marketing and product development support to grow the area's business tourism and conferencing offer. It also supports organisations in preparing conference bids and with the management of conferences. The CVB's website showcases the benefits of hosting a conference in the area, leveraging the strengths of Bristol's facilities alongside Bath's world-class heritage and high quality leisure offer. With three major development projects between 2023 and 2026, Bristol will significantly increase its meetings capacity.

DEVELOPMENT ACTIONS

ACTION AREA 2.1: VIBRANT TOWNS AND LOCAL CULTURE		WHO *	TIMELINE
Stronger tourism towns with a vibrant cultural offer will keep visitors in Oxfordshire for longer and disperse them across the county spreading the benefits of tourism more widely	**Tourism towns audit and action plan** – undertake a tourism audit (similar to the guidance from Fáilte Ireland) for each of the main market towns and work with the relevant partners on development plans which seek to strengthen the offer. Bring together representatives from the towns to develop lessons that can be shared.	LAs (inc. Town Councils)	2025-2027
	Art and culture programming – building on previous VERP projects continue to support the growth and development of arts and cultural programming. Promote via 'what's on' type activity and use it to encourage visitors to convert from day to staying visits.	LAs, EO	Ongoing
	Events strategy – create a countywide strategic events plan to pro-actively develop signature events which can attract staying visitors as well as community events which will add to the animation in local areas. Bring partners together to jointly plan events with a coordinated forward plan.	LAs, FOP, EO	2026-2027

ACTION AREA 2.2: ACTIVE OUTDOORS		WHO	TIMELINE
Develop and expand the active experiences (cycling, walking, watersport) available across the county to encourage 'slow tourism'. Ensure experience development is balanced with protection of the natural environment.	**Infrastructure and businesses** – develop the range and quality of trails and routes, including improving accessibility, and encourage investment in hubs and facilities that service visitors (e.g. cycle hire, watersport hubs). Encourage the take up of Walkers Welcome or Cyclists Welcome schemes by tourism businesses.	FOP, EO, CT, VE, National Landscapes & National Trails	2025-2028

ACTION AREA 2.3: BUSINESS TOURISM		WHO	
Grow the volume of discretionary business tourism activity in the county (Conferences, Meetings and Incentives) by generating and converting enquiries and using local ambassadors.	**Convention Bureau** – establish a countywide Convention Bureau to generate business tourism enquiries and convert them to bookings, working with all business tourism venues including those currently in development. Build an ambassador programme to generate leads for association conferences and to grow the volume of corporate meetings and events retained in the county including within the soon to open Schwarzman Centre for the Humanities.	EO	2024-2028
	Conference Centre – review previous feasibility studies to determine whether and how a dedicated international conference centre for Oxfordshire can be progressed to capitalise on the internationally recognised research and academic status.	FOP, OxLEP	2025-2028

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ACTION AREA 2.4: UNDERPINNING			
Continuing to invest in a quality experience will help Oxfordshire maximise the benefits from tourism. There is also a need to ensure that effective, positive and sustainable planning policies are in placed to assist with these actions. Underpinning projects include…	**Pipeline projects** – making certain that the investment from proposed pipeline projects is delivered. Actively support applicants to bring investments forward encouraging support for wider policy initiatives e.g. sustainable and accessible tourism, local employment and training etc.	FOP, LAs	Ongoing
	Accommodation development – encouraging accommodation development that meets the needs of target market segments and maximises the positive impacts from visitors to the county including meeting the needs of business as well as leisure visitors and groups. Encourage all new accommodation to be highly sustainable and accessible and ensure that benefits to local communities are maximised. Accommodation demand studies produced for each district.	FOP, LAs, EO, CT	Ongoing
	Food and drink development – actively encourage and promote local food and drink production and experiences including connecting tourism businesses with local supply chains, market development and tasting/tour experiences.	FOP, OxLEP, EO, CT	2025-2027
	The University experience – coordinate and develop the relationship with Oxford University (OU) to manage the visitor experience, ensure it does not detract from the student experience and to tell the story of OU's impact on the world. Collaborate closely with Oxford Brookes University on opportunities which include the arts, creative, digital and business tourism.	OU, OBU, FOP, OCC	2025-2028

* Note: FOP (Future Oxfordshire Partnership), LA (Local Authorities), OU (Oxford University), OCC (Oxford City Council), OBU (Oxford Brookes University)

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7 DESTINATION MANAGEMENT

Oxfordshire must achieve a better balance between the needs of communities, business, visitors and the environment and this DMP advocates a more 'hands-on' approach to visitor management.

Oxfordshire has the potential to move up the league table of domestic tourism, capturing more value from the visitors it already has and bringing greater benefits to the host communities. The problems created by visitors need addressing, with a shared ownership of the problems and a partnership approach to tackling them. Partnership working can also support communities and businesses in making visitors feel welcome and, in turn, help visitors to understand their role in visiting responsibly.

With a clear commitment to carbon reduction, all of those involved in tourism need to play a more active role in ensuring that Oxfordshire emerges as a truly sustainable destination.

The following are the main priorities under destination management:

▶ Sustainable Destination

▶ Brilliant Basics

▶ Business Support

This marks a shift from where the destination is now in which the frustrations of local communities are evident and the negative impacts of tourism are all too visible. The main challenge however is that it is not for one organisation to fix and it has implications for a greatly improved partnership approach that brings together the interests of visitors, business, communities and the environment to plan and develop improvements.

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SUSTAINABLE DESTINATION

Exemplar sustainable visitor destination should be the ambition for Oxfordshire if the county is to achieve its carbon reduction objectives. It will require a focussed commitment by the whole industry and interventions which result in changes in visitor behaviour, to tourism business operations and destination improvements in infrastructure driven by public sector partners.

BRILLIANT BASICS

Brilliant basics are the things which are easy to neglect. They are unlikely to be the reasons why a visitor will come – but they will put visitors off coming if they are not being carefully managed. Visitor welcome, first and last impressions, orientation, parking, waste management, public transport, public realm are just some of the services which need to match 'world-class' aspirations for the destination.

BUSINESS SUPPORT

Business support through an advice hub will signpost to information and support on subjects that are vital to all tourism businesses. This will include guidance on sustainability, accessibility, welcome, legal matters, marketing and market insights, training, grants and sourcing suppliers. LVEP status necessitates a role which represents and supports the whole industry.

BEST PRACTICE EXAMPLES
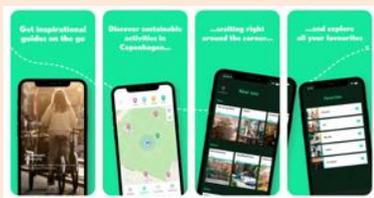
SUSTAINABILITY	BRILLIANT BASICS	BUSINESS SUPPORT
VisitCopenhagen has recently launched a sustainability guide to empower visitors to the city to make sustainable choices. The DMO's website is a comprehensive, yet accessible resource making it easier for visitors to choose sustainable options when it comes to food and drink, transport and accommodation. In addition to the website, visitors can download the Planet CPH app enabling them to build an itinerary featuring sustainable businesses and low impact travel options.	**Bristol** was the first UK city to develop a comprehensive legible city concept. Designed to help improve people's understanding and experience of the city through a programme of identity, information and transportation projects including directional signs, information panels, area maps, walking maps, visitor information and art. During 2021 research among visitors, locals and businesses found that half of visitors still use the scheme to help them find their way around and 97% still found the scheme helpful in discovering quieter and scenic routes not usually recommended via digital tools such as Google Maps.	**VisitBritain** has updated the Business Advice section of its website to support tourism businesses improve their accessibility. As well as being a moral and legal duty, better accessibility offers enormous market potential, as people with health conditions and impairments (alongside their travelling companions) spend around £15.3 billion on trips in England each year. The site offers advice on easy changes businesses can make to improve accessibility and case studies which demonstrate the additional return on investment businesses have achieved by improving accessibility.

MANAGEMENT ACTIONS

ACTION AREA 3.1: SUSTAINABLE DESTINATION		WHO	TIMELINE
Tourism generates significant impacts from travel and the consumption of experiences and accommodation. It's also a diverse sector touching many different businesses and communities and truly sustainable destinations need concerted investment and commitment by the whole sector to address these challenges.	**Sustainable destination task force** – because of the breadth and complexity of the sector a public/private sector task force should be created to audit, plan and implement actions to reduce the impact from tourism and to chart actions which can make Oxfordshire an exemplar destination for sustainable tourism. Promote local examples of good practice to encourage adoption by other businesses and organisations and encourage positive visitor behaviour (e.g. use of public transport, buying locally)	EO, CT, LAs	2024-2027
	Accreditation - sign up to the Glasgow Declaration (or similar) as a commitment at the destination level to change. Encourage sign up and adoption of industry accreditation schemes e.g. Green Tourism and support changes that reduce waste, conserve energy, support biodiversity and local supply chains.	EO, CT	2024 onward
ACTION AREA 3.2: BRILLIANT BASICS		**WHO**	**TIMELINE**
Monitoring and maintaining the essential services and environments that meet the needs and expectation of visitors and which create a positive impression and result in positive advocacy and repeat business. A Welcome scheme is being piloted with funding from VERP and could kick start some of these actions.	**Welcome, arrival and public realm** - review and improve first and last impressions of the destination (including visitor information). Create quality public realm which encourages increased dwell.	LAs, EO	2024-2026
	Access, orientation and transport – review access requirements from visitors and how investment can meet their needs e.g. signage in languages other than English. Develop and improve transport hubs as points of arrival and dispersal for visitors. Positively influence transport planning investment at the county council and align to the Local Transport and Connectivity Plan to meet the needs of visitors as well as local communities and which improves the viability of rural transport. Improve signage and orientation for pedestrians and direct visitors to attractive neighbourhoods (e.g. Jericho or Cowley Road in Oxford). Address issues including coach tourism and drop-off/pick up in key locations.	LAs	2025-2028
	Community advocacy – LVEPs to support local authorities with the tools and messages to make the case to local communities of the benefits that come from having a strong and vibrant visitor economy. To highlight the benefits in terms of jobs, earnings, quality of life and support for the things which residents value (heritage, culture, retail, pubs etc)	LAs, EO (CT)	2025-2028
	Direct funding options – explore options for a tourism levy or accommodation or tourist BID to directly and sustainably fund destination marketing and management alongside public and business funding.	FOP, LAs, OxLEP	2024-2026

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ACTION AREA 3.3: BUSINESS SUPPORT		WHO	
World class destinations are built on the experiences provided by incredible businesses. Bringing businesses together to learn from and work with each other, to access rich insights and advice and to collaborate will help achieve that.	**Advice hub** – create a comprehensive advice hub that provides insights and information and signposts the industry to all the support that is available from national, regional and local providers. This needs to be available to all tourism businesses in the destination and reflects local needs and circumstances.	EO, CT, OxLEP, LAs	2024-2025
	Accessibility and Walkers/ Cyclists Welcome – encourage improved accessibility across the tourism industry by developing business accessibility guides. Expand adoption of the Walkers Welcome and Cyclists Welcome accreditation to align with the development priorities.	EO, CT, OxLEP	2024-2025
	Accessibility & Inclusivity – provide training across the sector and increase the number of businesses making improvements with accessibility champions, accessibility guides, accessible facilities as well as dementia and autism friendly initiatives.	EO, CT, LAs	2024-2028

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8 PARTNERSHIP & RESOURCING

A renewed partnership approach to managing, marketing and developing the destination is needed to support delivery of this DMP and make the most of the opportunities for Oxfordshire.

The successful delivery of the DMP is not in the gift of one organisation. It will require a collaborative approach to partnership that recognises the different strengths and roles of each stakeholder. Destination management done well will need the LVEPs, public sector partners, private business, education and national bodies to all play their part.

The official LVEP status for Experience Oxfordshire and Cotswolds Tourism places them in a critical position. Both organisations are the natural lead organisations for destination marketing and the sales activity across business tourism and travel trade. They are important links to the tourism industry in their respective areas and also to the national tourist boards (VisitEngland/VisitBritain) and through them to the Department for Culture, Media and Sport. They are also the organisations which need to advocate for visitors and will have the greatest understanding of visitors and their needs which will in turn influence destination management and business/partner activity. As the LVEP programme develops we would expect more collaborative working across the two Oxfordshire LVEPs, in particular around areas of common interest (sustainability, accessibility, data and insights etc).

The Local Authorities have a vital role – they are responsible for, or strongly influence, much of what the visitors experience. They also have the closest relationship with local communities and the county's residents. But they are usually less aware of what visitors think or need from a destination.

So there needs to be a way in which these partners come together and we propose a role for the Future Oxfordshire Partnership (FOP) to convene the different partners with the DMP being nested within the Partnership's Strategic Vision. FOP, which is a joint committee of the six councils of Oxfordshire plus strategic partners, was established to deliver a better future for the county and deliver on the bold aims articulated in its vision and which it does by overseeing the delivery of projects that the councils of Oxfordshire are seeking to deliver collaboratively in the fields of economic development and strategic planning. It will provide overall oversight and monitoring of the DMP within Oxfordshire, helping to identify funding and resources to support

implementation. OxLEP will support FOP in this role, providing a link to the wider economy, local business and also to Government objectives and potential funding programmes. This proposed partnership arrangements at a strategic level are illustrated here:

This approach is one that works for Oxfordshire. It respects the important role that the LVEPs have in meeting the destination management role which they are tasked with by VisitEngland but also acknowledges that many of the practical ways in which destination management is delivered needs a whole system approach and commitment.

In taking forward the DMP, the roles of the lead organisations are often distinct from each other. The diagram on the next page illustrates how these lead partners would align with the main stakeholders.

In practice this would mean that partners would lead on the following types of activity.

Future Oxfordshire Partnership:
- DMP oversight & partner co-ordination
- Alignment to SEP and FOP vision

LVEP:

- DMP monitoring to VisitEngland/DCMS
- National tourism projects and priorities
- Destination marketing
- Funded destination management projects

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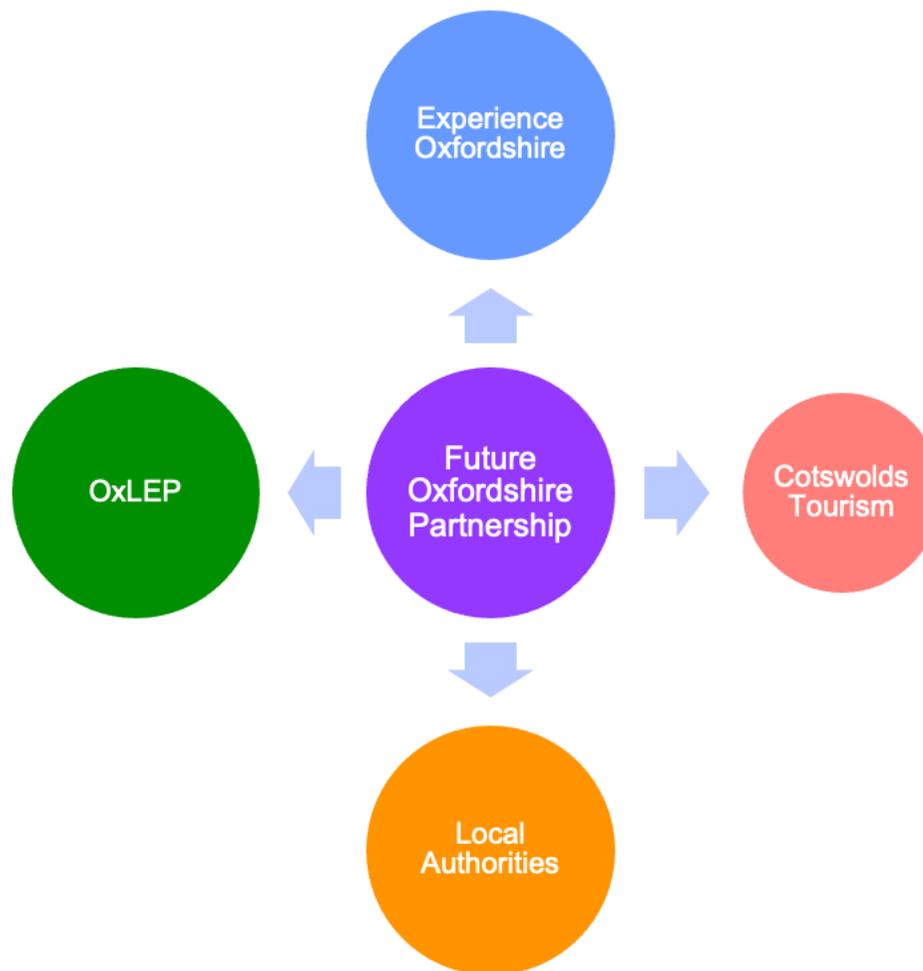
- Visitor insights & data
- Convention bureau
- Support development proposals

Local Authorities:
- Resident/community engagement
- Visitor welcome and public realm
- Sustainable transport
- Landscape & access
- Development and planning
- Directly run experiences

OxLEP:
- Visitor Economy Renaissance Programme delivery
- Broker of visitor management projects
- Monitoring DMP progress (in county)
- Managing strategic partnerships (LAs, AONBs, Government)
- Accessing funding and grants for projects
- Strategic economic plan links
- Business support
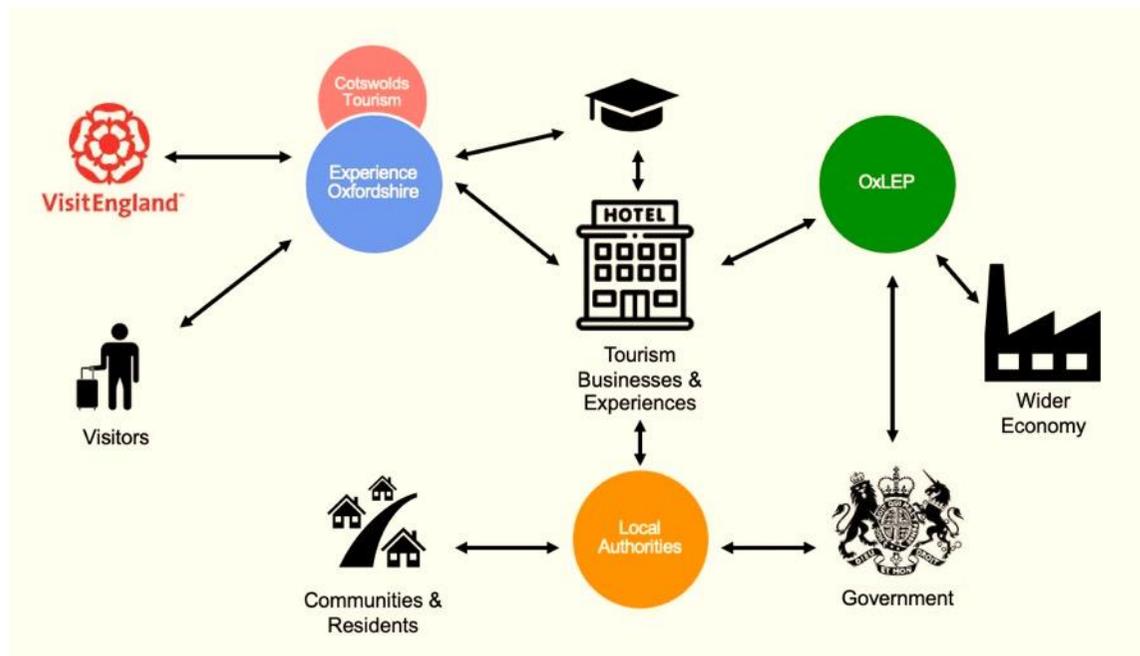
Other stakeholders, including the Universities and education providers and tourism businesses, will have an important role in supporting this DMP. As projects are developed the way in which these stakeholders will be involved will be developed with clear roles and targets.

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RESOURCES

As the first DMP for Oxfordshire, there are priorities and actions in this plan which are currently unfunded in particular in relation to destination management. There is therefore a need to be realistic about what can be achieved and a recognition that to make a step change in and address the challenges highlighted will require investment. As a general rule in other destinations, local authority funding is required to address the destination management challenges, while business investment is secured to support destination marketing. In taking the DMP forward, the FOP should be mindful of the need to identify resources before progressing priorities which are currently unfunded and there is no default assumption that partners can absorb the actions and priorities identified in this plan. Consideration should also be given to exploring alternative funding sources including visitor levy and/or accommodation or tourism BID opportunities. A separate funding strategy will be developed alongside this DMP to identify potential sources of funding.

Indicative implications in resource and costs arising from the plan are set out below. More detailed costings will need to be developed as projects are worked up.

Action Area	Additional Staff Resource	Additional Delivery Costs	Notes
Marketing actions (1.1 – 1.3)	1 – 1.5 FTE required to deliver the work programme	£25,000-£50,000 for itinerary development (one-off) £100,000+ p.a. for campaign delivery	These could be shared resources across the two LVEPs that cover Oxfordshire, weighted appropriately to match geographic coverage.
Smart & sustainable development actions (2.1 – 2.4)	2 – 3 FTE focussed on product development and convention bureau activity	£50,000-£100,000 p.a. for one-off projects e.g. tourism towns audit and regular activity e.g. convention bureau	
Destination management actions (3.1 – 3.3)	1 - 2 FTE across new programmes for sustainable tourism, brilliant basics and business support	£50,000-£100,000 p.a. for project delivery and relevant studies	The resourcing of the DMP should be considered as part of overall allocations to delivery organisations and ongoing commitments and priorities.
Monitoring		£50,000 p.a. for monitoring action in following section (not already contained in data/insights action)	

9 MONITORING

To support Oxfordshire's ambitions for tourism we recommend monitoring performance in three key areas – Market Reach, Market Development and Product Development. This recommended programme of research and monitoring is intended to provide robust insight at a pan-county level as well as at an individual district and borough level, where possible.

Commissioning syndicated research (i.e. where Oxfordshire local authorities can agree an overall approach via pooled resources) via the LVEP as the experts in visitor research is likely to provide the most effective way to achieve market insights at a pan-county and local level as well as offering data sharing benefits and cost efficiencies. Experience Oxfordshire will also have a formal role in monitoring progress of the DMP to VisitEngland (as will Cotswolds Tourism for the Cotswolds).

1. Market Reach			
What to measure	**Where to measure it**	**How to measure it**	**Recommended approach**
Destination awareness/familiarity	Omnibus survey	Scale from: 'I've never heard of it before' to 'It's a place I know very well'	Benchmark Oxfordshire versus other GB counties and ask for key locations across Oxfordshire (e.g. Oxford city, Cotswolds, Chilterns, Thames Valley)
Past visitation	Omnibus survey	Scale from 'I've never visited before' to 'I've visited within the last 5 years'	
Sentiment – perceived welcome	Omnibus survey	Scale from 'disagree strongly to 'agree strongly' on 'It's a destination that makes all visitors feel welcome, no matter who they are or where they're from'	
Intention to visit	Omnibus survey	Scale from 'I would never consider visiting' to 'It's a place I'd definitely consider visiting'	

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2. Market Development			
What to measure	**Where to measure it**	**How to measure it**	**Recommended approach**
Visitor numbers	Cambridge economic model	Total and split by day and staying visits	At Oxfordshire level and by local authority area (city/district).
Average length of stay	Cambridge economic model	Average number of nights stayed	
Average spend per visit	Cambridge economic model	Total average and split by day and staying visits	
Seasonal spread	Cambridge economic model	Monthly spread of visits (Total and split by day and staying visits)	
Visitor profile & experience	Visitor survey	Visitor home location, demographics, reasons for visiting, locations and attractions visited, satisfaction, recommendation, likelihood to return	Surveys at key points of the year to give a representative view of peak and low seasons. Analysable samples required for each local authority area
Resident perceptions	Resident survey	Resident activities/experiences of visitor economy; perceived benefits/impact of visitor economy on employment, environment and quality of life; attitudes towards visitors & visitor behaviours	Annual survey. Analysable samples required for each local authority area

3. Product Development			
What to measure	**Where to measure it**	**How to measure it**	**Recommended approach**
Itinerary development	Number of new itineraries developed which include overnight stays in Oxfordshire; number of new	Count	Annually among in-scope operators

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3. Product Development			
	itineraries which increase dwell time in Oxfordshire		
Accommodation occupancy	Local accommodation provider study or equivalent e.g. STR hospitality data	Rate calculated on number of available units	Annual reporting
Accommodation revenue per available room	Local accommodation provider study or equivalent e.g. STR hospitality data	Assess alongside occupancy levels	Annual reporting
Sustainability accreditation	Number of businesses achieving sustainability accreditation (e.g. Green Tourism scheme)	Count	Annual count of visitor economy businesses
Accessibility & inclusion	Number of businesses offering an accessibility guide; number of staff having undertaken accessibility & inclusion training	Count	Annual count of visitor economy businesses
Destination sustainability	Carbon impact from visitors; strength of local sourcing and supply chain	Carbon footprinting via a qualified consultant	Establish baseline; subsequent annual reporting

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BLUE SAIL

VISITORS PLACES DESTINATIONS

OXFORDSHIRE VISITOR ECONOMY VISION & DESTINATION MANAGEMENT PLAN BASELINE REPORT

REPORT FOR THE DMP STEERING GROUP/OXLEP

AUGUST 2023

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CONTENTS

1 SUMMARY FINDINGS

This document is a technical appendix to the Vision and Destination Management Plan. It provides a summary of the findings from the desk based analysis and early stages of the project.

The following SWOT provides a useful summary that brings together the emerging insights:

STRENGTHS	WEAKNESSES
▶ Strong and internationally recognisable brands in Oxford and the Cotswolds with identifiable experiences e.g. Oxford University and Blenheim Palace	▶ Geographic/administrative boundaries drive activity rather than visitor destination marketing
▶ Robust visitor numbers and 32,000 jobs in tourism (2019)	▶ Oxfordshire not seen as the destination and City/County visitor experience disconnect
▶ Proximity to London and large source markets (domestic and international)	▶ Bottom half of league table for domestic holidays and business visits
▶ High in league table for inbound (international) visitors	▶ Uneven distribution of visits across the districts and limited public transport options – ease of access and getting around
▶ High quality marketing activity	▶ Fewer major events than competing destinations
▶ Ageing demographics with high disposable income	▶ Visitor satisfaction levels lower in some areas (transport and retail)
▶ Policy support for tourism development and residents get importance of tourism	▶ Lack of focus on 'destination management' and resulting issues e.g. visitor welcome
▶ Strong thematic experiences (Heritage, History, Culture, Gardens and Countryside, Waterways)	▶ Oxford city receives lower numbers of older visitors despite appeal
▶ Strong demand for visitor accommodation	▶ Residents unhappy about tourism issues (congestion, environment) and concerns of quality of public realm and welcome

OPPORTUNITIES	THREATS
▶ Expanding strong themes (Film, Wellbeing, Food and Drink)	▶ Delayed recovery from some international markets
▶ Increased working with/ through travel trade and packaging	▶ Business resilience (post-covid) and increased operating costs (attractions 22% down in 2022 v 2019)
▶ Business tourism (joining up knowledge economy with association conferences) and providing suitable facilities	▶ Cost of living crisis and visitors spending less
▶ Plug gaps (off-peak months and Sundays)	▶ Sustainability and responsibility balanced with growth
▶ Local Visitor Economy Partnership status and activity	▶ Businesses not engaging with travel trade
▶ Joining up experiences (City, Cotswolds, Thames Valley)	▶ Workforce development and labour supply
▶ Outdoor active trends for countryside areas	
▶ Partnership and collaboration to 'grow the tourism cake'	
▶ Additional accommodation stock (staying visitors = 12% visits and 48% spend)	
▶ Strong pipeline projects and investor confidence	
▶ Make more of market towns and villages (countryside and city) to spread benefits	
▶ Signature events to influence visits (esp. off-peak)	
▶ New funding sources e.g. an Accommodation Business Improvement District which would administer a nominal levy on overnight stays in paid accommodation establishments	

2 STRATEGY AND POLICY CONTEXT

KEY POINTS

▶ There is a comprehensive and supportive strategic & policy environment for the visitor economy in Oxfordshire.

▶ National policies/strategies emphasise the importance of the tourism sector, with a focus on sector recovery, growth, productivity and dispersal of value across the UK.

▶ County and district plans/strategies highlight Oxfordshire's existing strengths as a visitor destination, the value of the tourism sector to the local economy, opportunities for sustainable growth and the need to maximise geographical and seasonal spread of visits.

▶ National, county and local strategies/plans in this section are:

National strategies/plans	UK Industrial Strategy: Tourism Sector Deal 2019, UK Government Build Back Better: our plan for growth, HM Treasury, March 2021 Visit Britain/Visit England Strategy 2020 - 2025 DCMS Tourism Recovery Plan, June 2021 & Update on Delivery, March 2023
County	Oxfordshire Local Industrial Strategy, July 2019, OxLEP Oxfordshire Strategic Economic Plan, 2016 OxLEP Creative, Cultural, Heritage and Tourism Strategy, OxLEP Oxfordshire's Economic Recovery Plan: The ERP Action Plan 2021, OxLEP Visitor Economy Renaissance Programme, OxLEP Oxfordshire County Council Strategic Plan, 2022 – 2025 Oxfordshire Strategic Vision 2022, Future Oxfordshire Partnership Ambition Statement 2019, Experience Oxfordshire Cotswolds Tourism Destination Management Plan 2022 – 2025

District & City	Adopted Oxford Local Plan 2016 – 2036, Oxford City Council Emerging Oxford Local Plan 2040, Oxford City Council Oxford's Economic Strategy 2022- 2023, Oxford City Council Oxford City Centre Action Plan 2021 – 2030, Oxford City Council South Oxfordshire Adopted Local Plan 2011 – 2035 West Oxfordshire Local Plan 2011 – 2031 Adopted Cherwell Local Plan 2011 – 2031 Vale of White Horse Local Plan 2031

NATIONAL STRATEGIES/PLANS

UK Industrial Strategy: Tourism Sector Deal 2019, UK Government

The Tourism Sector Deal sets out how the government and industry will work in partnership to boost productivity, develop the skills of the UK workforce and support destinations to enhance their visitor offer.

Build Back Better: our plan for growth, HM Treasury, March 2021

'Build Back Better: our plan for growth' sets out the government's plans to support growth through significant investment in infrastructure, skills and innovation, and to pursue growth that levels up every part of the UK, enables the transition to net zero, and supports the vision for Global Britain. The plan supersedes the government's 2017 Industrial Strategy.

Visit Britain/Visit England Strategy 2020 - 2025

Tourism in Britain contributes 9% of GDP and accounts for 10% of all jobs. It has been recognised as a leading sector in the Government's future economic planning, with the granting of a Tourism Sector Deal as part of its Industrial Strategy. The Visit Britain/Visit England Strategy sets out how it will support the delivery of the Tourism Sector Deal. The mission 'to make tourism one of the most successful and productive sectors for the UK economy' will be achieved by:

Growing value

Through stepping up our domestic marketing activity, we will address the balance of trade deficit and encourage more people to holiday at home. We will focus on younger customers (aged 18-34), whose domestic tourism activity is in decline, and families, who are both essential for the long-term growth of the industry. Through developing our customer segments for the domestic market, we will ensure we reach the right customers with the right content. Through our work in the delivery of the Tourism Sector Deal, we will support Government's ambition to make the UK the most accessible destination in Europe.

Driving the dispersal of tourism value across Britain

Working in partnership with Destination Management Organisations (DMOs), we will grow visits and value of our leisure and business travel across England. This will be supported by the development of regional product that addresses domestic and international market gaps and address product gaps through the distribution platform Tourism Exchange Great Britain (TXGB). In addition, we will build our partnerships and expertise in route development to grow connectivity to regional England. Through our work on the delivery of the Tourism Sector Deal we will identify new Tourism Zones, supported by central Government, and a biddable funding process, to drive visitor numbers across the country, extend the season and to tackle local barriers to tourism growth.

Supporting productivity optimisation

Our priority will be to support the development of the England product, this will extend the season for an international and domestic audience and enable the distribution of this product in international markets building on the success of the Discover England Fund. By helping the industry build digital skills, we will ensure that product is researchable and bookable online. Our focus on winning business events for England will see us work closely with venues and locations and matching them with international opportunities, providing them with platforms to meet international buyers and supporting them through the bidding process.

Being the expert body on growing tourism

We will ensure that VisitEngland is seen as a trusted partner in delivering on the Government agenda and provide and distribute statutory research, data and analysis that informs our own, industry and Government decision-making. Supporting and working together with DMOs and the wider England industry our assets, market plans and intelligence will be shared for national benefit. We will also provide platforms and events that enable us to share best practice and celebrate business excellence across English tourism.

Our customers

Our global segments, nuanced by markets, are:

- Buzzseekers – younger, free-spirited and spontaneous, they like holidays full of action and excitement
- Explorers – older, they enjoy the outdoors, sightseeing and embracing local culture at a more relaxed pace
- Culture buffs – image and brand-conscious, travel is seen as a status symbol; they like well-known safe destinations
- Free and easy mini-breakers – similar to buzzseekers, this younger domestic audience love the opportunity to take short breaks where they can either let loose or unwind

Our markets

UK Domestic

Drive regional and seasonal dispersal increasing volume and value of short breaks in the shoulder season. Increase focus from one to two target audiences to address long term growth and short-term opportunity.

Overseas

Our most beneficial overseas market by some distance, and the market showing the most profitable growth, is the USA, followed by value growth from China. These are two of our markets that we uplift investment in using the GREAT funds – we add to that Australia, France, Germany, GCC, India and UK. Our secondary markets for value include the rest of Europe, Canada, Brazil and South Korea. Lower growth (among our core markets) is projected from Hong Kong, Japan, Russia and Austria. For each market we have developed and refined a market strategy that focuses on the best prospects for driving tourism growth.

DCMS Tourism Recovery Plan, June 2021

In June 2021, the UK government published the Tourism Recovery Plan in response to the significant impact that the COVID-19 pandemic had wrought on the sector. The Tourism Recovery Plan outlined the following six objectives:

For the short to medium term, to:
▶ recover domestic overnight trip volume and spend to 2019 levels by the end of 2022, and inbound visitor numbers and spend by the end of 2023 – both at least a year faster than independent forecasts.

And for the medium to long term, to:

▶ ensure that the sector's recovery benefits every nation and region, with visitors staying longer, growing accommodation occupancy rates in the off-season and high levels of investment in tourism products and transport infrastructure;

▶ build back better with a more productive, innovative and resilient industry, maximising the potential for technology and data to enhance the visitor experience and employing more UK nationals in year-round quality jobs;

▶ ensure the tourism industry contributes to the enhancement and conservation of the country's cultural, natural and historic heritage and minimises damage to the environment;

▶ ensure the tourism industry provides an inclusive offer that is open to all, aiming for the UK to become the most accessible tourism destination in Europe by 2025;

▶ make the UK a leading European nation for hosting business events.

In March 2023, DCMS released an Update on Delivery. Updates have been provided against each of the six objectives.

Objective 1: To swiftly recover pre-pandemic levels of domestic and international visitor volume and spend.

The picture of recovery is a mixed one. Domestic visitor numbers appear to have recovered up to or close to 2019 levels. However, international visitor numbers and spending remain below 2019 levels. The government's aim is now to recover 2019 levels of inbound visitors and spend by the end of 2024.

Objective 2: To ensure that tourism benefits every nation and region

In addition to a series of investment and funding initiatives, the government is taking steps to support regional tourism by taking forward the recommendations from the Nick de Bois Review of Destination Management Organisations (DMOs), with the aim of supporting regional areas to better attract and manage tourists. The de Bois Review was launched by the government in 2021, in recognition of the impact of COVID-19 and of '*the important role DMOs play in supporting and driving English tourism locally, regionally and nationally. They also have a role to play in creating, growing and retaining domestic and international business events and in providing a warm UK welcome to delegates whilst here.*'

This includes the renaming of DMOs as Local Visitor Economy Partnerships (LVEPs), the introduction of a new accreditation system for LVEPs, and the pilot of a multi-year core funding model, the Destination Development Partnership, in the North East. The Levelling Up White Paper, published in February 2022, set out how the government will spread opportunity more equally across the UK, including through the introduction of Devolution Deals which present an opportunity to further unlock the potential of local and regional tourism.

The Tourism Recovery Plan is the government's strategic framework for supporting and working with the tourism sector and the government will continue to revisit the six Recovery Plan objectives at regular intervals to ensure that the right policy interventions are in place to support the sector.

OXFORDSHIRE STRATEGIES/PLANS

Oxfordshire Local Industrial Strategy, July 2019, OxLEP

The ambition for the Oxfordshire Local Industrial Strategy is: *to position the county as one of the top three global innovation eco systems, highlighting our world-leading science and technology cluster and to be a pioneer for the UK and our emerging transformative technologies and sectors.* The Strategy is based on a partnership between representatives of the county's businesses, universities, education bodies, local authorities and the government. The framework is grouped around the five foundations of productivity:

- ▶ Ideas: establish a globally connected innovation economy.

- ▶ People: develop a more responsive skill system creating better opportunities for all.

- ▶ Infrastructure: enable greater connectivity and accessibility especially across key growth locations.

- ▶ Business environment: become a powerhouse for commercialising transformative technologies.

- ▶ Places: develop Oxfordshire as a living laboratory to help solve the UK's grand challenges.

Under the 'Places' foundation, the Strategy states:

Oxfordshire is a global destination with international reach. It is increasingly attractive to visitors across new markets, attracted to Oxfordshire by its considerable tourist offer including the City of Oxford, Bicester Village, the Cotswolds and Blenheim Palace. In 2017, the county welcomed nearly 30 million visitors, with many of these from international locations. The tourism and hospitality industry supports 10 per cent of all employment in Oxfordshire, contributing £2.17bn to the economy. Increased investment in areas such as high-grade hotel stock and international conferencing facilities could boost this offer, complement Oxfordshire's global brand, and create more accessible, permanent jobs for the wider community.

Oxfordshire Strategic Economic Plan 2016 (SEP), OxLEP

Oxfordshire's Strategic Economic Vision to 2030 is: *By 2030 Oxfordshire will be recognised as a vibrant, sustainable, inclusive, world leading economy, driven by innovation, enterprise and research excellence.*

The four key themes are:

- ▶ Innovative Enterprise: Encourage innovation led growth, underpinned by Oxfordshire's strengths in University research and development, business collaboration and supply chain potential

- ▶ Innovative People -Deliver and attract specialist and flexible skills at all levels, across all sectors, as required by our businesses, with full, inclusive employment and fulfilling jobs

- ▶ Innovative Place - Provide the quality environment and choice of homes needed to support growth and capitalise upon the exceptional quality of life, vibrant economy and the dynamic urban and rural communities of our county

- ▶ Innovative Connectivity - Allow people to move freely, connect easily and provide the services, environment and facilities needed by a dynamic, growing and dispersed economy

Under the 'Place' theme, one of Oxfordshire's strengths is stated as: *a major tourist destination with a growing visitor and cultural economy*. One of the opportunities is to be: *a globally renowned visitor and cultural economy.*

The SEP prioritises interventions in key locations, specifically along the 'Oxfordshire Knowledge Spine'. The Knowledge Spine runs through the centre of the county with the three key areas for growth potential in population, employment and housing at Bicester, Oxford City and Science Vale Oxford.

Note: The revised, updated SEP is currently in draft and under review.

Creative, Cultural, Heritage and Tourism Investment Plan (CCHTIP), OxLEP

This Investment Plan set out a new growth agenda, in line with the ambition outlined in the 2016 SEP. The Plan states: *The creative industries and tourism have an opportunity to play an important role here in generating jobs and contributing to innovation and competitiveness across the economy. But this will only happen if better use is made of the cultural and heritage assets, for the jobs they generate but also for the added value they create by enhancing the quality of places, improving their appeal, and helping to ensure growth is sustainable, inclusive and sensitive to our distinctive sense of place.*

Four thematic areas identified to help deliver the growth goals of the SEP are:

- ▶ Productive and Engaging Experiences
- ▶ Skills, talent development and business growth
- ▶ Creative place-making
- ▶ Collaboration – a cross-cutting theme

Under the section, 'Growing the Tourism Economy in Oxfordshire: Harnessing the Wealth of Creative, Cultural and Heritage Assets', the Plan stated:

A significant proportion of growth potential in the visitor economy lies in the overseas market, so Oxfordshire needs to attract more international visitors to stay longer and spend more. However key areas to support this growth will involve investment in new accommodation particularly 5-star hotels to support the luxury market, and a hotel development with 300-400 bedrooms to attract the corporate market that could potentially host large conferences in one location. The county currently lacks capacity to meet demand which limits the opportunities for visitors to explore, stay and experience more of what Oxfordshire has to offer.

The Plan included 35 investment proposals, provided under the four themes.

Oxford Economic Recovery Plan: The ERP Action Plan, 2021, OxLEP

This ERP Action Plan provided a route map for recovery from COVID-19. The timeframe was from Spring 2021 to Spring 2023. Actions were set out across three themes: People, Business, Places. A key additional enabler across these themes was Connectivity. For each of the three themes there were four 'action streams' which together provided the recovery response. These were: Action Stream 1: Existing Activities; Action Stream 2: Response Measures; Action Stream 3: Oxfordshire Investment Plan 'early wins'; Action Stream 4: Target Proposals. Visitor Economy Renaissance was one of the Target Proposals.

Visitor Economy Renaissance Programme (VERP), OxLEP

OxLEP is leading a £1.64 million programme of activity to assist the recovery of Oxfordshire's visitor economy. The programme links directly to the Oxfordshire Covid 19 Economic Recovery Plan (ERP). With key elements of the programme delivered in partnership with Experience Oxfordshire and Cotswolds Tourism, the aim of the VERP is to *'attract visitors and ensure that Oxford and Oxfordshire maintains its position as one of the UK's most desirable visitor destinations for local, national, and international visitors, with a focus on attracting value from all visitors and encouraging green and sustainable tourism and practices'*.

Oxfordshire County Council Strategic Plan 2022 - 2025

Oxfordshire County Council's vision is: working in Partnership to make Oxfordshire a greener, fairer and healthier county. The nine priorities are:

- ▶ Put action to address the climate emergency at the heart of our work.
- ▶ Tackle inequalities in Oxfordshire.
- ▶ Prioritise the health and wellbeing of residents.
- ▶ Support carers and the social care system.

- Invest in an inclusive, integrated and sustainable transport network.

- Preserve and improve access to nature and green spaces.

- Create opportunities for children and young people to reach their full potential.

- Play our part in a vibrant and participatory local democracy.

- Work with local businesses and partners for environmental, economic and social benefit.

Oxfordshire Strategic Vision, Future Oxfordshire Partnership 2022

The Future Oxfordshire Partnership which comprises the six councils and key strategic partners are working together to deliver a better future for the county. Its purpose is to deliver the bold aims of its strategic vision and it will:

- Coordinate local efforts to manage economic, housing and infrastructure development in a way that is inclusive and maximises local social and environmental benefits;

- Support the development of local planning policy that meets the UK Government's stated aim of net zero carbon by 2050, and contributes towards biodiversity gain whilst embracing the changes needed for a low carbon world; and,

- Seek to secure funding in the pursuit of these aims and oversee the delivery of related work programmes delegated to it by the joint committee's constituent local authority members.

The stated outcomes of the partnership are that by 2050:

- Our natural environment will be in a better state than that in which we found it

- We will already be carbon neutral and accelerating towards a carbon negative future

- Our residents will be healthier and happier, and overall wellbeing will have improved

- Our local economy will be globally competitive, sustainable, diverse and inclusive

- Our county will be a more equal, fair and inclusive place for everyone

- Our vibrant historic and cultural offer will be rich, diverse and enhanced

- We will have energy efficient and affordable homes in the right number, location and tenure

- Our county's connectivity will be transformed in ways that enhance wellbeing

- Our diverse and vibrant communities will thrive with a strong sense of identity

The vision is an ambitious pathway for long term change towards a more sustainable future and the partnership a way in which collaboration will hopefully unlock additional investment.

Ambition Statement, Experience Oxfordshire

Developed in 2019, but still highly relevant, the ambition statement clearly sets out how Experience Oxfordshire works in collaboration with partners and stakeholders to support the growth and development of the county's visitor economy.

Experience Oxfordshire's ambitions are to:

- Work with businesses and stakeholders to improve growth and productivity across the visitor economy; leading effective destination management, whilst ensuring that tourism works for everyone across Oxfordshire

- Encourage visits that offer the best balance of impact and contribution to the county

- Work to deliver a joint vision of pride in place across the city and county that engages with both residents and visitors to improve welcome and experience

- Spread the tourist season throughout the year to decrease the impact of seasonality and to encourage visitors to explore the whole county

- Increase overnight stays from both international and domestic visitors ensuring an increased spend per visit

- Encourage and enable the exploration of cultural treasures across the county by local people
- Advocate for the importance of the sector and influence stakeholders to address issues that hinder productivity and growth and to encourage skills development and job creation
- Drive growth across the visitor economy by increasing the value of visitor expenditure by 5% year-on-year
- Encourage long term investment and support from the public and private sectors to ensure that the county has a sustainable DMO that can deliver our destination management ambitions and drive growth
- Grow the Experience Oxfordshire partnership and make it work for small and large businesses, offering a flexible value for money proposition
- Experience Oxfordshire will deliver this by seeking investment from Partners and stakeholders and providing a range of services for Partners. The organisation prides itself in being a partnership where every business has a place and everyone can benefit

Cotswolds Tourism Destination Management Plan 2022 - 25

The Vision for Tourism in the Cotswolds is:

To ensure that the Cotswolds is a vibrant year-round destination where visitors enjoy high quality, authentic experiences and tourism makes an increasing contribution to the economic, social and environmental sustainability of the local economy.

34 detailed objectives are provided under the following 6 headings:

- Sustainability: objectives are provided around transport, business practices, local supply chains, information provision, participation in the Caring for the Cotswolds payback scheme, geographical and seasonal spread, promotion of active travel.
- Partnership: tourism partnerships, supporting businesses and organisations, identifying funding opportunities, effective partnership mechanisms with wider visitor economy stakeholders.
- Product – enhancing the visitor experience: developing a sense of place, advocacy for investment and improvements to the wider destination infrastructure, ensuring high quality service, maximising visitor distribution, developing new experiences, visitor information.

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▶ Marketing: strengthen the Cotswolds brand, new technologies, innovative marketing plans, new opportunities for year-round products, events and activities, visitor distribution, showcase new products and developments to counter potential misconceptions of the Cotswolds.

▶ Knowledge and data: annual economic impact studies, develop systems for monitoring visitor satisfaction, marketing effectiveness and business performance, tracking footfall and trends, analysis of cotswolds.com and social media channels, track local business activity and sentiment.

▶ Performance – building excellence through networking and collaboration: increase B2B connections encouraging greater use of local produce and suppliers, offer opportunities for B2B communication and sharing of best practice, encourage sustainable business practices, provide regular business updates, support businesses' use of new technologies and improve their online presence.

DISTRICT/CITY STRATEGIES/PLANS

Adopted Oxford Local Plan 2016 - 2036, Oxford City Council

The Adopted Oxford Local Plan states 'We want Oxford in 2036 to be':

▶ A centre for learning, knowledge and innovation

▶ A prosperous city with opportunities for all

▶ An environmentally sustainable city

▶ An enjoyable city to live in and visit

▶ A strong community

▶ A healthy place

'Ensuring Oxford is a vibrant and enjoyable city to live in and visit' is examined in Chapter 8, leading to Policy V5: Sustainable Tourism. The Plan comments that tourism is an important element of Oxford's economy, attracting large numbers of tourists. However, with this success comes challenges

for the infrastructure and management of the city.   A large number of tourists make very short visits (day/part-day), generating only slight economic benefits but significant impact on the city. Many arrive on coaches, adding to congestion pressures.

Policy V5 Sustainable Tourism:

Planning permission will only be granted for the development of new sites for holiday and other short stay accommodation in the following locations: in the City Centre, in District Centres, on sites allocated for that purpose, and on Oxford's main arterial roads where there is frequent and direct public transport to the city centre. This locational requirement does not apply to proposals to refurbish or expand existing sites.

Premises that seek to be refurbished and/or expanded are supported in principle, provided that any adverse environmental impacts including traffic are properly managed. The policy also seeks to protect the existing supply of short-stay accommodation to ensure that a diverse range of facilities are retained, unless lack of viability is proven.

Planning permission for new tourist attractions will be supported subject to a number of criteria including ease of access (by walking, cycling or public transport); environmental and traffic impacts; relationship to existing/proposed tourist and leisure related areas.

Policy V6 Cultural and social activities:

Planning permission will be granted for proposals which add to the cultural and social scene of the city within the city and district centres provided the use is appropriate to the scale and function of the centre.

Proposals for cultural, entertainment, leisure and tourism (not accommodation) are subject to a number of criteria including around accessibility; environmental, traffic and residential impact; cumulative impact in relation to other similar uses; and policies V1 and V2 (Ensuring the vitality of centres and Shopping frontages in the city centre).

Emerging Oxford Local Plan 2040, Oxford City Council

The Emerging Oxford Local Plan 2040 states as its vision:

In 2040, Oxford will be a healthy and inclusive city, with strong communities that benefit from equal opportunities for everyone, not only in access to housing, but to nature, to jobs, to social and leisure opportunities and to healthcare. We will be a city with a strong cultural identity, that respects our heritage, whilst maximising opportunities to look forwards, to innovate, learn and enable businesses to prosper. The city will be supported to continue to make advancements in the life sciences and low carbon sectors, helping provide solutions to global crises. The environment will be central to everything we do; it will be more biodiverse, better connected and resilient. We will utilise resources prudently whilst mitigating our impacts on the soil, water and air. The city will be net zero carbon, whilst our communities, buildings and infrastructure will be more resilient to the impacts of future climate change or other emergencies.

The six themes of the Local Plan are:

▶ Society: a healthy, inclusive city to live in

▶ Environment: a green, biodiverse city that is resilient to climate change

▶ Economy: a prosperous city with a globally important role in learning, knowledge and innovation

▶ Societal/Economy: a more equal and inclusive city with strong communities and opportunities for all

▶ Societal/Environment: a city of culture that respects its heritage and fosters design of the highest quality

Future emerging policies as set out in the Preferred Options document and subject to recent public consultation responses, confirm that the new policies will seek to plan for future growth in the short-stay accommodation sector, but with an even greater recognition of the need to support a sustainable approach to tourism. This will be informed by the recent Oxford Hotel Report (Hotel and Short Stay Accommodation Study for Oxford, Bridget Baker Consulting Ltd) which highlights how the sector has changed and the new emerging issues that need to be addressed. New, short-stay accommodation will be directed to the most sustainable locations, being the City and District centres, together with the main arterial roads and on allocated sites. The expansion of existing short-stay accommodation will be supported in principle, subject to criteria which includes its location, together with the need to ensure that its impacts on neighbouring properties is minimised. The existing stock of short-stay accommodation will continue to be protected but based on the size of the premises, with the aim of safeguarding those of 10 bedrooms and above from being converted to other uses.

Oxford's Economic Strategy 2022- 2023, Oxford City Council

*Oxford's Economic Strategy seeks to establish a new standard for economic **inclusion** in the city. This will be underpinned by the strength of an impactful **global** city economy, evolving in a way which recognises environmental limits and harnesses the opportunity of a new **zero carbon** economy.*

Oxford's four priority sectors are Health and Life Sciences, Technology and Digital, Creative Production, Green and Low Carbon. The importance of the Visitor Economy is also recognised in '*helping us welcome the World to Oxford and further enhance our reputation for history and culture*'.

Examples of existing visitor economy assets:

▶ Heritage offer

▶ Cultural resonance and strong local offer (film, TV, literature, music and theatre)

▶ Access to waterways and green space city-wide and nearby Cotswolds

Future opportunities in and around Oxford:

▶ Support more systematic entry level jobs and career progression in the sector

▶ Create more hotel capacity for higher value overnight stays

▶ Drive innovation in sustainable tourism and support new attractions in-line with Local Plan

'Evolving Oxford's Visitor Economy' is one of three focus areas in the Delivery Plan. Six strategic principles to guide delivery are:

▶ Increase overnight stays from international and domestic visitors

▶ Enhance the tourism offer to encourage and enable exploration

▶ Spread the tourist season throughout the year to decrease the impact of seasonality

▶ Enhance tourism management to ensure visits achieve a balance between impact and economic contribution

▶ Support the tourism sector to recover from the impacts of Covid-19 and the recession

▶ Develop employment and skills pathways to support local careers

Action number 28 in the Strategy's Delivery Plan has the Guiding Principle: *Support the recovery of the visitor economy and seek benefits for visitors and residents.* Project/Activity is to 'Deliver the Focussed Visitor Economy Plan' including*:*

▶ Visitor Economy – Vision and Action Plan for Oxfordshire, 2022-24 and Visitor Economy Renaissance Programme 2022-24 with OxLEP and partners

▶ Continuing to build a commissioning relationship with Experience Oxfordshire, where resources allow, to support promotion, business support, and management of visitor economy, including coach parking and language schools

▶ Seek central Government support for the visitor economy as proposed in the Oxfordshire Industrial Strategy Investment Plan and Oxfordshire Economic Recovery Plan, which includes core funding for the DMO, promotion and marketing, skills development, business support and capacity building measures - Support the promotion of schemes like the Oxford Pass to encourage overnight stay

▶ Increase visitor accommodation by working with the LPA and landowners on strategic sites

▶ Deliver new Covered Market leasing and marketing strategy, alongside the development of a masterplan and investment strategy to create key city centre destination

▶ Explore with landowners, opportunities in the city centre for a new major cultural/ music venue (with conferencing facilities) in-line with local plan policies and allocations.

Oxford City Centre Action Plan 2021 - 2030, Oxford City Council

The City Centre Action Plan is collaboration between Oxford City Council and local stakeholders, with the objective of identifying a set of actions to strengthen the resilience of the city centre. The Plan focuses on four workstreams over the next eight years:

▶ Connectivity and Access – limiting private vehicles, reducing conflict and congestion and creating spaces for buses, bikes and people

▶ Public Realm and Animation – improving the look and feel of the city centre, providing events and experiences to bring it to life, so people want to stay longer

▶ Getting the mix right – building on Oxford's world class innovative and creative spirit, enhancing the city centre as a place to live, start and grow a business, visit and play

▶ Getting the basics right – creating an inclusive, safe and attractive city centre that promotes a diverse range of activities and uses.

The tourism proposals are:

Connectivity and Access

▶ A two-stage project to lessen the impact of visitor coaches on the city centre: (i) create additional temporary drop-off locations to ease the pressure on St Giles and work with coach operators and destinations to direct services to use the drop-off nearest their destination and to then move on to agreed layover sites; (ii) reduce the number of city centre drop-off locations, including exploring the potential to close the St Giles stop altogether, and replace them with edge of city facilities integrated with other transport options.

Getting the basics right

▶ Explore options for a new model of visitor information centre, including options for an improved digital welcome.

▶ Seek funding to continue the development and promotional work to switch from day and part-day visits to overnights stays.

▶ Conduct a survey of coach drivers and passengers on arrival in the city centre.

▶ Work with local partners to create and embed a guide protocol into language school operations.

▶ Explore funding to allow a review of existing city centre signage and recommend a cohesive, updated approach.

▶ Explore funding opportunities to enhance destination management and promote the Oxford offer.

Hotel & Short Stay Accommodation for Oxford, Oxford City Council/Bridget Baker 2023

The report provides an assessment of the hotel and short stay accommodation market in Oxford and is designed to inform the local plan. In terms of supply the study found that Oxford has a good supply of accommodation with 81 properties offering 3324 bedrooms. The report noted the absence of 'aparthotels' in Oxford.

Hotel performance against UK regional averages showed strong results for occupancy and ADR (achieved daily rate). Occupancy was almost 2% points higher than the average (2019) while ADR was almost 23% higher. The results were broadly similar however to comparable destinations (Cambridge, Bath & York).
The report noted the sector challenges associated with attracting staff, driven by low unemployment, competition for labour from other sectors, costs of housing and the availability of public transport (especially to coincide with early starts/late finishes).

It also estimated that Oxford had around 200 entire homes being marketed on short stay websites such as AirBnB.

Informing planning policy the report concluded that future hotel development should be focussed on:
▶ Headington (close to the John Radcliffe Hospital and Oxford Brooke's University)

▶ City Centre/West End/Osney Mead including the Oxpens site

▶ Northern Gateway/Oxford North

▶ District Centres/Arterial Roads

In summary the report found:
▶ Oxford has a good supply of accommodation but based on performance there will be a need for further accommodation development over the life of the Local Plan

▶ Support for directing development to the sites and locations identified above

▶ The need for accommodation to underpin the business travel requirements from emerging business and science parks with appropriate public transport connections

▶ A presumption to protect hotel and guest houses above a certain size with a presumption to permit change of use to residential for properties below a determined size.

South Oxfordshire Adopted Local Plan, 2011 - 2035, South Oxfordshire District Council

South Oxfordshire's vision for 2035 is: *South Oxfordshire will remain a beautiful and prosperous place to live. It will be an attractive place for people to work and spend their leisure time.*

Strategic Objectives are set out for: Settlements; Housing; Economy; Infrastructure; Design; Community; Natural and Built Environment; Climate Change. Objective 3.7 under 'Economy' states: *Encourage tourism by protecting our built and natural assets, such as the Thames, and providing services and facilities for visitors.*

Tourism-related policies within the Employment Policy list are:

▶ EMP 10: Development in Rural Areas. The council will ….

iii) support sustainable rural tourism and leisure developments that benefit businesses, communities and visitors in rural areas and which respect the character of the countryside. This will include supporting the provision and expansion of tourist and visitor facilities in appropriate locations where identified needs are not met by existing facilities in rural service centres;

▶ Policy EMP11: Tourism:

1. The Council encourages new development to advance the visitor economy for leisure and business purposes. Proposals for such purposes will be supported as follows:
i) within the built-up areas of the towns - larger scale developments including conference facilities, museums, heritage centres, hotels, guest houses and associated facilities for visitors;
ii) within the built-up areas of the larger and smaller villages – smaller and proportionately scaled developments that are in keeping with the character of the settlement, including museums, heritage centres, hotels, guest houses, self-catering accommodation and associated facilities for visitors; and
iii) at service areas on the main transport corridors - hotel accommodation.

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2. Outside the above locations, small-scale development to support the visitor economy, including farm diversification and equine development, will be supported provided that proposals are in keeping with the scale and character of the locality and would not adversely affect heritage assets or their setting. Larger developments will only be supported in exceptional circumstances, for example to sensitively re-use a historic building, or to proportionally support or enhance enjoyment of a significant and established visitor attraction where this cannot reasonably be achieved from a town or village location.

▶ Policy EMP12: Caravan and Camping Sites

▶ Policy EMP13: Retention of Visitor Accommodation

West Oxfordshire Local Plan 2011 - 2031, West Oxfordshire District Council, Adopted September 2018

The Plan's core objectives are set out under five headings:

▶ Strong market towns and villages

▶ Meeting the specific housing needs of our communities

▶ Sustainable economic growth

▶ Sustainable communities with access to services and facilities

▶ Protecting and enhancing our environment and reducing the impact from climate change

Economic objectives include CO8: *to enable a prosperous and sustainable tourism economy.*

The Plan includes Policy E4 Sustainable Tourism, which states: *Tourism and leisure development which utilises and enriches the natural and built environment and existing attractions of West Oxfordshire to the benefit of visitors and local communities will be supported.*

Adopted Cherwell Local Plan, 2011 – 2031, Cherwell District Council

The Plan has three central themes:

▶ Policies for Developing a Sustainable Local Economy

▶ Policies for Building Sustainable Communities

▶ Policies for Ensuring Sustainable Development

The Vision for Cherwell District is: *By 2031, Cherwell District will be an area where all residents enjoy a good quality of life. It will be more prosperous than it is today. Those who live and work here will be happier, healthier and feel safer.*

Policy SLE 3: Supporting Tourism Growth states: *The Council will support proposals for new or improved tourist facilities in sustainable locations, where they accord with other policies in the plan, to increase overnight stays and visitor numbers within the District.*

Tourism also features in Policy ESD 16: The Oxford Canal: *We will protect and enhance the Oxford Canal corridor which passes south to north through the District as a green transport route, significant industrial heritage, tourism attraction and major leisure facility through the control of development. The length of the Oxford Canal through Cherwell District is a designated Conservation Area and proposals which would be detrimental to its character or appearance will not be permitted. The biodiversity value of the canal corridor will be protected. We will support proposals to promote transport, recreation, leisure and tourism related uses of the Canal where appropriate, as well as supporting enhancement of the canal's active role in mixed used development in urban settings. We will ensure that the towpath alongside the canal becomes an accessible long distance trail for all users, particularly for walkers, cyclists and horse riders where appropriate.*

Vale of White Horse Local Plan 2031

Four thematic areas central to the Local Plan are:

▶ Building healthy and sustainable communities

▶ Supporting economic prosperity

▶ Supporting sustainable transport and accessibility

▶ Protecting the environment and responding to climate change

Strategic Objectives include: SO 5: Support a strong and stable economy within the district, including the visitor economy.

District Wide Policies include: Core Policy 31: Development to Support the Visitor Economy – *the Council encourages new development to advance the visitor economy for leisure and business purposes…..*

In assessing key challenges and opportunities for the district, the Plan highlights 'Promoting Tourism', including:

▶ Increasing the economic impact and value of tourism by taking steps to convert day visitors to overnight visitors, in particular by addressing the shortage of hotel accommodation.

▶ Supporting growth in conferencing and business tourism stimulated by anticipated growth in the Enterprise Zone.

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3 VISITOR DATA ANALYSIS

SCALE AND NATURE OF TOURISM IN OXFORDSHIRE

- ▶ Estimating the volume and value of the visitor economy in any jurisdiction can be tricky given the breadth of activity that can justifiably be said to fall within the bounds of tourism.

- ▶ The approach in this project has been to primarily rely on the national tourism surveys when painting a picture of tourism in the county ahead of the pandemic. While these surveys are certainly imperfect they do allow for a look at trends over time in a broadly consistent manner, and to compare the picture in one area with that of another. Where data is available at district level, we have shown differences in performance. However, where this is not possible, results are displayed at county level.

- ▶ To overcome the challenge presented by relatively small sample sizes many of the charts that follow are based on the annual average during the period 2017 to 2019. There is only limited data on the scale of day trips to the area by international visitors to the UK who are not overnighting within the county, with it assumed that their typical spend while on a day visit is akin to that for domestic residents undertaking what is called a Tourism Day Visit.

- ▶ The tourism bodies and local authorities also invest in Economic Impact Studies for their respective areas. These can produce different results as they model the economic impact using a number of inputs, including locally sourced business data. The difference between these results is most stark at the district level and care should be taken over how and where data is used.

- ▶ Based on the approach set out above the following chart suggests that the county was earning around £1.4bn per annum from tourism ahead of the pandemic, with half of this amount attributable to Tourism Day Visits by domestic residents, underscoring how vital this often overshadowed type of tourism is. This contrasts with the £1.95bn from the Oxfordshire economic impact study1 (£2.47bn after indirect/induced spend).

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[1] Destination Research. Experience Oxfordshire Economic Impact of Tourism 2019.

Note that Tourism Day Visits is not a measure that reflects all leisure trips that are done and dusted within the space of a day. A Tourism Day Visit is a trip for leisure that lasts 3+ hours, is not taken very regularly and is to a place outwith the Local Authority within which the respondent lives.

The reason for using Tourism Day Visits in this analysis is that these are the types of trips that are most likely to be influenced by the activities of those delivering tourism marketing activity. For comparison the value of Leisure Day Visits lasting 3+ hours (so removing the criteria for regularity and being outwith the respondent's own Local Authority) sees the value increase from £684.7m in the following pie chart to £865.9m. Were day trips for leisure lasting less than 3 hours, and business-related day trips also included the estimate would be higher still.

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Focussing on domestic tourism spend by Local Authority we can note from the following chart that Oxford leads the way followed by Cherwell (where the Tourism Day Visits spend will likely reflect the presence of Bicester Village in the Local Authority). West Oxfordshire is the Local Authority where we see the closest equivalence between domestic overnight and domestic Tourism Day Visit spending.

However it is worth noting that the survey sample sizes, particularly in rural areas, can be quite low and this means results for areas like West Oxfordshire may underrepresent the true values achieved for tourism. Indeed West Oxfordshire's own economic impact study (2019) suggests domestic visitor spend is £204m.

Domestic visitor spend (£m, annual average 2017-19)

Local Authority	Domestic overnight	Domestic Tourism Day Visits
Cherwell	£42	£192
Oxford	£106	£209
South Oxfordshire	£46	£147
Vale of White Horse	£23	£85
West Oxfordshire	£46	£52

Source: GBTS, GBDVS
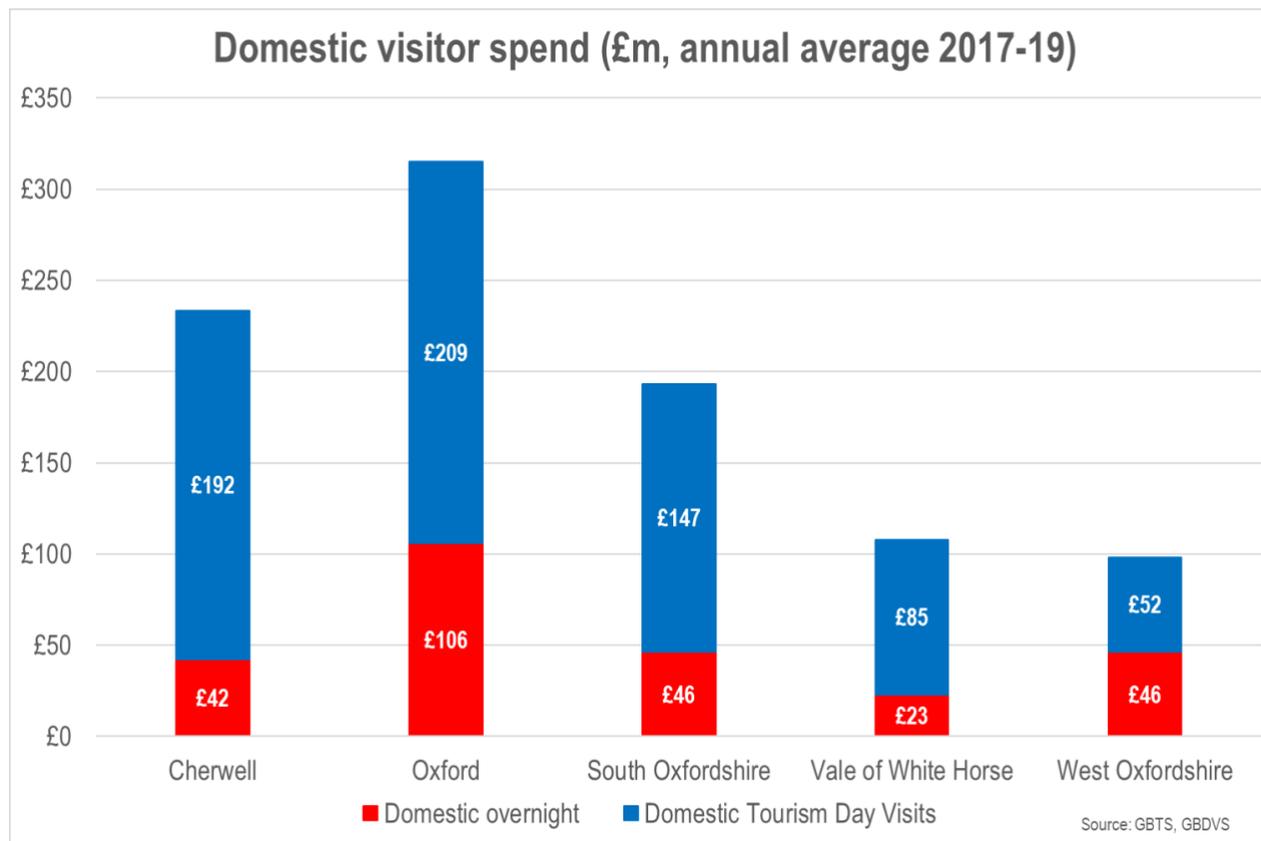
Overnight visits by inbound visitors generated 29% of annual spending while approximately one-fifth came courtesy of domestic overnight trips. The remaining 2% of spending is accounted for by inbound visitors who were just visiting the county on a day trip while spending their nights elsewhere.

Average annual tourism spend in Oxfordshire (2017-19 - £m, % share)

£21.4, 2%
£269.3, 19%
£403.2, 29%
£684.7, 50%

- Domestic Overnight Tourism
- Domestic Tourism Day Visits
- Inbound Overnight Tourism
- Inbound Day Visits
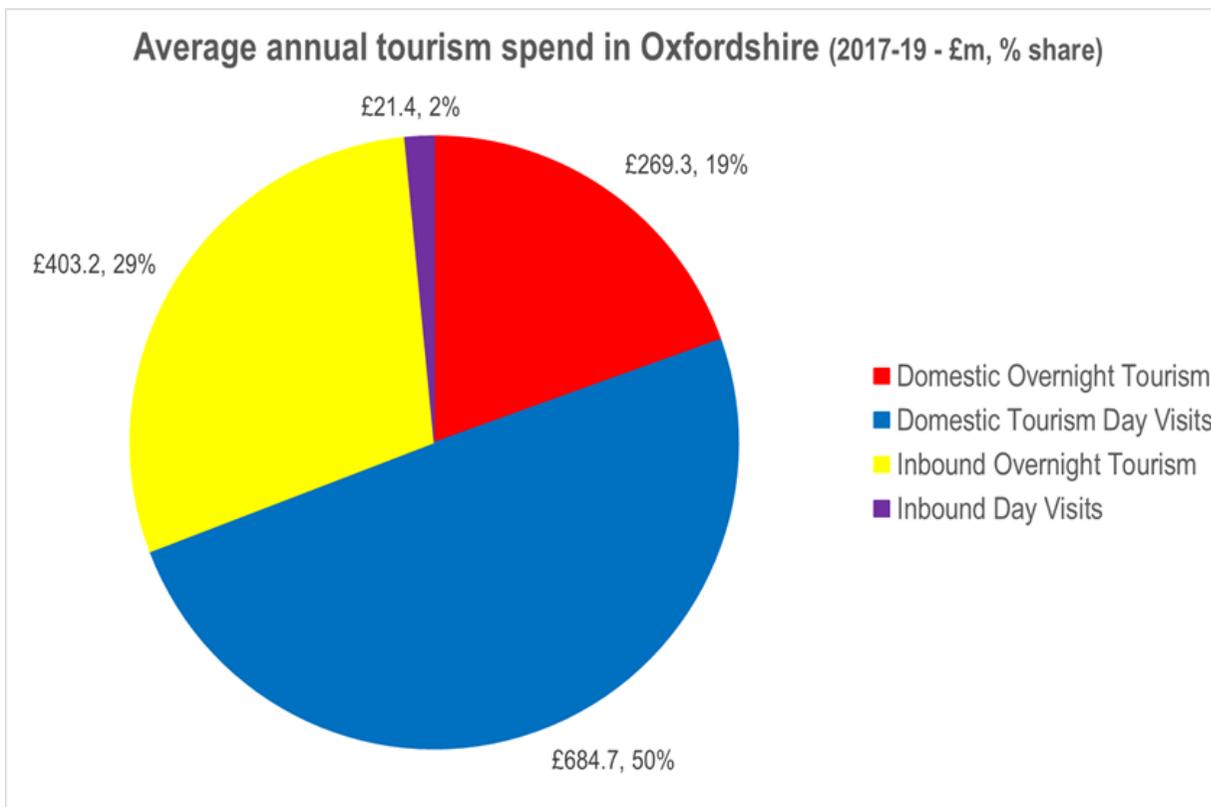
OVERNIGHT DOMESTIC TOURISM

Looking at the trend in the number of overnight domestic visits in each of the five Local Authority areas within the county reveals that volumes remained fairly stable in the dozen or so years ahead of the pandemic, with Oxford itself always the district attracting the most visits and Vale of White Horse nearly always the district with the fewest visits. As one might expect by looking at the trend at the Local Authority level at the county level overall volumes have remained steady at around 1.6 million per annum. This flatlining in the volume of domestic overnight tourism closely mirrors the picture for England as a whole.

Again local economic impact studies will produce different results and they are shared at the end of this chapter.

Overnight domestic trips in Oxfordshire (000s)
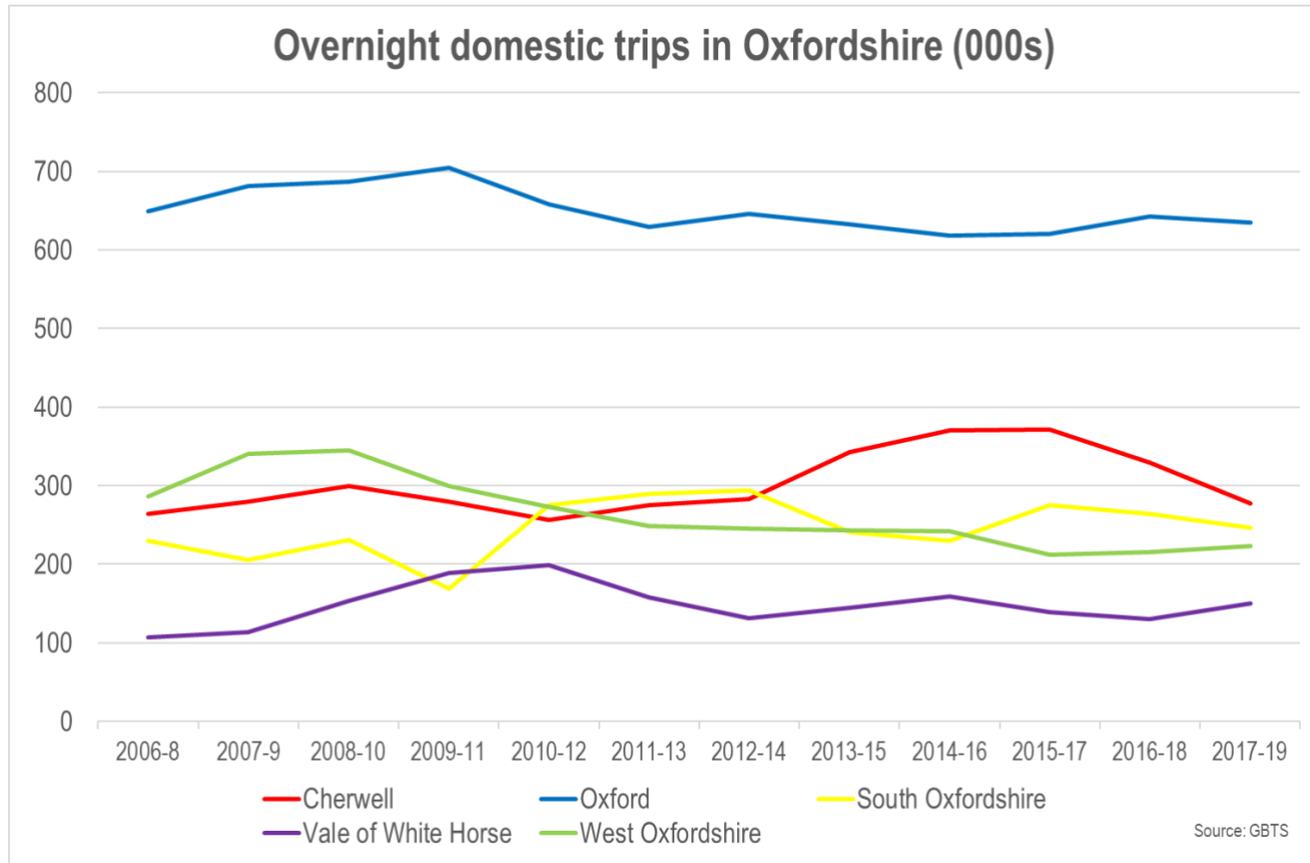
Source: GBTS

Millions of domestic overnight domestic trips (2017-19 annual average)

Holiday		VFR		Business	
London	3.95	London	4.46	London	3.22
Devon	3.40	Greater Manchester	1.42	West Midlands	1.08
North Yorkshire	3.25	West Midlands	1.39	Greater Manchester	0.96
Cornwall and Isles of Scilly	3.21	Hampshire	1.36	Hampshire	0.50
Cumbria	2.68	Devon	1.31	North Yorkshire	0.44
Dorset	1.92	West Yorkshire	1.24	West Yorkshire	0.43
Norfolk	1.89	Bristol/Bath area	1.18	Bristol/Bath area	0.42
Lancashire	1.59	Kent	1.16	Kent	0.33
Lincolnshire	1.38	North Yorkshire	1.10	Berkshire	0.32
Greater Manchester	1.29	Essex	1.03	Merseyside	0.30
East Sussex	1.25	East Sussex	0.90	Buckinghamshire	0.29
Somerset	1.20	Dorset	0.87	Lancashire	0.29
Hampshire	1.18	Cornwall and Isles of Scilly	0.85	South Yorkshire	0.27
Kent	1.11	Merseyside	0.80	Tyne and Wear	0.27
Merseyside	1.07	**Oxfordshire**	**0.80**	Devon	0.26
Bristol/Bath area	1.03	Norfolk	0.78	Hertfordshire	0.24
Derbyshire	1.00	Surrey	0.77	Cumbria	0.23
Northumberland	0.91	Cambridgeshire	0.74	Surrey	0.23
West Midlands	0.84	Tyne and Wear	0.72	Leicestershire	0.23
West Sussex	0.80	Derbyshire	0.71	Staffordshire	0.22
West Yorkshire	0.79	Cheshire	0.71	**Oxfordshire**	**0.22**
Gloucestershire	0.74	Hertfordshire	0.71	Warwickshire	0.21
Suffolk	0.72	South Yorkshire	0.69	Norfolk	0.20
Cheshire	0.71	Nottinghamshire	0.69	Cheshire	0.20
North Lincolnshire/Humberside	0.67	Lincolnshire	0.66	Cambridgeshire	0.20
Isle of Wight	0.61	Gloucestershire	0.64	Gloucestershire	0.19
Wiltshire, County of	0.59	West Sussex	0.63	Nottinghamshire	0.18
Tyne and Wear	0.56	Berkshire	0.63	Cornwall and Isles of Scilly	0.17
Essex	0.55	Cumbria	0.62	West Sussex	0.16
Berkshire	0.55	Lancashire	0.60	Lincolnshire	0.16
Shropshire	0.54	Leicestershire	0.58	Durham	0.16
Oxfordshire	**0.52**	Somerset	0.56	East Sussex	0.16
Staffordshire	0.51	Staffordshire	0.56	Derbyshire	0.16
Nottinghamshire	0.49	North Lincolnshire/Humberside	0.54	Wiltshire, County of	0.16
Warwickshire	0.45	Wiltshire, County of	0.54	Essex	0.15
South Yorkshire	0.39	Suffolk	0.52	Dorset	0.15
Cambridgeshire	0.39	Buckinghamshire	0.50	Suffolk	0.15
Durham	0.34	Shropshire	0.48	Northamptonshire	0.14
Bedfordshire	0.29	Northamptonshire	0.42	Bedfordshire	0.12
Worcestershire	0.29	Worcestershire	0.41	North Lincolnshire/Humberside	0.12
Buckinghamshire	0.29	Warwickshire	0.35	Somerset	0.11
Surrey	0.28	Bedfordshire	0.32	Shropshire	0.10
Northamptonshire	0.25	Durham	0.29	Worcestershire	0.10
Leicestershire	0.25	Northumberland	0.25	Northumberland	0.06
Hertfordshire	0.21	Herefordshire	0.18	Tees Valley	0.04
Herefordshire	0.19	Tees Valley	0.18	Herefordshire	0.04
Tees Valley	0.10	Isle of Wight	0.16	Isle of Wight	0.03
Rutland	0.04	South Gloucestershire	0.05	South Gloucestershire	0.01
South Gloucestershire	0.02	Rutland	0.05	Rutland	0.00

While not suggesting that these are the counties offering the most pertinent competition to Oxfordshire in terms of domestic overnight tourism it is perhaps nonetheless informative to take a look at those English counties that are in the same area of the 'league table' when it comes to the volume of such trips, and this is shown in the following table for each of the three main journey purpose categories.

If we compare the journey purpose mix of domestic overnight tourism in Oxfordshire with that for England, we can observe from this chart that the county is more reliant on Visits to Friends and Relatives (VFR) trips than England, whereas at the national level half of trips are for a Holiday but in Oxfordshire the equivalent figure is around one-third.

Overnight domestic trips: purpose splits 2017-19
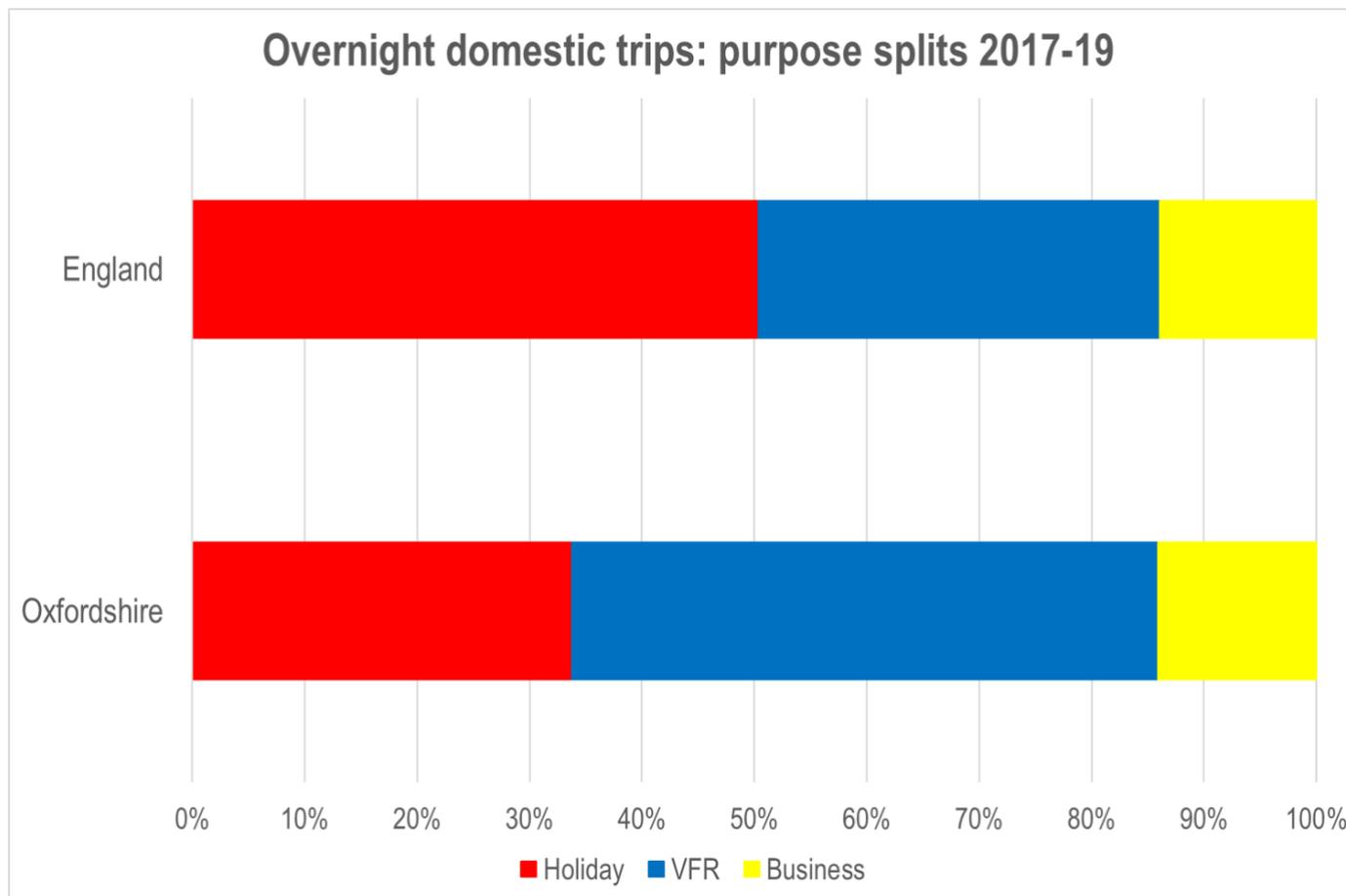
The average length of stay for both Holiday and VFR trips to Oxfordshire is typically a little lower than is the case across England as is evident from the following chart, while Business visits to the county are slightly longer on average than at the national level.

The reverse is true when we turn our attention to average spend per night, with both Holiday and VFR visitors to Oxfordshire spending more than the national average but Business visitors spending somewhat less.

Average spend per night for overnight domestic trips (2017-19)

Average length of stay (nights) for overnight domestic trips (2017-19)
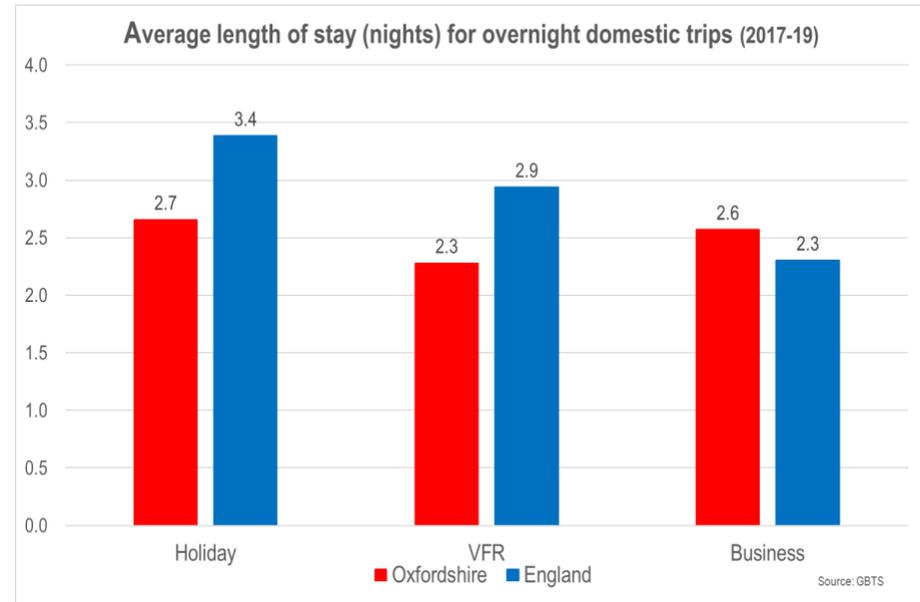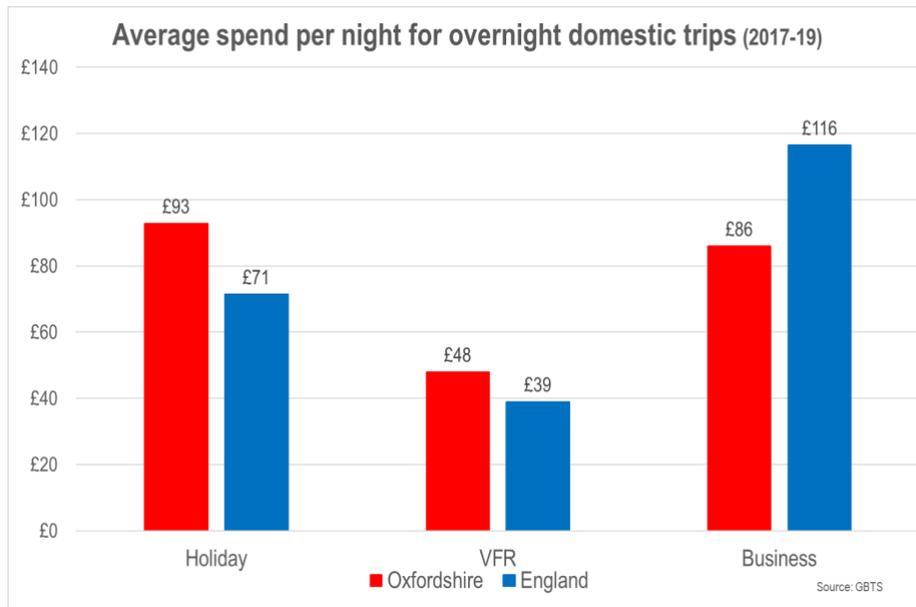
If we bring these metrics together to examine the amount of spending per visit we discover that the county is closely aligned with the national picture for Holiday and VFR trips but falls short of the national average when it comes to Business trips.

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Average spend per trip for overnight domestic trips (2017-19)

Holiday: £247 (Oxfordshire), £242 (England)
VFR: £109 (Oxfordshire), £115 (England)
Business: £221 (Oxfordshire), £268 (England)

Source: GBTS
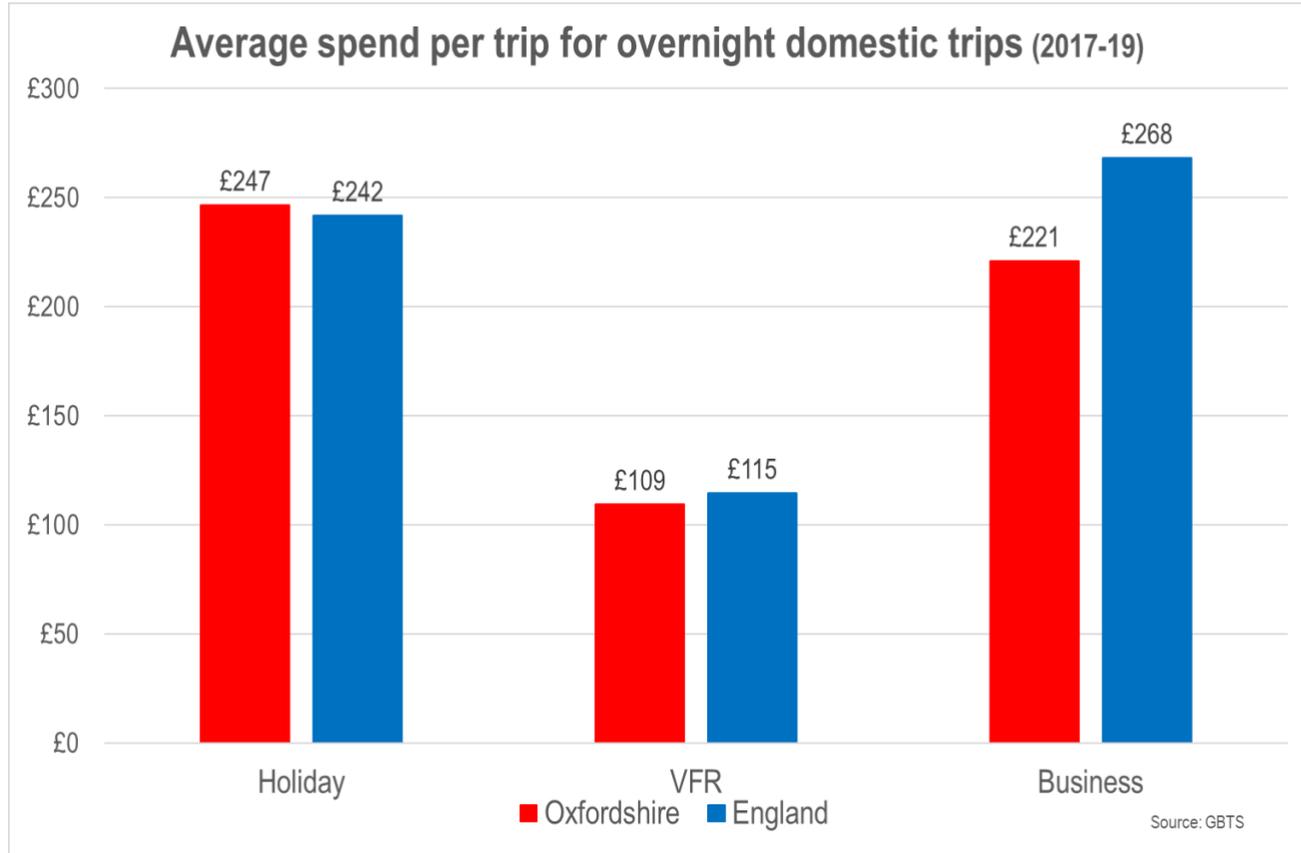
Looking at the distribution of trips by both Local Authority and journey purpose shows that VFR dominates in each area apart from West Oxfordshire where Holiday trips predominate.

Oxford attracts the highest volume of trips across all three categories of trip purpose.

For both Cherwell and Oxford the volume of Business trips is not dissimilar to that of Holiday visits, whereas in the other three districts there are only a negligible amount of Business trips.

Overnight domestic trips (2017-19 annual average, millions)

	Cherwell	Oxford	South Oxfordshire	Vale Of White Horse	West Oxfordshire
Holiday	0.068	0.172	0.083	0.042	0.135
VFR	0.148	0.311	0.155	0.094	0.079
Business	0.059	0.124	0.009	0.013	0.009
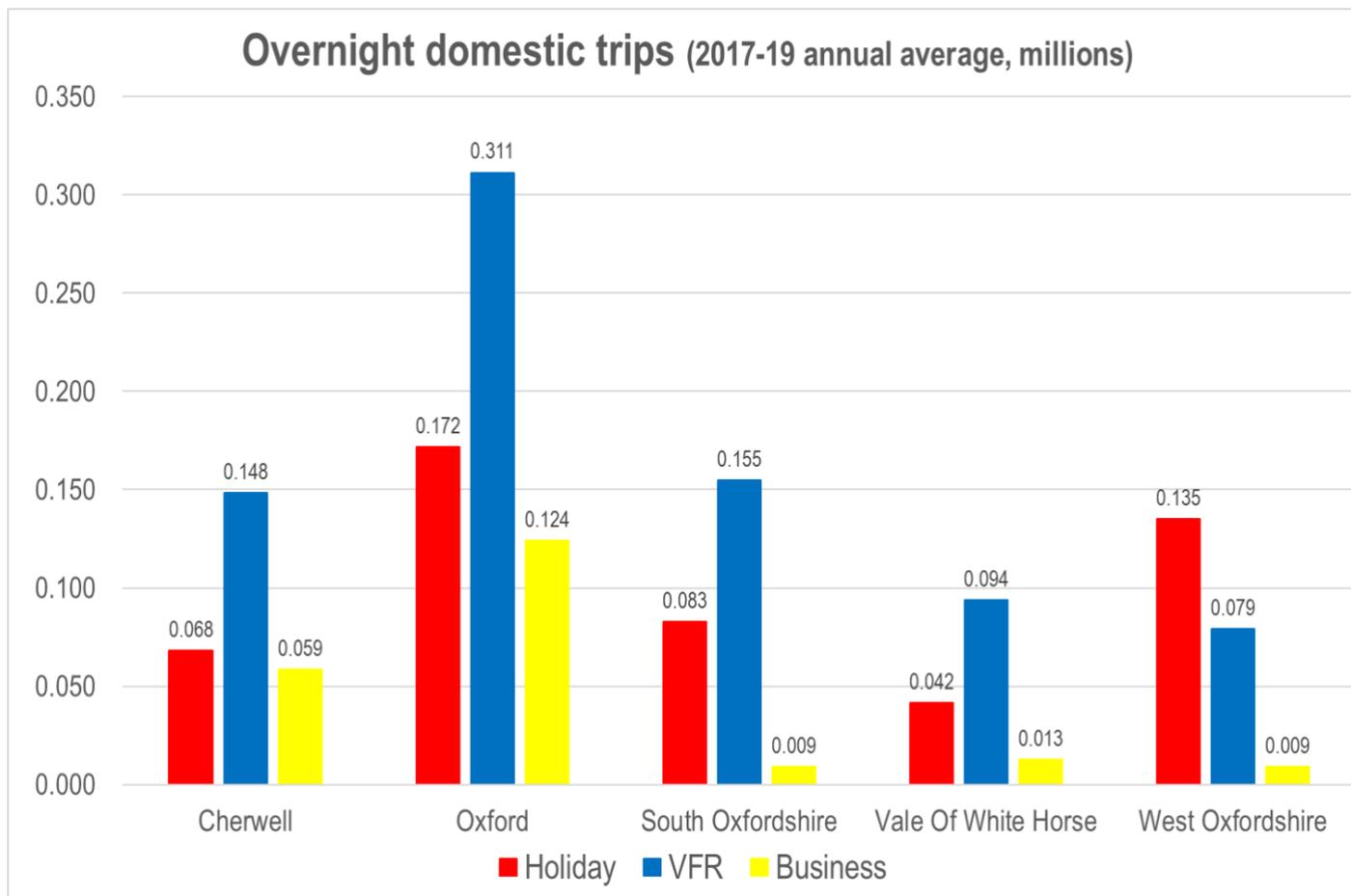
The story is somewhat different if we look at the same set of results but with a focus on spending, as can be seen from the later chart this sees an uptick in the relative importance of Holidays relative to VFR thanks to their higher spend profile. In most of the districts we can also spot that the importance of Business tourism is more evident once looking at spending than was the case when simply focussing on the volume of trips, especially in Cherwell and Oxford.

A study undertaken by VisitEngland focussing on GB residents who had taken a domestic holiday in the past month shone a light on the visitor profile of different destinations, one of which was Oxford. It was found that 53% of this group had visited at some stage in the past.

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Overnight domestic spend (2017-19 annual average, £m)
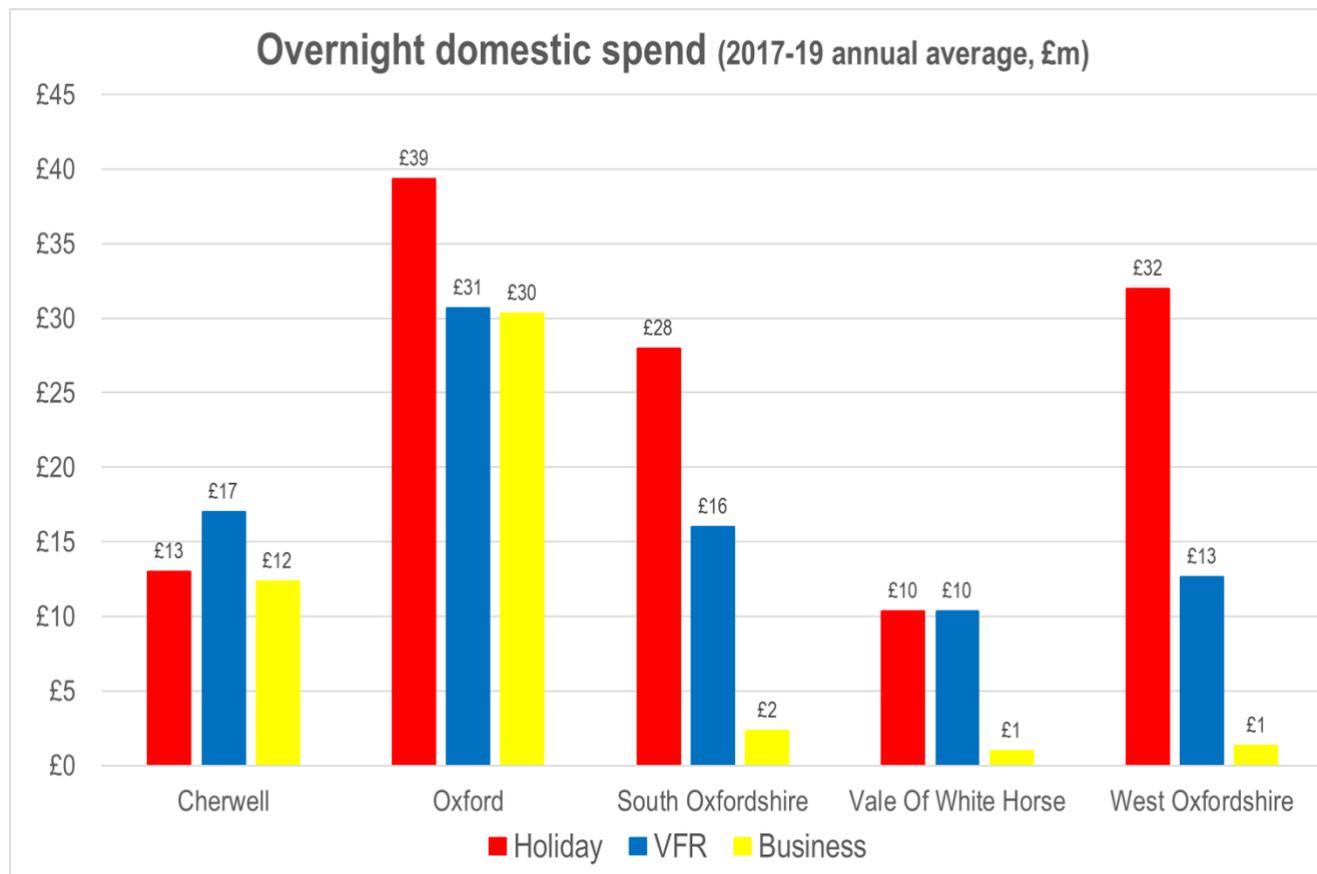
DOMESTIC TOURISM DAY VISITS

These visits area subset of 3 hour+ Leisure Day Visits defined as follows:

- Activities – involving participation in one or more of a series of specified leisure activities
- Duration – lasting at least 3 hours, including time spent travelling to the destination
- Regularity – the participant indicates that the visit (i.e. same activity in same place) is not undertaken 'very regularly'
- Place – the destination of the visit is different from the place (i.e. city, town, village or London borough) where the participant lives.

Starting with a glance at trends in both the volume and value of Tourism Day Visits in Oxfordshire indicates that after having dipped in the middle part of the last decade ahead of the pandemic the volume was on a par with that from 2011-13 by the end of the period under scrutiny.

Before adjusting for inflation spending on Tourism Day Visits was on a gently upward trajectory.

Oxfordshire Tourism Day Visits (m trips and £m spend, outturn prices)

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As can be seen from the brace of pie charts the volume of Tourism Day Visits is fairly evenly spread across the five Local Authority areas.

Although caution is needed when it comes to the reliability of spend estimates it is interesting to note that the survey finds day visits to West Oxfordshire have a much lower spend profile than is the case in the remaining Local Authority areas, hence the much smaller proportion of overall spending accounted for in this area.

Tourism Day Visits (2017-19 annual average, million, % share)

Tourism Day Visits (2017-19 annual average, £m, % share)
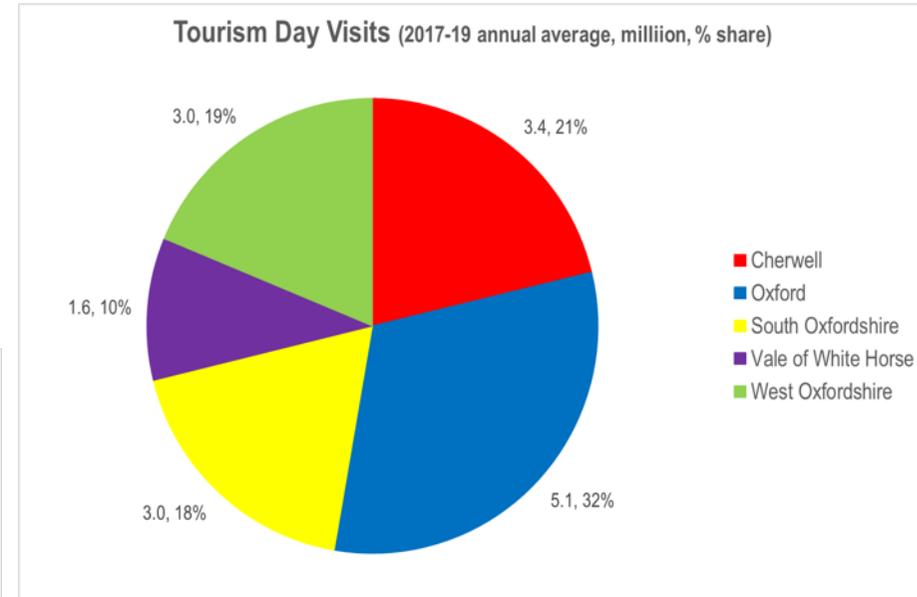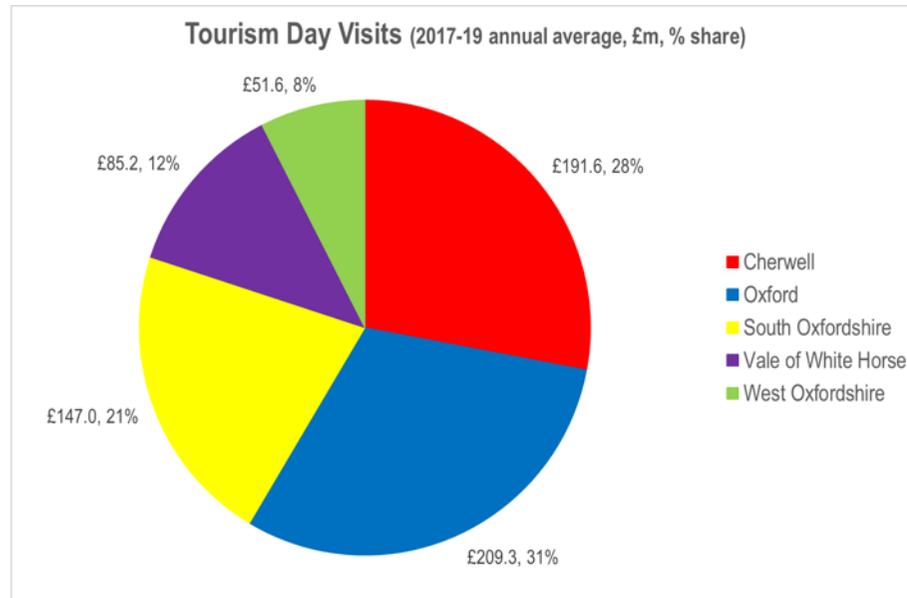
This may reflect tour groups visiting West Oxfordshire for 'sightseeing' but there being little by way of spending opportunities that feature in that part of their trip. However caution should be noted with small sample sizes when looking at district level data.

By contrast Cherwell sees its spend share being higher than its volume share, which may be accounted for by the presence of Bicester Village in Bicester.

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In order to provide a feel for the scale of Tourism Day Visits in the county the table below shows those English counties that sit astride Oxfordshire's tally, based on data for the period 2017-19.

	TDV (m)			
London	309.3			
Greater Mancheste	63.8			
West Midlands	55.7		Staffordshire	21.7
Kent	50.5		North Lincolnshire/l	21.6
West Yorkshire	50.1		Gloucestershire	21.1
Essex	46.3		West Sussex	21.1
Devon	42.8		Somerset	20.0
Hampshire	40.9		Leicestershire	20.0
North Yorkshire	38.6		Surrey	19.6
Norfolk	36.9		Cumbria	19.4
Lancashire	36.9		Buckinghamshire	19.2
East Sussex	29.5		Hertfordshire	18.6
Tyne and Wear	27.5		**Oxfordshire**	**16.3**
South Yorkshire	27.3		Berkshire	16.1
Merseyside	27.2		Worcestershire	15.5
Derbyshire	27.2		Shropshire	15.2
Nottinghamshire	27.0		Northamptonshire	14.8
Cheshire	27.0		Warwickshire	14.0
Lincolnshire	26.5		Wiltshire	13.3
Dorset	25.9		Durham	13.2
Cambridgeshire	25.1		Northumberland	11.4
Suffolk	25.0		Bedfordshire	10.4
Cornwall and Isles	24.9		Tees Valley	7.8
Bristol/Bath area	23.3		Isle of Wight	5.5
			Herefordshire	4.5
			South Gloucestersh	2.6
			Rutland	1.2

INBOUND OVERNIGHT TOURISM

During the decade prior to the pandemic we can see from the following chart that there was a period of growth between 2013 and 2016, but both before and after this time volumes were fairly stable.

The number of overnight visits to Oxfordshire by overseas visitors grew by 34% during the 2009 to 2019 period, almost identical to the 31% seen across the UK as a whole.

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Inbound overnight visits to Oxfordshire (000s)

Source: VisitBritain
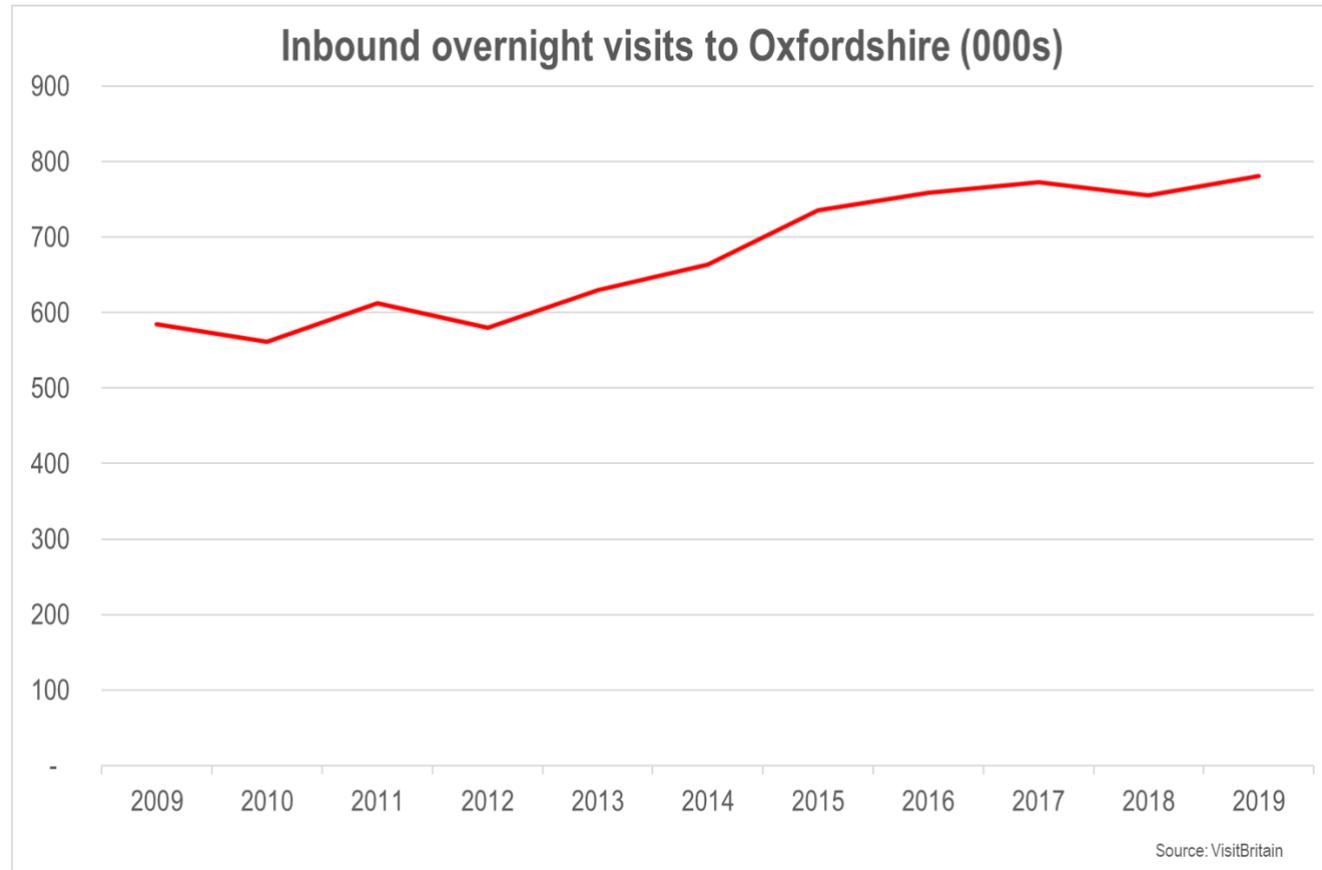
Comparing the journey purpose mix of inbound overnight visits to Oxfordshire with that of the UK we can see that there are few significant variances with the exception of the county over-indexing in terms of the share of Study visits.

Differences in the amount spent per visit are quite marked in some cases, which accounts for the even greater share of inbound visitor spending in the county attributable to Study visits seen in the second chart.
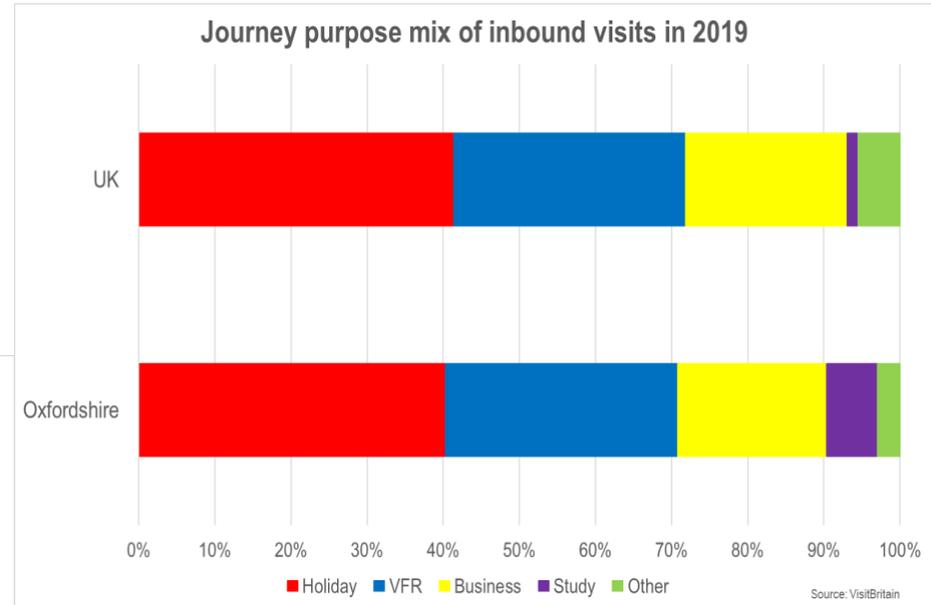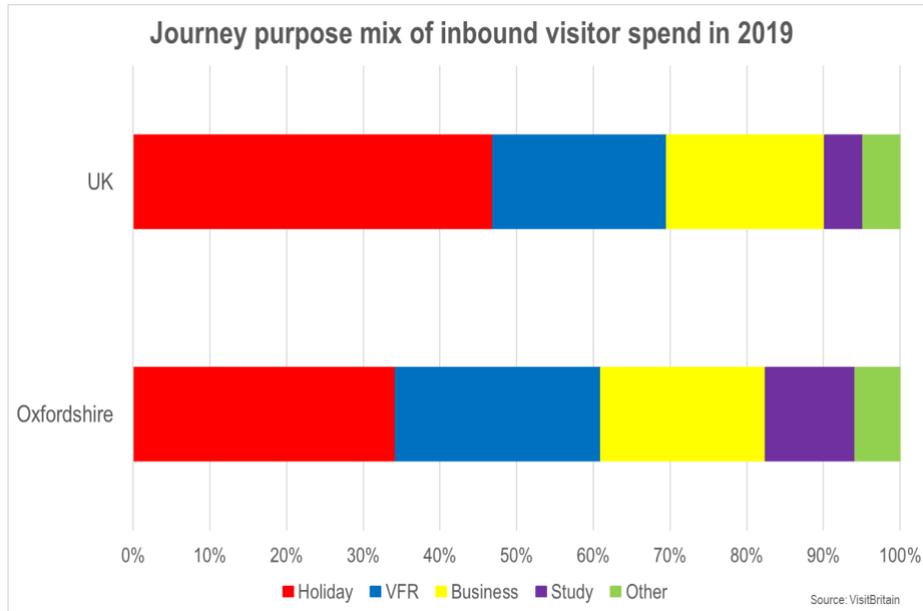
A further observation from these two charts is that Holidays account for a lesser share of spend relative to visits in the county compared with the UK. There are a few factors that sit behind this starting with average length of stay.

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The next chart shows that while trips tend to last longer in the UK than in Oxfordshire, with the most pronounced for VFR trips.

In terms of spend per night the county lags the UK for both Holiday and Business visits from overseas but is ahead for VFR trips.

Inbound visits average length of stay (2019)

Inbound visits average spend per night (2019)
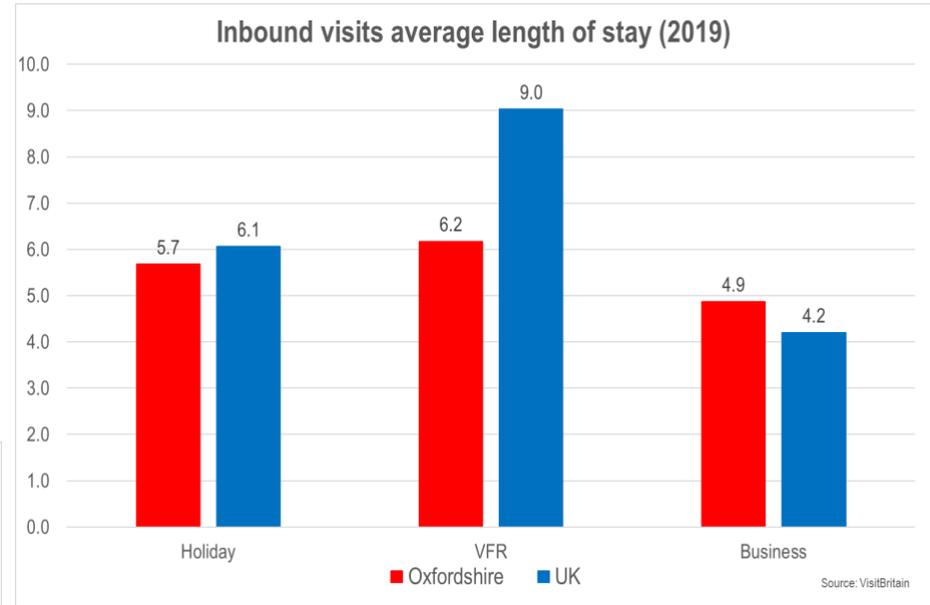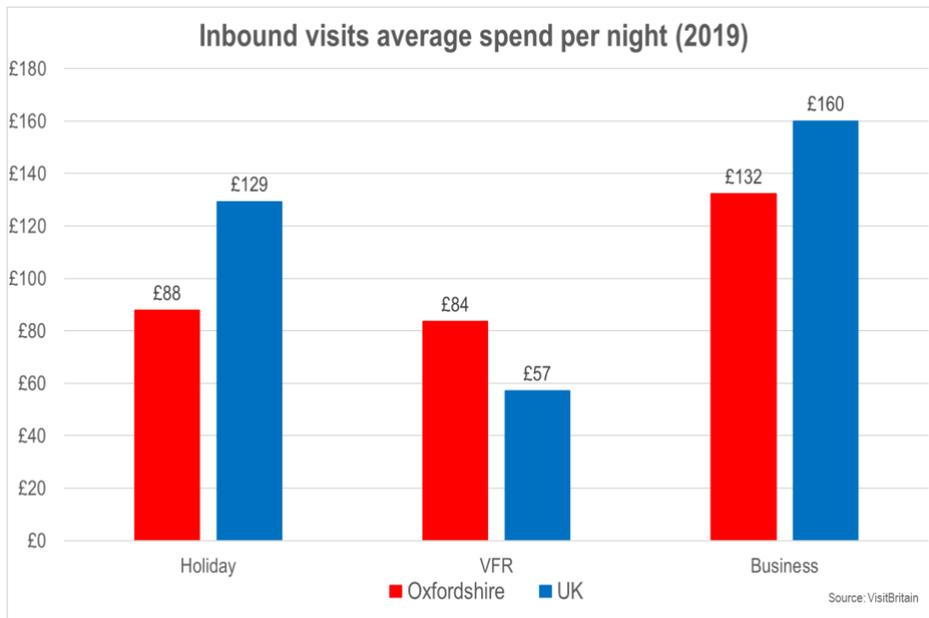
Bringing these parameters together and looking at spend per visit, the following chart, sees Oxfordshire being on a par with the UK for VFR and Business but falling short when it comes to the average amount spent by a Holiday visitor.

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Inbound visits average spend per visit (2019)

	Holiday	VFR	Business
Oxfordshire	£499	£516	£644
UK	£784	£516	£673

Source: VisitBritain
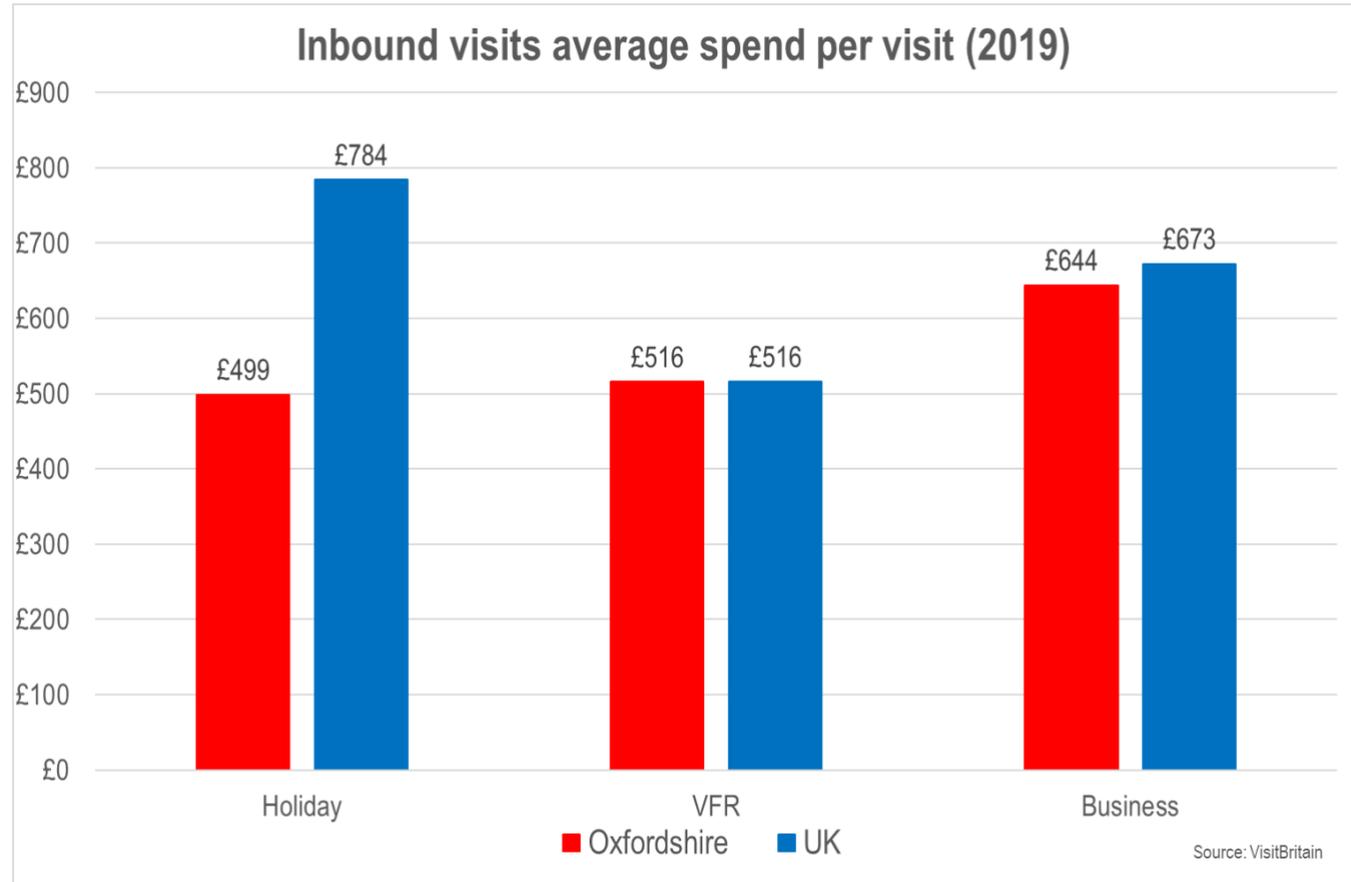
While not indicative of the areas against which Oxfordshire is necessarily competing it is worth seeing where, for each journey purpose, the county sits in relation to other areas of the country, and this is done in the following table, demonstrating just how vital Oxford is in attracting international study visits as it comes second only to London.

Annual average staying visits 2017-19, 000s

| Holiday		VFR		Business		Study	
London	11,009	London	5,234	London	3,893	London	222
Gtr Manchester	537	Gtr Manchester	559	West Midlands Met County	661	**Oxfordshire**	**36**
East Sussex	407	West Midlands Met County	480	Gtr Manchester	441	East Sussex	36
Kent	399	Hampshire	325	Kent	308	Cambridgeshire	33
Merseyside	363	East Sussex	321	Berkshire	220	Gtr Manchester	32
Somerset	353	Surrey	318	Merseyside	160	West Midlands Met County	23
Oxfordshire	**308**	Kent	313	Cambridgeshire	156	Merseyside	18
West Midlands Met County	277	Hertfordshire	287	**Oxfordshire**	**152**	Kent	17
Cornwall & Scillies	250	Berkshire	274	West Yorkshire	148	Somerset	15
North Yorkshire	249	**Oxfordshire**	**247**	Bristol UA	146	Bristol UA	14
Cambridgeshire	241	Cambridgeshire	236	Hampshire	143	Dorset	14
Devon	223	Bristol UA	235	Essex	129	Devon	14
Hampshire	209	West Yorkshire	229	Warwickshire	112	Hampshire	12
Bristol UA	208	Essex	226	Northamptonshire	102	South Yorkshire	9
Berkshire	191	Merseyside	225	Surrey	99	Leicestershire	9
Warwickshire	160	Somerset	220	West Sussex	95	West Yorkshire	9
Dorset	155	West Sussex	200	Bedfordshire	91	North Yorkshire	8
West Sussex	150	Buckinghamshire	171	Nottinghamshire	87	Lancashire	7
Cumbria	150	Cheshire	162	Buckinghamshire	85	Tyne & Wear	7
Wiltshire	141	Devon	160	Tyne & Wear	83	Berkshire	6
West Yorkshire	122	North Yorkshire	160	Leicestershire	83	West Sussex	6
Surrey	119	Lancashire	152	East Sussex	79	Warwickshire	5
Gloucestershire	113	Dorset	151	Cheshire	79	Nottinghamshire	5
Essex	109	Nottinghamshire	151	Hertfordshire	78	Essex	5
Hertfordshire	103	South Yorkshire	141	South Yorkshire	75	Hertfordshire	4
Tyne & Wear	100	Bedfordshire	139	Derbyshire	69	Durham	4
Lancashire	87	Leicestershire	138	North Yorkshire	63	Suffolk	3
Bedfordshire	84	Warwickshire	135	Wiltshire	61	Gloucestershire	3
Cheshire	83	Tyne & Wear	128	Somerset	56	Cheshire	3
Buckinghamshire	68	Gloucestershire	120	Staffordshire	44	Hull UA	3
Nottinghamshire	65	Norfolk	114	Suffolk	43	Surrey	3
Lincolnshire (excl N&NE)	63	Wiltshire	109	Lincolnshire (excl N&NE)	43	Northamptonshire	3
Leicestershire	53	Derbyshire	106	Devon	40	Wiltshire	2
South Yorkshire	50	Hereford & Worcester	95	Shropshire	39	Bedfordshire	2
Derbyshire	50	Suffolk	94	Gloucestershire	37	Derbyshire	2
Norfolk	49	Northamptonshire	89	Lancashire	36	Cornwall & Scillies	2
Hereford & Worcester	46	Cornwall & Scillies	88	Dorset	32	Cumbria	2
Staffordshire	42	Cumbria	82	Hereford & Worcester	31	Staffordshire	2
Suffolk	40	Lincolnshire (excl N&NE)	79	Norfolk	25	Isle of Wight	2
Northamptonshire	36	Staffordshire	76	Cumbria	24	Shropshire	1
Northumberland	32	Shropshire	65	Hull UA	20	Tees Valley/Cleveland	1
Durham	30	Durham	47	Durham	17	Buckinghamshire	1
Shropshire	23	Hull UA	32	Northern Lincolnshire	13	Norfolk	1
Isle of Wight	20	Northumberland	30	Tees Valley/Cleveland	13	Lincolnshire (excl N&NE)	1
Hull UA	12	Tees Valley/Cleveland	29	Cornwall & Scillies	10	East Yorkshire	1
East Yorkshire	10	Isle of Wight	23	Northumberland	7		
Northern Lincolnshire	6	East Yorkshire	21	East Yorkshire	5		
Tees Valley/Cleveland	6	Northern Lincolnshire	20	Isle of Wight	2		

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In terms of the largest source markets for the county two long-haul markets held sway at the top of the staying visits chart for the county back in 2019, namely the USA and China ahead of a cluster of EU source markets headed by France.

Oxfordshire overnight visits in 2019 (000s)

Country	Visits (000s)
USA	100
China	60
France	55
Netherlands	46
Germany	46
Spain	44
Italy	34
Irish Republic	26
Poland	25
Romania	22
Hong Kong	21
Australia	21
Czech Republic	20
UAE	20
Canada	19
Belgium	15
India	15
Switzerland	14
Norway	14
Brazil	12

Source: VisitBritain
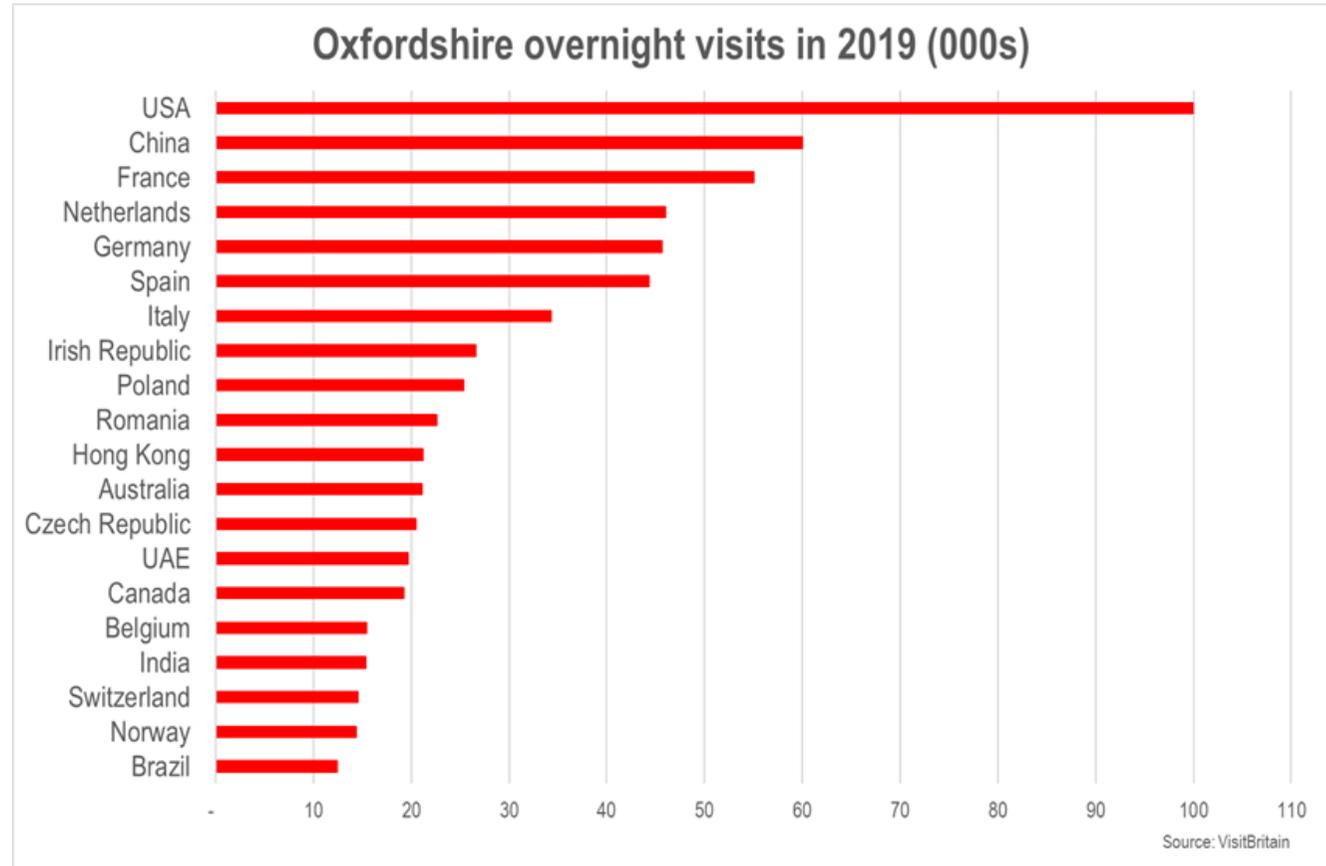
DAY VISITS BY INBOUND VISITORS

The International Passenger Survey does not routinely collect information on where international visitors travel to on day trips, the only geographical information collated covers where they stay overnight. However, in 2016 VisitBritain sponsored a question on the ONS survey to establish the extent of day-tripping by overseas visitors and the destinations visited on those trips.

From this it is possible to establish that Oxfordshire saw around half a million day visits by overseas visitors that year, with Oxford being the most visited destination in the county.

The following chart shows the overall journey purpose of those inbound visitors who undertook a day trip to either Oxford or Bicester (the only two destinations within the county for which estimates are available).

For those in the UK for a Holiday, Study or for Business reasons Oxford was the third most visited destination for day trips, while for those here for a VFR trip it was ranked 6th.

Inbound day-tripper volumes in 2016 (000s)

Source: VisitBritain
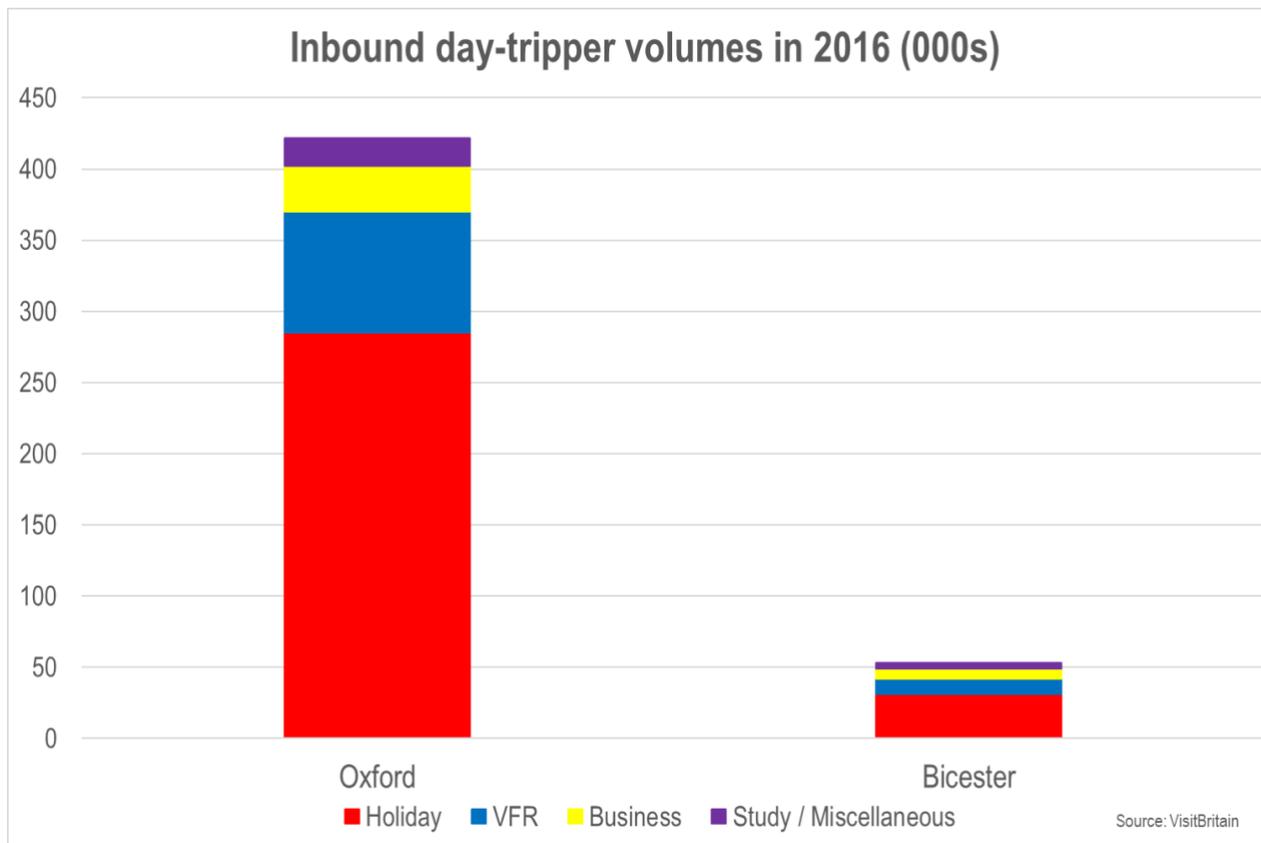
LOCAL ECONOMIC IMPACT STUDIES

While the nationally produced data shared above provides useful comparison at a county level against other regions, it can be argued that it does not accurately reflect the picture at the local level. For this reason many destinations invest in local economic impact studies for their areas. These are prepared by different companies who model the impact in a locality using the national data sets and modelling outputs based on a number of other variables including locally collected data (occupancy, attraction visits etc).

Within Oxfordshire, Experience Oxfordshire supply economic impact studies for the County and district level studies for Cherwell and Oxford City as well as the county. In West Oxfordshire, Cotswolds Tourism provide a study for the district as part of Cotswold-wide studies. Below are the key results of these studies for 2019.

West Oxfordshire 2019 (South West Research Company)

	Domestic Staying	Overseas Staying	Day Trips	Total
Trips	464,000	84,500	3,475,000	4,023,500
Nights	1,023,000	674,000	-	1,697,000
Spend £m	80.316	43.093	123.555	246.964
Employment				4,389 roles
				3,197 FTEs

City of Oxford 2019 (Destination Research)

	Domestic Staying	Overseas Staying	Day Trips	Total
Trips	639,000	577,000	6,606,504	7,822,504
Nights	1,424,000	3,719,000	-	5,143,000
Spend £m	143.499	312.514	318.588	733.539

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Employment				17,032 roles
				12,551 FTEs
				*following adjustments made to avoid double counting

Cherwell District 2019 (Destination Research)

	Domestic Staying	Overseas Staying	Day Trips	Total
Trips	342,000	60,000	7,762,189	8,164,189
Nights	833,000	425,000	-	1,258,000
Spend £m	71.045	18.537	344.171	404.496*
Employment				8,786 roles
				6,318 FTEs
				*following adjustments to avoid double counting

Oxfordshire County 2019 (Destination Research)

	Domestic Staying	Overseas Staying	Day Trips	Total
Trips	2,074,000	769,000	28,077,232	30,920,232
Nights	5,303,000	5,230,000	-	10,533,000
Spend £m	446.084	378.217	1,235.775	1,947.280*
Employment				42,077 roles
				30,657 FTEs
				*following adjustments to avoid double counting

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VISITOR ECONOMY EMPLOYMENT

The most recent detailed employment data at the local level broken down by Standard Industrial Classification relates to 2021, available through NOMIS. Based on a cohort of 4-digit SIC groups that align with travel and tourism it is possible to establish that in total employment accounted for by these activities exceeded 29,000 in 2021, varying as a percentage of total employment by Local Authority from 5.4% in Vale of White Horse to 12.0% in West Oxfordshire.

The following chart shows employment by SIC and Local Authority, confirming that three activities dominate, namely 'restaurants and mobile food service activities', 'beverage serving activities' and 'hotels and similar accommodation'.

Employment in 2021

Source: NOMIS

Legend: Cherwell, Oxford, South Oxfordshire, Vale of White Horse, West Oxfordshire
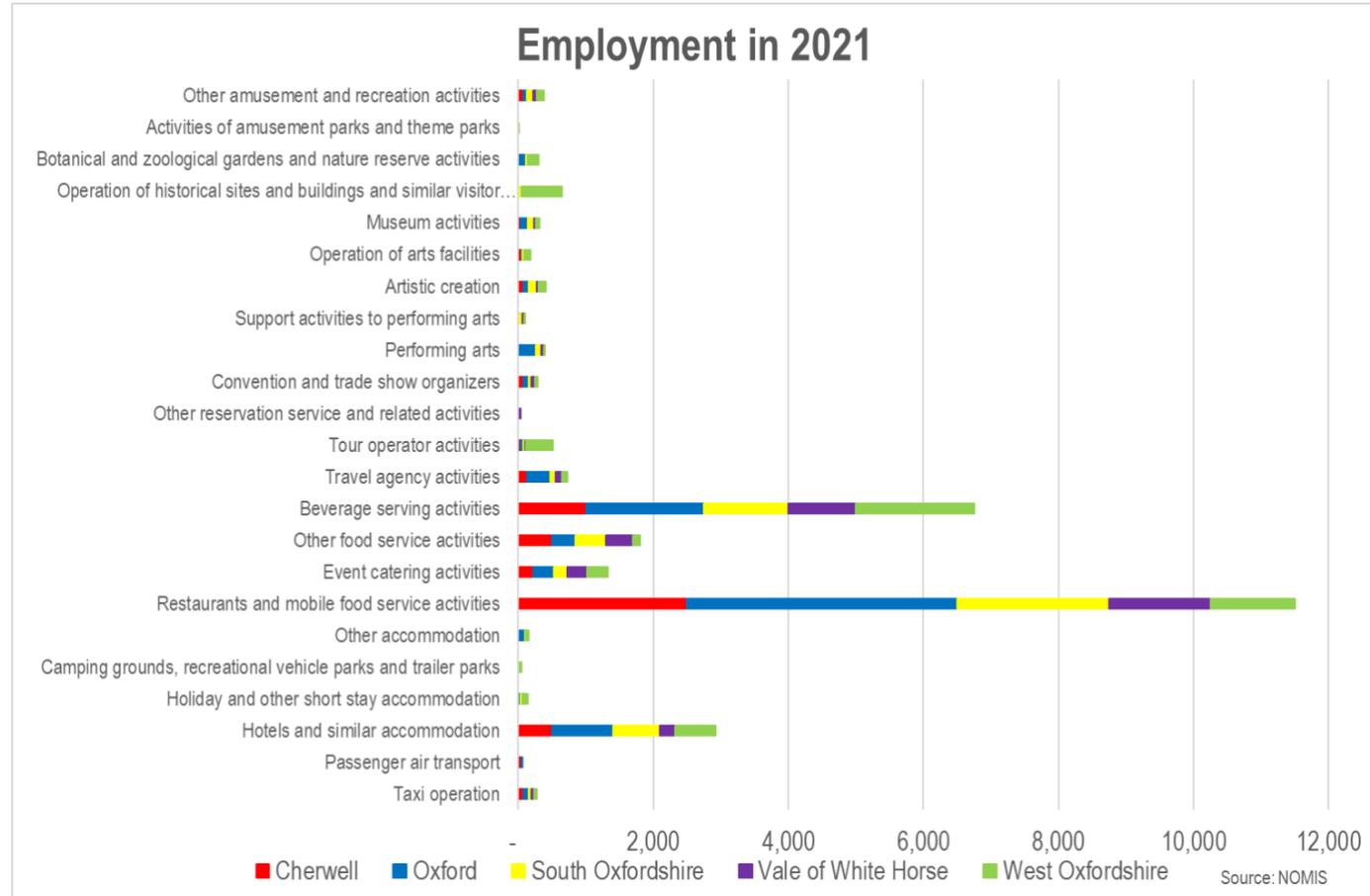
VISITS TO VISITOR ATTRACTIONS

We can get a more contemporary feel for how the visitor economy in the county is performing by taking a look at data from the Association of Leading Visitor Attractions as figures for 2022 have now been released.

While not covering all attractions in the county we can note that among those for which data is available last year saw visits still 22% below the 2019 level. The following chart depicts the number of visits in 2012, 2019 and 2022. It should be recognised that the nature of the offer at Bodleian Libraries has changed substantially in recent years meaning that the uptick in visits should be treated with caution. Nevertheless, the aggregate increase among the remaining attractions between 2012 and 2019 stood at 29%, which compares favourably with the 21% growth over this period for ALVA member attractions across the UK.

Visits to leading attractions

Source: ALVA

2012 2019 2022

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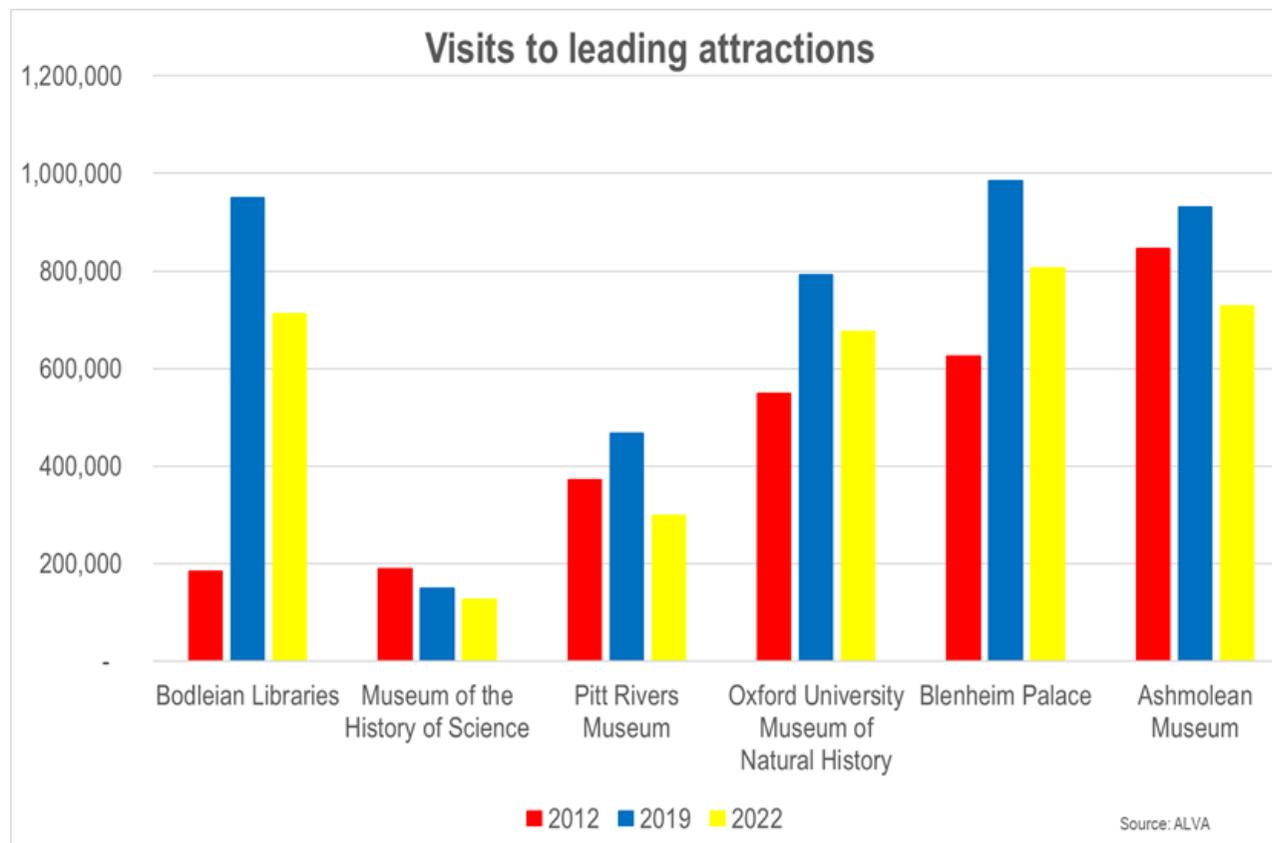
SEASONALITY

The current Economic Impact document for Oxfordshire from Experience Oxfordshire suggests that for overnight tourism July is the peak month for both volume and value and January the quietest month, while for day visits it is estimated that August is the peak month and February the quietest.

ACCOMMODATION

Data from STR helps shine a light on seasonality in the county, with the following chart based on information provided to STR from around 60% to 65% of the hotel rooms on the STR Census of rooms available in, or close to, the county of Oxfordshire.

Monthly data for the period from January 2015 to February 2023 has been analysed and the first of the following charts shows room occupancy for each individual month and also on a twelve-month moving average basis. It is strikingly evident that demand is highly seasonal (outside of the period impacted by Covid-19) with a marked trough in January and a peak between June and August.

On a moving average basis occupancy was fairly static ahead of the pandemic and has now recovered to within two percentage points of the 79% that had been the norm.

It is not known to what extent data for hotels in the county is being impacted by some of the nation's hotel stock being utilised by the government for the purpose of housing refugees.

Oxfordshire Hotel Occupancy

Source: STR

Legend: Actual (red) — Rolling 12 months (blue)
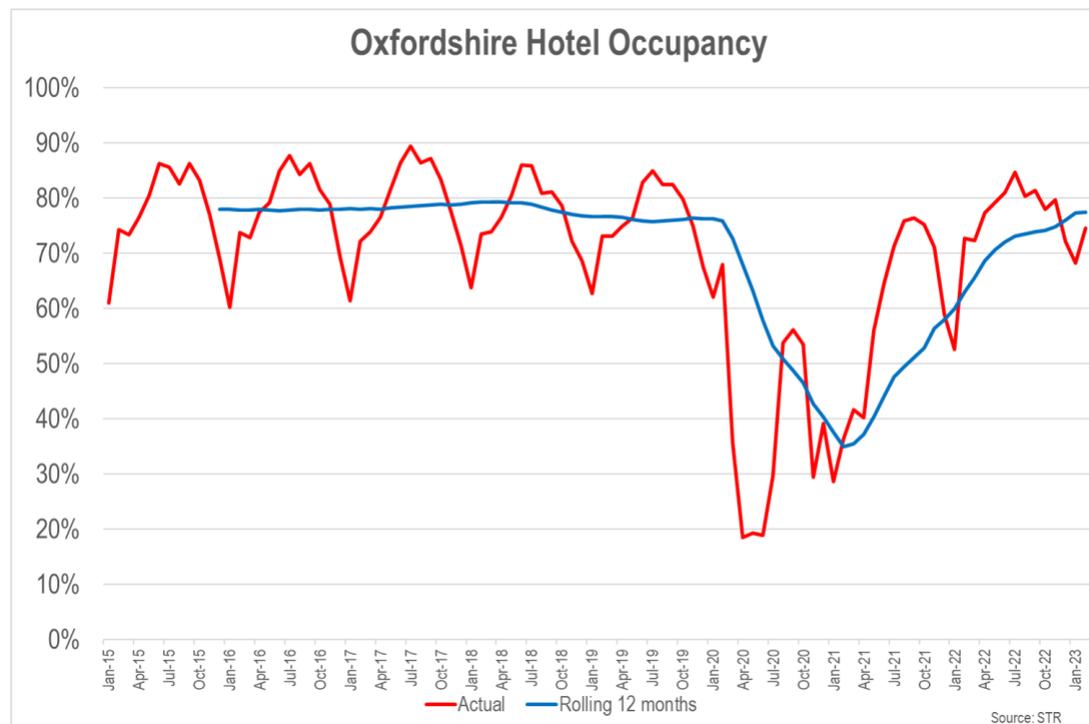
Looking at Average Daily Room Rates (ADR) we can see that (having adjusted for inflation) July traditionally sees the highest rates and January the lowest, with a differential in excess of £30 between these months. On a moving average basis ADR was higher in real terms during the summer of 2022 than had been the case in any of the five summers ahead of the pandemic.

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Oxfordshire Hotel ADR, constant prices

Source: STR

Legend: Actual, Rolling 12 months
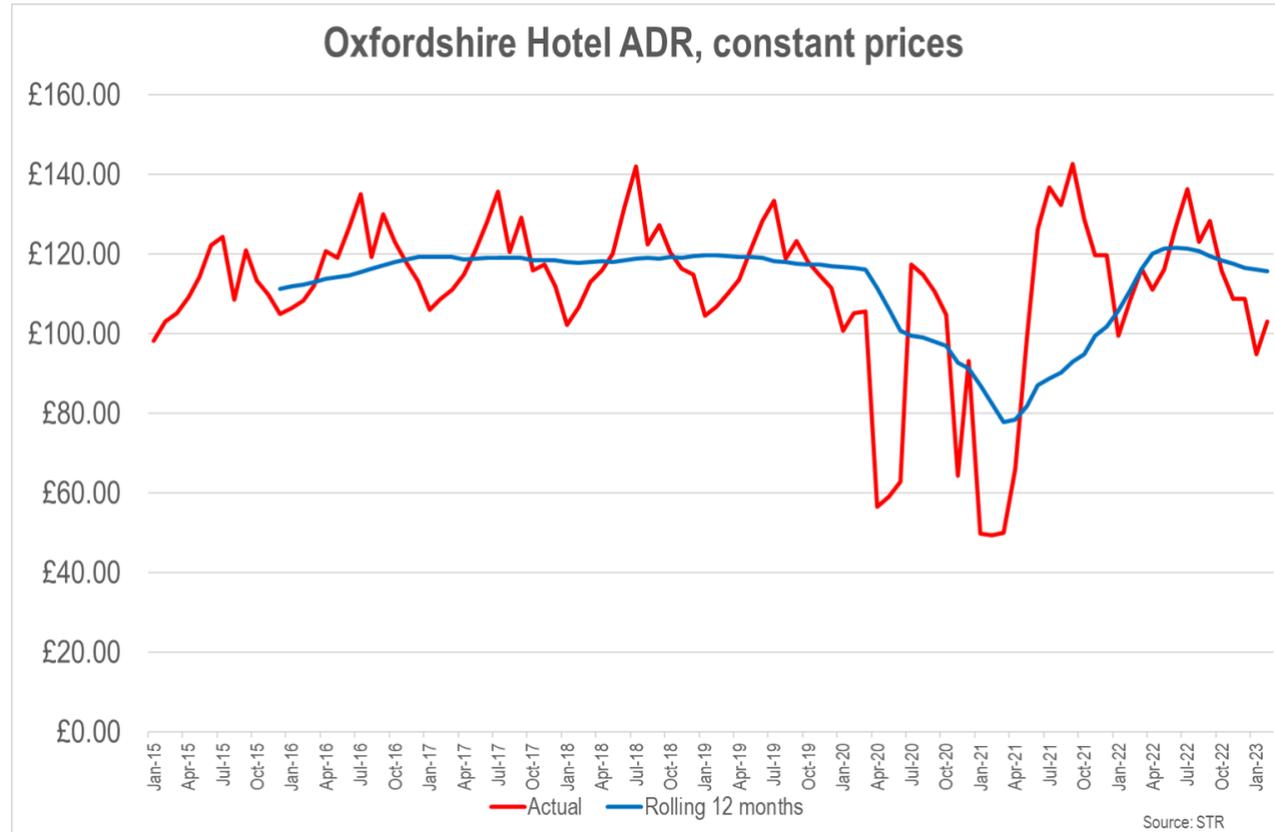
Bringing occupancy and ADR together produces what is known as RevPAR, or Revenue per Available Room and here we find that courtesy of occupancy not having fully regained its pre-pandemic level on a smoothed basis last summer saw RevPAR about £5 shy of where it was for much of 2017 and 2018.

Comparing RevPAR data for Oxfordshire with that for the wider geography of South East England (based on data published by VisitEngland) it is evident that throughout 2022 the county consistently outperformed the wider region.

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Oxfordshire Hotel RevPAR, constant prices

Source: STR
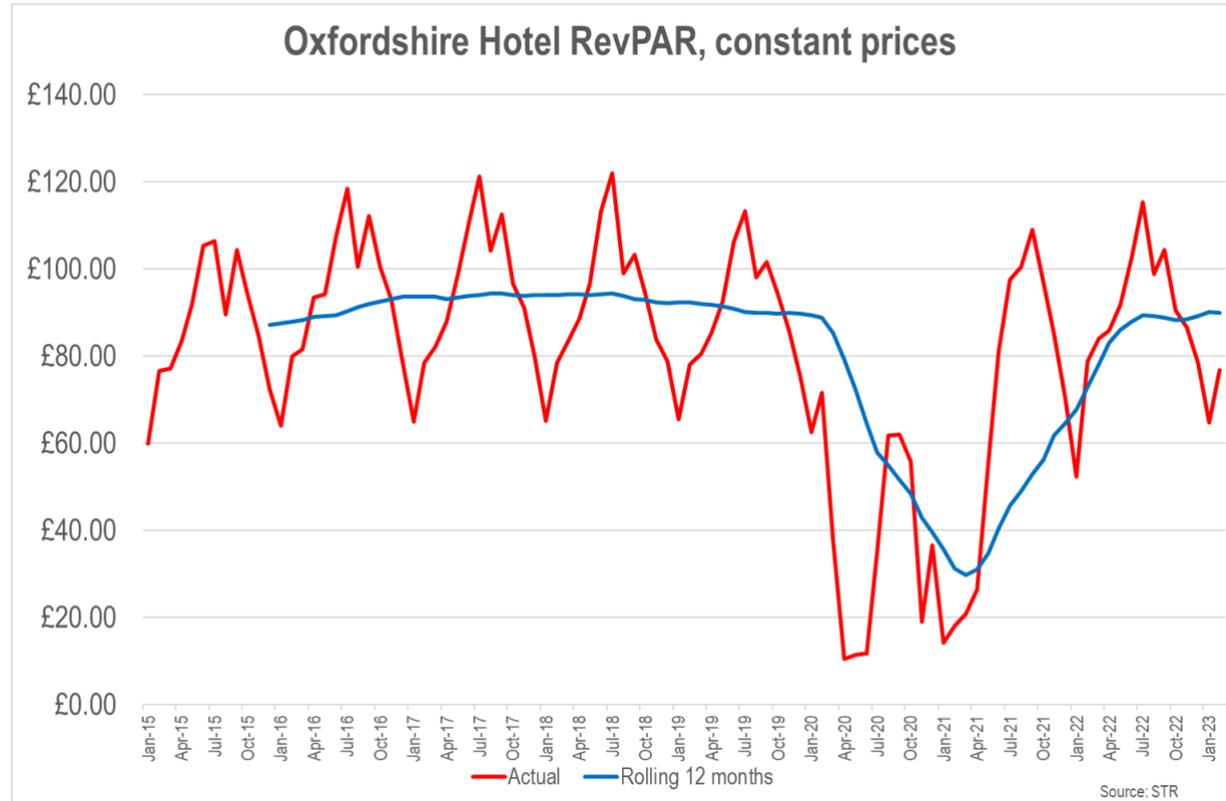
Switching attention to performance by day of week and with a focus just on the most recent twelve months we can observe from the following chart that Tuesdays, Wednesdays or Saturdays have typically delivered the highest occupancy in recent times while Sundays consistently fall a long way short of other days of the week.

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Oxfordshire Hotel Occupancy

Source: STR
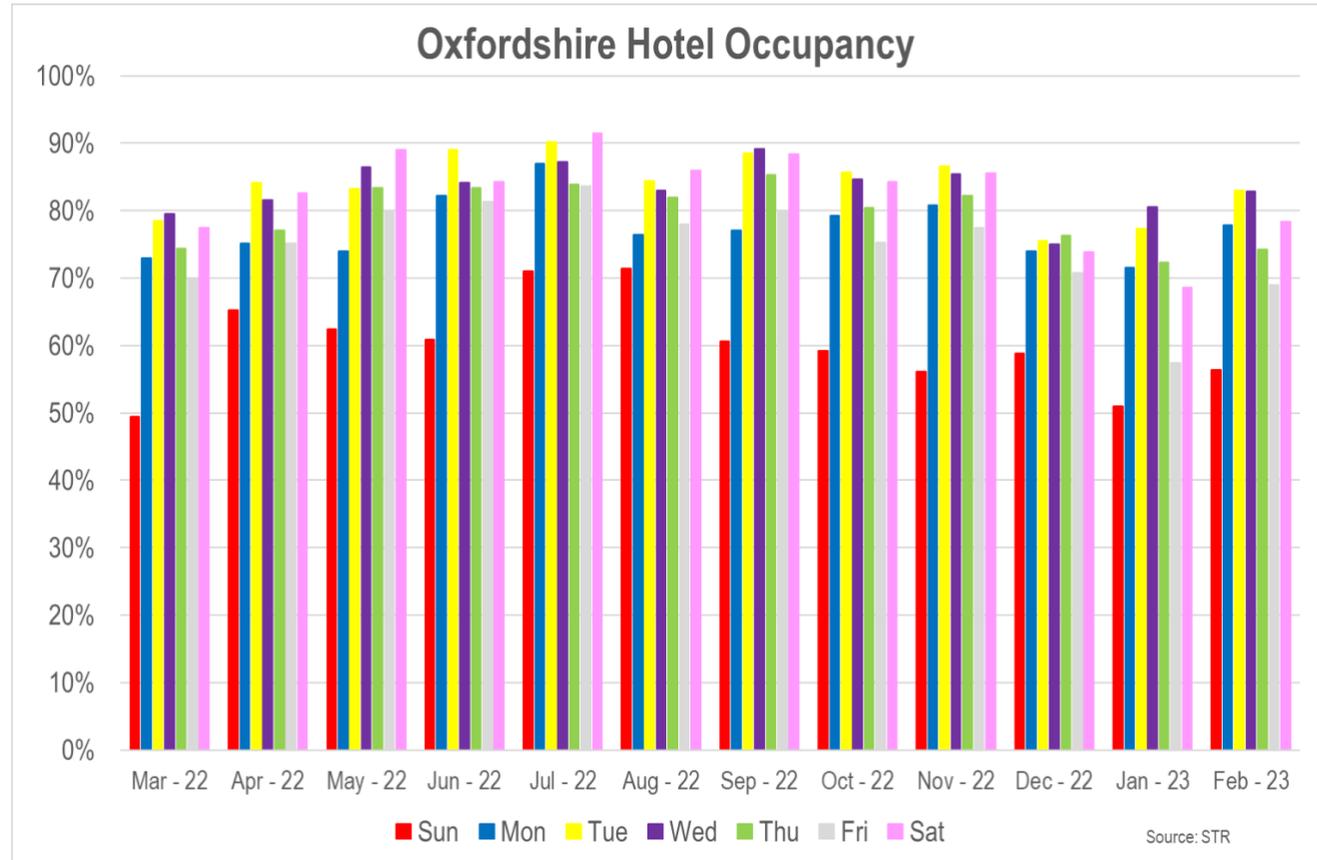
Hoteliers vary their ADR significantly by day of week to take advantage of inelastic demand on certain days, with the later chart revealing that in July last year the typical Saturday saw an ADR of £162, some £50 higher than the average rate being charged on a Sunday night.

Oxfordshire Hotel ADR

Source: STR

Legend: ■ Sun ■ Mon ■ Tue ■ Wed ■ Thu ■ Fri ■ Sat
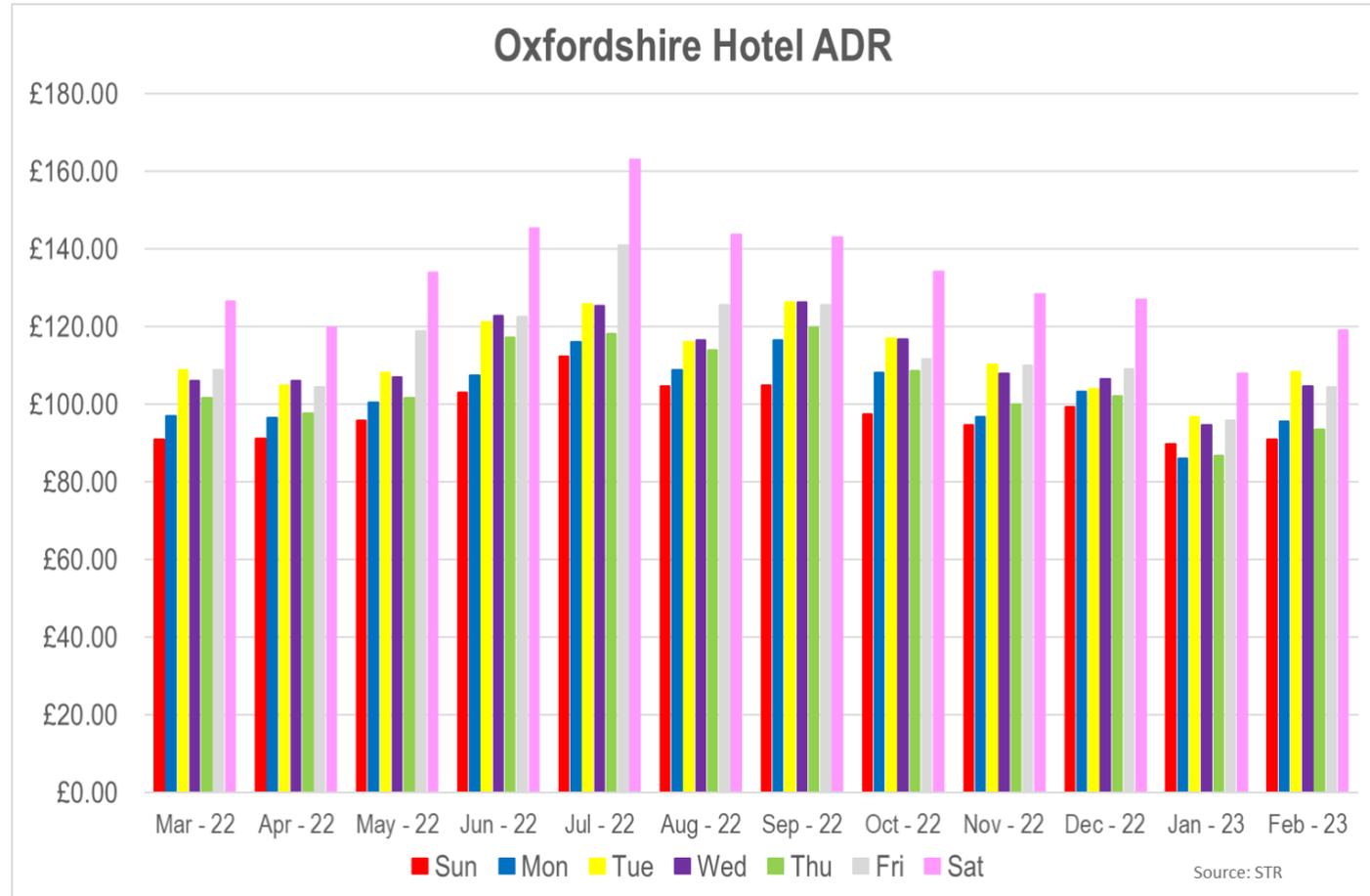
Again looking at what this means for RevPAR we find that in most recent months the strongest returns are found on Saturdays, especially in the summer, while in winter months Tuesdays and Wednesdays come a close second.

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Oxfordshire Hotel RevPAR

Source: STR
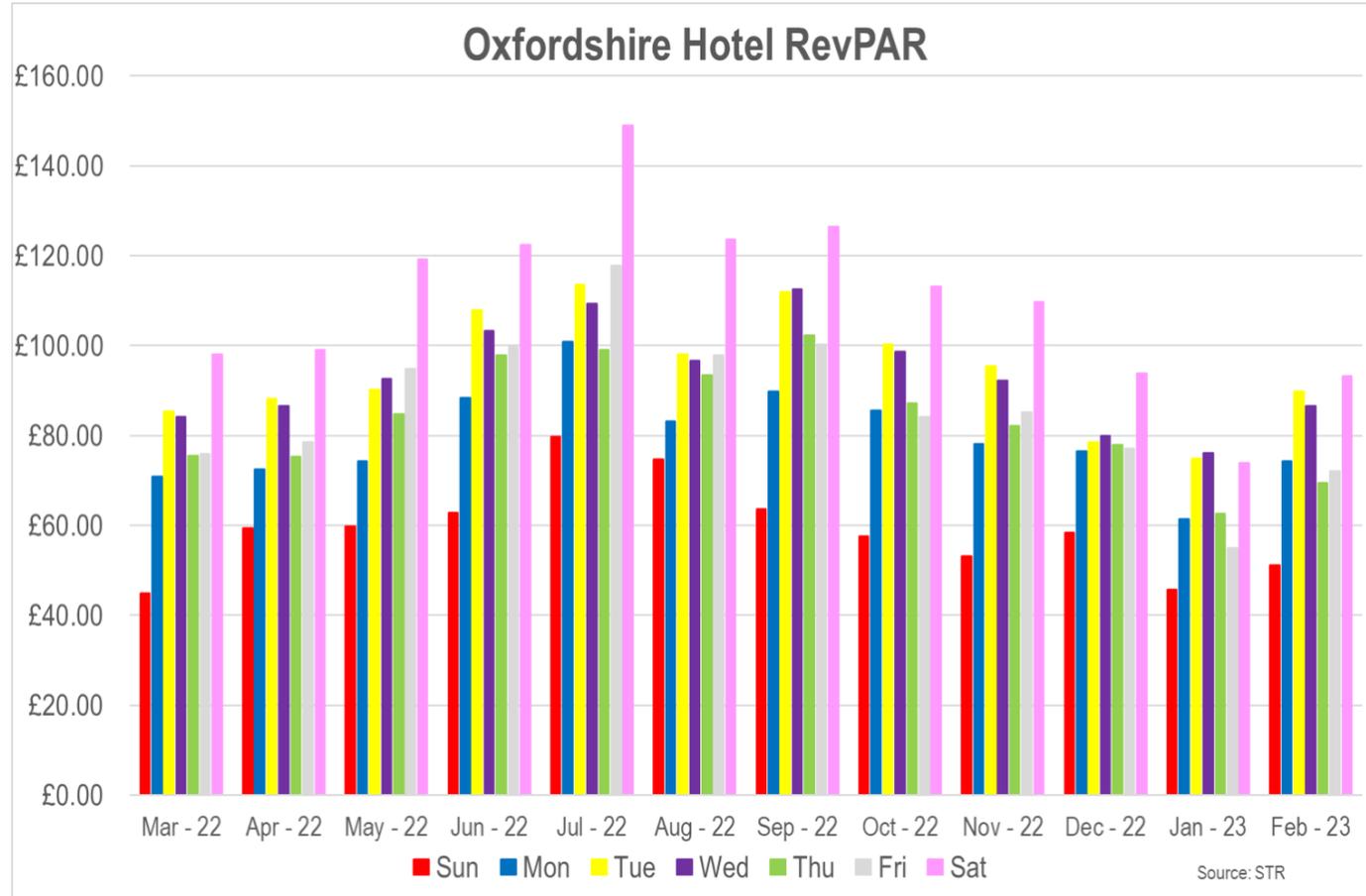
4 VISITOR MARKETS AND MARKET TRENDS

KEY FINDINGS

▶ Oxfordshire evokes rich associations in people's minds. Consumer research2 shows Oxfordshire is predominantly associated with history and heritage; it is also renowned as a centre for museums and galleries with a vibrant arts and culture scene. As a global icon, and the county's most visited destination, the city of Oxford is likely to be the driver of these top-of-mind associations.

▶ However, the same research also suggests people's idea of the county is more than its famous city with over half of people mentioning its attractive countryside as a reason to visit. There are opportunities to build on strengths in the county's profile for the active outdoors, its gardens and its food and drink offer, with around a third of people mentioning these as motivations to visit. More recessive features of Oxfordshire's reputation – cited by approximately only a quarter of respondents – focus on it being easy to get to and as a place to visit for shopping, as well as for events and festivals.

▶ Alongside Oxford, people's experiences of the county are most likely to be shaped by visits to Henley-on-Thames, Burford and Bicester.

▶ Profile data shows that couples make up 45% of all visitor groups to Oxfordshire with families and groups of friends being the next most popular.

▶ Visitors are most likely to arrive in Oxfordshire for a day trip. Short stays (overnight stays of less than a week) are undertaken by 40% of visitors, while long stays of more than a week are mentioned by only 6%.

▶ Visiting a pub, tearoom or restaurant alongside visiting attractions are the most popular activities undertaken by visitors (among almost two-thirds). 44% had visited a cultural venue or museum and a third had toured around the county. Around a quarter of people mentioned they had either been walking, attended an event or went on a special shopping trip when visiting the county.

▶ VisitEngland research among visitors to Oxford3 found that three-quarters of people who had taken a recent trip to the city highly rated its history and heritage, cultural offer and the quality of food and drink. However, areas where Oxford performed less positively versus other GB cities and large

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[2] Experience Oxfordshire Consumer Survey (March 2023)
[3] Oxford Destination Report, VisitEngland (2018)

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town were shopping and also transport connectivity – both in terms of reaching the city and then being able to navigate it easily once there. These themes are echoed in the more recent research at a county level by Experience Oxfordshire. Visitors to Oxford also registered lower trip satisfaction and were less likely to make a return trip when benchmarked versus other GB cities and large towns.

▶ Equivalent analysis for the Cotswolds (covering the entire geography, a separate analysis of the Oxfordshire Cotswolds is not available) demonstrates the strength of its reputation as a destination with a high-quality natural environment. It also performed positively on factors including history and heritage, food and drink, as well as being seen as welcoming and friendly. Trip satisfaction was on a par with the GB rural/countryside average with likelihood to return being slightly ahead of benchmark levels. This suggests that leveraging key assets from the Oxfordshire Cotswolds in visitor marketing may help to enhance the county's overall reputation as a destination with a compelling countryside experience.

▶ Domestic visitor profile data for Oxford shows the city under-indexes on visitors aged 45+. In the context of Oxford's renown as a university town this may be unsurprising. Nevertheless, with the trend for an ageing population, it will be important to understand any potential barriers to visiting for more mature cohorts. Given Oxford's comparatively weaker reputation for good transport links relative to other GB cities, this may suggest an issue with access for older visitors and one which would merit exploration. Nevertheless, Oxford is a well-liked city among Baby Boomers polled by YouGov, who score the destination more highly than either Millennials or Generation X cohorts. Therefore, Oxford appears to be in a good position to appeal to mature visitors if it can reach them with a meaningful proposition.

▶ The age profile of domestic visitors to the Cotswolds aligns with the GB destination average (45% aged between 18-44 and 55% aged 45+). Therefore, the Oxfordshire Cotswolds is likely well-placed to attract mature visitors to arrive and explore the wider county.

▶ Analysis of best prospect visitor segments for Oxfordshire suggests six target groups (three UK domestic and three international) who are well placed to deliver value growth for the county.   By lifestage, there are potential growth opportunities among a middle-aged and older cohort in the UK and internationally who could be attracted by the county's landscapes, heritage and cultural offer; UK and international visitors under 35 travelling without children searching for action-packed breaks full of novel experiences; UK-based families looking for family-friendly learning experiences and outdoor activities; plus adult groups aged under 40 from China and GCC markets attracted by high-end experiences.

▶ Business tourism is also a significant opportunity for Oxfordshire given its international profile in education, technology and science. A study by Oxford Brookes Business School in 2019 found that 'sustainable growth in the business visitor economy is both attainable and desirable' for Oxfordshire. Investment in a new multi-purpose venue was highlighted as central to achieving significant growth for business tourism with estimates that this type of venue could annually attract more than 350,000 visitors and value of up to £8m.

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▶ The travel market is currently characterised by uncertainty as a result of pandemic disruption, economic headwinds and geopolitical instability. This has heightened people's focus on their short-term needs and immediate circumstances, putting pressure on businesses to accommodate last minute changes and cancellations. Nevertheless, trends are emerging that are likely to have a medium to long-term impact on visitor behaviour. In the case of a growing desire to engage with the outdoors for wellbeing and the increased adoption of digital technology in researching and booking trips, the pandemic can be seen to have had a catalysing effect. Economic constraints are encouraging people to think about destinations closer to home and to seek value wherever possible. People's consciousness of their environmental impact also continues to grow. However, a lag between thought and action remains without the widespread and consistent adoption of sustainable practice among both businesses and consumers.

▶ Research among the county's residents by Experience Oxfordshire in March 2023 shows an almost universal appreciation of the importance of tourism to the health of the county's wider economy (95% saying tourism is 'important/very important'). Just under a quarter of residents also believe that tourism has a positive impact on their quality of life. However, a similar number believe the reverse with traffic congestion and concern about environmental impacts being key areas of concern. Therefore, addressing residents' concerns in these areas will be important in encouraging their support and advocacy for the future growth of tourism.

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VISITOR EXPERIENCES AND PERCEPTIONS OF OXFORD AND THE COTSWOLDS

Oxford

As the most visited destination within Oxfordshire, how visitors experience the city of Oxford is key to shaping perceptions of the wider county. Therefore, we have explored the strength of the Oxford experience to understand its likely effect on how people perceive the county.

Data is taken from VisitEngland research among GB domestic visitors and assesses different elements of their experience across the period April 2015 to January 2018. Oxford is benchmarked against other GB cities and towns included in the study, as well as a broader GB destination average. Results are shown in the graphic below:

Three-quarters rated Oxford 4 or 5 for 'quality of food and drink', 'opportunities for cultural activities' and 'history and heritage', with this being akin to or better than the case for GB cities more widely.

However, on a less upbeat note Oxford fell short of the performance of the typical GB city across many of the attributes, with this particularly the case for 'shopping opportunities', 'ease of getting to the destination' and 'ease of getting around the destination'. The city also scores below other GB destinations on the friendliness of its welcome.
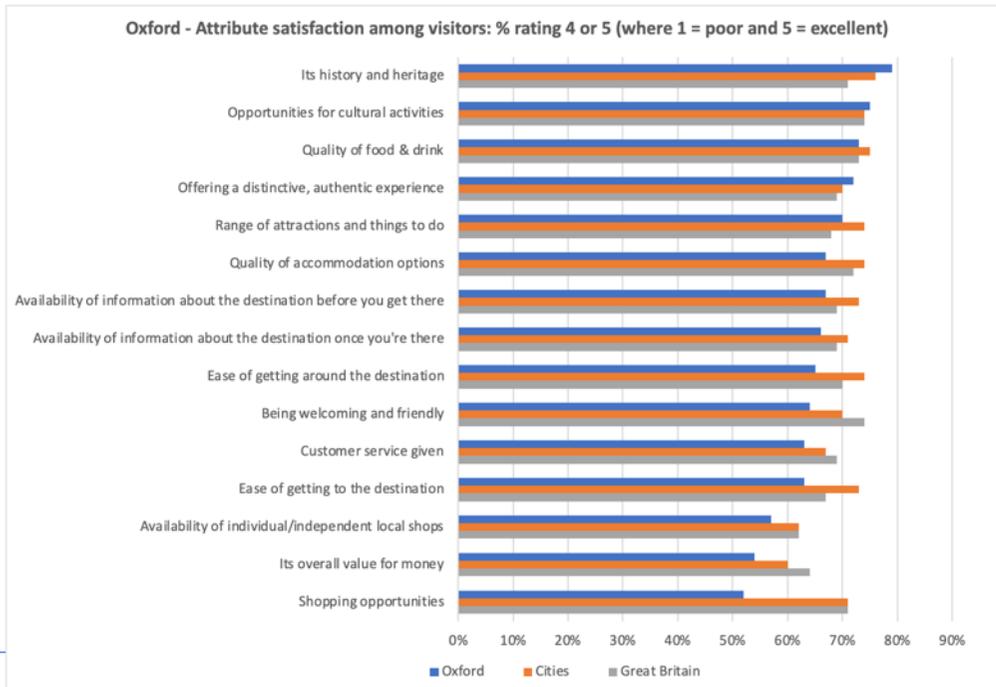
The Cotswolds

The same study also included the Cotswolds. Responses are shown below for the whole of the Cotswolds area (it not being possible to split out the Oxfordshire Cotswolds separately) and benchmarked versus a rural countryside average and the GB destination average:

Oxford - Attribute satisfaction among visitors: % rating 4 or 5 (where 1 = poor and 5 = excellent)

Over 90% of visitors rated the Cotswolds highly for its 'quality of the natural environment'. While more than four in five showed strong satisfaction with its 'history and heritage', 'quality of food and drink' and its 'being welcoming and friendly' with 'quality accommodation options'.

There may be an opportunity to create a positive halo for Oxfordshire and enhance its reputation around the natural environment by showcasing the landscapes and rural assets of the Oxfordshire Cotswolds in destination marketing for the county.

Cotswolds - Attribute satisfaction among visitors: % rating 4 or 5 (where 1 = poor and 5 = excellent)
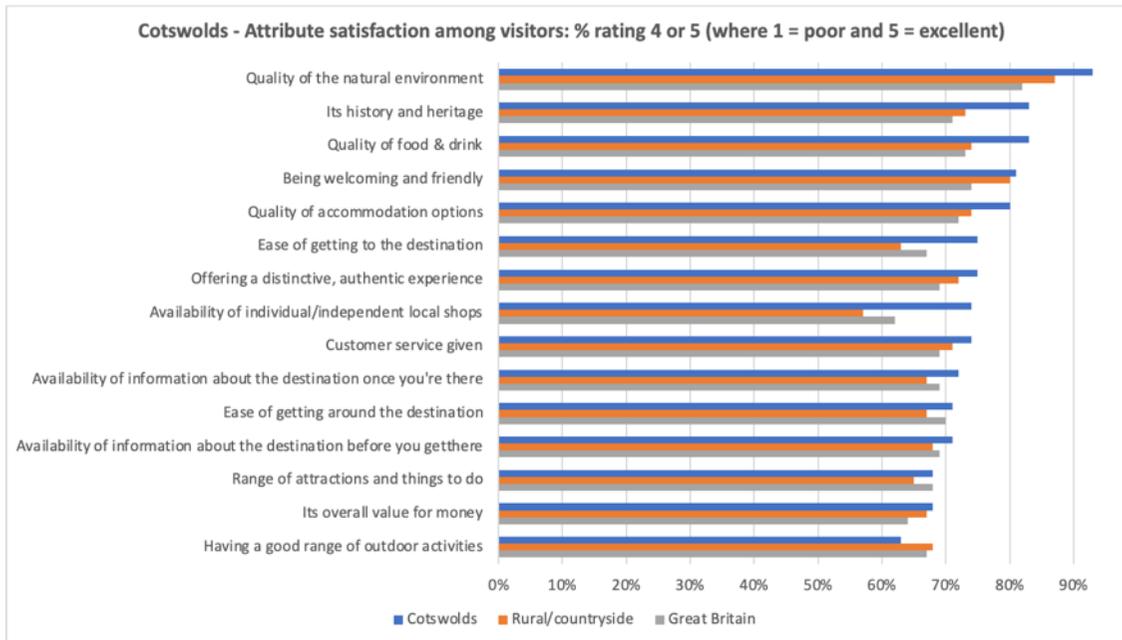
This research also asked GB domestic visitors about their likelihood to consider visiting selected destinations in the future and, if they had visited one these key destinations, to rate their satisfaction with their last trip and likelihood to return. Both Oxford and the Cotswolds were included in these questions.

Results are shown in the table below. Oxford is benchmarked against other GB cities large and towns; the Cotswolds is shown in the context of the rural/countryside average. The GB average is shown as a benchmark for both destinations:

Key Measures, Oxford & Cotswolds Destination Reports (2018)

	Oxford	GB City/Large Town Avg.	Cotswolds	GB Rural/ Countryside Avg.	GB Destination Avg.
Loyalists *I often/sometimes take holidays there and intend to in the next year/couple of years*	**13%**	18%	**20%**	17%	17%
Considerers *I have been/never been to this destination before but would like to in the future*	**51%**	49%	**57%**	49%	48%
Rejecters *I have been/never been to this destination before and am not likely to do so in the future*	**29%**	24%	**15%**	27%	25%
Satisfaction *Among recent visitors: % rating 4 or 5 where '5 is excellent and 1 is poor''*	**39%**	48%	**52%**	53%	49%
Likelihood to return *Among recent visitors: score out of 10 where 10 is 'definitely' and 1 is 'definitely not'*	**7.9**	8.4	**8.5**	8.3	8.4

Source: VisitEngland

Scores for Oxford showed a higher-than-average number of 'rejecters' and lower levels of satisfaction, with visitors slightly less likely to make a return trip in comparison to other GB cities/large towns and the overall GB destination average. The Cotswolds performed relatively strongly in terms of 'loyalist' and 'considerers' and in its ability to encourage return visits.

The implications for Oxfordshire as a destination brand are around demonstrating the diversity of its offer and leveraging the strengths of its key assets. Oxford stands out as an historic and cultural centre, aspects which are unique and compelling for visitors. However, research indicates the need to investigate and address perceptions around the city's retail offer and transport links in particular. Leveraging the Oxfordshire Cotswolds profile as a high quality and welcoming countryside experience is likely to pay dividends in terms of deepening people's understanding of the breadth of the county's visitor offer. Establishing a common thread that links all Oxfordshire experiences will be key.

Visitor age profile

A study undertaken by the National Tourist Boards during the middle part of the last decade provides an insight into the age profile of visitors to different destinations across Great Britain, one of which was Oxford.

We can note from the following chart that, in comparison with the average city destination, Oxford under-indexes on visits among those in older cohorts and conversely has a slightly younger visitor profile. These results may be unsurprising given Oxford's profile as a centre for study. However, whilst it is important to continue to attract younger visitors and build a lifelong relationship with them, understanding the levers which will attract mature visitors is a key consideration given the ageing trend in the wider population. Therefore, further investigation is needed to understand what may be driving this result and possible inhibiting factors for more mature visitors. Oxford's comparatively weaker profile for good transport links may indicate perceived issues around accessibility; a hypothesis that may deserve exploration.

Age profile of domestic visitors to Oxford
■ Oxford ■ Cities ■ Great Britain
Source: VisitEngland

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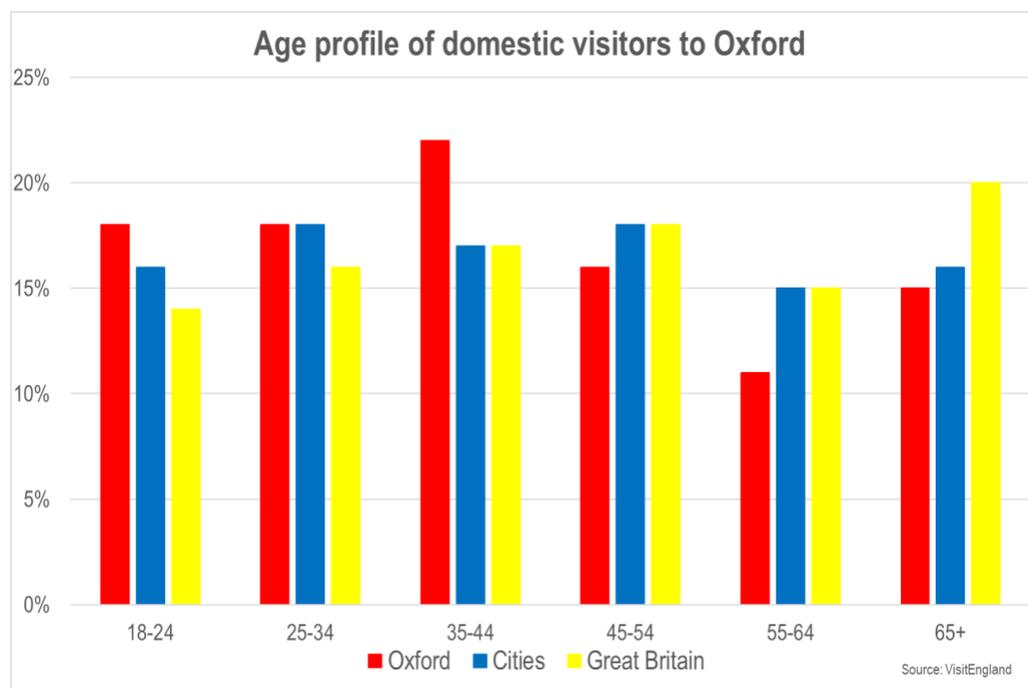
As a point of comparison, the same age analysis is available for visitors to the Cotswolds. Results show visitor age is largely in alignment with the GB destination average with 45% of adult domestic visitors aged between 18 and 44 years and 55% aged 45 years or over. Therefore, the Oxfordshire Cotswolds may be well positioned to attract more mature visitors to the county with the opportunity being to encourage them to explore Oxfordshire more widely.

Although data shows a relatively younger visitor profile for Oxford, we can observe from YouGov data that positivity for Oxford actually increases with age, with half of millennials but almost seven-in-ten of those classified as Baby Boomers having a positive opinion. Therefore, Oxford has a good perceptual base to build on amongst more mature visitors, if it can reach them with a meaningful proposition.

Overall Oxford was ranked 5th out of 48 places across the UK that are included in the study, behind York, Edinburgh, London and Cambridge. The Cotswolds is not included in the study.

Oxford liked by (%)

Source: YouGov
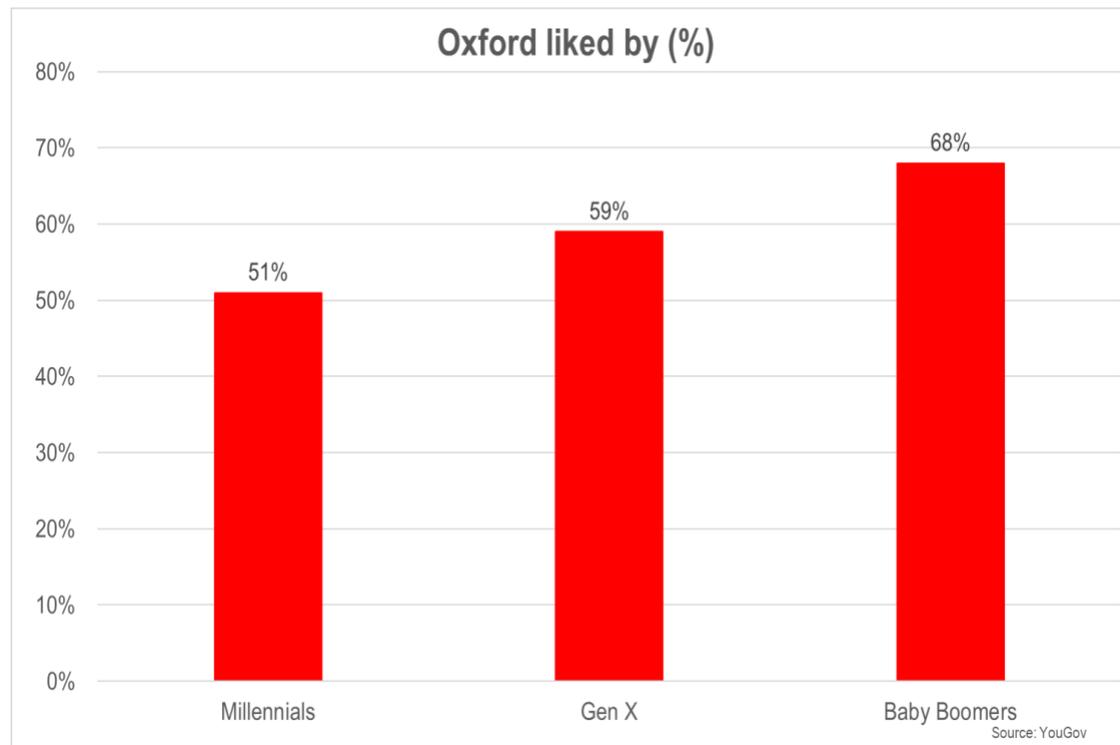
POTENTIAL GROWTH MARKETS

Analysis of domestic and international visitor segments suggests six visitor types who, alongside the business tourism market, can offer value growth for Oxfordshire. These best prospect segments have been identified on the basis of their likelihood to deliver value via longer overnight stays and engagement with a range of activities across the county.

UK	WHO THEY ARE AND WHAT THEY WANT	INTERNATIONAL	WHO THEY ARE AND WHAT THEY WANT
Country-Loving Traditionalists	• Couples aged 50+ travelling without children • Mid-affluence living in South East England • Countryside breaks • Heritage, outdoors & experiencing local culture – including food & drink	**Explorers**	• Typically 45+ travelling without children • Largest segment in Germany & Netherlands. Significant in France, Canada, Australia & USA • Mid-affluence; overseas trips a priority • Like a relaxed pace in small cities/countryside • Heritage, outdoors & experiencing local culture – including food & drink
Free & Easy Mini-Breakers	• Under 35s travelling without children • Willing to spend on trips • City breaks • Trips packed with activities & experiences • Events, culture, boutique accommodation, quality food & drink • Public transport & good digital connectivity	**Buzzseekers**	• Under 35s travelling without children • Largest segment in USA, Canada, Australia & France • Frequent travellers & will spend on experiences • Cities, plus rural locations that offer 'only here' experiences (e.g. active outdoors, events) • Boutique accommodation, quality food & drink • Public transport & good digital connectivity
Aspirational Family Fun	• Families with school-aged children • Affluent, living in London & SE • City breaks – but rural locations with outdoors activities also attractive • Family-friendly activities – especially entertainment, culture & events	**Culture-Buffs**	• Under 40, travelling in social groups (no children) • China & GCC • Travel trade a key intermediary • Image & brand-conscious – travel is a status symbol • Cities with 'kudos' – London+ trips an opportunity • 'Iconic' experiences to gain social media status

UK	WHO THEY ARE AND WHAT THEY WANT	INTERNATIONAL	WHO THEY ARE AND WHAT THEY WANT
Business Tourism – UK & International	• Non-discretionary business meetings • Corporate meetings and events • Driven by Oxfordshire's significant global profile in academia, technology & the life-sciences • A compelling and varied leisure offer		

Source: UK segments via VisitEngland, international segments via VisitBritain

Oxfordshire's Business Visitor Economy

A 2019 study by Oxford Brookes Business School into the Business Visitor Economy 'found evidence to suggest that the region is underperforming (compared to other regions); not achieving its potential and is turning away business'. The study concluded that Oxfordshire has the opportunity to grow the business visitor economy, noting that a better use of existing facilities would make a positive contribution in the short to medium-term and that significant growth would only be achievable through investment in new facilities – including a new multi-purpose venue – for meetings, conferences and events. The study estimated that such a new venue could attract approximately 350,000 visitors annually and generate revenue in the range of £7m-8m. The report outlined the need for partnership and collaboration (including the involvement of the private sector) around a shared vision for the business visitor economy in Oxfordshire to drive effective planning and long-term investment in order to realise the economic potential offered by this market.

HOW RESIDENTS VIEW THE VISITOR ECONOMY

Research shows that 95% of Oxfordshire residents recognise the importance of the visitor economy to the county's wider economy. However, there is a polarised response to how residents view the impact of tourism on their quality of life. While 23% of residents believe tourism delivers a positive contribution to their quality of life, 26% believe it results in a negative effect. Traffic congestion (61%) and environmental impacts (32%) are seen as the main negative consequences of tourism within the county.[4]

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[4] Experience Oxfordshire, Residents' Perceptions Research (March 2023)

TRENDS

We have identified six macro trends likely to influence travel behaviours in the medium in the long-term and with implications for the development and marketing of Oxfordshire as a destination.

TREND	DETAILS	EMERGING IMPLICATIONS FOR OXFORDSHIRE
#1: The Certainty of Uncertainty	• Pandemic, economic and an unstable geopolitical environment have had an **unprecedented effect** on tourism demand and supply • Visitor choices and behaviours will respond to global and national upsets affecting destination choice and activities, some changes may stick but it's likely that **fundamental motivations** will remain the same	• Heightened consumer expectation of **flexibility** in booking and **last-minute decision-making** that continues to place risks on businesses • Plan for a **multi-speed recovery** of inbound markets with near European and north American markets rebounding at a faster pace than east Asia
#2: Home Front	• **More time at home**, with ongoing WFH, means some people have invested in their homes rather than take breaks, whereas others may be desperate to get out • The line between being at work and not is **increasingly blurred** with many continuing to work while on holiday • **Decrease in commuting** has impacted the buoyancy of city centres	• The **quality of accommodation** needs to be as good as, if not better than, at home: high speed broadband provision and workspaces important in accommodation • **Towns and villages** may be **more vibrant** as visitors seek to live like a 'local' on a trip • Showcase what is **distinctive** about Oxfordshire so visitors can get 'under its skin'
#3: Fresh Adventures in the Fresh Air	• **Increased appeal** of the outdoors evident during the pandemic and set to continue • Greater awareness of **wellbeing benefits** from being outdoors. Gentle strolls, off-road cycling, nature photography - just some of the outdoor pursuits the pandemic encouraged	• Greater demand for **active** and **outdoor** experiences • **Raise awareness** of Oxfordshire's extensive outdoor assets – especially green routes – and encourage people to **experience more** of the destination outside of honeypots

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TREND	DETAILS	EMERGING IMPLICATIONS FOR OXFORDSHIRE
#4: All About Value	• While price matters, **value** for money and the **quality** and **distinctiveness** of the destination's offer are also crucial to justify people 'investing' in a trip • Inflation is at a high and the cost of living is **eroding** disposable income. The cost of travel is also set to increase • A tight labour market and inflation will put **upward pressure** on wage/business costs	• Domestic visitors may be looking to travel less and choose **destinations closer to home** – wanting to discover something new/different in their 'backyard' • Discretionary spend may be **reduced** so more visits may not result in more value • **Low £ rate** may encourage international visitors if they perceive a compelling reason to visit
#5: Going Digital	• An **accelerated** the use of digital during the pandemic; changes from video conferencing to booking flexibly will persist and evolve • Technology supports **accessibility** but a potential **barrier** for those who do not feel digitally 'savvy' • 'Effective use' – driven by **benefits**, rather than features – will be the measure success • More use of digital content, booking etc in destination on mobile devices	• Online planning and booking enables visitors to discover more about a destination and build an itinerary, so pre-visit **digital touchpoints are key** • Fast, reliable **internet access** is vital for businesses to be seen as competitive • **Hybrid business events** may continue and soften physical attendance, but widening the reach for future in-person events
#6: Changing Behaviours in a Changing Climate	• The UK Government has set a target to achieve **Net Zero** carbon emissions by 2050 • Tourism is a contributor to climate change and will be required to **reduce its impacts**. Despite acceptance of its importance this is yet to translate to widespread, consistent changes in business practice or consumer choices	• Nationally, new strategies, policies, funding and practices are being developed to guide and support a **coherent approach** • Responses will be required by the **destination** (target markets, transport etc), **businesses** (waste and energy reduction) and **visitors** (travel, behaviours, choices such as locally produced food & drink)

5 MARKETING REVIEW

SUMMARY

▶ Travel media sites tend to feature Oxford and The Cotswolds prominently on their websites as popular destinations to visit. Entries relating to the county are harder to find.

▶ Where Oxfordshire does have presence on travel media sites, it tends to be via blogs. Oxford City (as the 'city of dreaming spires'), Blenheim Palace and Bicester Village tend to feature as the county's highlight experiences within those blogs, particularly those aimed at an international audience. The county's frequent appearances as a filming location in major films such as Harry Potter and popular TV programmes such as Downton Abbey, are also used as a hook.

▶ Oxford city and parts of Oxfordshire (namely Blenheim Palace and some of the Cotswold villages) are common features in tour operators' day trip itineraries from London. Popular itineraries see them packaged with Stratford-upon-Avon, Windsor Castle, Warwick Castle, Stonehenge and Cambridge University.

▶ Oxfordshire's official destination marketing is delivered by its accredited LVEP Experience Oxfordshire which is the trading arm of the parent charity, the Experience Oxfordshire Charitable Trust, a not for profit public and private sector partnership organisation covering the whole of the county. Cotswolds Tourism, as a local authority-led LVEP for the Cotswolds, leads and coordinates the marketing of the Cotswolds as a visitor destination. So, there is some overlap in the official marketing of the western part of the county which falls both in Oxfordshire (Experience Oxfordshire) and in the popular regional tourism destination of the Cotswolds (Cotswolds Tourism). The marketing outputs from these two organisations at times seem to unnecessarily complicate the visitor experience and journey and in doing so, dilute the impact of their activity. For example the part of Oxfordshire that falls within the Cotswolds is promoted via the Cotswolds Tourism channels, its sub site the Oxfordshire Cotswolds (and associated social media channels) and via Experience

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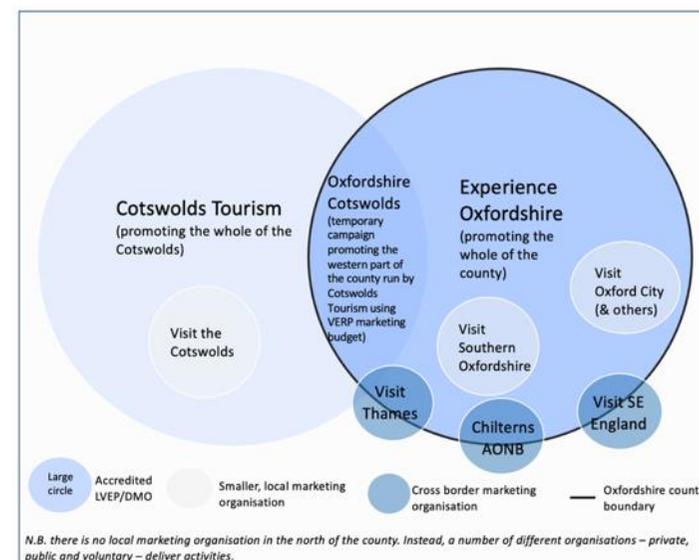
Oxfordshire. From a user perspective, there is a sense that marketing activity is delivered within a political geographic context rather than designed with a natural visitor journey in mind. This is complicated further when factoring in the several other unofficial platforms that are also promoting various parts of the destination. See diagram to the right.

▶ That being said, the content being created and distributed by Experience Oxfordshire and Cotswolds Tourism is generally engaging and of a high quality. This is reflected in the three recent marketing campaigns run as part of the Visitor Economy Renaissance Programme (VERP), all of which delivered impressive results.

TRAVEL MEDIA

We have looked at a range of travel media sites to see how they are promoting Oxfordshire and what key messages they are using. Our findings are recorded below.

Lonely Planet

▶ Centred around Oxford as 'the prime visitor destination' but with the surrounding towns and countryside offering 'excellent day trip options' and 'stop off destinations for travellers heading west into the Cotswolds'. Blenheim is featured as the county's 'major highlight'

Visit England

▶ Oxford (peruse the city of dreaming spires) and the Cotswolds (how to visit this bucolic beauty spot on a budget) and are featured prominently on VE Places to Visit home page – see image right.
▶ Blogs talk about the 'dreamlike quality' of the county, walking through parks, gardens and Cotswolds villages, and shopping at Bicester Village. It has a somewhat elitist positioning with a *'jaunt to Henley-on-Thames to see varsity teams row in posh regattas'* featured as a top thing to do.

Visit Britain

▶ Talks about Oxford rather than Oxfordshire, leading with its location from London 'just an hour by train'. Oxford is featured as a 'popular' city

Popular Places To Visit

Norwich
Spend a weekend in this beautiful city without breaking the bank ›

The Cotswolds
How to visit this bucolic beauty spot on a budget ›

▶ Predominantly heritage, the university and quintessential Englishness e.g. 'cobbled lanes and canals', supplemented by Harry Potter, shopping (Bicester Village), food and its location 'on the doorstep to the Chilterns, the Cotswolds and the baroque country pile of Blenheim Palace.'

▶ The Cotswolds is listed as a 'popular' countryside destination (Oxfordshire is not)

▶ Blenheim Palace features more prominently and frequently across the site than the overall destination

▶ Bicester Village features as one of Britain's five most iconic shopping destinations outside of London

Other

▶ Expedia gives a comprehensive overview of the county summed up in its final sentence…

> "Oxfordshire will peak your interest in the history of academia, while offering a taste of blissful rural England." Expedia

▶ Rough Guides packages Oxford with the Cotswolds and Stratford-upon-Avon

▶ Tripadvisor presents Oxfordshire as a destination but with no associated narrative, unlike Oxford which is hung on 'the city of dreaming spires' idea. According to Tripadvisor, the categories that Oxfordshire is great for, are film tours, bars, historical tours, the great outdoors, cultural tours and food & drink.

TRAVEL TRADE

Day trips from London

We have looked at some of the most popular tour operators offering day trips from London e.g. Evan Evans Tours and Golden Tours. Oxford city and parts of Oxfordshire are a common feature in several of their day trip itineraries which include:

- ▶ Windsor Castle, Stonehenge and Oxford

- ▶ Oxford and Cambridge Universities

- ▶ Blenheim Palace, Downton Abbey Village and the Cotswolds

- ▶ Warwick Castle, Shakespeare's England, Oxford and the Cotswolds

- ▶ Assuming that the visit to Oxfordshire as part of one of these trips lasted for 3+ hours, the visit will be counted within the 2016 International Passenger Survey inbound day visits data which showed that Oxfordshire saw around half a million day visits by overseas visitors that year.
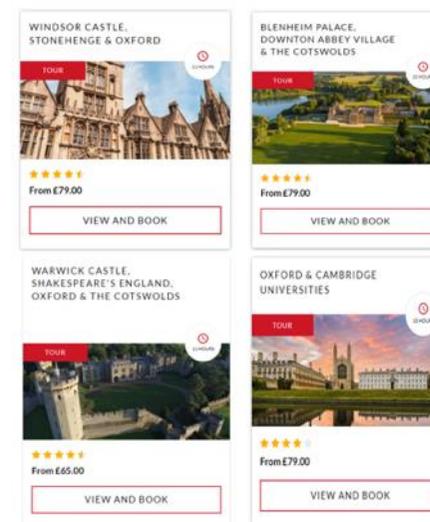
Overnight tour packages

According to Tour Radar, Oxford is included in 107 overnight tour packages, ranging from 2 to 38 days in length. Approximately 90% are fully guided group tours, with 60% being categorised as 'in-depth cultural'. June is the month with the largest number of tour departures.

REVIEW OF OXFORDSHIRE DMO CHANNELS

The following tables provide a snapshot of some of the key marketing channels used by Experience Oxfordshire and Cotswolds Tourism

Experience Oxfordshire	
Positioning – *Oxfordshire is a wonderful place to visit. With amazing architecture and history, beautiful villages, traditional market towns and hidden treasures there is so much to explore. It is home to famous literary figures, unique traditions and the city is famous for its dreaming spires skyline. Explore this website to discover more about Oxfordshire and what it can offer whatever the weather.*	
Markets – young adult groups, families	
Key themes – museums/culture/heritage, shopping, film & TV	
Experience Oxfordshire Website	Experience Oxfordshire typically gets annual page views of about 2.2m. Its visitors are split 68% UK, 32% international. There is a good use of video showcasing the visitor offer and diversity of experiences and there are ten nicely put together itineraries giving a flavour for destination wide activities e.g. Time Together, Fresh Air and Freedom, Arts & Culture. However, with nine headings, and various thematic subheadings, the navigation is quite complex meaning some of that content can be quite difficult to find. It has a range of bookable products including tours, attraction tickets, extensive events listings, and an integrated venue finder.
Social Media Channels Facebook – 9,600 followers Instagram – 8,200followers Twitter – 13,100 followers Linked In – 2,557 followers	Facebook – 'experience Oxfordshire and discover amazing architecture, beautiful villages and hidden treasure.' Regular posting but low number of followers and engagement Instagram – 'your official photo guide to #oxford and #oxfordshire' Fairly low number of followers and engagement Twitter – 'The Oxford & Oxfordshire Experts (Official DMO). We bring you updates from around the county so you can find your favourite spots to visit!'

	High engagement on Linked In.
Other	772k enewsletters sent out per year
	EO also operates residents reports, business reports and consumer surveys.

Cotswolds Tourism	
Positioning – *Welcome to the Cotswolds, a very special, very wonderful place. A short break or even an extended holiday in the Cotswolds will leave you wanting more and you'll be booking your next Cotswolds holiday as soon as you return home!* *The Cotswolds covers a huge area – almost 800 square miles – and runs through five counties (Gloucestershire, Oxfordshire, Warwickshire, Wiltshire and Worcestershire). One of the delights of visiting the Cotswolds is exploring the different areas, each with its own identity, yet all with those defining Cotswold features: golden stone and rolling hills, the 'wolds'.*	
Markets – not entirely clear but seems to be targeting a more mature audience, couples	
Key themes – countryside (walking), heritage, food and drink (artisan, farmers' markets, festivals)	
Cotswolds Tourism Website	The site promotes the whole of the Cotswolds ('almost 800 sq. miles' and running through five counties – Gloucestershire, Oxfordshire, Warwickshire, Wiltshire and Worcestershire). Throughout the site, the quality of images used is high with a good mix of attractions, landscapes, accommodation and townscapes, although there are very few visitors featured in the images and the use of video is limited which means it tends to lack some engagement with the user. Its navigation is simple but effective arranged by: • Inspire me • Do

	- Stay - Eat & Drink - What's On There is an integrated Booking.com availability search function for some accommodation providers but generally there is little bookable product featured on the website. There are a number of member ads featured throughout the site, some of which have quite poor display quality compared to the rest of the site material. In 2022, the CT website had over 1.5m users. Visitation was consistent throughout the year with a slight peak in May and September. Users originate from UK (approx. 70%), US (15% - a large rise in 2022 compared with previous years) and Australia (1%). Domestically, London is by far the most popular place of origin (26%), followed by Birmingham (2%), Bristol (1.45%) and Cheltenham (1%).
Social Media Channels Facebook – 47,981 Twitter – 25,700 Instagram – 69,334	Domestically, Facebook and Instagram followers skew towards London residents. Internationally, followers tend to live in USA, Italy and Australia. Overall, social media content tends to profile individual members' news, products etc rather than having a destination focus. Facebook content is posted regularly, generally around heritage, market towns and gardens. It is focused on announcing (rather than sharing) members' news, events, developments etc. Again, visitors featuring in imagery are few and far between. Engagement is consistently pretty good. Instagram – regular posting, good engagement, nice use of story highlights by theme e.g. outdoors, heritage, food & drink. The strapline, 'welcome to the #Cotswolds , a very special, very wonderful place' could be more descriptive in terms of its positioning of the destination.

	Twitter – less content and lower engagement rates than on other social media channels. YouTube – content quite out of date.
Marketing reports: *Digital Health Check, 2021* *Travel Trade Involvement Business Survey, 2023*	A **Digital Health Check Report** carried out in 2021 showed that there is a lack of digital marketing knowledge, confidence and skills amongst Cotswold Tourism members. Whilst 100% of businesses do have a website and social media presence, only 37.6% of the 550 members have a marketing plan. It showed that Facebook is the preferred social media platform, followed by Instagram and then Twitter but that businesses are not posting regularly and very few are running social media ads regularly. Learning opportunities are in areas such as Search Engine Optimisation, social media, website management and auditing and putting together marketing emails. **The Travel Trade Involvement Business Survey** showed that despite a recognition of the opportunity offered by international markets for individuals (FITs), leisure and MICE, the key focus for CT members is the domestic market, with a strong bias towards holidays and direct business – 10% are targeting day trips and 86% want to be part of a domestic holiday itinerary. A very limited number of CT members currently work with the international travel trade (with only 16% having a trade ready product), and there is limited appetite for future engagement. Of the interest that does exist, OTAs are the preferred route to market – linked to a sense of 'quick wins' by reaching consumers through low effort engagement. 29% are actively targeting MICE business. There is also a low awareness of the Cotswold Tourism trade website resource and trade engagement at trade shows remains low. Future training and engagement techniques for working with the travel trade and distribution channels (including TXGB) may be helpful for the region. Some of the qualitative feedback from the travel trade showed that Oxford is seen as a base for Cotswolds tours, alongside Bath.

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| Other | There is a separate part of the main website branded as the Oxfordshire Cotswolds – this is a hangover site, funded by West Oxfordshire District Council when the main Cotswolds site (which was funded and influenced by the Gloucester LEP and County Council) was developed. There don't appear to be any long term plans for this site but according to Cotswolds Tourism, it has been useful in the short term to apply for and use funds that have been secured via VERP (Oxlep funding).

It positions Oxfordshire Cotswolds as:
Located within easy reach of London and Oxford, the stunning Oxfordshire Cotswolds is the perfect location for a short break or holiday with family or friends.

There's so many things to do, with everything from historic houses like Blenheim Palace to animal attractions like Cotswolds Wildlife Park, as well as miles of unspoilt countryside to explore. What's more the area is dotted with towns and villages of honey-coloured stone including the bustling towns of Burford, Chipping Norton, Witney and Woodstock. Here you will find great shopping at local, independent retailers, and a wonderful choice for food and drink.

There's a great choice of accommodation for your stay too, whether you prefer to relax in a hotel or inn, enjoy a homely bed & breakfast or make yourself at home in a delightful self-catering cottage.

Don't forget to find out what's on in the Oxfordshire Cotswolds when you visit, there is a lively programme of year round events and not to be missed unique events which you won't find anywhere else.

Be inspired to visit the Oxfordshire Cotswolds on your next short break or holiday and plan your trip today.

Cotswolds Tourism also operates several social media channels under the Oxfordshire Cotswolds banner. Both the Oxfordshire Cotswolds Facebook and Twitter accounts have 6,000 followers. |

OTHER CHANNELS

Elements of the region are also promoted via the following websites:

- ▶ Visit South East England – Run by Tourism South East, this is the official tourism website for South East England. It leads with the city of Oxford as 'the city of Dreaming spires' offering its visitors plenty of attractions. The wider county is described as being a key filming location in popular TV dramas such as Downton Abbey and films such as Harry Potter.

- ▶ Visit Southern Oxfordshire – South Oxford District Council's 'dedicated tourism website' includes a Google map which plots key tourism assets and a downloadable leaflet 'Visit Vale of White Horse Country'

- ▶ Visit North Oxfordshire – it is unclear who operates this website which dates back to 2017 (but with content published as recently as 2022), although it appears to be built by a US-based web designer. Content is blog-based but with no audience engagement. The homepage appears to have been hacked with content of an adult nature.

- ▶ Oxfordcity.co.uk – 'a destination guide and business directory' for Oxfordshire, managed and owned by Oxfinder, an Oxfordshire-based digital marketing agency.

- ▶ Visitthecotswolds.uk – 'the number one guide to exploring the Cotswolds'.. It has 225k followers on Instagram with high post engagement but it is unclear who is operating it.

REVIEW OF VISITOR ECONOMY RENAISSANCE PROGRAMME MARKETING CAMPAIGNS

OxLEP is currently managing and delivering the Visitor Economy Renaissance Programme (VERP), part of which sees the delivery of nine funded strategic marketing campaigns led by the county's two DMOs.

Three campaigns have been delivered to date. These are detailed in the below table along with their topline results (note, at the time of writing – March 23 - these are provisional results):

Campaign overview	Lead	Budget	Target markets	Channels	Results
"Hygge" Cosiness and conviviality - roaring fires, food and drink	Cotswolds Tourism, Autumn 22	£10-£15k	▶ Pre-nesters ▶ Empty nesters ▶ Parents 'escaping' for a short break	▶ External advertising - Time Out ▶ Content Creator/influencers ▶ Promoted posts ▶ Website (Oxfordshire Cotswolds) ▶ Owned social media channels	New likes and follows – 1,082 Page views – 10,868 Clicks – 7,635 16 businesses included
"Made Here" Amazing things made locally (two strands - eshop and shop local)	Cotswolds Tourism, Winter 22	£10-£15k	▶ London residents ▶ Local residents	▶ External advertising – Metro London, Oxford Mail ▶ Influencers, product testers ▶ Promoted posts ▶ Website and blogs	Reach – 609,842 New likes and follows – 2014 Page views – 13,258 Send volume – 141, 436 Impressions – 236,786 Clicks – 14,231 50 business included

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Only in Oxfordshire Local food, drink and producers, accommodation, attractions, Christmas events, artisan crafts, shopping and celebrations "Only in Oxfordshire. Not far from home but a world away"	Experience Oxfordshire, Autumn/Winter 2022	£94k (total commission for three campaigns £290k)	▶ Off peak short breaks	▶ Campaign webpages (county and district level – Oxford, Cherwell, South, Vale and West) ▶ 3 minute campaign videos ▶ Five 2/3-day itineraries Paid digital ads (Facebook, Instagram, native Youtube, PPC and display) ▶ Organic social media ▶ Visitor newsletters ▶ Competitions ▶ Radio advertising (Jack FM) ▶ PR	Final results: Individuals engaged – 10.9m Video views – 440k Page views – 104k Competition entries – 24k 127 Oxfordshire-wide accommodation, food & drink, shop local and attraction providers

The campaigns took two different approaches. Experience Oxfordshire took a destination-wide approach, inspiring interest and engagement through itineraries, PR and driving traffic to a campaign landing page. Cotswolds Tourism's aim was more around brand building and promotion of individual businesses.

The remaining six campaigns will be delivered between now and March 2024. They are:

▶ "Slow down, make time" – walking, cycling, natural world and sustainability. Led by Cotswold Tourism – Spring 2023

▶ Experiential Oxfordshire: Arts, Culture & Events – off peak short break focus on health and vitality, spiritual and physical (inc arts scene, outdoor exploration and activity), development of an online culture guide. Led by Experience Oxfordshire – Spring 2023

▶ "Insider Knowledge": Hidden gems and local secrets. Led by Cotswolds Tourism – Summer 2023

▶ "Our four-legged friends": All about dogs and how dog friendly the businesses are. Led by Cotswolds Tourism – Autumn 2023

▶ Experience the Oxfordshire Welcome, hospitality at its best – off peak short breaks in Oxfordshire, Christmas and New Year 23/24, Launch Welcome Oxfordshire Scheme. Led by Experience Oxfordshire – Autumn 2023

▶ "Out of the Ordinary": Special, quirky and surprising – activities, attraction, accommodation. Led by Cotswolds Tourism – Early 2024

OTHER RECENT OXFORDSHIRE CAMPAIGNS

In recent years, Experience Oxfordshire has also run the following marketing campaigns, securing £170k of funding for Escape the Everyday activity:
  ▶ Escape the Everyday in Oxfordshire (with VisitEngland)
  ▶ Escape the Everyday in Oxford (with VisitEngland)
  ▶ Inspirational Oxfordshire
  ▶ Rediscover Oxford
  ▶ Opening up Oxfordshire

6 PRODUCT ANALYSIS

KEY POINTS

▶ Oxfordshire has an impressive visitor offer. Oxford University, Blenheim Palace and The Cotswolds are world-famous attractions, leading the county's rich and distinct visitor experience. The heritage and beauty of the area are apparent throughout, whether exploring the city of Oxford, visiting grand, country estates, punting on the River Thames, touring picturesque, Cotswold villages, or rambling through rolling, English countryside. Beyond the prominent experiences of the university, country houses and quintessential English landscapes, there is a varied array of attractions and activities. At Henley-on-Thames there is a River and Rowing Museum, various boating activities and the famous Henley Royal Regatta.   British motoring heritage is represented at a few Oxfordshire attractions, as well as at Silverstone and the British Motor Museum in nearby Northamptonshire and Warwickshire. A number of breweries, distilleries and vineyards offer tours, tastings and additional visitor experiences, including Shire horses, Alpacas and Food & Drink festivals. There is a relatively small but interesting selection of family attractions, including a crocodile zoo, fairy tale farm, Story Museum, Oxford Castle & Prison and Cotswold Wildlife Park. The choice of walking and cycling routes is extensive and includes sections of long distance and national trails. Some notable literary/film/tv connections provide further visitor interest and many themed walks/tours are available. They include Harry Potter, Alice in Wonderland and Inspector Morse (Oxford University and Oxford city), Downton Abbey (Bampton village), and Midsomer Murders (Wallingford).

▶ This product analysis is not intended to cover all visitor attractions and products. Rather we have focussed on distinctive features that Oxfordshire offers as a visitor destination. These are considered to be:

- Oxford city
- Oxfordshire country houses and gardens
- Cotswolds towns & villages
- Family attractions
- Countryside, walking and cycling trails
- Henley-on-Thames
- British motoring heritage
- Breweries, distilleries and vineyards

- Literary, film and TV connections

Additional experiences are:

- Shopping: Bicester Village is a popular designer shopping village with more than 150 luxury boutiques and attracting over 7 million visitors annually. Oxford Covered Market is a historic indoor market which has recently secured funding for redevelopment.
- Visual Arts: Modern Art Oxford and Oxfordshire Artweeks provide important contemporary art space and art celebration for the county.
- Events: Oxford Festival of the Arts; Truck music festival in Steventon; The Big Feastival at Alex James' Farm in Kingham; The Wilderness Festival.

▶ There are close to 1,000 visitor accommodation establishments in Oxfordshire, providing approximately 36,000 bedspaces. Three quarters of establishments and two thirds of total bedspaces are serviced. (Note: 2016 data)

▶ The accommodation product is of high quality, with many luxury hotels and an interesting range of choices, from grand, city centre hotels in Oxford, to riverside boutique hotels in Henley, and historic, characterful country inns in the Oxfordshire Cotswolds. Two, luxury destination resorts are Heythrop Park in Chipping Norton and Soho Farmhouse in Great Tew. Self-catering provision, again has an emphasis on luxury and Oxfordshire/Cotswold charm. Just over 3,000 active rentals are available through AirBnb, 42% of which are available full-time.

▶ There is a good supply of touring camping and caravanning sites in the county, mostly small rural sites. Three larger sites are Hardwick Parks, Standlake with 196 pitches and river watersports; Lincoln Farm Park, Standlake with 90 pitches, a leisure centre with 2 pools; Swiss Farm Touring and Camping, Henley with 125 pitches, a fishing lake and outdoor swimming pool. There is also some glamping provision through small glamping sites/clusters of glamping units, as well as individual shepherd's huts/safari/bell tents in various locations.

▶ Oxfordshire's conference and meeting provision is predominantly supplied through the county's larger hotels and Oxford University's colleges and venues. Largest capacities are: Oxford's New Theatre (1,785), The King's Centre (1,000), Sheldonian theatre (717), Oxford University Union (635), The Kassam Stadium (600), Oxford Town Hall (500).

▶ Some significant pipeline projects include: Great Wolf Lodge - an indoor water-part resort; Oxford United FC new stadium and conference facilities; Mullin Automotive Experience – classic car museum and luxury accommodation; Bicester Motion Masterplan – a major motor attraction development. The proposed Wilder Spaces development from Berkshire, Buckinghamshire and Oxfordshire Wildlife Trust (BBOWT) could also support Oxfordshire's credentials as a leader in sustainable tourism.

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VISITOR ATTRACTIONS

A map of key attractions by theme can be found here showing the location of major assets and experiences.
https://www.google.com/maps/d/edit?mid=1PXGFMV6AUxxB4dQ0LzDCKjiwNfBhTbo&usp=sharing

In the following table, we present nine signature experiences/prominent themes for Oxfordshire, with their associated 'hero products'. They have been selected from a combination of listings on Experience Oxfordshire, Cotswolds.com, Visit South East England, Visit England, Trip Advisor, Timeout, Google, Culture Trip.

Oxfordshire's Visitor Attraction Offer

Signature experience/ Theme	Hero products	Location	Description	Trip Advisor Ranking -*Things to do in Oxfordshire*
Oxford City	University of Oxford	Oxford	World-famous university with 39 colleges and 5 private halls. Variety of tours available.	7
	Ashmolean Museum	Oxford	Oxford University's museum of art and archaeology. Britain's oldest public museum, with collections spanning continents and cultures. Rooftop bar & restaurant. (931,000 visits in 2019)	2
	Bodleian Library	Oxford	World-famous library, opened in 1602. Largest academic library system in the UK. (761,000 visits in 2019)	1
	Christ Church	Oxford	One of Oxford University's largest colleges and Oxford's Cathedral. Great Hall, Picture Gallery. Connections to Alice in Wonderland and Harry Potter.	8
	Oxford University Museum of Natural History	Oxford	Award-wining natural history museum. Striking Victorian neo-Gothic architecture. Café, shop. (792,000 visits in 2019)	6

	Pitt Rivers Museum	Oxford	Museum of archaeology and ethnography founded in 1884. Vast and otherworldy collection of treasures from around the world. Gift shop. (468,000 visits in 2019)	5
	Boating	Oxford	Punts, chauffeured punts, rowing boats and pedalos available for hire at Cherwell Boathouse and The Magdalen Bridge Boathouse. Cherwell Boathouse restaurant with inside and outside dining.	
	Christ Church Meadow	Oxford	Scenic park and 2-mile walk through meadows and along river bank.	11
	Port Meadow	Oxford	Large area (440 acres) of common land, alongside River Thames. SSSI.	23
Oxfordshire Country Houses and Gardens	Blenheim Palace	Woodstock	UNESCO World Heritage Site. Birthplace of Sir Winston Churchill. Magnificent Baroque Palace, 2,000 acres of 'Capability' Brown parkland, 90 acres of formal gardens, walled garden, tours, exhibitions, events, cafes, restaurants, shop. (985,000 visits in 2019)	4
	Broughton Castle	Banbury	14th Century fortified manor house with moat. Gardens, tea room, gift shop.	16
	Grey's Court	Henley-on-Thames	14th Century country house, series of walled gardens, tea room, shop, second-hand book shop. National Trust. (146,000 visits in 2019)	20

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	Buscot Park & The Faringdon Collection	Faringdon	Family home of Lord Faringdon. Late 18th Century house, pleasure gardens, woodlands walks, art collection, tea room, shop. National Trust.	37
	Oxford Botanic Garden & Arboretum	Oxford	The UK's oldest botanic garden, founded in 1621. 5,000 different types of plant from around the world, walled garden, 7 display glasshouses. Harcourt Arboretum with 130 acres of rare or endangered trees. Shop. (174,000 visits in 2019)	18
	Waterperry Gardens	Waterperry	8 acres of ornamental gardens. Plant centre, garden shop, gift barn, gallery, rural life museum, teashop. Crafts and gardening courses.	40
	Rousham House & Gardens	Rousham, Woodstock	One of England's most important gardens, designed by William Kent (18th Century) and remaining unspoilt. Pleasure grounds and 3 walled gardens.	43
	Stonor Park	Henley-on-Thames	Stonor family residence. Historic House with 250 acres of grounds and gardens. 'Tumblestone Hollow' – a large adventure play area. Pizza hut, visitor centre, gift shop. Extensive events calendar.	66
	Kelmscott Manor	Kelmscott	Grade 1 Listed farmhouse built around 1600. Summer home of William Morris, with his collections of furniture, textiles, pictures, carpets, ceramics, metalwork.	*12 (things to do in Gloucestershire)*
	Chastleton House	Chastleton	Built in the early 1600s and owned by the same family until 1991, Chastleton is a a superb example of Jacobean architecture both inside and out.	*5 (things to do in Moreton-in-Marsh)*

| Cotswolds towns and villages | Cotswolds towns and villages | Cotswolds | Many beautiful, quintessentially English towns and villages such as Woodstock, Chipping Norton, Minster Lovell, Burford, Witney, Bampton, Kingham, Great Tew, Shilton. | |

Family attractions	Cogges Manor Farm	Witney	13th century manor house and scheduled ancient monument. 17 acres of grounds, walled garden, farmyard, events, festivals, workshops, classes, café, shop. Downton Abbey film location.	68
	Cotswold Wildlife Park & Gardens	Burford	160 acres of parklands. Diverse collection of species. Hands-on animal experiences. Gardens.	*1 (things to do in the Cotswolds)*
	Oxford Castle & Prison	Oxford	Costumed guided tours, murder mystery events, ghost tour, escape room, shop.	246
	Crocodiles of the World	Brize Norton	UK's only crocodile zoo with more than 130 crocodiles, alligators and caimans.	10
	Fairytale Farm	Chipping Norton	Mix of fairy tale experiences, animals and adventure play. Café, shop, events. Fully accessible. (38,000 visits in 2019)	30

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	The Story Museum	Oxford	Museum celebrating story telling around the world. Different story worlds. Talks, events, workshops, performances in the museum's studio theatre. Café, gift & book shop.	52
	Didcot Railway Centre	Didcot	Living museum set around 1932 engine shed, with collection of Great Western Railway steam locomotives, carriages, wagons, artefacts, steam train rides. (44,000 visits in 2019)	184
	Chinnor and Princes Risborough Railway	Chinnor	Steam railway alongside Chiltern Hills. 1-hour round trip. Station café, shop. Open Sundays, Bank holidays and selected Saturdays, March – October.	214
Countryside, walking & cycling	The Chilterns AONB	Chilterns	Area of Outstanding Natural Beauty covering 324 square miles, including Henley and Wallingford, stretching north to Hitchin.	
	Cotswolds AONB	Cotswolds	Area of Outstanding Natural Beauty covering 800 square miles and 6 counties, including Oxfordshire.https://www.visitbritain.com/en/destinations/england/cotswolds	
	Oxfordshire & Cotswolds walks	Oxfordshire & Cotswolds	200+ walks available through the 'Oxfordshire Walks' app, including Chiltern Hills & Warburg Nature Reserve, Chimney Meadows, Uffington White Horse, Christmas Common, Windrush Valley, Badbury Hill, Rushy Common. Suggested Cotswolds walks are: Burford, Woodstock & Blenheim Park, Chipping Norton, Swinbrook, Minster Lovell, Charlbury,	

			Milton-under Wychwood, Spelsbury, Ascott-under-Wychwood, Stonesfield.	
	Thames Path National Trail	Cotswolds to London	Long distance National Trail (185 miles) from the source of the Thames in the Cotswolds to Woolwich, London. Links to a short, circular walk around Christ Church Meadow.	76
	The Ridgeway National Trail	Includes White Horse Hill to Thame	140km National Trail for walkers, cyclists and horse riders, stretching from Avebury in Wiltshire to Ivinghoe Beacon in Buckinghamshire. Oxfordshire section from White Horse Hill to Thame.	
	The Oxfordshire Way	Includes Henley	Walking route from Bourton-on-the-Water in Gloucestershire to Henley. Links the Heart of England Way with the Thames Path National Trail.	
	The Chiltern Way	Includes Ewelme	134-mile circular route with 3 optional extensions. Goes through Ewelme, Wallingford.	
	Hanson Way	Oxford to Didcot	14-mile route from Oxford to Didcot. On National Cycle Network NCN5. 50% traffic-free.	
	The Chilterns Cycleway	Includes Henley and Wallingford	170-mile circular route around the Chilterns Area of Outstanding Natural Beauty. Gateway towns include Henley and Wallingford. On-road route.	
	Cotswold Line National Cycle Route	Oxford to Worcester	Route following Cotswold Line railway from Oxford to Worcester. Cycle in one direction (short/long stages) and get the train home.	
	Thames Valley cycle route	Oxford to London	99-mile cycle route from central London to Oxford. NCN 4,5 and 51. 48% traffic-free. Includes some sections of the Thames Path National Trail (see above).	

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Henley-on-Thames	River and Rowing Museum	Henley	5 permanent galleries exploring the River Thames, Rowing, Henley town, British artist John Piper, Wind in the Willows experience. Community gallery, shop, café.	51
	Boating	Henley	Boat trips down the Regatta course (Hobbs of Henley and Salter's Steamers). Punts, rowing boats canoes and motor boats for hire.	
	Henley Royal Regatta	Henley	5-day sporting spectacle. One of the longest established sporting events in the country.	127
	The Henley Distillery	Henley	See distillery section below.	63

British Motoring Heritage	Nuffield Place	Huntercombe, Henley	Home of William Morris, founder of the Morris Motor Company. National Trust property.	72
	Oxford Bus Museum	Long Hanborough, Witney	Tells the story of bus and coach travel around Oxfordshire over the last 130 years. There is also a Morris Motors Museum and a Historic Cycles collection	45
	Bicester Heritage	Bicester	UK's only hub for historic motoring excellence. Founded in 2013, now with 45 specialist automotive businesses. Sunday	73

			Scramble events have hundreds of classic and collector cars, special displays, family activities. Each Sunday Scramble attracts up to 10,000 visitors.	
	The Aston Martin Museum	Drayton St Leonard, Wallingford	Small museum displaying several Aston Martin cars alongside engineering displays and models. Pre-booked visits only.	79
	Silverstone Interactive Museum	Silverstone, Northamptonshire	Celebrates the past, present and future of Silverstone and British motor racing. Over 60 hands-on exhibits, iconic cars and bikes, Heritage Track Trail, café, shop. Located 7 miles from Oxfordshire border.	*22 (Things to do in Northamptonshire)*
	British Motor Museum	Gaydon, Warwickshire	World's largest collection of historic British cars. Museum, collections centre, exhibitions, events, café, shop. Located 7 miles from Oxfordshire border.	*6 (Things to do in Warwickshire)*
Breweries, distilleries and vineyards	Hook Norton Brewery	Hook Norton	Family-owned, Victorian Tower Brewery. Tours, Shire horses, shop, café, museum, meeting rooms.	3
	Oxford Artisan Distillery	Oxford	Craft distillery. Whisky tours, distillery tours, garden bar, shop.	13
	The Henley Distillery	Henley	Gin distillery. Tour and tasting, signature gin experience, shop.	63
	Tap Social Movement	Four venues across Oxfordshire	A social enterprise craft brewery, bakery and hospitality business that creates training and employment for people in prison and prison leavers. Varied events calendar	*2 (for nightlife in Oxford)*

	Loose Cannon Brewery	Abingdon	Brew 68 different beers spanning permanent, seasonal and specialist lines. Monthly brewery tours and weekend Taproom opening	*4 (Oxfordshire Breweries)*
	Lovibonds	Henley	Produce American-style craft beer. Run tasting room events	*5 (Oxfordshire Breweries)*
	Chiltern Valley Winery and Brewery	Hambleden, Henley	Vineyard, Winery, Brewery, Liqueur making, shop, tours & tastings, B&B accommodation and farmhouse lets.	9
	Brightwell Vineyard	Wallingford	16-acre vineyard, shop, tours and tastings. Thames Valley Food and Wine Festival – weekend event in June.	170
	Sunnyhill Vineyard	Horspath	Vineyard & Winery (weekends only), tours, tastings, Alpaca walking experience.	
	Freedom of the Press	Minster Lovell	A small 'urban winery on a hill in the Cotswolds'. Open for tours and tastings every Saturday July-August. Ad hoc events	

Literary, film and TV connections (many tours available)	Harry Potter	Oxford University	The university was used for a number of scenes in the Harry Potter films, including the dining hall at Christ Church which was the Hogwarts Great Hall.	
	Alice in Wonderland	Christ Church	Lewis Carrol wrote Alice in Wonderland at Christ Church. Alice Liddell was the daughter of the Dean of Christ Church and inspired the character of Alice in Wonderland.	

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	Inspector Morse	Oxford	A number of Oxford locations were used in the filming of Inspector Morse and spin-off programmes.	
	Downton Abbey	Bampton and Witney	Bampton village and Cogges Manor Farm in Witney were used as filming locations for Downton Abbey.	
	Midsomer Murders	Wallingford	Many villages in south Oxfordshire were used for the filming of Midsomer Murders, including Wallingford.	
	Lewis Carroll, JRR Tolkien, CS Lewis, Philip Pullman	Oxford University	All held various roles at Oxford University, with many aspects of the university and Oxford inspiring their works.	
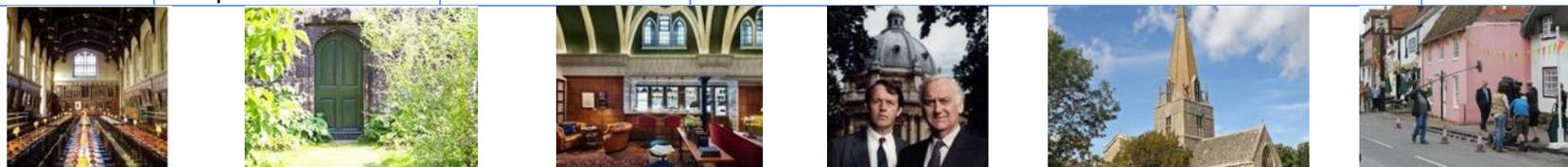
Photos: experienceoxfordshire.org, oxfordpunting.co.uk, ox.ac.uk, nationaltrust.org.uk, cotswolds.com, cogges.org.uk, fairytalefarm.co.uk, didcotrailwaycentre.org.uk, visitthames.co.uk, chilternsaonb.org, ldwa.org.uk, experiencehenley.co.uk, austin-healey-club.co.uk, bicesterheritage.co.uk, britishmotormuseum.co.uk, chilternvalley.co.uk, sunnyhillvineyard.co.uk, chch.ac.uk

ADDITIONAL EXPERIENCES

Additional Oxfordshire experiences include:

Shopping

▶ Bicester Village is a popular designer shopping village with more than 150 luxury boutiques. It attracts over 7 million visitors per year and is now one of the UK's foremost retail destinations outside London. (Number 17 in Trip Advisor's Things to do in Oxfordshire.)

▶ Oxford Covered Market is an indoor market dating back to 1770s. There are over 50 specialist, independent traders selling traditional Oxford fare, food, drink, gifts, fashion, flowers etc. Oxford City Council has recently (February 2023) approved a £6.87 million masterplan package to revitalise the Market. (Number 195 in Trip Advisor's Things to do in Oxfordshire.)

Visual Arts

▶ Modern Art Oxford is a contemporary art space with changing exhibitions, artist commissions, events, shop and café. (Number 104 in Trip Advisor's Things to do in Oxfordshire.)

▶ Oxfordshire Artweeks is a 3-week celebration of the visual arts taking place each May in venues across the county. UK's oldest and largest open studios event.

Events

▶ Oxford Festival of the Arts is a 2-week festival founded by Magdalen College School, taking place in June each year. It attracts internationally renowned artists and performers in music, theatre, visual art, film, dance, literature, comedy.

▶ Truck Festival is an annual, independent music festival that takes place in July, at Hill Farm, Steventon. It is described as 'the Godfather of the small festival scene'.

▶ The Big Feastival is an August weekend family event combining food and music at Alex James' farm in Kingham. It attracts some of the UK's biggest artists and Michelin star chefs.

VISITOR ACCOMMODATION

The most recent accommodation stock data available for Oxfordshire is from the national accommodation stock audit undertaken in 2016 by Visit England. Whilst this is now a number of years out-of-date, and there likely to have been new openings since, the audit still provides a useful general picture of accommodation supply in the county. Note: The Visit England data gave a very high figure for camping bedspaces in Cherwell (over 17,000 for just 15 campsites). Online research (Google, Pitchup.com, ukcampsites.co.uk) suggests that the correct numbers are likely to be nearer 4,000 bedspaces between around 30 campsites. Therefore, the analysis below uses these amended figures. Some summary points are:

- In 2016, there were close to 1,000 visitor accommodation establishments in Oxfordshire, with approximately 36,000 bedspaces.

- Three quarters of establishments and two thirds of total bedspaces were serviced.

- Oxford accounts for a third of the county's serviced bedspaces.

- West Oxfordshire has the highest share of non-serviced establishments (36%).

- Cherwell has the highest share of non-serviced bedspaces (32%) – through its camping & caravanning provision. Banbury in particular has many camping & caravan sites.

- A large proportion (75%) of Oxford's non-serviced bedspace supply is through 'other collective accommodation (hostel and university accommodation).

- Cherwell's non-serviced supply is predominantly tourist campsites.

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Oxfordshire serviced establishments

- Oxford 16%
- Cherwell 20%
- South Oxfordshire 24%
- Vale of White Horse 16%
- West Oxfordshire 24%

Oxfordshire non-serviced establishments

- Oxford 15%
- Cherwell 23%
- South Oxfordshire 16%
- Vale of White Horse 10%
- West Oxfordshire 36%
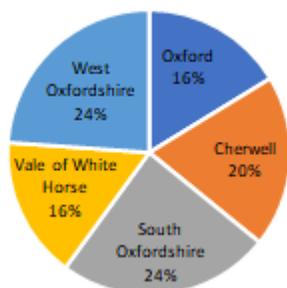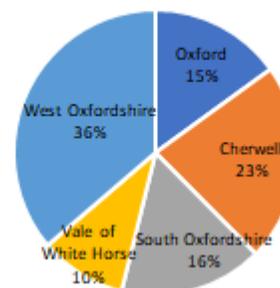
Oxfordshire serviced bedspaces

- West Oxfordshire 23%
- Oxford 33%
- Vale of White Horse 12%
- South Oxfordshire 15%
- Cherwell 17%

Oxfordshire non-serviced bedspaces

- West Oxfordshire 28%
- Oxford 28%
- Vale of White Horse 4%
- South Oxfordshire 8%
- Cherwell 32%
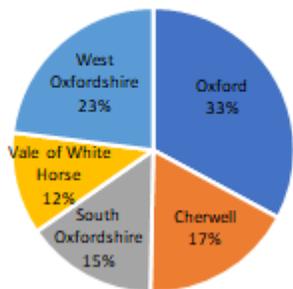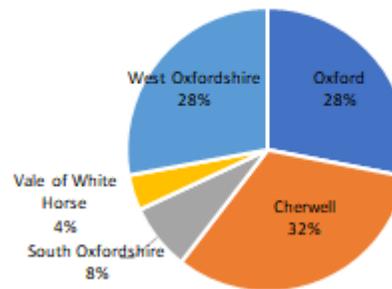
Oxfordshire non-serviced accommodation:bedspaces

Number of bedspaces

	Oxford	Cherwell	South Oxfordshire	Vale of White Horse	West Oxfordshire

■ Holiday dwellings   ■ tourist campsites   ▓ Other collective accommodation
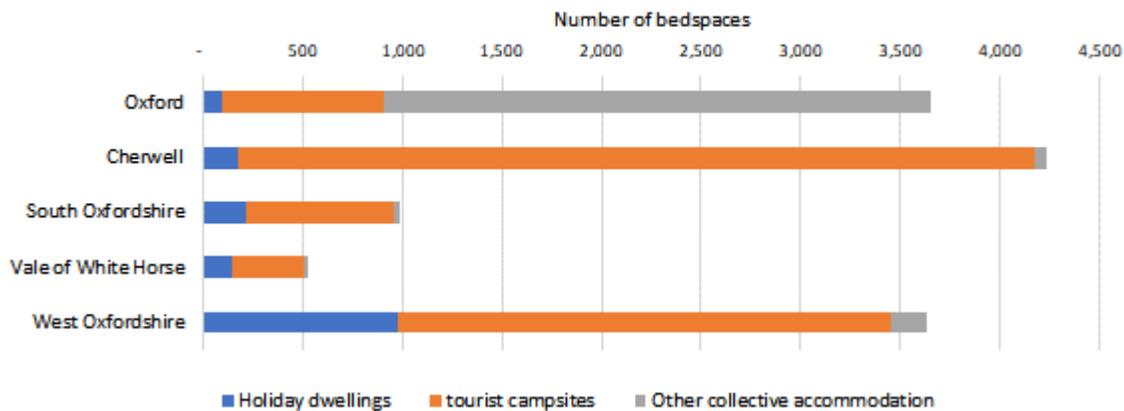
Source: Visit England Accommodation Stock Audit 2016 (with amended figures for Cherwell campsite establishments and bedspaces)

Hotels

Online perusal of sites such as booking.com and Telegraph Travel, suggests that Oxfordshire's hotel product is of a high quality, with many appealing, luxury hotels to choose from. Of the 164 Oxfordshire hotels listed on booking.com, 46% are rated as 4 or 5 star, 21% 3-star, 32% 'unrated'. The unrated properties are predominantly of high quality, with two thirds rated at least 'very good'.

Leading the supply is Raymond Blanc's Le Manoir aux Quat' Saison, which includes his renowned 2 Michelin-starred restaurant. Oxford City centre has a number of striking, luxury hotels in historic buildings. Henley has its riverside setting, boutique hotels and private members clubs. The Oxfordshire Cotswolds has many beautiful 16th/17th Century hotels with period features and luxury accommodation. Two high-end resort hotels are Warner Leisure's Heythrop Park near Chipping Norton and a members-only Soho House hotel in Great Tew.

New hotels in the planning process or with outline permission could add a further 1,000 bedrooms to the Oxford city hotel stock, comprising up to five new larger hotels and some extensions, (source: Hotel and Short Stay Accommodation Study for Oxford, Bridget Baker Consulting Ltd).

In the following table we present a selection of luxury hotels in Oxfordshire. The selection is intended to give a flavour of supply rather than being a fully inclusive list.

Luxury hotels in Oxfordshire

Hotel	Location	Description	Rating on booking.com	Bedrooms
Le Manoir aux Quat' Saison, A Belmond Hotel	Great Milton	Renowned, 5-star manor house hotel created by Raymond Blanc. 2 Michelin-star restaurant, Raymond Blanc cookery school	9.4	32
Old Bank Hotel	Oxford city centre	5-star luxury hotel in historic building	9.0	43
Old Parsonage Hotel	Oxford city centre	5-star boutique hotel in Oxford's 17th Century Old Parsonage	9.0	35
The Randolph Hotel	Oxford city centre	Striking hotel by Graduate Hotels	8.2	151

Malmaison Oxford	Oxford city centre	Luxury boutique hotel in converted Victorian prison	8.3	95
Vanburgh House Hotel	Oxford city centre	18th Century boutique hotel	7.6	22
The Head of the River	Oxford city centre	Riverside pub in former warehouse with 20 luxury bedrooms	8.2	20
Voco Oxford Thames Hotel	Sandford-on-Thames	4-star IHG hotel Set in 30 acres of grounds and gardens. Pool, spa & gym	8.6	104
Mercure Oxford Hawkwell House Hotel	Iffley	Country manor house hotel, 2 miles from Oxford city centre	8.6	77
The Relais Henley	Henley	Luxury boutique hotel	9.0	40
Hotel du Vin	Henley	Luxury boutique hotel in historic former brewery	8.0	43
Leander Club	Henley	Historic private rowing club with 11 boutique bedrooms	8.7	11
Phyllis Court Members Club	Henley	Members club in historic manor. Fitness centre & pool	8.5	17
Greenlands Hotel	Greenlands, Henley	Home to Henley Business School. Set in 30 acres of grounds with restaurant, bar and fitness centre	8.7	100
The George Inn	Barford Saint Michael	17th Century thatched pub and boutique hotel	9.2	9
The Harcourt Arms	Stanton Harcourt	Traditional country inn with 5 AA star bedrooms and 2 AA rosette restaurant	9.1	10
Old Swan	Minster Lovell	5 AA-star 15th Century inn	7.6	15
Minster Mill Hotel & Spa	Minster Lovell	Converted mill house in 50-acre grounds with spa, tennis court and fishing	7.7	38
The Bird in Hand	Witney	Grade II Listed building with period features	9.3	16
Bay Tree Hotel	Burford	16th Century Cotswold hotel	8.5	21
The Double Red Duke	Clanfield	16th Century Cotswold hotel	9.0	19
The Swan Inn	Swinbrook	16th Century traditional Cotswold country inn	8.9	11
The Killingworth Castle	Woodstock	17th Century coaching inn with Michelin restaurant	8.9	8
The Feathers Woodstock	Woodstock	17th Century townhouse boutique hotel	8.2	21
MacDonald Bear Hotel	Woodstock	Former 13th Century coaching inn with period features	7.8	54

Weston Manor Hotel	Bicester	12th Century country house hotel set in 12 acres of gardens and grounds.	8.2	32
Bicester Hotel Golf and Spa	Bicester	Set in 130 acres of countryside, 11 lakes, health club, tennis, pool, spa, 9-hole golf course	8.1	52
The Chesterton Hotel	Bicester	18th Century Manor house and luxury boutique hotel	9.1	23
Heythrop Park	Enstone, Chipping Norton	Warner Leisure resort. Grade II Listed country house in 440 acres of parkland. Golf, spa, traditional sports, theatre. Adult only hotel	-	311
Soho Farmhouse	Great Tew	Members only Soho House Hotel. Canadian cabin-style, luxury rural retreat in 18th Century farmhouse buildings. Set in 100 acres of countryside with comprehensive, luxury leisure facilities.	-	114

Sources: Booking.com, telegraph.co.uk; Photos: Experience Oxfordshire, booking.com

University accommodation

Many of Oxford's colleges offer accommodation to visitors, although the majority of bedrooms are only available at Easter, mid-June to mid-September, and over Christmas. There are more than 7,000 bedrooms in total. University.com provides a booking service for tourists and conference delegates for rooms at 33 of Oxford's colleges. (Source: Hotel and Short Stay Accommodation Study for Oxford, Bridget Baker Consulting Ltd.)

Self-catering

Oxfordshire offers some very attractive, luxury self-catering cottages with plenty of Cotswold and rural Oxfordshire charm. Experience Oxfordshire promotes self-catering accommodation through four partners:

- Grange Farm Country Cottages – 5 luxury cottages in Godington, rural Oxfordshire.

- StayCotswold Ltd – 50 luxury properties in Oxfordshire, of which 17 sleep 8+

- Greyfriars Hideaway – 2 historic luxury self-catering properties sleeping up to 12 in central Oxford. Visit England 5-star Gold rating.

- Snaptrip Holiday Cottages - with a large collection of self-catering accommodation across the UK.

Cottages.com lists 93 properties in Oxfordshire. 33 have a 5-star rating, 54 have a 4-star rating and 6 have a 3-star rating. 45 are described as 'luxury'. 8 properties sleep 8+ people.

Some providers of note are:

- Bruern Cottages: located between Chipping Norton, Stow-on-the-Wold and Burford. 12 luxury cottages, sleeping between 2 and 10 people. Spa, swimming pool, gym, gardens, children's playgrounds, bicycles and a games room. Visit England 5-star Gold rating.

- Kingham Cottages: collection of 5 self-catering cottages in the grounds of Kingham Lodge, not far from Bruern. It offers 5 acres of landscaped gardens, tennis court, indoor swimming pool and a traditional Turkish Hammam.

- Treedwellers Treehouses: located near Chipping Norton, offering 7 striking, luxury treehouses, sleeping 3 - 5 people

photos: cottages.com, Kinghamcottages.com

Airbnb

AirDNA (provider of short-term rental data for Airbnb and Vrbo) reports over 3,000 active rentals in Oxfordshire, 42% of which are available full-time. 67% are 'entire home' rentals. There is of course a cross-over between the commercial-provider supply discussed above, and the supply data provided through AirDNA, with many commercial cottage providers also promoting their properties through Airbnb.

AirDNA data

	Oxfordshire
Entire home	2,131
Private room	995
Shared room	8
Total active rentals	**3,134**
Entire home rentals as percentage of total active rentals	67%
% available full time	42%
Average rental size (bedrooms)	2.1
Average rental size (guests)	4.5
Airbnb ratings (% at least 4.5 overall)	84%

Source: AirDNA

Camping & Glamping

The Visit England stock audit above indicates that there is a large supply of camping accommodation in Oxfordshire, particularly in Cherwell. Around 60 camping sites are listed on pitchup.com, predominantly small, rural sites. Some of the larger ones are:

▶ Hardwick Parks, Standlake: 180-acre site with 196 pitches, 2 lakes, watersports on Windrush River, bar, restaurant

▶ Lincoln Farm Park Standlake: 5-star site with 90 pitches, play area, games room, leisure centre with gym and two swimming pools, shop

▶ Swiss Farm Touring and Camping, Henley: 5-star site with 125 pitches, glamping, holiday homes, fishing lake, outdoor swimming pool, shop, café, bar

▶ Greenhill Leisure Park, Bletchingdon: 100 pitches, shop, play area and 4 fishing lakes

▶ Oxford Camping & Caravanning Club: 80 pitches, 1 mile from the city centre

▶ Cotswold View: 5-star rating from Times Travel, 131 pitches, farm trail, outdoor games and gym, games room, located in Charlbury

▶ Burford Caravan and Motorhome Club: 121 pitches, opposite Cotswold Wildlife Park

▶ Chipping Norton Camping & Caravanning Club: 90 pitches plus 5 safari tents

There are a few, small clusters of glamping units as well as a scattering of individual shepherd's huts and safari/bell tents across the county. Some examples are:

▶ The Chilterns' View, Wallingford: 5 adult-only eco lodges with wood burning stoves and hot tubs, situated on the Ewelme Down Farm estate

▶ Ye Olde Swan Tipi Village, Bampton: 10 luxury tipi tents on the banks of the River Thames

▶ Glamping Thorpe, Banbury: converted huts, caravans, bell tents and army style glamping trailers, 10 units in total. Set up for parties and group events.

▶ Oxford Riverside Glamping, Witney: 10 bell tents adjacent to River Thames pathway

▶ Rolling Fields Glamping, Moulsford, Wallingford: 3 bell tents, 2 Luna tents and a shepherd's hut

▶ Valley Farm Campsite: camping site with 20 touring pitches, 3 bell tents and 1 shepherd's hut, situated 3 miles from Oxford

▶ The Red Lion at Northmoor: 3 luxury shepherd's huts

Photos: campsites.co.uk

CONFERENCE VENUES

Oxfordshire's conference and meeting provision is predominantly supplied through the county's larger hotels and Oxford University's colleges and venues. In addition, the King's Centre, Oxford is a dedicated conference/meeting/exhibition/event venue with a capacity of up to 1,000 delegates. Further, larger-capacity venues in Oxford (500+ delegates) are the Kassam Stadium, Oxford Town Hall, Sheldonian Theatre and New Theatre.

The following table lists a selection of larger-capacity conference venues:

Selection of Oxfordshire Conference Venues

Venue	Location	Description	Maximum capacity (theatre)
Hotels			
The DoubleTree by Hilton Oxford Belfry	Thame	154-bed hotel with 19 meeting rooms, spa and swimming pool.	450
The Randolph Hotel	Oxford	151-bed, 5-star, landmark city centre hotel. 6 meeting rooms.	350
Leonardo Royal Hotel	Oxford	240-bed hotel with 20 meeting rooms, gym, splash pool. 3 miles from Oxford city centre.	350
Voco Oxford Spires Hotel	Oxford	181-bed hotel with 10 meeting rooms, gym, spa and swimming pool.	266
Voco Oxford Thames Hotel	Sandford-on Thames	104-bed hotel with 11 meeting rooms, gym, spa and swimming pool.	200
Mercure Oxford Hawkwell House	Iffley	77-bed hotel with 5 meeting rooms	200
Bicester Hotel and Spa	Bicester	52-bed hotel with golf, tennis, outdoor activities, health club & spa. 8 meeting rooms.	200
Phyllis Court Club	Henley	5 meeting rooms, 17 hotel rooms, fitness centre with swimming pool.	300
Universities			

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Venue	Location	Description	Maximum capacity (theatre)
Oxford University	Oxford	Conference Oxford lists 72 university colleges/venues that offer conference/ meeting/event facilities. In total there are over 500 meeting spaces, with capacities from 50 to 900 guests. The Ashmolean Museum has 8 meeting rooms and a reception capacity of 900 in the atrium. The Oxford Union has 7 meeting spaces with a maximum, theatre-style capacity of 635. The Newman Rooms have 8 meeting spaces with the largest room seating 500. Three of the examination schools have capacities of 300+. The Said Business School has 17 meeting spaces with the largest lecture theatre seating 317.	635
Oxford Brookes University	Oxford	Over 50 meeting rooms, 5 lecture theatres (maximum capacity 320) and a large lecture hall (maximum capacity 475).	475
Conference centres			
The King's Centre	Oxford	Conference centre with 12 meeting spaces. 9,000 sqm exhibition space.	1,000
Culham Conference Centre	Abingdon	Conference centre at Culham Science Centre. 7 meeting rooms.	234
Worton Hall	Cassington	Meetings, weddings & events venue on a working farm. 3 meeting spaces. Holiday lets, tennis, swimming pool.	280
Other venues			
The Kassam Stadium	Oxford	38 meeting rooms, dedicated meeting & events team. 400 sqm exhibition hall.	600
Oxford Town Hall	Oxford	Grade II Listed Victorian building with 10 meeting rooms.	500
New Theatre	Oxford	Theatre with 4 meeting rooms and main auditorium seating 1,785	1,785
Sheldonian Theatre	Oxford	Sir Christopher Wren Theatre. Oxford University's ceremonial hall. 4 meeting spaces.	717
Bicester Heritage	Bicester	Hangar hire – 45,000 sq. ft flexible events/filming space and 2 meeting rooms	450
Williams Experience Centre	Wantage	Conference and training centre with 7 meeting spaces	200

Sources: Experience Oxfordshire, conferencesuk.org.uk; online research

Oxford University's Rhodes House is currently undergoing a major redevelopment programme, including the construction of a new conference centre catering for events of up to 300 delegates.

Conference Oxford represents 70 venues in the city. This includes 38 Colleges, 3 permanent Private Halls and 29 University venues, the latter including academic departments, museums, gardens, libraries and ceremonial buildings. Academic events account for the majority of enquiries (55%), the corporate market accounts for 22%, Associations 4%. In terms of international Association conference business, ICCA reported that Oxford hosted 24 international conferences in 2019 (38 in 2018). This ranked the city 4th in the UK for both years. (Source: Hotel and Short Stay Accommodation Study for Oxford, Bridget Baker Consulting Ltd.)

In 2018, OxLEP commissioned Oxford Brookes Business School to undertake a study into the potential for the sustainable economic growth of the business visitor economy (BVE) in Oxfordshire. The study concluded that the BVE in Oxfordshire has the potential to grow through better use of existing resources and more collaboration between venue and accommodation providers and agencies. However, it also concluded that the existing provision faces significant capacity constraints and is not able to host events over a certain size in any of the BVE and live performance segments identified as providing the potential for growth.

PIPELINE PROJECTS

Some significant pipeline projects to note are:

▶ Great Wolf Lodge is North America's largest owner, operator and developer of family-orientated indoor waterpark resorts. Their first European resort will be located in Chesterton, near Bicester. The £200 million development is at detailed design stage, with a target completion of late 2024.

▶ Oxford United FC new stadium and conferencing facilities: proposed new 18,000-seat stadium on land south of Kidlington. Currently at local consultation and negotiation stage. The stadium would include some conference facilities for approximately 600-800 persons.

▶ Mullin Automotive Experience: American car enthusiast, Peter Mullin, has submitted plans to West Oxfordshire District Council to develop a classic car museum at The Driving Centre, Enstone Airfield on the Great Tew Estate. Along with the museum there would be luxury holiday homes and farmstead properties.

▶ Bicester Motion masterplan: Bicester Motion Heritage was founded in 2013 and is now considered to be the home of historic motoring enterprise in the UK. The site has become a visitor attraction, with thousands of visitors attending the scramble events. Bicester motion Heritage is the first of four quarters to be developed on the 400-acre site which is a former WW2 RAF Bomber Training Station. The remaining three are: Innovation, Experience and Wilderness. The Experience Quarter will be a family day out destination, with 3 miles of driver training and handling tracks. The Wilderness Quarter will regenerate a former quarry and lakes to provide a wilderness reserve, promoting health and well-being and outdoor activities. It will also include eco-lodge style accommodation. Bicester Motion plans to become a top 20 UK visitor attraction.

▶ Banbury Vision 2050: a consultation and engagement programme is being undertaken by Cherwell District Council, as a first phase of a long-term regeneration plan for Banbury. The plan includes retail, culture and tourism, the evening economy, housing, employment, and connectivity.

▶ Oxford Covered Market: Oxford City Council has approved (February 2023) a £6.87 million package to revitalise Oxford's historic Covered Market. The masterplan includes three main improvements: a pedestrian friendly Market Street, a new communal space with a large seating area, and improved entrances.

▶ The Store Hotel, Oxford: a new, 100-bed, 4-star hotel is being developed on the site of the old Boswells department store. Due for completion in Spring/Summer 2023.

▶ Estelle Manor (previously Eynsham Park), near Witney, will reopen in Spring 2023 after an extensive refurbishment programme. It will open as a membership club, similar to the Soho House concept. It will offer 108 bedrooms, four restaurants, extensive health and spa facilities, kids club and members area.

▶ Wilder Spaces is a new planned visitor attraction positioned as a 'new destination for nature in Oxfordshire'. BBOWT, the region's nature largest conservation charity, is developing Wilder Spaces. The attraction will feature a range of wildlife-friendly show gardens and immersive learning experiences to encourage visitors to take action for nature. Assuming capital project expenditure of £40m and annual visits of up to 500,000, the economic impact of Wilder Spaces is projected to be between £250-£300m, creating at least 40 FTE jobs.

7 DEMAND SIDE DRIVERS AND FORECASTS

FORECASTS FOR INTERNATIONAL TOURISM

For much of the past thirty to forty years you could be pretty certain that the volume of international tourism trips taken globally would grow by about 4% per annum, with more mature destinations such as the UK seeing growth a percentage point or two below this level.

The past three years were very different due to the pandemic, but recovery in international travel has not been even across different world regions.
The following chart is based on forecasts from Tourism Economics and shows the volume of outbound travel from different world regions, with this indexed to 100 in 2019 to aid comparisons.

We can observe that while the volume of travel fell from all world regions the decline was a little less steep in Europe than in Asia in 2020 and 2021. By the end of this year it is forecast that outbound travel from the Middle East, Western Europe and North America should be back to levels seen in 2019, whereas even by the end of 2024 outbound travel from North East Asia could be one-third lower than had been the case ahead of the pandemic.

VisitBritain forecasts that inbound visits to the UK in 2023 will reach 86% of their 2019 volume, with the strongest performance from short-haul markets, the Middle East and North America, whereas arrivals from Asia look set to remain relatively subdued this year despite the easing of travel restrictions in China.

Outbound travel by world region (2019 = 100)

Source: Tourism Economics
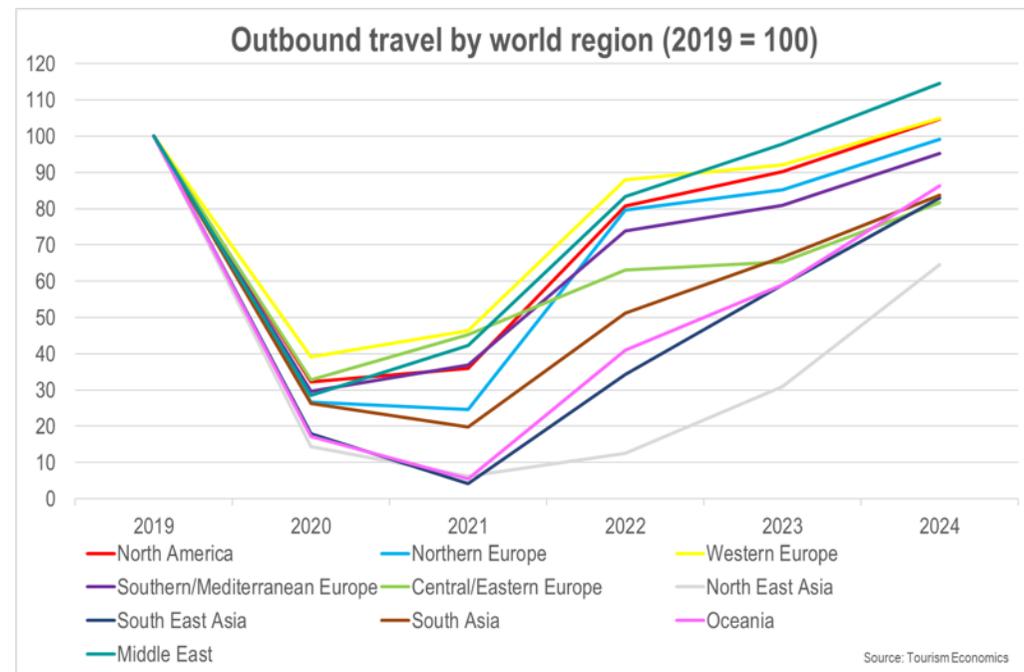
FORECASTS FOR DOMESTIC TOURISM

As the main surveys capturing the volume and value of domestic tourism have generated little data in recent times due to both a change in survey methodology and their suspension during the early part of the pandemic it is tricky to pinpoint reliable forecasts for the absolute volume or value of domestic tourism.

However, past experience tends to suggest that the market for overnight tourism is typified by little to no growth, with one of the few exceptions in the past couple of decades being 2009 when a dramatic decline in the value of sterling dissuaded many from travelling abroad and to take a staycation instead.

We can nonetheless use the Domestic Sentiment Tracker undertaken by the national tourist boards of England, Scotland and Wales to get a flavour for short-term prospects, the most recent wave of which was published on 17th March with fieldwork having taken place during the first week of the month.

Trip intentions next twelve months compared with 2019

	Will take more	Will take about the same	Will take fewer	Don't know / not sure yet
Overseas overnight trips	15%	33%	30%	22%
Domestic overnight trips	24%	38%	21%	17%

Source: VisitBritain
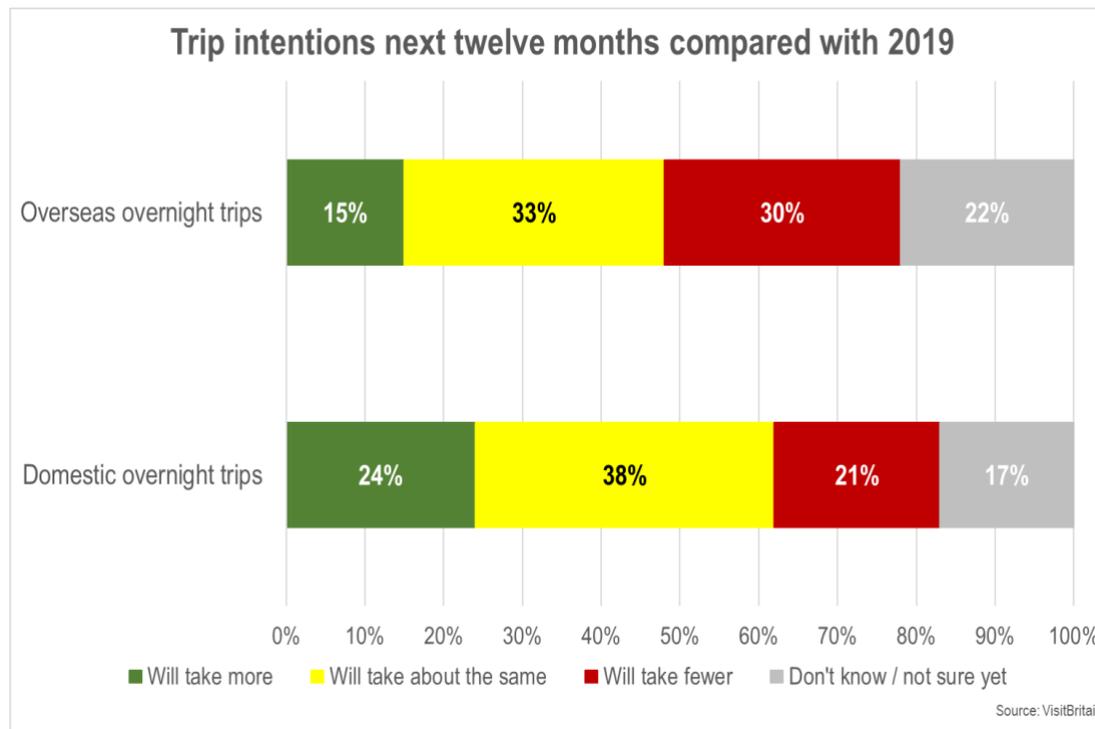
One of the questions posed in the study asks respondents about their trip intentions in the next twelve months compared to before the pandemic. We can see from the chart that twice as many say they will be taking fewer overseas trips as say they will be taking more overseas trips, whereas slightly more say they will be taking more domestic overnight trips than say they will be taking fewer such trips.

This potentially signals some trip switching from overseas to domestic, but it is important to note that more than one-in-five said they didn't know what their overseas travel plans might look like this year.

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From a separate question in the survey we can explore what the perceived barriers are to taking a domestic overnight trip in the upcoming six months, and the answer is very much an economic one, with 39% citing the rising cost of living as a barrier and 28% their personal finances.

When asked how they might cutback on their UK overnight holiday spending the most common answers were to choose cheaper accommodation, to look for more 'free' things to do and to spend less on eating out, with just shy of 30% mentioning each of these.

Of those surveyed 9% said they would take domestic day trips instead of overnight breaks, while 8% said they simply wouldn't go on any domestic overnight trips.

For domestic day trips the most common approach to adapting to cost of living pressures were found to be to look for more 'free' things to do (28%), spend less on eating out (26%) and to take fewer day trips (25%).

Many of the habits that people adopted during the pandemic were done so reluctantly, and even those that felt more amenable at the time have started to evaporate as lockdown retreats further into our memories. However, one change that was accelerated by Covid-19 and looks set to stay, and that has an implication for tourism, is working from home.

This impacts city centre hospitality businesses if there is lower commuter footfall and the overall volume of business tourism as virtual meetings become the norm for many.

We can see from the next chart that the average number of minutes per day spent working from home for those who

Barriers to taking domestic overnight holiday in next 6 months

Rising cost of living	39%
Personal finances	28%
Rising cost of holidays / leisure	26%
UK weather	26%
The cost of fuel	19%
My general health	17%
Limited available annual leave	17%
No barriers	13%
Wouldn't take a UK holiday or short-break regardless of circumstances	13%
I have concerns about catching Covid-19	11%

Source: VisitBritain

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are in paid employment shot up at the start of the pandemic and that despite it now being many months since there were any form of restrictions on movement the figure remains much higher than it historically was, standing at 101.3 minutes per day in March 2022.

One school of thought might be that if people are spending more time in their homes they will choose to invest more of their income on that home, and/or move to a place that is further from their employer's office, and it is realistic to imagine that Oxfordshire would be a desirable location for many who need regular but occasional access to a workplace in central London.

Average minutes per day spent working from home for those in paid employment

Source: ONS
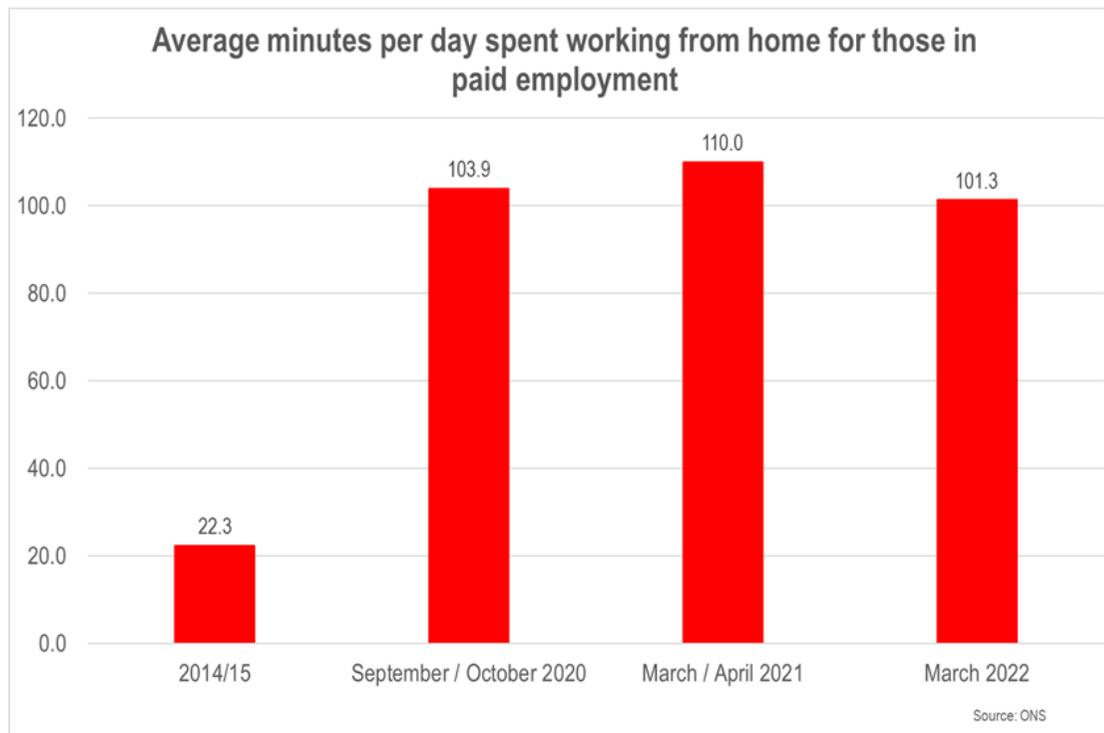
DEMOGRAPHICS

As was established earlier, around half of tourism spending in the county comes courtesy of day visits by domestic residents. Analysis shows that across England as a whole 52% of all Tourism Day Visits had a round-trip distance of less than 20 miles, with just 28% at over 40 miles. This tells us that the bulk of day visits in most areas are going to be by those who live relatively locally.

While Local Authority level data is not available for this metric from the survey, we might imagine that for Oxford (as opposed to the wider county) there may be a greater tendency for visits to have an above average distance considering the ease of travel by public transport from London. However, it is the demography of the local population that will play a key role in shaping the vibe of a place, and the following chart plots the age distribution for each Local Authority area in the county alongside that for the UK as of mid 2021.

The standout insight is perhaps no surprise given the high number of students in Oxford, but nonetheless it is striking just how distinct the population of the city is compared to that of the rest of the county. We can also see that Oxford has relatively fewer residents aged 45+ than is the case elsewhere, while remaining Local Authorities all have a relative absence of those aged from their late teens through to their mid-twenties in comparison with the UK.

Population by age, mid 2021

Source: ONS
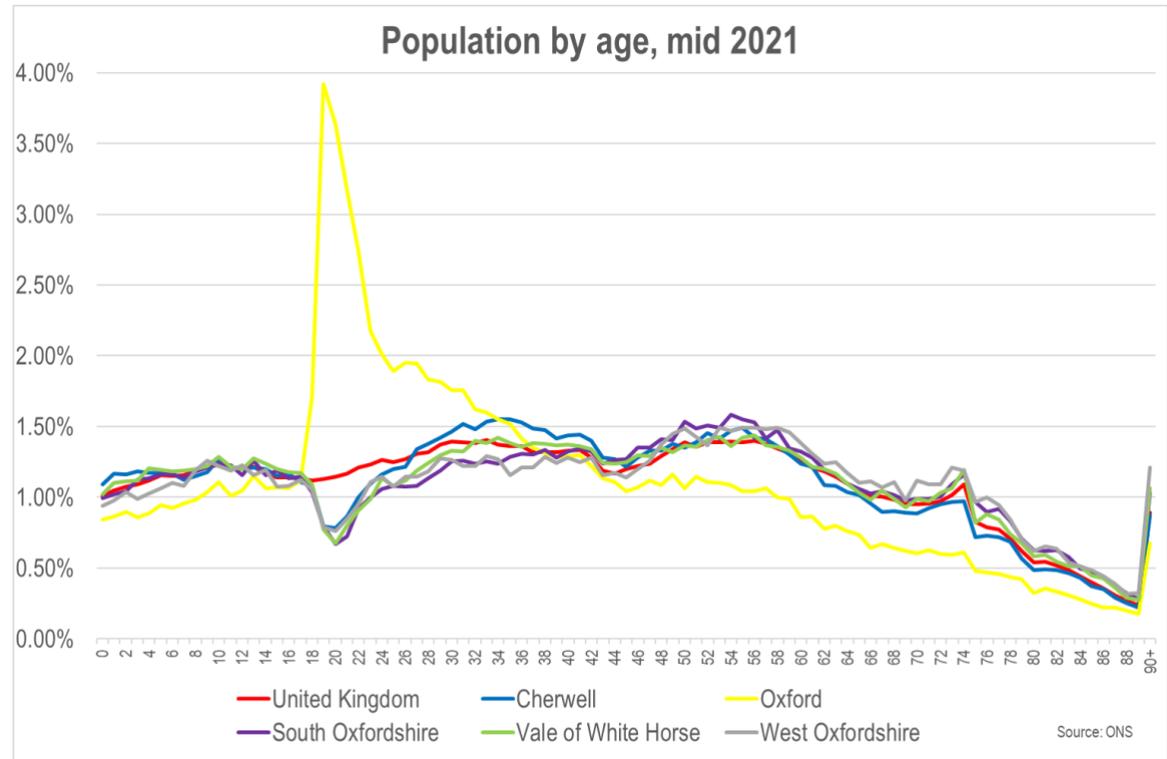
Population projections suggest that Cherwell and Vale of White Horse are the areas set to see the fastest growth in population over the next ten to twenty years, with the tally elsewhere being broadly either stable or showing a slight decline.

Turning to national as opposed to local demographic trends all other things being equal it is reasonable to expect that the volume of tourism will respond to changes in the size of a nation's population.

Between 2000 and 2021 the population of the UK increased by 8,1 million, to stand at 67 million. Growth, however, has not being geographically uniform in nature, for example, the population of London has increased by more than one-fifth over the period, well ahead of any other area. Wales and Scotland have both seen modest growth of 8% or so, but the area with the slowest pace of population growth has been North East England at just 4%.

Population projections

Source: ONS
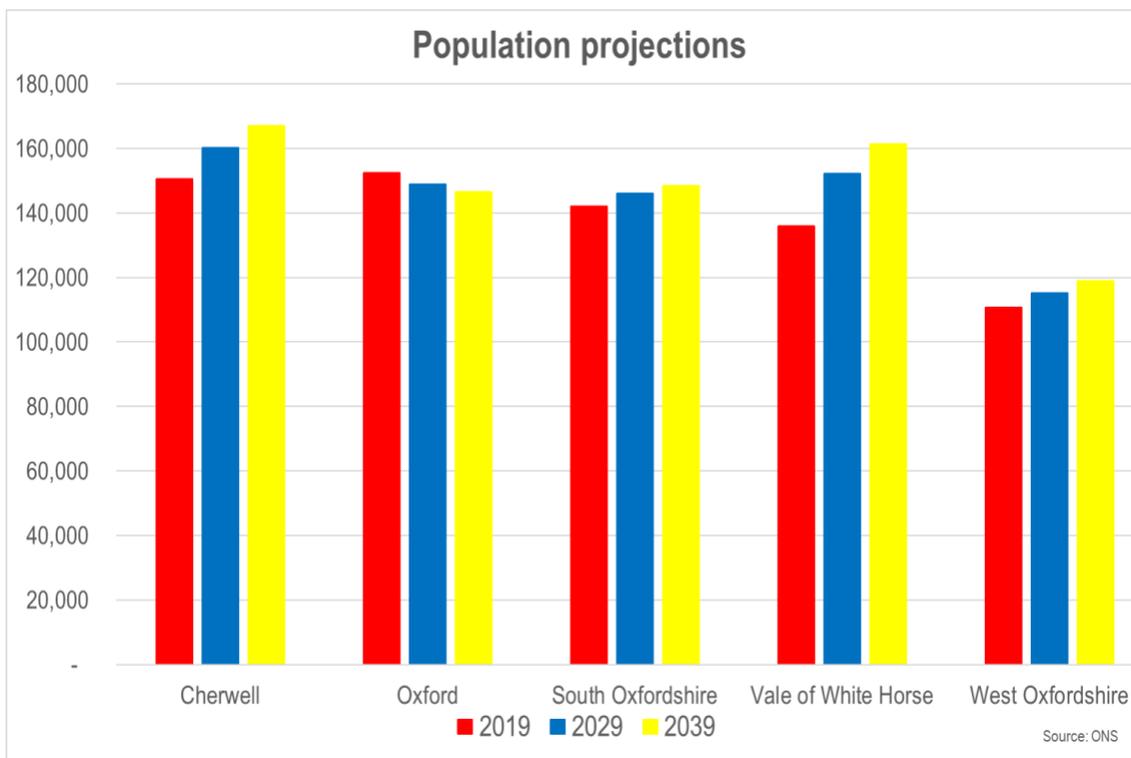
It is not just how many people there are that matters of course, those of different ages will exhibit different travel behaviours.

The following chart plots the resident UK population by age band in 2001, the estimates for 2021 and projections for 2041. Among the insights that emerge from the chart are:

- Whereas in 2001 the most populous age group was 30-39 by 2021 it was those aged 50-59 (of course these will largely be the same individuals but twenty years older)

- The number of children aged 0-9 increased by roughly 600,000 during the period 2001 to 2021 but a decline of close to one million is projected by 2041
- There were one million more residents aged 20-29 in 2021 than two decades earlier, reflecting both ageing of those 0-9 back in 2001 but also significant inward migration by young working-age adults
- Every age band from 40-49 and older has seen a rise in population over the past twenty years, including almost 1.8 million more residents aged 50-59 and aged 60-69, and 1.6 million more residents who are in their 70s
- The upcoming two decades are projected to see further ageing of the UK population with steep increases in those above retirement age
- The population of over 80s is expected to be more than twice its 2001 level by the time we reach 2041

An ageing population has significant implications for visitor economy businesses, including that a growing chunk of the market might expect to receive discounted admission etc due to being above the retirement age.

Furthermore, the need for businesses to be accessible to those with a disability will increase given the correlation between propensity to have an impairment and age. It is estimated that one-in-five people in the UK have some form of disability, with this increasing to two-in-five of those aged 70+.

A growing array of insights has started to emerge from the 2021 Census that may be of relevance to the scale and nature of tourism demand, including that over the past decade there has been an 8.3% increase in the number of people living alone in the UK, with the proportion of one-person households ranging from 25.8% in London to 36.0% in Scotland. This underscores the importance of visitor economy businesses having affordable options for solo travellers.

UK population estimates and projections

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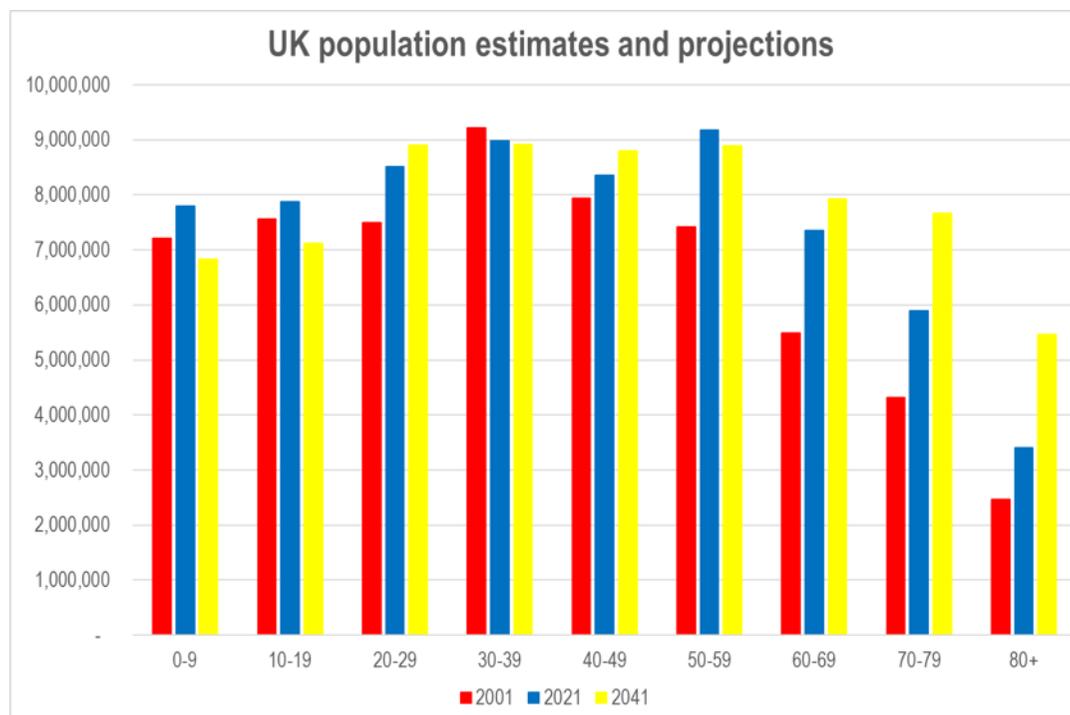
INCOME

Income is a key driver of tourism, and the next chart shows Gross Disposable Household Income per head for Oxfordshire and the wider South East of England relative to that for the UK for the period 1997 to 2020.

We can see that throughout this period the residents of Oxfordshire are, on average at least, better off than is the case for the typical resident of South East England by a fairly narrow margin, but by a more substantive amount when it comes to the wider UK population. Oxfordshire had been increasing this differential fairly consistently since 2011, and it will be interesting to see whether this trend has persisted in the more recent past when 2021 data is released in early April.

GDHI per head, UK = 100

Source: ONS

Oxfordshire   South East

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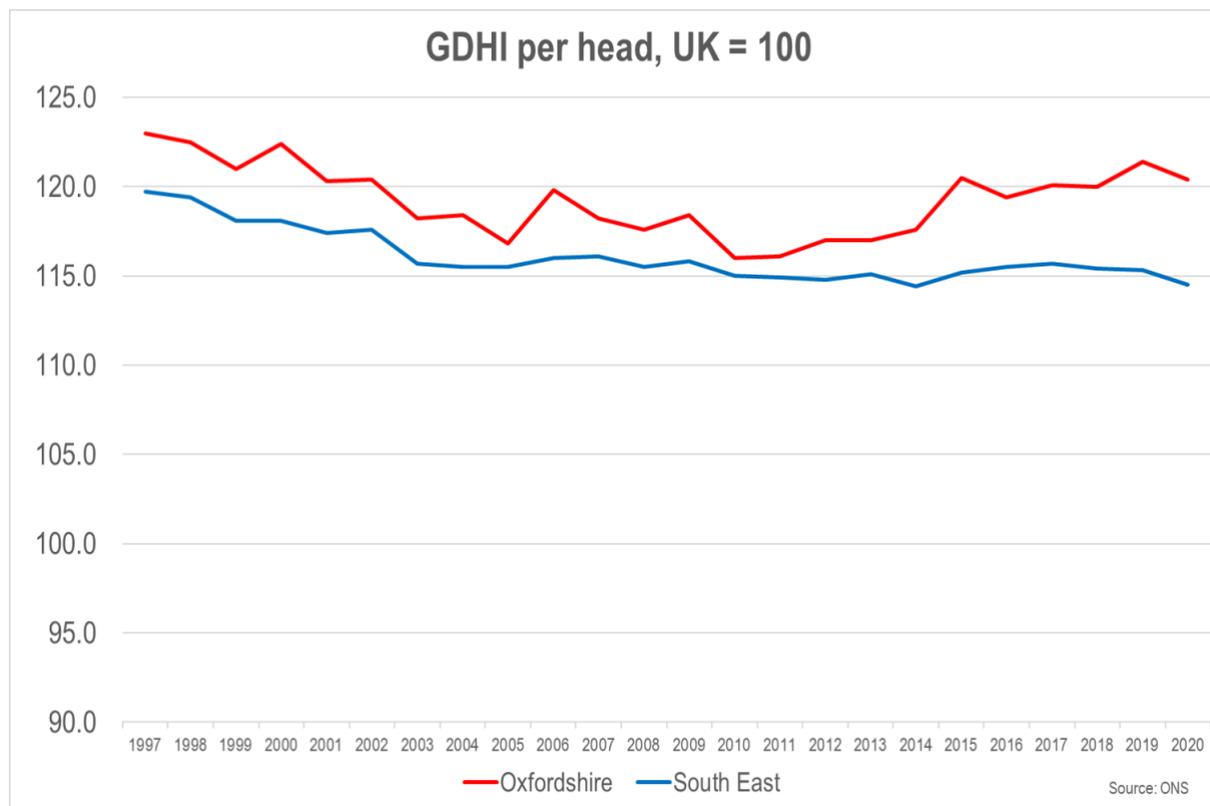
Turning to national trends and projections, the following chart shows the annual change in disposable income per head once figures are adjusted for inflation extending back over recent decades.

In the two decades up to 2001 the average annual growth rate had been 2.9%, but in the subsequent two decades it has fallen sharply to just 1.1%, so while in more recent times we have, on average, been getting richer, this is at a much slower rate than had been the norm.

The economic ups and downs during the pandemic saw many oddities, with GDP falling dramatically but incomes largely holding up thanks to the furlough scheme. However, the second chart paints a worrying picture as it shows the same data series as per the annual figures but on a quarterly basis from the start of 2019 through to Quarter 3 of 2022 (the most recently published data point).

We can observe how rapidly the situation has deteriorated since late 2021, with a year-on-year decline in disposable income per head of 3.1% in Q3 of 2022. While the economic situation is now more stable than was the case briefly last autumn, most analysts

still expect that 2023 will see the typical household get poorer rather than richer. This clearly has implications for the choices that individuals and families will make regarding their discretionary spending on activities relating to travel and tourism.
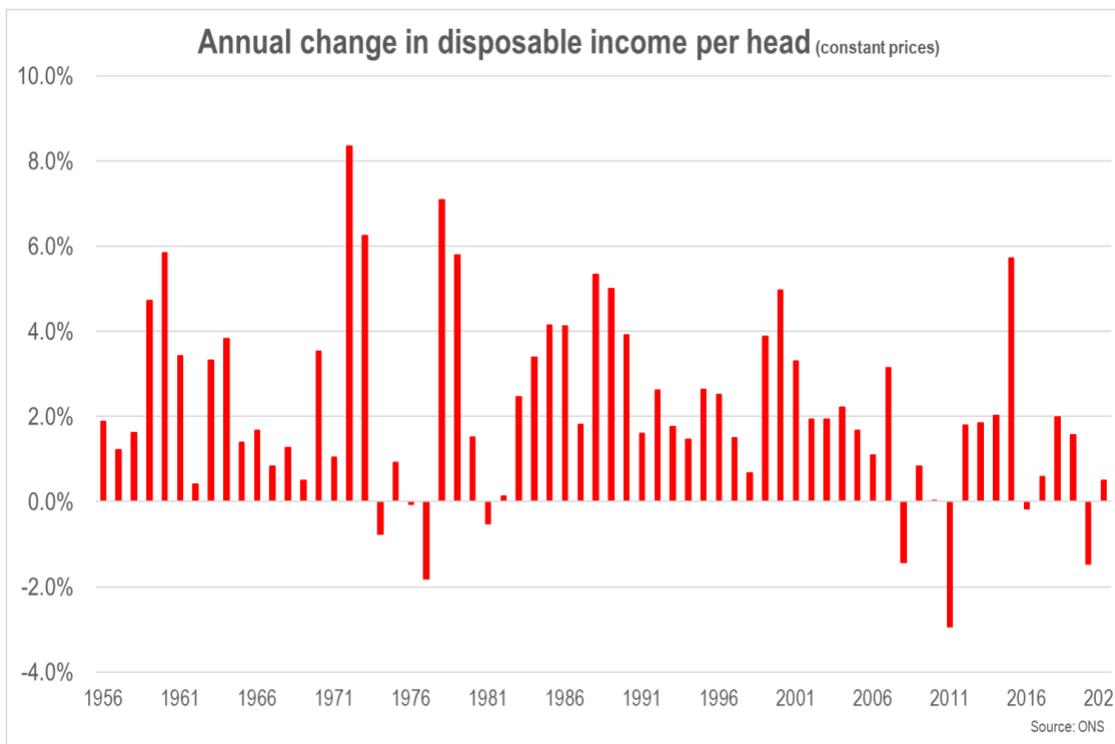
Inflation is set to fall back during 2023 but that does not mean prices are falling, simply that they are increasing more slowly. The Bank of England again increased base rates at its March Monetary Policy Committee meeting, but many analysts now expect there to be few if any further hikes.

At the risk of celebrating what is in essence mediocre news it does now appear that the UK will not enter a technical recession this year, but the Head of the Office for Budget Responsibility has said that the typical UK household may be no richer five years from now than it was back in 2019.

The lacklustre outlook for how much income potential visitors have available looks set to act as a brake on the visitor economy for at least the next couple of years.

Annual growth in disposable income per head (constant prices)

Quarter	Value
2019 Q1	0.7%
2019 Q2	2.8%
2019 Q3	2.0%
2019 Q4	0.9%
2020 Q1	-0.2%
2020 Q2	-3.2%
2020 Q3	-1.1%
2020 Q4	-1.2%
2021 Q1	0.3%
2021 Q2	1.9%
2021 Q3	0.2%
2021 Q4	-0.4%
2022 Q1	-1.6%
2022 Q2	-2.5%
2022 Q3	-3.1%

Source: ONS
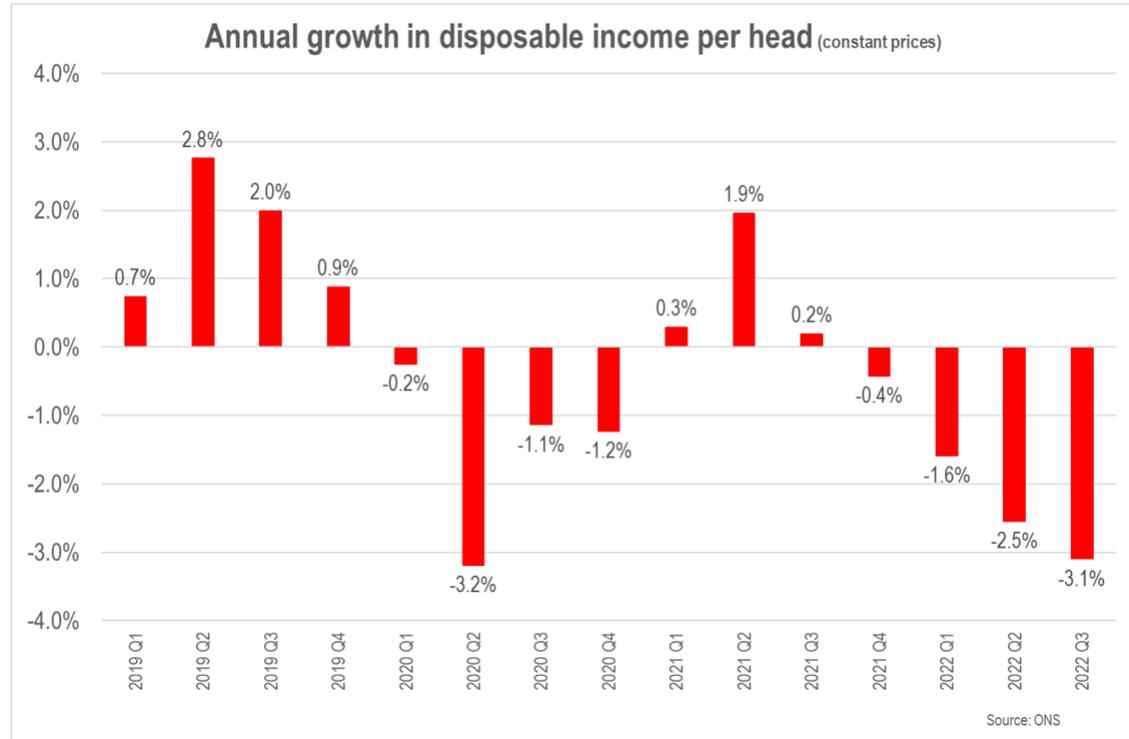
TRANSPORT

Every destination that wishes to thrive has to be accessible, ideally to those wishing to use public transport, those wishing to use their own or a hired vehicle and indeed those organising group tours.

While Oxford and Didcot both enjoy excellent public transport links to London and reasonable public transport links to the West, Midlands and North, many parts of the wider county have limited public transport provision. Both Bicester and Banbury have services south to London Marylebone and the latter is also served by Cross-Country trains operating to the south coast from the North of England. Bicester Village is an example of a large retail destination that has excellent rail connections, allowing those in London to reach the site in 46 minutes.

Oxford has some of the most frequent and affordable coach links with London of any comparable city of a similar distance to the capital. This can equally be a lever for encouraging those wishing to spend at least some time in London to overnight in Oxford and make value for money trips to central London. Improvements are on the cards with the redevelopment of Oxford station and the planned launch of East West Rail linking the city to Milton Keynes, and eventually Cambridge, but in the short-term this will result in disruption to both rail and road users while work takes place.

It might be that having frequent services from London that can take under an hour is as much a curse as it is a blessing for the city's visitor economy, in as much as this enables day trips to be taken rather than overnight stays, thereby reducing visitor spending.

This same argument can be made in relation to international visitors who can readily stay in London but make a day trip to the county rather than experience the local accommodation offer. Oxford is readily accessible by train and coach from Heathrow, Gatwick and Birmingham Airport, but not so easy to reach for those arriving at the low cost hubs of Luton or Stansted. Even though getting from the likes of Heathrow to Oxford might be fairly quick and easy, for an inbound visitor with limited knowledge of the options available staying in London and visiting on a day trip may feel like a more manageable alternative to carting their luggage from the airport to a city whose name that airport does not bare.

A study undertaken by the national tourist boards in the middle of the past decade explored the characteristics of domestic overnight visitors to a range of destinations, one of which was Oxford. This revealed that 19% of visitors to the city lived in Greater London and a further 17% in the South East of England, demonstrating that even for trips that involve a night away from home the destination is often relatively local in nature.

Most domestic tourism journeys are undertaken by car, and that poses the challenge of providing appropriate parking facilities at those locations frequented by visitors. An additional consideration that has emerged in recent years relates to growth in the number of electric vehicles in the car fleet. The amount of publicly available charging devices has not expanded as rapidly as has the number of EVs, and there is variation in the number of devices in different localities as well as a widespread perception that the charging infrastructure is often unreliable.

From the chart we can note that when thinking about all types of charging device four out of the five Local Authority areas in the county were ahead of the UK in terms of devices per 100,000 of population while South Oxfordshire lagged the UK slightly. For rapid charging devices the only Local Authority to be behind the UK average at the start of 2023 was West Oxfordshire.

Publicly available EV charging devices (per 100,000 of population, January 2023)

	All	Rapid
United Kingdom	55.3	10.3
Cherwell	85.3	20.4
Oxford	85.6	20.0
South Oxfordshire	49.3	14.7
Vale of White Horse	74.6	10.8
West Oxfordshire	72.1	3.5

Aource: DfT
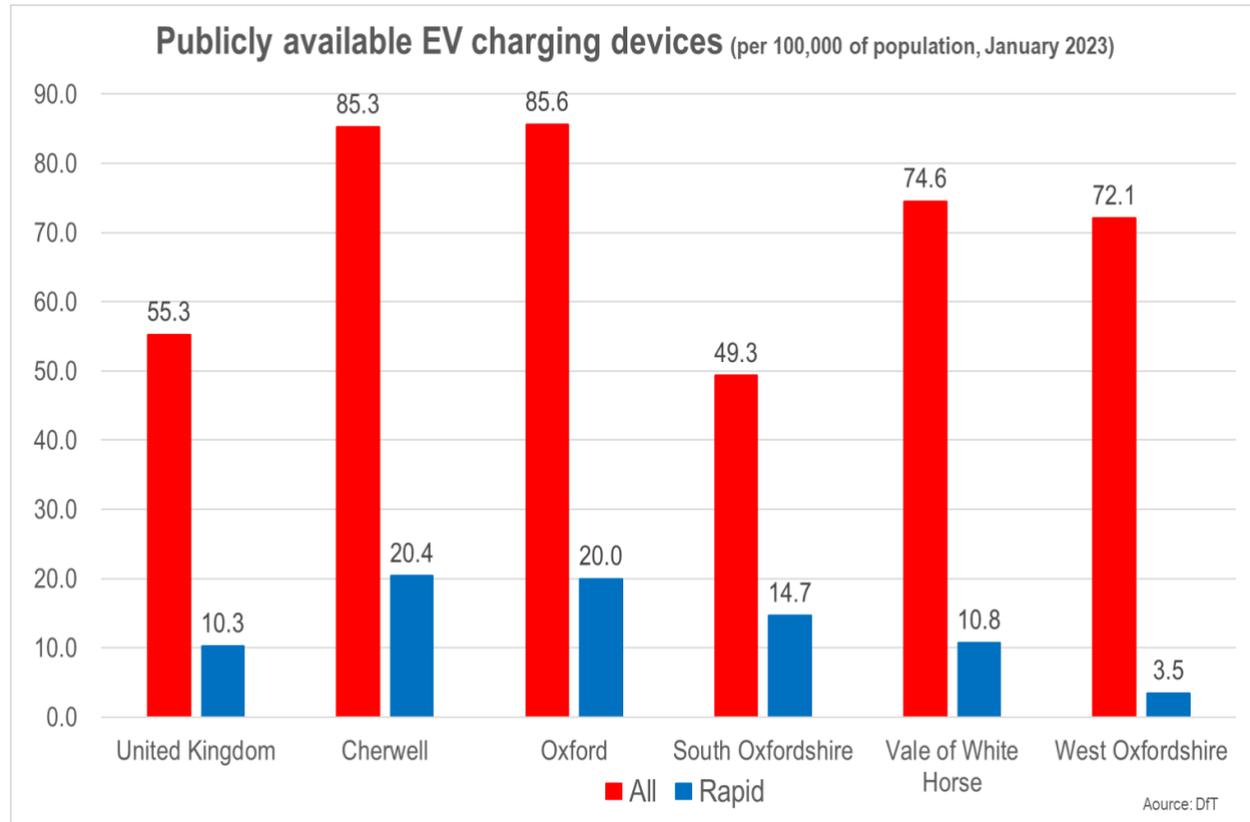
ENVIRONMENT

Caution is required in jumping to the conclusion that travel behaviours are quickly changing due to awareness of climate change and a broader appreciation of matters connected to the environment.

Several surveys have shown that people say they are concerned about the environment, but when asked to rank different factors that determine their choice of destination, hotel etc, environmental considerations tend to be towards the foot of the table, with factors such as value for money far more important.

There is helpful data from YouGov polling covering the degree to which Brits say they would swap a foreign holiday for a domestic trip in order to avoid flying.

The following chart shows that at the start of 2023 the proportion saying that this is something that they already do varied from 16% for those living in London to 24% for those elsewhere in the South of England.

However, between one-quarter one-third said that this is not something they would contemplate doing, with the greatest levels of rejection being among those who live in London.

Swap a foreign holiday for a UK holiday to avoid flying

Source: YouGov

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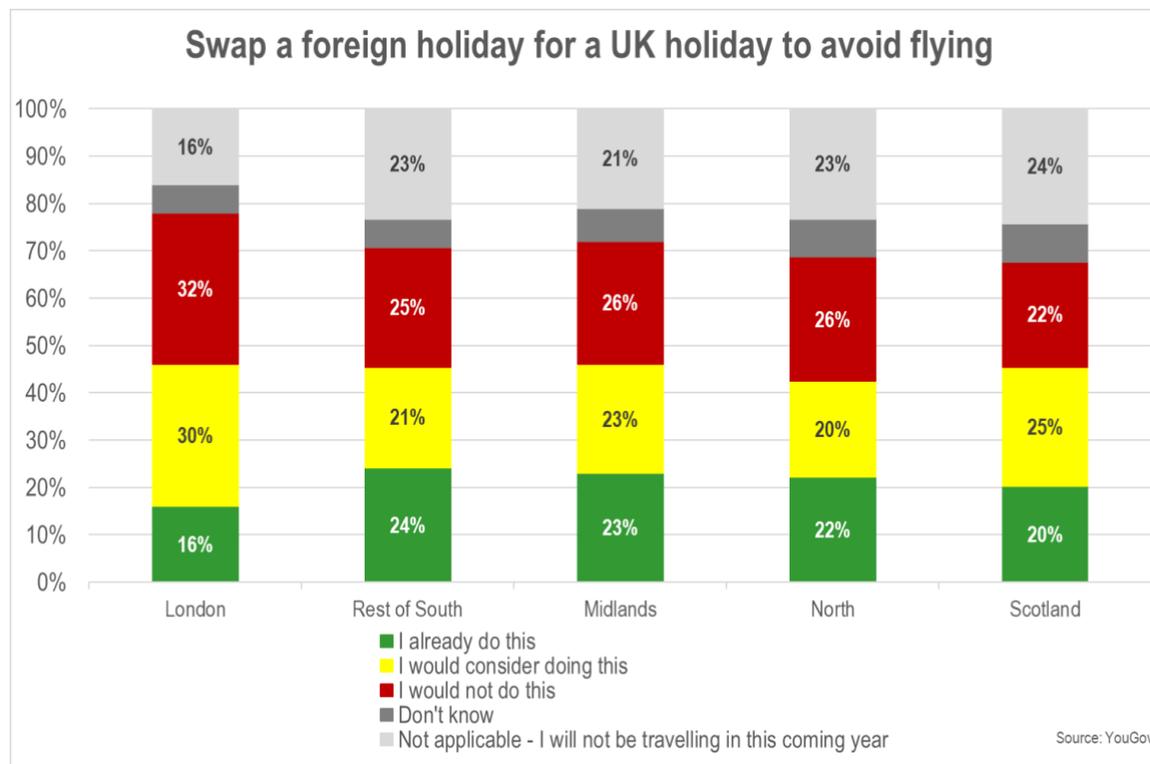
Perhaps contrary to expectations when analysing the way this question was answered by age we can observe that it was the young who were the least keen on the idea of giving up a foreign holiday, maybe a function of having been denied the chance to explore the world on their own as they enter adulthood due to travel restrictions in 2020 and 2021.

Swap a foreign holiday for a UK holiday to avoid flying

	18-24	25-49	50-64	65+
Not applicable - I will not be travelling in this coming year	18%	18%	26%	30%
Don't know				
I would not do this	30%	27%	26%	22%
I would consider doing this	24%	25%	20%	20%
I already do this	18%	24%	23%	22%

Legend:
- I already do this
- I would consider doing this
- I would not do this
- Don't know
- Not applicable - I will not be travelling in this coming year

Source: YouGov

8 ENGAGEMENT AND CONSULTATION

The development of the DMP has involved extensive consultation and engagement which has included:

▶ Visioning Workshop with the DMP Steering Group (29 March) and sessions following stage 1 and stage 2 of the project

▶ Stakeholder Workshops (face to face 18 May and online 26 May)

▶ Meeting with the local authority Chief Executives (5 June)

▶ Online sessions with teams from each of the local authorities

▶ Online sessions with teams from Experience Oxfordshire and Cotswolds Tourism

▶ 30+ 1:1 consultations with various stakeholders

▶ Online business and community survey

VISIONING WORKSHOP

A visioning workshop was held at the beginning of the project to tease out the ambitions and requirements of a pan-Oxfordshire Vision and DMP. The session looked at what good growth should look like and how these outcomes will be achieved.

▶ A summary of key findings from the workshop was that there was:

▶ Lots of consistency in stated priorities

▶ Recognition that the DMP is an important strategy document to chart the development of the visitor economy

▶ An opportunity to bring coherence and co-ordination to efforts to develop the visitor economy

▶ A need to align this work with the wider Strategic Economic Plan

▶ All areas and communities in Oxfordshire need to benefit from the visitor economy

▶ There needed to be more focus on destination management (as well as marketing) and broader engagement and representation of the whole visitor economy.

CONSULTATION AND STAKEHOLDER WORKSHOPS FINDINGS

A full list of participants at the workshops and consultation sessions as well as the local authority and DMO sessions is attached at appendix A. The main findings are summarised under three areas displayed here and on the following pages:

Things to fix...

- 'Final Mile' and rural public transport
- Market towns struggling especially at night
- Missing out on travel trade (Cotswolds)
- Worker recruitment and retention
- Language and welcome for international
- Visitors are seen as an inconvenience
- Collaboration & partnership working (LAs and DMOs)
- Tourism careers and business/ education links
- Perceived elitism with developments
- Managing coaches and coach tourism
- Arrogance about tourism in Oxon – 'too many visitors not spending enough'
- Funding and investment in destination management
- Visitor welcome and first and last 5 minutes
- Wet weather experiences
- Need to raise value of not-spots and spread value
- Accessibility (more than just physical)
- Tackling AirBnB issues
- Lack of mid-market accommodation
- 'Oxford is currently a a7/10'

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Strengths to build on…

- Business Tourism a growth opportunity
- Packaging of experiences
- Itineraries key to value and dispersal
- Arts, culture and strategic events planning
- National Landscapes, National Trails & wellness
- Reputation as a sustainable destination
- Strengthen market towns 'not spots'
- University more involved in tourism
- LVEPS key to management and marketing
- Make more of city's neighbourhoods
- Could make more of the waterways
- Pipeline projects all strengthen the offer
- International markets important but keep sticky
- More mid-market accommodation to grow value
- Make more of local and authentic (food & drink)

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Things to keep in mind…

- Social impacts are important
- Digital development a priority
- Partnership working is vital
- Need for better data and insights
- Need to show value for locals
- Marketing and management are inter-related
- Must be about good growth
- Move from 'don't upset residents' to residents being strongest advocates
- World class aspirations but falling short currently
- Carrot rather than stick for visitor behaviour
- Must encourage dispersal
- Must be focussed. Can't do it all.
- The DMP needs funding
- Rural farm diversification an opportunity
- Oxfordshire means nothing. Oxford, Cotswolds, Chilterns the brands
- Don't re-invent the wheel. Make most of what have
- Slow travel. Spend longer. Explore more. Travel sustainably
- Need to drive repeats and loyalty

BUSINESS & COMMUNITY SURVEY

During May and June 2023, Blue Sail hosted a short online survey to gather the views of businesses and other stakeholders (including community groups) within Oxfordshire's visitor economy in order to understand the resulting actions they would like to see from the new Destination Management Plan for the county. The survey was distributed by OxLEP and partners and 30 people responded. Results are indicative due to sample size; a summary of the findings is outlined below:

▶ Endorsed by 90% of respondents, the city of Oxford (including the University of Oxford) tops the list of the county's strongest assets in attracting visitors. This is closely followed by history and heritage at 87%. Four in five say characterful towns and villages play a positive role in bringing visitors to Oxfordshire, while museums and galleries are seen as a key draw for visitors by almost three-quarters. Placed at the lower end of the list of attractors are food and drink (30%), shopping (27%), accommodation (23%) and quality facilities for conferencing/meetings (10%).

▶ Respondents give Oxfordshire's visitor economy an at best 'lukewarm' endorsement across a range of key success indicators – including visitor welcome, reputation for sustainable tourism, and workforce skills. On most of these indicators, 'agree slightly' is the main response. However, when it comes to accessibility and inclusion, marketing resources, and advice on growth, at least a third of respondents 'disagree strongly' that the county's performance is positive in these areas. The overarching implication of these findings appears to be the need for more co-ordinated and active management of the county's visitor economy, including support to empower local businesses to develop and market their offer.

▶ When it comes to visitor behaviours respondents would like to encourage more overnight stays (70%) and seasonal spread (67%) are the main areas of focus. Increased use of hospitality (60%), experiencing the evening economy (60%), and longer overnights (53%) and are also behaviours a majority would like to foster more among future visitors.

▶ When prompted with a list of ideas to leverage the economic impact that students at Oxford's universities could have on the county's visitor economy, 72% of people surveyed believe more should be done to encourage friends and families visiting students to stay overnight. A student ambassador scheme which incentivises those studying in Oxford to encourage friends and family to visit the county is also a popular idea, endorsed by 62% of respondents. However, less than a third believe that discounts or a loyalty scheme for students from local retailers and businesses would help to grow the visitor economy.

▶ Respondents believe that visitors within close proximity to and those living within Oxfordshire should not be overlooked as future growth audiences over the next five years. 73% believe people living within a two-hour travel time are an important market for growing the value of Oxfordshire's visitor economy over the next five years and 60% say targeting people living within the county would have a beneficial effect on generating value.

Attracting visitors from the rest of the UK (60%) and visitors from overseas (57%) is also seen as important to driving future value – with overnight visits the likely key opportunity. The USA, Asia, the Middle East and Europe are seen as the key overseas markets to target.

▶ Families – and particularly multi-generational families – are seen as a key growth opportunity by the majority of respondents. Outside of families, the emphasis appears to be around driving growth overall, rather than targeting a particular visitor demographic. Therefore, helping stakeholders to understand more about best prospect markets and their motivations for visiting Oxfordshire will be important in supporting them to prioritise activity around develop their visitor offer and marketing activity. 45% of respondents believe business travellers are a growth market

▶ Generating increased visitor spend is cited as the number one outcome from a successful DMP.

▶ More joined-up working between visitor economy businesses and local authorities is mentioned as the main way to raise the quality of the visitor offer and drive growth. Improved orientation, accessibility and sustainable transport are seen as key in encouraging people to experience more of the county. Oxford is seen as a key point of entry here. Sustainable transport routes that are easy to access and give people choices and which open up the county for visitors are also seen as important to future growth.

▶ An improved transport infrastructure and a high-quality visitor welcome are the two most important investment priorities for growing Oxfordshire's visitor economy (each endorsed as 'very important' by 72% of respondents). Next in priority is resources to support accessibility and inclusion (55% 'very important'). Respondents also see the benefits of collaboration and of developing a stronger understanding of visitors with 52% saying resources to support shared marketing activity are very important and 48% calling for better insights and research. Support to improve digital skills is considered as less of a priority, with only 28% seeing it as very important. Incentives and advice for businesses to adopt sustainable practices is also relatively low at 21%. This may indicate that a case needs to be made for communicating the benefits of digital touchpoints as a way of connecting with visitors even more effectively and reassurance that business investment in sustainability is key in enabling the county to achieve its ambitions in tackling the climate crisis.

▶ Respondents understand the positive impact the county's visitor economy can deliver for the local community across a range of socio-economic benefits. These include: how investment to improve visitor facilities also benefits the local community (79% 'agree strongly'); the visitor economy's role in improving local people's prosperity through encouraging investment (69% 'agree strongly'); and the importance of the visitor economy as a source of local employment (66% 'agree strongly'). In addition to economic impact, 61% of respondents also strongly agree that there are important social, cultural and educational benefits from welcoming UK and international visitors to Oxfordshire.

▶ Alongside the obvious benefits of a vibrant visitor economy, there is also recognition of some of the negative impacts of the visitor economy for local people. Perceived to be most pressing is the need for a strategy to manage the effects of tourism on traffic congestion (62% agree strongly).

Managing the impact of tourism on the availability and expense of residential accommodation is seen as a vital issue among 45% of respondents, while 38% strongly agree that more needs to be done to address local people's concerns about the environmental impact of tourism.

Data from the key survey questions is included below:

Oxfordshire's strongest visitor assets

The city of Oxford (including the University of Oxford) is viewed as the county's strongest asset in attracting visitors. Other strong reasons to visit are evidenced through the county's history and heritage, its towns and villages and cultural offer – particularly museums and galleries. Experiences associated with Oxfordshire's outdoors offer are 'mid-ranking' attractors, with food and drink, retail and accommodation being seen as having a less prominent role in bringing people to Oxfordshire. Only one in ten mention quality facilities for business tourism as an asset given the current lack of large-scale provision within the county.

Which of the options below, if any, would you say are currently Oxfordshire's strongest assets to attract visitors?

| Option	%
The city of Oxford (including the University of Oxford)	90%
History and heritage (including historic houses and heritage sites)	87%
Characterful towns and villages	80%
Museums and galleries	73%
Arts and culture (e.g. theatres, live music venues)	53%
Filming locations (e.g. places made famous by films and TV)	47%
Family-friendly attractions (e.g. wildlife parks, leisure centres...)	40%
Attractive landscapes (including countryside, gardens and parks)	40%
Active outdoors life (e.g. walking, cycling)	40%
Festivals and events (e.g. special public events, carnivals, live...	33%
Food and drink	30%
Shopping/retail	27%
Range and quality of accommodation	23%
Quality conferencing/meeting facilities for businesses	10%

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Perceptions of Oxfordshire's visitor economy

Respondents appear to have a 'lukewarm' attitude towards the current performance of Oxfordshire's visitor economy. Only a minority 'strongly agree' with any of the prompted statements; the most common response is to 'agree slightly' and there is also relatively high endorsement of 'don't know'. The pattern of responses suggests stakeholders believe that Oxfordshire's visitor economy would be strengthened by more active and collaborative destination management to improve the visitor offer and to support businesses more in delivering the offer.

There is an opportunity to strengthen responses across the range of key indicators. However, visitor accessibility/inclusion and business support (including DMO support, marketing resources and growth advice) are the areas where there is least confidence in the current arrangements. In fact, more than a third 'disagree strongly' that Oxfordshire's visitor economy performs well in these areas.

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And thinking about visitor behaviours, which of the following activities would you like visitors to do more often when they come to Oxfordshire?

Activity	%
Stay overnight, rather than just visit for the day	70%
Visit outside of peak season (i.e. outside June to September)	67%
Visit cafés, pubs, or restaurants	60%
Enjoy the evening economy (including cultural venues and hospitality)	60%
Stay for more nights	53%
Go shopping	50%
Visit more locations across the county (including market towns)	47%
Behave in a mindful way to protect the natural environment	37%
Go to festivals and events	33%
Undertake active and outdoor experiences	33%
Stay longer on a day visit	33%
Use private cars less	17%

Visitor activities: opportunities for growth

While respondents believe that close-by and local visitor markets should not be overlooked, encouraging overnight stays is the number one visitor behaviour they would like to see more of over the next five years. Encouraging more out-of-season visits comes a close second. Both of these behaviours will be important in generating greater value from visitors. Greater visitor engagement with hospitality and the evening economy are also seen as key behavioural levers to pull and may help to make overnight visits, in particular, a more relevant and attractive proposition.

Students of Oxford's two universities are also considered as offering growth potential for the county's visitor economy. The majority of respondents believe more should be done to encourage friends and families to stay overnight when visiting students. Additionally, a student ambassador scheme which incentivises those studying in Oxford to encourage friends and family to visit the county is also a popular idea. However, less than a third believe that discounts or a loyalty scheme for students from local retailers and businesses would help to grow the visitor economy given the economic pressure this may place upon (often small) local businesses.

Which of the following ideas, if any, do you think would help to increase the economic impact that students from both of Oxford's universities could deliver for the local visitor economy?

Idea	%
Encouraging students' friends and families to stay overnight when visiting	72%
A student ambassador scheme which incentivises people studying in the city to encourage friends and family to visit Oxfordshire	62%
Encouraging students to stay in Oxford outside of term time	45%
Advertising university-based accommodation that is available to students' friends and families when visiting	38%
A loyalty scheme where students can receive rewards and offers from local retailers and businesses	31%
Local retailers and businesses offering student discounts	31%

Visitor growth markets

When asked to identify visitor markets with the most growth potential for Oxfordshire over the next five years, respondents believe that visitors within a relatively local catchment are important (i.e. those located within two hours of travel and also people living within the county). Encouraging these visitors to experience more of Oxfordshire – particularly with longer and more varied day visits, and by converting day visits to overnights – could deliver greater economic impact. There is also likely to be community engagement benefits in making Oxfordshire's visitor economy as accessible as possible to residents. Visitors from further afield in the UK and overseas are also seen as having an important role to play in growing the value of the county's visitor economy. A focus on more overnight visits and extending length of stay is likely to be a key value driver for these audiences. The USA, Asia, the Middle East and Europe are seen as the key overseas markets to target.

While families are identified as key growth opportunity – particularly multi-generational families (who will likely enjoy experiencing the breadth of the county's visitor offer) – respondents appear to be agnostic about where growth may come from; rather it appears that Oxfordshire is perceived as having the potential to a broad range of demographics. Therefore, overlaying the thematic strengths of Oxfordshire's offer with the motivations of best prospect visitor segments for the county will be the most effective way to inform priorities for marketing and experience development to attract these markets.

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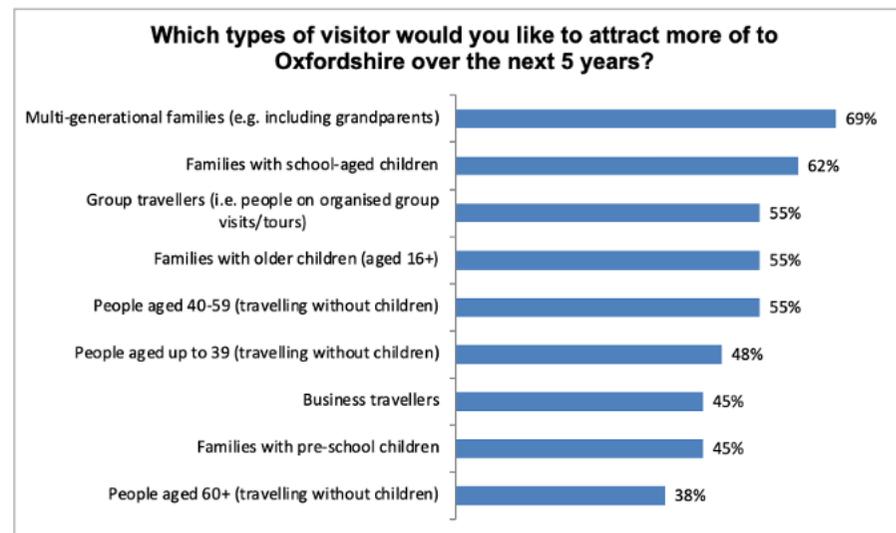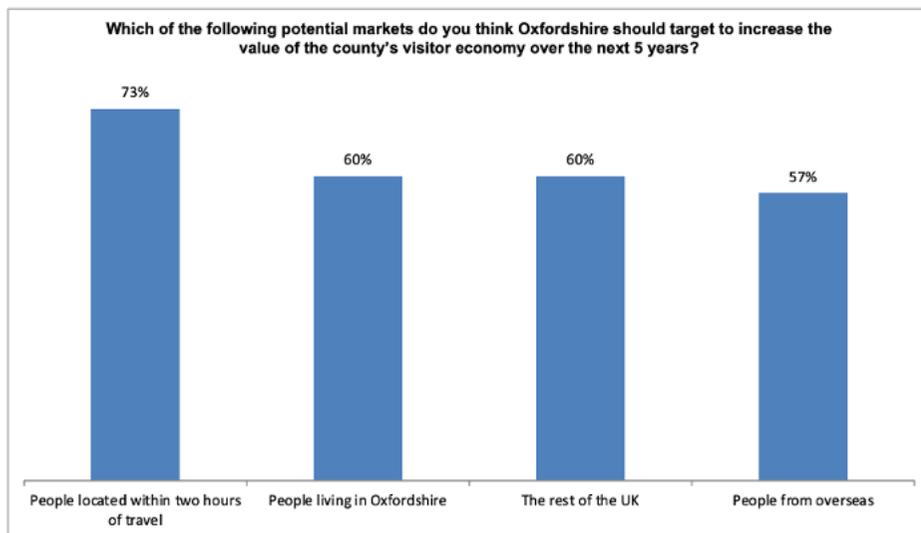
Priority outcomes from the DMP

Generating increased visitor spend is cited as the number one outcome from a successful DMP. More joined-up working between visitor economy businesses and local authorities is mentioned as a way to raise the quality of the visitor offer. Improved accessibility and better basics including welcome and orientation, and sustainable transport are seen as key in encouraging people to experience more of the county.

What are the priority outcomes you'd like to see from a new Destination Management Plan for Oxfordshire?

	Any mention of…
More spend/economic impact from visitors	39%
More joined-up working/collaboration/business engagement	13%
Better accessibility	9%
Better basics (public realm/welcome/signage)	9%
Focus on sustainability (including transport)	9%

World cloud generated from word counts via open text responses
'Oxford/Oxfordshire' removed for purposes of presentation

What improvements or changes would need to take place for your chosen priority outcomes to be achieved?

Collaboration – including businesses and councils working more closely together – is seen as one way to support successful delivery of the DMP. Sustainable transport and transport networks that make Oxford and the rest of the county navigable are cited as important success factors also. Mentions of marketing talk about the benefits of collaborative activity and encouraging visitors to experience more of the county.

Actions to support the growth of Oxfordshire's visitor economy

An improved transport infrastructure and a high-quality visitor welcome are the two key investment priorities for growing Oxfordshire's visitor economy. Accessibility and inclusion is also seen as significant.

Outside of the above, factors which support effective collaboration via shared marketing, county-wide networking, effective insights and engagement with the travel trade are endorsed as important priorities. More than a third of respondents believe activity to make the sector more attractive as an employer is 'very important', with another 57% saying this is 'quite important'. Therefore, the need for a long-term approach to growing the workforce should not be underestimated.

Support to improve digital skills is and incentives to encourage businesses adopt sustainable practices are considered relatively less of a priority. This may indicate that a case needs to be made to help businesses understand that more effective digital touchpoints can support their priority goals around visitor welcome and accessibility.

How important do you think each of the following factors could be in supporting the future growth of Oxfordshire's visitor economy?

% saying 'very important'

| Factor	%
Investment in transport infrastructure to improve connectivity	72%
A consistent and high quality welcome for all types of visitors	72%
Resources to support accessibility and inclusion (e.g. business guides & toolkits, advice on accreditation, signposting to funding)	55%
Support for businesses to collaborate and increase the impact of their marketing activity (e.g. shared marketing, access to shared toolkit of marketing resources)	52%
A county-wide network to help stakeholders and businesses of all sizes to collaborate on developing the visitor economy	48%
Better visitor insights and market research	48%
Engaging with the travel trade more	46%
Making tourism and hospitality an attractive long-term career for more people	37%
Training and support for businesses to improve their digital skills	28%
Incentives and advice for businesses to adopt sustainable practices (e.g. electric car charging points, zero landfill waste management)	21%

Furthermore, alongside being a key driver of tackling the climate emergency, greater adoption of sustainable practices can enhance Oxfordshire's reputation as a 'green' destination. Hence, there is likely an opportunity to demonstrate to businesses how their actions, no matter how small, can support the county's overarching strategic aims around sustainability.
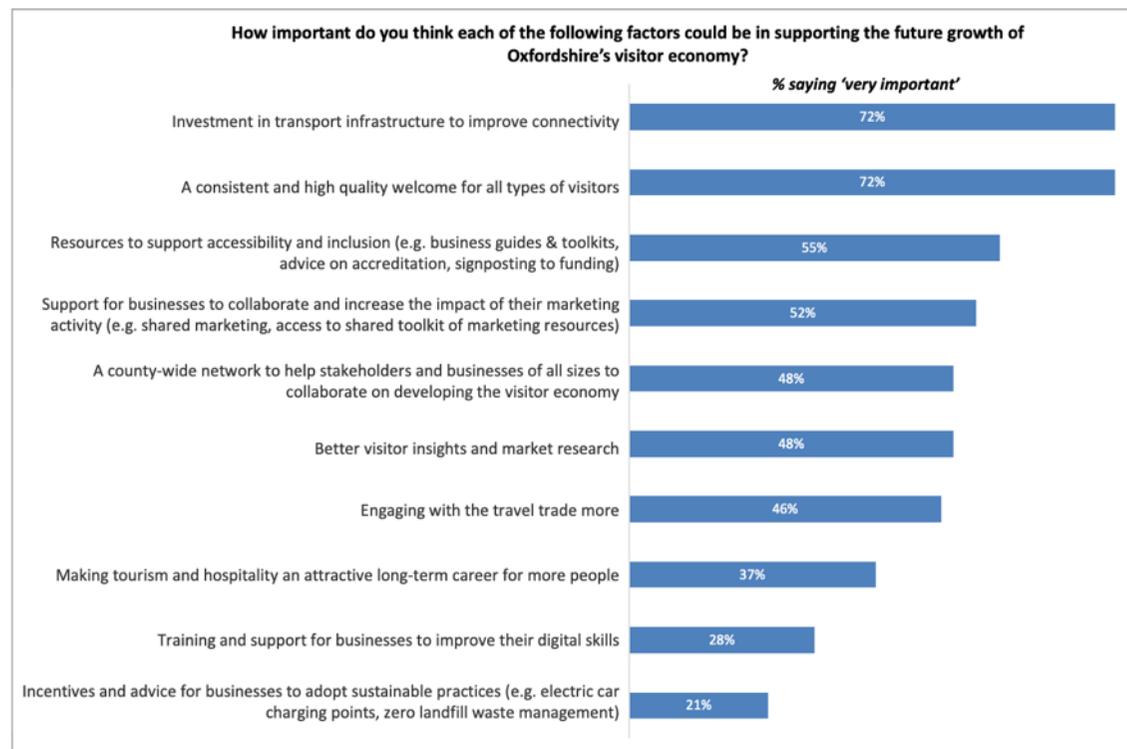
The community impact of Oxfordshire's visitor economy

Respondents understand the positive impact the county's visitor economy can deliver for the local community across a range of socio-economic benefits. They also believe Oxfordshire residents can feel a sense of pride in living in a county that is also an attractive destination for visitors.

In terms of negative impacts resulting from tourism and the visitor economy, traffic congestion is seen as the most acute. Mitigating against the effects of tourism on the supply and cost of residential accommodation is an issue of some importance for almost two-thirds of those surveyed. Addressing residents' concerns around environmental impacts is also pressing for a similar number. However, almost a fifth 'strongly disagree' that more should be done in this area, which may be a symptom of some stakeholders seeing residents as being 'close-minded' about the growth and development of the visitor economy.

This therefore suggests that any community engagement activity needs to carefully balance communicating the benefits of a vibrant visitor economy and future growth plans alongside clear evidence about how environmental impacts will be mitigated against; thus supporting business growth and fostering resident buy-in.

How strongly do you feel each applies to the impact that tourism and the visitor economy has on Oxfordshire's local community?

Agree strongly/slightly

Statement		Agree strongly/slightly
Investment to improve facilities for visitors benefits local people too	3% / 17% / 79%	96%
The visitor economy is an important source of employment for local people	7% / 28% / 66%	94%
There are important social, cultural and educational benefits from welcoming UK and international visitors to Oxfordshire	4% / 4% / 32% / 61%	93%
A vibrant visitor economy improves the prosperity of people living in Oxfordshire (i.e. through visitor spend and business investment)	3% / 7% / 21% / 69%	90%
Being an attractive visitor destination makes people feel proud to live in Oxfordshire	3% / 10% / 34% / 52%	86%
Oxfordshire needs a strategy to manage the effects of tourism on traffic congestion	3% / 3% / 7% / 7% / 17% / 62%	79%
More needs to be done to address local people's concerns about the environmental impacts of tourism	17% / 7% / 10% / 28% / 38%	66%
Without careful management, tourism can make residential accommodation less available and more expensive for local people	3% / 3% / 17% / 14% / 17% / 45%	62%

■ Don't know   ■ Disagree strongly   ■ Disagree slightly   Neither agree nor disagree   Agree slightly   ■ Agree strongly

APPENDIX A – PARTICIPANTS IN ENGAGEMENT & CONSULTATION

VISIONING WORKSHOP

John Hoy – OxLEP Culture & Visitor Economy Stakeholder Group (CVESG) and independent heritage consultant	Miranda Markham – Bicester Village	Nigel Tipple – CEO, OxLEP
Peter Lugosi – Oxford Brookes University	Suzanne de la Rosa – Oxford Uni (Gardens Libraries & Museums)	Paula Redway, Culture & Community Development Manager for Oxford City Council
Karen Roberts – South & Vale DC	Kevin Kaley – Consultant (representing Experience Oxfordshire)	Helen Ryan-Wallis, OxLEP
Ian Boll, Corporate Director for Communities, Cherwell DC	Vicky McGuinness, Oxford Uni (Head of Public Engagement)	Ted Maxwell, Economic Development & Green Transport for Oxford City Council
Tom Bridgman, Executive Director of Development for Oxford City Council	Caroline Jones, Story Museum	

1:1 CONSULTATIONS

Stuart Crook – Wellers Accountants (EO Board)	Cllr Duncan Enright – Oxfordshire County Council (EO Board)	Joanna Davidson – EO Chair
Hayley Beer-Gamage – EO	Chris Wigg – St Anne's College	Andrew Lister – The Mill Arts Centre Banbury
Ant Greenway – Stonor Park	Jayne Manley – The Earth Trust	Niall McWilliams, Jon Clarke and Adam Benson – Oxford United FC

Sarah-Jane Curtis – Bicester Motion	Miranda Markham – Bicester Village	Dominic Hare – Blenheim Palace
Simon Townsend – Banbury Museum	Caroline Jones – Story Museum	Paul Hobson – Modern Art Oxford
Bob Price – former Leader Oxford City Council	Claire Ford - VisitEngland	Diane Montrose – Wake up to Woodstock
Luke Marion – Oxford Bus Company	Fran Downton – Tourism South East	Estelle Bailey – Berkshire, Buckinghamshire and Oxfordshire Wildlife Trust
Annette Weiss – Chilterns AONB	Andy Parsons – Cotswolds AONB	Diana Fawcett – Oxford City Centre Manager
Brendan Hattam – Westgate Oxford	Suzanne De La Rosa – University of Oxford	Dr Victoria McGuinness – University of Oxford
Nicole Ferdinand – Oxford Brookes University	Paul Southouse & Bernadette Evans – Jericho Traders Association	Laura Price – Oxfordshire Community & Voluntary Action

LOCAL AUTHORITY SESSIONS

West Oxfordshire District Council 10 May		
Will Barton – Economic Development	Chris Hargraves - Planning	Hannah Kenyon – Climate Change
Chris Jackson - Tourism	Sophie Long – Cotswolds Tourism	
Cherwell District Council 24 May		
Steven Newman – Economic Development	Nicola Riley - Culture	Tara Murtagh-Stewart – Arts
Philippa Tatham – Visitor Economy	Chris Thom – Planning	
South & Vale 18 May		
Karen Roberts – Economic Development	Nick King – Economic Development	Abigail Brown – Arts & Culture

Alison Williams – Economic Development	Karen Tolley – Economic Development	
Oxford City Council 23 May		
Paula Redway – Culture	Ted Maxwell – Economic Development	Tom Morris - Planning
Diana Fawcett – City Centre Manager		
Oxfordshire County Council 17 May		
Robin Roger – Partnerships & Delivery	Dawn Pettis – Strategic Planning	Benjamin Smith – Infrastructure/Transport
Jemma Davis - Museums		

DMO SESSIONS

Cotswolds Tourism 10 May		
Chris Jackson	Sophy Long	Sally Graff
Emma	Lyndsay Purdie	
Experience Oxfordshire 17 May		
Hayley Beer-Gamage	Lesley Wright	Jenny McGee
Kevin Kaley		

STAKEHOLDER WORKSHOPS

Courtyard by Marriott (Abingdon South) 18 May

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Karen Roberts – South & Vale DC	John Hoy – Heritage Consultant	Giles Hughes – West Oxfordshire DC
Hannah McDonnel – Oxfordshire Community Rail Partnership	Lesley Wright – Experience Oxfordshire	Jenny McGee – Experience Oxfordshire
Kim Hallet – Kim Hallet Consulting	Kate Ji – Oxford Brooked University	Robin Tucker – Coallition for Healthy Streets and Active Transport
Geron Swann – Film Oxford	Ian Green – Oxford Civic Society	Darren Evans – Dylogic
Jeff Hunter – Courtside Hubs CIC	John Wynne - Crucible	Qing Yan – JKDRG
Andrew Pritchard – Oxford Civic Society	Liz Morrison – Happiness Horseboxes	Jonathan Clarke – OUFC
Sophy Long – Cotswolds Tourism		
Online Session 25 May		
Andrew Down – Future Oxfordshire Partnership	Andy Parsons – Cotswolds National Landscape	Dave Lewis – Earth Trust
Kevin Kaley – Consultant (on behalf of Experience Oxfordshire)	Diana Fawcett – Oxford City Centre Manager	Helen Ryan-Williams - OxLEP

Cherwell District Council

Executive

2 October 2023

Procurement Strategy (incorporating Social Value)

Report of Assistant Director Law and Governance & Monitoring Officer

This report is public.

Purpose of report

To provide an overview of a new Procurement Strategy - with background context to its aims and objectives - for adoption by the Council.

1.0   Recommendations

The meeting is recommended:

1.1   To approve the Procurement Strategy.

2.0   Introduction

2.1   Effective procurement and contract management are increasingly important for the successful delivery of value for money and quality services. The Council is a significant purchaser of goods, services and works in Cherwell. It is subject to public sector procurement rules and as such must buy goods, services and works in compliance with applicable law.

2.2   The attached Strategy sets out the objectives of the Procurement & Contracts Unit – part of Law and Governance - over the next few years to support the Council's aims for achieving cost efficiencies and added value in procurement.

2.3   The Strategy includes an action plan to build on existing processes, implement the new contract management model and drive strategically designed procurement outcomes. In addition, it will form the foundation for continuous improvement in purchasing practices, governance, and sustainability to support effective delivery of outsourced requirements.

2.4   This forward approach to purchasing, contract and supplier management will apply across all phases of procurement:

| Planning Phase | ☐ The planning phase generally refers to the decision around what needs to be bought. This phase requires significant commercial and contract planning to ensure that public funds are spent effectively, delivering the requirements to end users. |

| Award Phase | ☐ The award phase involves the placing of a contract to acquire the goods/services/works. This is a regulated environment with the Council aligning its work in this area to the legal requirements laid out in the Public Contracts Regulations 2015. |

| Execution Phase | ☐ The execution phase refers to the administration of contracts, to ensure that work is delivered in accordance with the previous phases. There is a legal obligation for providers to deliver what they have been contracted to, in line with the requirements and terms of the contract. |

2.5   The Procurement Strategy explains how a cohesive procurement and contract management approach will support development of professional standards and processes across the Council for the award and management of quality supplies, services and works contracts that reflect good value for money and provide social value for our community.

3.0   Report Details

Summary

3.1   The Strategy sets out the aims and objectives of the Council's approach to Procurement & Contract Management (2023-2025), including:

Supporting Cherwell	Developing the procurement and contracts service in alignment with Cherwell's Delivery Themes set out in the Council's Business Plan. In addition, offering practical support and commercial support for the Council's strategic plans, such as Digital Futures.
Compliance & Governance	Public procurement is governed by a legal framework aimed at promoting the principles of economic competition, transparency and equality of treatment set out in public contracts legislation. Governance will be achieved through the Procurement & Contracts Group and application of the Council's Contract Procedure Rules.
Value for Money	Significant savings and added value for the Council and local community can be achieved through: • Pipeline Planning and Stakeholder Engagement • Providing Support on Route to Market Options, Frameworks etc

	• Guidance and Support on Developing Specifications • Continuous Improvement and deployment of the E-Procurement Portal
Supplier & Contract Management	Effective management of suppliers throughout the procurement and contract lifecycle, including: • Promoting Use of Council Standard Terms and Conditions where appropriate • Support on Specifications and KPIs • Contract Management Training and Development of Staff (e.g., Guidance, Workshops, Contract Lifecycle support) • Due Diligence • Supplier Awareness and Engagement • Contracts Register
Social Value	Further to the Public Services (Social Value) Act 2012, the Council has established as part of its procurement gateway process and this Strategy: • Consideration of how proposed significant purchases of services might improve the economic, social and environmental well-being of the local area • How Sustainability - such as carbon footprint and emissions reduction, recycling and energy efficiency - may be achieved • Promotion of Equality, Diversity and Inclusion in the resourcing and delivery of contracted services and works
Promoting Opportunities	This includes consideration of Added Value, an Inclusive Economy and Apprenticeships in relevant procurement requirements, in addition to engagement with business and collaboration in public procurement with local and other public sector organisations.

3.2 The Strategy sets out a vision and roadmap for promotion of procurement opportunities, supplier engagement and partnerships to achieve value for money for the Council and increased social value for the local community. The action plan included in the Strategy sets out measurement of objectives and timelines in respect of developing procurement and contract management capabilities.

3.3 The current gateway process, established in March 2023, sets out a requirement that individual contract requirements (over the applicable thresholds set out in the Contract Procedure Rules) require submission and review of a clear contract strategy prior to approval.

3.4 Subsequently, the Council deployed a new electronic procurement portal for tendering and quotation activity. The intention is that medium-high value procurement activity is filtered through this e-procurement portal to enable accurate reporting and transparency of process.

Social Value
& Opportunities

Value for Money &
Continuous Improvement

Good Procurement Governance &
Quality Contract Management

STRATEGIC ACTION PLAN
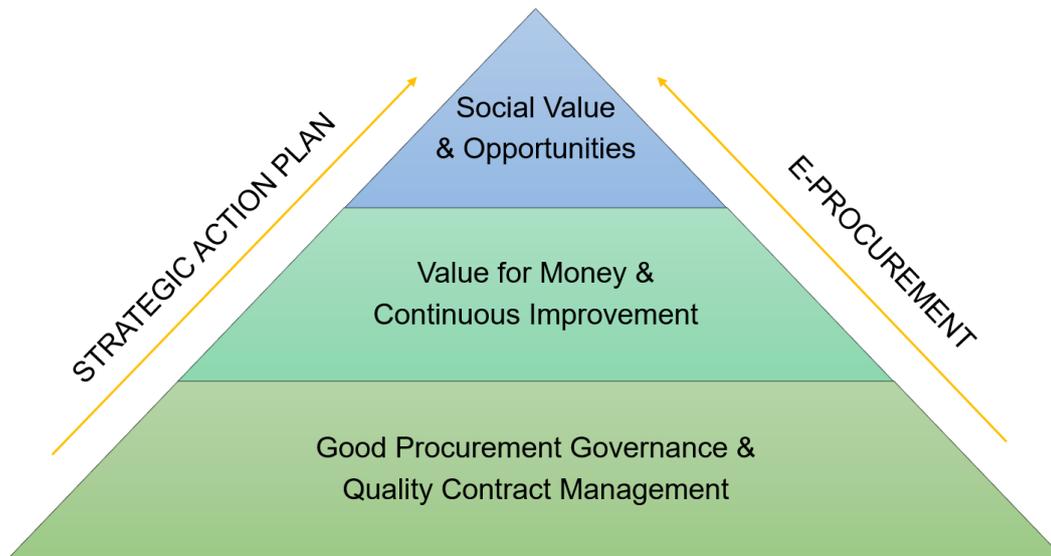
E-PROCUREMENT

4.0 Conclusion and Reasons for Recommendations

4.1 The Procurement Strategy – incorporating social value - will complement deployment of the portal and drive individual procurements and contract management requirements for effective outcomes of price, quality, quantity, place and time. This strategy – and the included action plan - will form the basis of a continuous improvement approach to drive efficiency and effectiveness.

5.0 Consultation

Officer	Role
Mark Duff	ICT and Digital Lead
Jo Miskin	Climate Action Manager, Environmental Services
Mike Gillespie	Property & Assets Manager, Property Services
Steven Newman	Senior Economic Growth Officer

6.0 Alternative Options and Reasons for Rejection

6.1 The following alternative options have been identified and rejected for the reasons as set out below.

Option 1: No Procurement Strategy

Rejected: An absence of a new strategy may result in a lack of clarity and direction for the development of procurement and contract management within the Council.

7.0   Implications

Financial and Resource Implications

7.1   The introduction of a Procurement Strategy on its own does not have explicit financial implications. However, having a clear strategy outlining how the Council should go about procurement in a lawful manner and ensuring that proper governance is followed will help to demonstrate that the Council is delivering value for money and best value.

Comments checked by:
Michael Furness, Assistant Director of Finance (S151 Officer)
Michael.furness@cherwell-dc.gov.uk

Legal Implications

7.2   It is anticipated this Strategy will have a positive impact on mitigating legal risk by setting out a roadmap for governance, legal compliance with the Public Contracts Regulations 2015 and new procurement legislation expected to come into force in 2024.

Comments checked by:
Shiraz Sheikh, Assistant Director Law & Governance (Monitoring Officer)
Shiraz.sheikh@cherwell-dc.gov.uk

Risk Implications

7.3   There are no significant risks arising directly from this report, on the contrary approval of this Strategy will mitigate any risk of becoming not complaint with the Public Contracts Regulations 2015. Any strategic risks arising through will be managed corporately and any local operational risks will be managed within the service area.

Comments checked by:
Celia Prado-Teeling, Performance and Insight Team Leader
Celia.prado-teeling@cherwell-dc.gov.uk

Equalities and Inclusion Implications

7.4   This Strategy has been developed in line with the commitments established in our Equalities, Diversity and Inclusion framework, an Equalities Impact Assessment has been completed, reflecting overall a positive impact.

Comments checked by:
Celia Prado-Teeling, Performance and Insight Team Leader
Celia.prado-teeling@cherwell-dc.gov.uk

Sustainability Implications

7.5   It is anticipated this Strategy will have a positive impact on promoting sustainability in the purchase of goods, services and works by setting out a roadmap for

addressing environmental issues and climate measures in procurement planning and contract management.

7.6   Climate and Equality Impact assessments have been conducted with no negative impacts identified (including community impacts).

Comments checked by:
Jo Miskin, Climate Action Manager
Jo.miskin@cherwell-dc.gov.uk

8.0   Decision Information

Key Decision

Financial Threshold Met: Yes

Community Impact Threshold Met: Yes

Wards Affected:

All

Links to Corporate Plan and Policy Framework

Cherwell Social Value Policy

CDC Business Plan 2023-2024

Lead Councillor

Councillor Adam Nell, Portfolio Holder for Finance

Document Information
Appendix number and title
- Appendix 1: Procurement Strategy (incorporating Social Value)

Background papers
None

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PROCUREMENT
STRATEGY
INCORPORATING SOCIAL VALUE

CHERWELL DISTRICT COUNCIL

DRAFT 2023

Cherwell | DISTRICT COUNCIL NORTH OXFORDSHIRE
PROCUREMENT & CONTRACTS

CONTENTS

INTRODUCTION

Cherwell District Council was recently re-organised as a standalone authority for the first time in a decade. It was heralded in an independent review as a leader of place, with big ambitions and a track record of delivering. The Council is a significant purchaser of goods, services and works in Cherwell. It is subject to public sector procurement rules and as such must buy goods, services and works in compliance with applicable law.

In March 2023, the Council:

- Approved new Contract Procedure Rules
- Commenced a programme of guidance and support for Council Officers
- Initiated new contract gateway procedures, leading to the establishment of a new Procurement & Contracts Group responsible for procurement governance

This Procurement Strategy explains how we will continue to develop professional standards and processes across the Council and support delivery of quality services that reflect value for money for our community.

It sets out the objectives of the Procurement & Contracts Unit – part of the Law and Governance department - over the next few years to support the Council's aims for achieving value for money and continuous improvement in procurement.

What is Procurement?		
The purchase of goods, services and works Ensuring compliance with applicable procurement law and internal governance	Development of purchasing requirements and specifications Advising on the best route to market	Engaging the market and obtaining quotes/tenders Assessing best value and supporting the contract award process
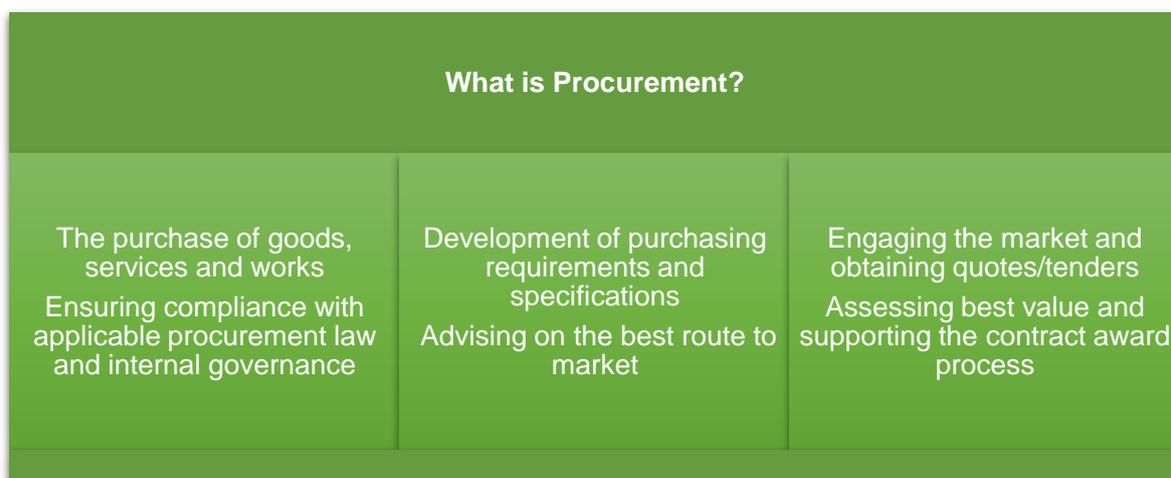
AIMS

This Procurement Strategy aims to achieve the following objectives:

This document sets out how these objectives will be achieved through the Council's procurement and contract approach over the next few years.

Delivery of these objectives will be measured and supported by an Action Plan, which forms part of this Strategy.

SUPPORTING CHERWELL

We will continue to develop the procurement and contracts service in alignment with Cherwell's Delivery Themes set out in the Council's Business Plan. In addition, we will offer practical support and commercial support for the Council's Strategic Plans, such as Digital Futures which sets out the vision to make life easier for everyone in Cherwell by using technology to enhance their experiences whether receiving or providing council services.

Through dedicated guidance, support and professional processes the Procurement & Contracts Unit will help maximise the value delivered through the Council's non-pay expenditure. This support will also assist the Council in management of strategic risk, through due diligence of suppliers and providing a framework for contract terms, specifications and key performance indicators. This approach mitigates risk, increases clarity on contract requirements and accountability of contractor performance.

Supporting Delivery Themes and Strategic Plans	Maximising Value and Achieving Savings	Mitigation of Strategic Risk

Stakeholder Engagement

Working with Council departments and service project teams to achieve early identification of procurement pipelines and forward requirements

Allocating resource and offering guidance and practical support to design and deliver efficient and effective procurement approaches

Market Engagement

Using the E-Procurement portal to advertise tender opportunities and obtain competitive quotations

Engaging with the supply market through soft market testing, supplier awareness sessions and information on registering for tender opportunities

Council & Community Engagement

Supporting the Procurement & Contracts Group in review of proposed contract strategies and procurement exercises

Implementing a new contract management approach to support supplier due diligence and control contract changes

Support Council Officers and Members with Guidance, Training and Workshops

GOVERNANCE

Public procurement is governed by a legal framework aimed at promoting the principles of economic competition, transparency and equality of treatment set out in public contracts legislation. Failure to comply with applicable law can lead to delays, costs and legal challenges. Good contract governance is also important to ensure supplies, services and works are delivered appropriately in accordance with contract requirements.

Appropriate compliance will be maintained through:

- Implementation of the Council's Contract Procedure Rules
- Monitoring of significant procurements by the Procurement & Contracts Group
- Continuation of guidance and training to Council colleagues
- Deployment of the new E-Procurement system
- Promoting measures on Anti-Fraud, addressing Conflicts of Interest & Modern Slavery Act
- Preparation for upcoming procurement legislation, currently anticipated to go-live in 2024

The key gateway forum for review and approval of significant procurement exercises is the Procurement & Contracts Group. This group considers procurement spend within the Council for medium to high value contracts. As part of the **Gateway Process**, contract strategies are considered by a multi-disciplinary group of officers and representatives of elected members:

Relevant projects are reviewed in respect of legal compliance, budget, commercial risks and alignment with the Council's Contract Procedure Rules and other policies. The Group can also be appraised with updates on how the procurement contract strategy has been delivered.

VALUE FOR MONEY

Council Procurement has a key function in delivering value for money and efficiency by ensuring the purchase of goods, services or works have been suitably market tested. This can be achieved by using processes such as requesting quotations, seeking tenders or calling off Framework Agreements (where suppliers have been selected onto the framework following a publicly advertised procurement process).

Procurement criteria may address price and quality. By facilitating a compliant procurement process, offering practical advice and implementing continuous improvement measures (such as the new E-procurement portal), the Procurement & Contracts Unit can help deliver significant savings and achieve added value for the Council and local community, by supporting:

- Pipeline Planning and Stakeholder Engagement
- Providing Support on Route to Market Options, Frameworks etc
- Guidance and Support on Developing Specifications
- Quality and Financial Criteria in Invitations to Tender
- Achieving Savings, Quality Service Deliverables and Added Value

To ensure good governance – and value for money – it is important the Procurement & Contract Unit is appropriately resourced. Further details are set out in the Action Plan.

New Contract Procedure Rules & Procurement Governance Structure

Practical Guidance, Contract Toolkit and Procurement Training

Continous Improvement, E-Procurement and Achieving Value for Money
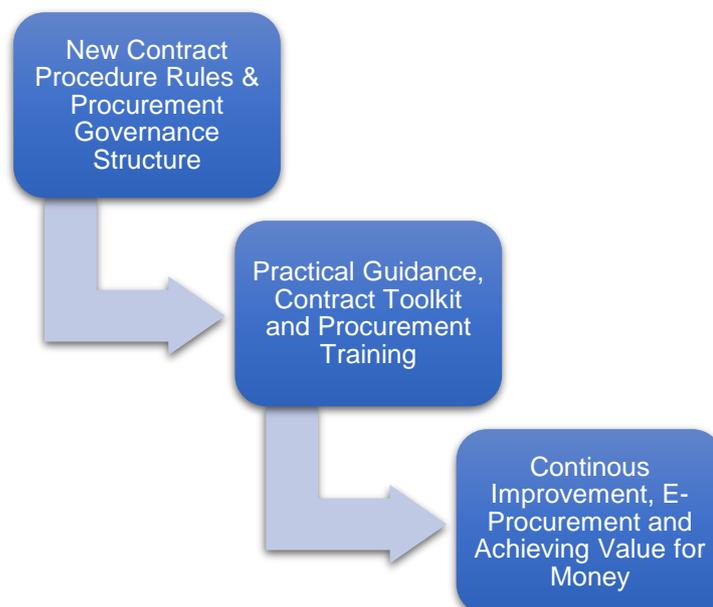
SUPPLIER & CONTRACT MANAGEMENT

Market testing and tender processes form just part of the overall contract lifecycle for long term and recurring procurement requirements. Contract Managers within the relevant service departments will be responsible for developing contract specifications and strategies, with support from the Procurement & Contracts Unit:
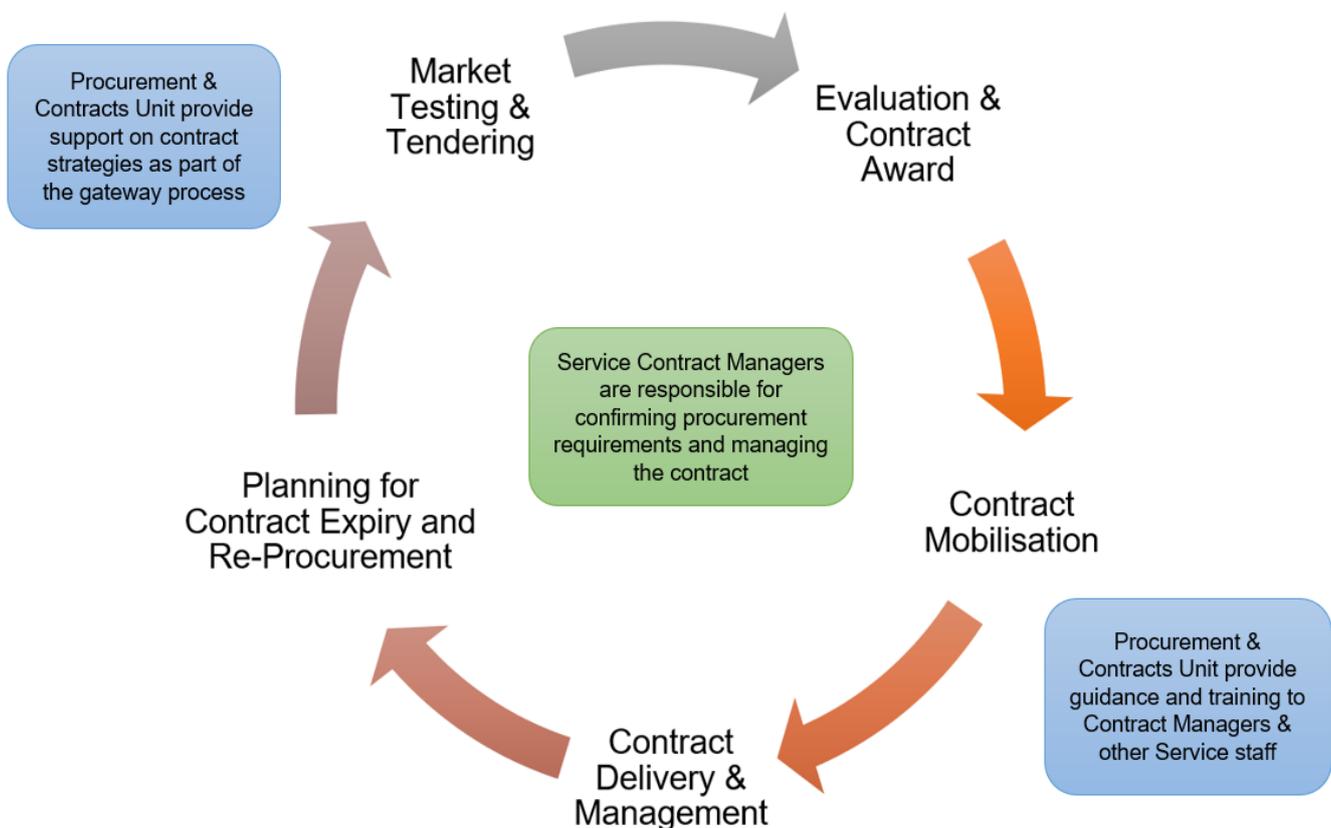
Once a supplier has been awarded a contract, good contract management is a vital step in the process to make sure what is promised will be delivered. Effective contract management involves the proactive monitoring of all activities necessary to ensure goods, services and works are provided in accordance with the contractual agreement.

Mobilisation happens after a supplier is selected, but before the contract goes live. The Contract Management approach will support information gathering to help run the contract and make sure that the right plans are in place.

For some contracts, the Council may be committed to working with a supplier for some time. The success of the contract relies on good communication between both parties. On-going due diligence can identify and mitigate issues such as missed deadlines, compliance failures and inefficiency.

The Contract Management approach will promote review meetings to avoid drift and keep the relationship open and constructive, identifying and resolving issues early. It will also support risk management to identify, control and manage risks that might have an impact on the contract being performed effectively.

Procurement and Contracts Unit can support Contract Managers in service departments on the management of contract changes that may arise during the term of the contract - to ensure they accord with the Contract Procedure Rules and applicable terms and conditions. Examples include:

- Changes of key personnel
- Factors affecting supplier costs
- Changes to legislation
- Extraordinary events beyond the supplier's control

The contract documentation should include clear expectations and strategies for exit and transition. Procurement & Contracts Unit are in a unique position to support the full contract lifecycle:

Promoting Use of Council Standard Terms and Conditions where appropriate	Support on Specifications and KPIs	Contract Management Training and Development of Staff (e.g., Guidance, Workshops, Contract Lifecycle support)
Due Diligence	Supplier Awareness and Engagement	Contracts Register
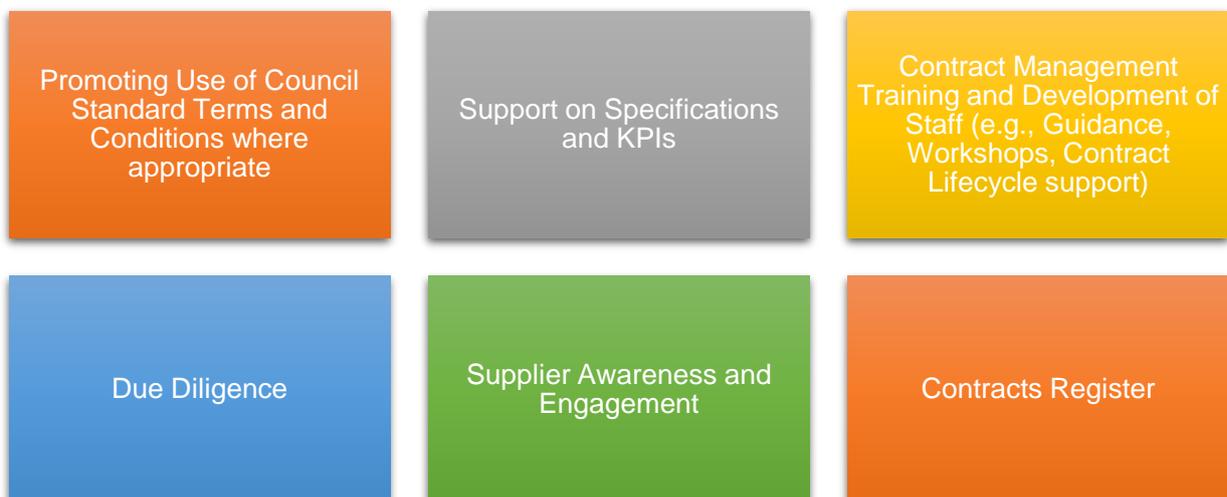
DELIVERING SOCIAL VALUE
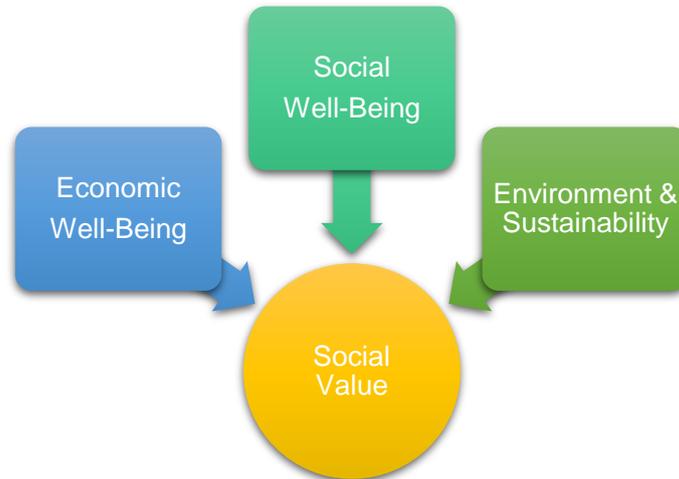
Social value in procurement is about promoting how the purchase of goods, services and works can create additional benefits for society.

Further to the Public Services (Social Value) Act 2012, the Council has established as part of its procurement gateway process and this Strategy:

- Consideration of how proposed purchase of services might improve the economic, social and environmental well-being of the local area where applicable

- How Sustainability – such as carbon footprint and emissions reduction, recycling or energy efficiency - may be achieved

- Promotion of Equality, Diversity and Inclusion in the resourcing and delivery of contracted services and works

These issues may be connected in their positive social impact and can be enhanced by the approach set out in this Strategy for procurement opportunities, supplier engagement and partnerships.

Approaches to delivering social value include:

- Engagement with organisations with a focus on maximising the social, community, and environmental value delivered through the spending power of the Council

- Supporting the development and inclusion of social value related specifications and evaluation criteria in the planning and design of procurement processes and contract management approaches, for example:

  - Promoting Local Skills and Employment and an "Inclusive Economy"
  - Supporting Healthier, Safe and More Resilient Communities
  - Supporting Decarbonisation and Net Zero Commitments

Further details on achieving these aims, including addressing climate change and Scope 3 emissions, are set out in the Action Plan.

This work will contribute to the procurement and contract related aspects of Cherwell's Themes, Outcomes and Measures ("TOMs") originally set out in the CDC Social Value Policy prior to de-coupling:

THEME	OUTCOMES
PROMOTING DIVERSE LOCAL SKILLS & EMPLOYMENT	More local people in employment
	More opportunities for disadvantaged people
	New and improved skills for local people
	Improved employability of young people
SUPPORTING GROWTH OF SMEs, THE GREEN ECONOMY AND ATTRACTING RESPONSIBLE INVESTMENT	More investment and opportunities for local MSMEs and VCSEs
	Improving staff wellbeing and mental health
	Increase and promote fair and equal pay, and reduce pay gaps (gender, ethnicity, disability, etc.), by collaboration with suppliers
	Encourage best practice and ensure compliant, ethical procurement
	Social Value embedded in the supply chain
VIBRANT, SAFER & MORE CONNECTED COMMUNITIES	Addressing the causes of health inequalities
	Vulnerable people are helped to live independently
	Crime and anti-social behaviour is reduced
	Engage with our communities, develop strong ties and collaborate on projects to improve the local area together
TAKING CLIMATE ACTION FOR A ZERO-CARBON FUTURE	Carbon emissions are reduced
	Air pollution is reduced
	Safeguarding the natural environment
	Resource efficiency and circular economy solutions are promoted
	Sustainable procurement is prioritised
ENCOURAGING SOCIAL INNOVATION	Other measures (TBD)

- This Strategy builds on these TOMs and progresses forward, helping to achieve a Cherwell specific procurement and contract management approach across the planning, evaluation and contract award (and post-award) stages:

Identify Council strategies and category plans relevant to the procurement

Identify relevant Social Value outcomes

Add evaluation questions to the tender

Define the weighting of those questions and publish as part of tender documentation

Tender evaluation and contract award process. Review and ongoing monitoring of outcomes and benefits
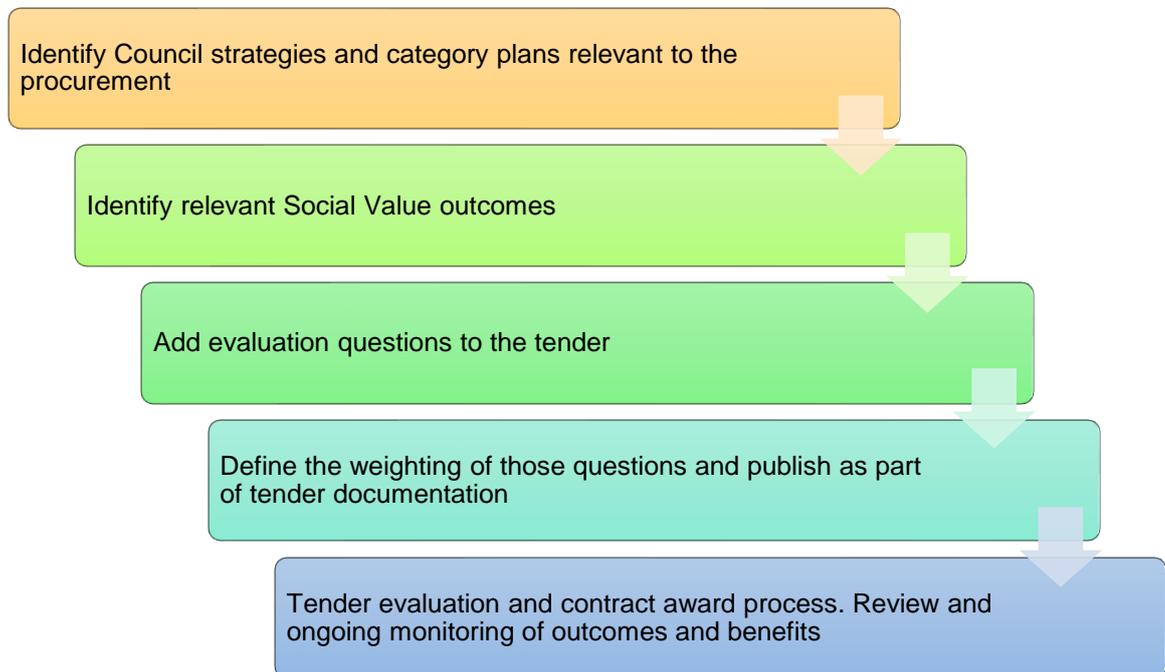
- We will also provide guidance to Council stakeholders and contract managers on considering how future requirements might be offered in smaller, multiple contracts – if practicable and aligned with appropriate contract management requirements

- In addition, we will engage with larger regional and national suppliers to enquire how they may utilise local suppliers in their supply chains – and/or invest into our local communities, through jobs, training or improving our environment

Social value criteria - in the context of procurement - should be relevant to the scope, specification and objectives of the contract. Council officers are prompted during the gateway process to consider how social value can be addressed as part of the contract strategy. They are also supported with guidance and training on developing social value requirements, criteria and related specifications.

By engaging with local suppliers and businesses we can increase interest and participation in procurement opportunities, supporting the local economy. Further details are set out in the Action Plan annex.

CREATING OPPORTUNITIES

The Council will encourage officers to use legally compliant processes to open up tender opportunities for local Small & Medium Enterprises (SMEs), and Voluntary, Community or Social Enterprise organisations (VCSEs) where practicable. This is supported by deployment of our new electronic procurement portal - used for registering suppliers, advertising tender opportunities and seeking quotations.

E-Procurement through our new portal offers a range of benefits to the procurement and contract life cycle, supporting compliance and the delivery of value for money.

Free internet based registration for Suppliers

Secure portal for tender submission

Ability to advertise opportunities openly and quickly

Supports Compliance & Audit Requirements

Contract Management Support Features

Publishes Transparency Award Notices

The Council can also promote opportunities for the local community and suppliers by:

- Including consideration of Added Value, Apprenticeships and other positive Community Impact in relevant procurement requirements

- Engagement with Local Business & Organisations through supplier awareness sessions and developing procurement information on our website and portal

- Promoting Collaboration & Partnerships in public procurement with local organisations and public sector partners

ANNEX

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ACTION PLAN

Procurement Objective	Action	Expected Outcome	Timeline
Efficient & Effective Procurement	Ensuring the Procurement & Contract Unit is appropriately resourced with relevant governance and commercial skill sets	Procurement & Contracts is seen as an enabling function supporting innovation, quality service provision and value for money	2023-2025
	Reviewing opportunities for improved ways of working, actively seeking involvement in projects at an early stage to help deliver efficiencies where possible	Buyers, contract managers and decision makers are provided with clear guidance and resources are available to assist them.	2023-2025
	Supporting contract managers and stakeholders with guidance and training to know where and how they can achieve best value	Buyers, contract managers and decision makers have the knowledge to make the right purchasing and contract management decisions	2023-2025
	Advising colleagues on developments in applicable regulations or other factors affecting Procurement, where there is likely to be a significant impact on the Council's operations, financial sustainability or reputation	Prevention or mitigation of commercial or financial risks arising from procurement of goods, services and works	2023-2025

Procurement Objective	Action	Expected Outcome	Timeline
Governance & Compliance	Contract and supply risks are noted and reduced / managed where appropriate	Prevention or mitigation of legal or strategic risks arising from procurement of goods, services and works	2023-2025
	Training of staff is appropriate to understand the legal aspects of procurement and encourage dissemination of knowledge and good practice	Prevention or mitigation of legal or strategic risks arising from procurement of goods, services and works	2023-2025
	Working in conjunction with Finance, Audit and Contract Managers to monitor areas of Expenditure where there may be a higher risk of fraud, supplier failure, or other related negative impacts	Prevention or mitigation of fraud related risks	2023-2025
	Review of new Procurement Legislation, related Government Guidance and Procurement Policy Notes	Ensure compliance with applicable law at all times (such as the Public Contracts Regulations 2015 or any subsequent procurement legislation as may be in force) to avoid potential challenges, delays or costs	2023-2025
		Revision and alignment of procurement policies, processes and guidance in time for implementation of any new Procurement Legislation	2024

Procurement Objective	Action	Expected Outcome	Timeline
Value For Money	Periodic Value for Money reviews across areas of spend, increasing market knowledge through category strategies or other procurement approaches/routes to market	Savings opportunities identified and delivered against	2023-2025
	Periodic benchmarking of current suppliers to ensure the Council is getting the best price and quality available	Savings opportunities identified and delivered against	2023-2025
	Potential category strategies or alternative procurement approaches to be designed, evaluated and where appropriate implemented	Consolidation of contracts and savings opportunities identified and delivered against	2024
	Prudent management of demand, including reducing or delaying specific contract activity, number of purchases, and consolidating multiple purchases to obtain maximum supply outcome for minimum expenditure where practicable	Consolidation of contracts and savings opportunities identified and delivered against	2023-2025

Procurement Objective	Action	Expected Outcome	Timeline
Achieving Social Value	Deploying the principles of sustainable procurement into the contract lifecycle with consideration to socio-economic and environmental factors (inc. Cherwell TOMs)	Opportunities to deliver social value and postive community impact identified and delivered against	2023-2025
	Facilitating sustainability workshops and addressing waste, energy efficiency & climate change measures (inc. Scope 3 emissions)	Opportunities to deliver sustainability and meet carbon targets identified and delivered against	2023-2025
	Promoting Equality, Diversity, Inclusion in the key stages of the procurement and contract lifecycle including in respect of protected characteristics	Opportunities to promote inclusive social values identified and delivered against	2023-2025
	Reviewing categories or areas most salient to Modern Slavery and promoting enforcement of the Modern Slavery Act in relevant procurement processes	Increased staff and supplier awareness of Modern Slavery Act issues and responsibilities in the supply chain	2023-2025
Promoting Opportunities	Launch of supplier focused procurement portal/website landing page	Enhanced supplier awareness of Council procurement opportunities and increased competitiveness in the supply market	2023
	Actively encourage new entrants to supply market through supplier engagement events – including local SME and other suppliers	Positive engagement with the supply market. Increased supplier awareness of Council procurement opportunities & enhanced competitiveness.	2024
	Jointly tendering with partners when appropriate	Increased co-ordination and engagement with community and public sector partners.	2024-2025

Cherwell District Council

Executive

2 October 2023

Performance, Risk and Finance Monitoring Report August 2023

Report of Assistant Director Finance and Assistant Director Customer Focus

This report is public

Purpose of report

To give the committee an update on how well the council is performing in delivering its priorities, managing potential risks, and balancing its finances during August 2023.

1.0   Recommendations

The meeting is recommended:

1.1   To consider and note the contents of the Council's Performance, Risk and Financial report for the month of August 2023.

1.2   To approve the Risk Strategy 2023 – 24 (Appendix 8).

1.3   To note the change in the reporting cycle for the five monitoring only measures from monthly to quarterly.

1.4   To approve the use of reserves in Appendix 5.

1.5   To approve the £0.108m additional grant funding for the Disabled Facility Grant Capital Project.

2.0   Introduction

2.1   The council actively and regularly monitors its performance, risk, and financial positions to ensure it can deliver its corporate priorities and respond effectively to emerging issues.

2.2   This monitoring takes place at least monthly so the council can identify potential issues at the earliest opportunity and put measures in place to mitigate them.

2.3   These updates are consolidated into a single report given the implications and interdependencies between them, and this is the summary up to August 2023.

3.0 Report Details

3.1 This report is split into three sections:
- Finance
- Performance
- Risk

3.2 The Finance section presents the year-end forecasts for the 2023/2024 financial year, based on actual income and expenditure figures up to the end of August.

3.3 The Performance section sets out the council's progress in achieving its August priorities, which are set out in its Outcomes Framework.

3.4 The Risk section highlights any changes to risks within the council's Leadership Risk Register during August. It also includes an updated Risk Strategy for 2023-24 for the committee's approval.

3.5 Finance Update

The Council's forecast outturn position for 2023/2024 is an overspend of £0.656m shown in Table 1. There has been a change in the forecast from the previous update of £0.318m mainly due to an increased forecast within Planning & Development and Environmental Services. For further detail of the major variances please see Table 4.

The Council notes that national pay negotiations are ongoing and that local union representatives are in discussion with employers. The forecast for this month includes the current interim pay award that was applied from 1 April 2023 – to help us support our staff ahead of the National negotiations. Once the outcome of the national pay negotiations has concluded and a local pay award agreement reached this will be factored into the forecast for 2023/24 and the MTFS for the Council.

Report Details

Table 1: Forecast Year End Position

Service	Original Budget £m	Current Budget £m	August Forecast £m	August Variance (Under) / Over £m	% Variance to current budget %	Prior Month Variance (Under) / Over £m	Change since Previous (better) / worse £m	
HR & OD	0.807	0.807	0.807	0.000	0.0%	0.000	0.000	🟩
Wellbeing & Housing	2.286	2.497	2.347	(0.150)	-6.0%	(0.110)	(0.040)	🟩
Customer Focus	2.367	2.367	2.337	(0.030)	-1.3%	(0.025)	(0.005)	🟩
Chief Executive	**5.460**	**5.671**	**5.491**	**(0.180)**	**-3.2%**	**(0.135)**	**(0.045)**	🟩
Finance	3.303	3.376	3.376	0.000	0.0%	0.000	0.000	🟩
Legal & Democratic	1.959	2.033	2.148	0.115	5.7%	0.030	0.085	🟥
ICT	1.526	1.526	1.526	0.000	0.0%	0.000	0.000	🟩

Property	(1.691)	(1.691)	(1.619)	0.072	-4.3%	0.079	(0.007)	🟥
Resources	**5.097**	**5.244**	**5.431**	**0.187**	**3.6%**	**0.109**	**0.078**	🟥
Planning & Development	1.890	1.893	2.084	0.191	10.1%	0.041	0.150	🟥
Growth & Economy	0.546	0.514	0.424	(0.090)	-17.5%	(0.090)	0.000	🟩
Environmental	5.106	5.191	5.747	0.556	10.7%	0.421	0.135	🟥
Regulatory	1.150	1.151	1.151	0.000	0.0%	0.000	0.000	🟩
Communities	**8.692**	**8.749**	**9.406**	**0.657**	**7.5%**	**0.372**	**0.285**	🟥
Subtotal for Directorates	**19.249**	**19.664**	**20.328**	**0.664**	**3.4%**	**0.346**	**0.318**	🟥
Executive Matters	3.695	3.695	3.687	(0.008)	-0.2%	(0.008)	0.000	🟩
Policy Contingency	5.229	4.814	4.814	0.000	0.0%	0.000	0.000	🟩
Total	**28.173**	**28.173**	**28.829**	**0.656**	**2.3%**	**0.338**	**0.318**	🟩

FUNDING	**(28.173)**	**(28.173)**	**(28.173)**	**0.000**	**0.0%**	**0.000**	**0.000**	🟩

(Surplus)/Deficit	**0.000**	**0.000**	**0.656**	**0.656**		**0.338**	**0.318**

Note: A positive variance is an overspend or a reduction in forecast income and a (negative) is an underspend or extra income received. Green represents an underspend and red represents a overspend for the current month's forecast.

Table 2: Analysis of Forecast Variance – August 2023

Breakdown of current month forecast	August 2023 Forecast £m	Base Budget Over/ (Under) £m	Savings Non-Delivery £m
Chief Executive	(0.180)	(0.195)	0.015
Resources	0.187	0.177	0.010
Communities	0.657	0.654	0.003
Subtotal Directorates	**0.664**	**0.636**	**0.028**
Executive Matters	(0.008)	(0.008)	0.000
Policy Contingency	0.000	0.000	0.000
Total	**0.656**	**0.628**	**0.028**

FUNDING	**0.000**	**0.000**	**0.000**

(Surplus)/Deficit	**0.656**	**0.628**	**0.028**

Table 3: Budget compared with Forecast

The graph below shows the change from July's forecast to August 2023 compared to budget.
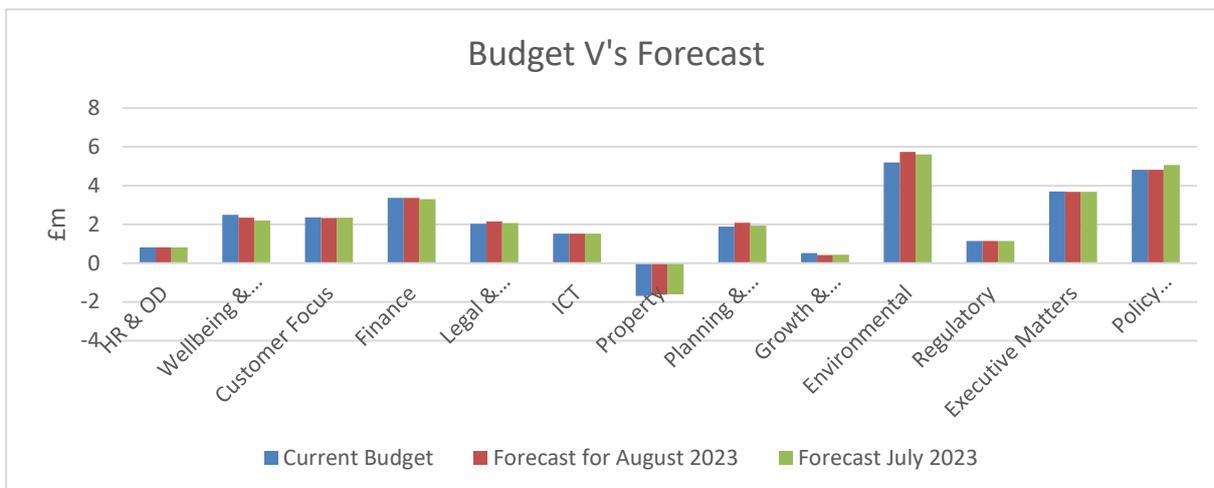
Table 4: Top Major Variances:

Service	Service	Current Budget	Variance	% Variance
Planning & Development	Development Management	0.598	0.191	31.9%
Environmental Services	Waste & Recycling	3.230	0.556	17.2%
Property	Property & Asset Management	0.790	0.072	9.1%
Legal & Democratic	Legal & Democratic	2.033	0.155	7.6%
	Total	**6.651**	**0.974**	

Development Management Variance £0.191m (July's Variance Overspend £0.041m)
Planning and Development presently has a projected overspend of £0.191m due largely to income projections being lower than expected and agency costs. Some in year saving has been made to assist the overall position (£0.075m). The expected outturn is £0.150m different to last month largely due to lower income expectations for Building Control as well as some extended agency cost.

Waste & Recycling Variance £0.556m (July's Variance over spend £0.421m): -
The forecasted pressure of £0.556m within Environmental Services is primarily due to changes in the global market for recycled materials falling as recycling processing costs have increased.
Commodity prices are currently very volatile, and this could change during the year.

Property & Asset Management Variance £0.072m (July's Variance Underspend [0.007m])

As previously reported, the Property team are being rebuilt post decoupling to provide the best level of service possible. Whilst this rebuild is being undertaken, agency support is required to the fill the resource in the interim.

Legal & Democratic Variance £0.155m (July's Variance overspend 0.030m)
Overspend is due to:
1) Higher than anticipated costs of delivering the District Elections.
2) As with Property, and as previously reported, the Legal team is being rebuilt post decoupling and agency staff is being used to fill posts whilst actively recruiting to the vacant roles.

These extra costs are partly offset by an underspend in Legal and Procurement because of vacant posts.

Table 5: Earmarked Reserves and General Balances at August 2023
The table below is a summary of the level of reserves the council holds.

Reserves	Balance 1 April 2023 £m	Original Budgeted use/ (contribution) £m	Changes agreed since budget setting £m	Changes proposed August 2023 £m	Balance 31 March 2024 £m
General Balance	(6.150)	0.000	0.000	0.000	(6.150)
Earmarked	(28.052)	(2.469)	1.396	(0.627)	(29.752)
Ringfenced Grant	(4.327)	0.711	0.344	0.000	(3.272)
Subtotal Revenue	**(38.529)**	**(1.758)**	**1.740**	**(0.627)**	**(39.174)**
Capital	(8.049)	1.000	0.000	0.000	(7.049)
Total	**(46.578)**	**(0.758)**	**1.740**	**(0.627)**	**(46.223)**

For reserve requests please see appendix 5.

3.6 Capital

There is a forecast in-year underspend of (£7.165m), of which £7.121m is to be reprofiled into future years. There is an overall forecast decrease in the total cost of schemes of (£0.044m).

Table 6: Capital Spend 2023/2024

Directorate	Budget £m	Forecast Spend 2023/24 £m	Re-profiled beyond 2023/24 £m	Variance to Budget £m	Prior Month Variance to Budget £m
Chief Executives	6.661	5.188	1.473	0.000	0.000
Resources	7.264	5.074	2.210	0.020	0.020
Communities	9.628	6.126	3.438	(0.064)	(0.064)

Total	**23.553**	**16.388**	**7.121**	**(0.044)**	**(0.044)**

For further detail please view Appendix 1.

Table 7: How the Capital Programme is financed

Financing	23/24 Budget £m	Future Years £m
Borrowing	17.652	10.222
Grants	5.901	8.763
Capital Receipts	0.000	1.175
	23.553	**20.160**

Table 8: Total Capital Project Forecast

Directorate	Budget £m	Total Forecast 2023/24 £m	Variance to Budget £m	Prior Month Variance to Budget £m
Chief Executives	12.337	12.337	0.000	0.000
Resources	7.264	7.284	0.020	0.020
Communities	24.112	24.048	(0.064)	(0.064)
Total	**43.713**	**43.669**	**(0.044)**	**(0.044)**

Table 9: Top Five in-year Capital Variances: -

Code	Top 5 In-Year Variances	Budget Total £'000	Reprofile to 24/25 £'000	% of in year Budget Variance
40278	Development of New Land Bicester Depot	2.775	2.275	81.98%
40131	S106 Capital Costs	3.310	1.116	33.72%
40144	Castle Quay	2.985	0.985	32.99%
40239	Bicester East Community Centre	1.371	0.600	43.76%
40028	Vehicle Replacement Programme	1.731	0.531	30.68%
		12.172	**5.507**	

Development of New Land Bicester Depot
Scoping underway. Spend will require re profiling in line with programme - detail to be confirmed as work is undertaken.

S106 Capital Costs
Cherwell DC holds developer contributions derived from s106 agreements for Town and Parish councils to deliver agreed programmes of work. The pace of this delivery is outside the control of CDC officers; whilst it is anticipated that many projects will be delivered close working with partners has enabled reprofiling of s106 to span into next year.

Castle Quay

As part of the Castle Quay Development and the regeneration of Banbury, the Council is working closely and in partnership with a number of public and private organisations to repurpose parts of Castle Quay Shopping Centre to deliver a number of complimentary uses enabling the regeneration of Banbury. Once each element has been contractually agreed, work can commence.

Bicester East Community Centre

Start date on site is September 2023. £1.371m of capital funding remains allocated to deliver this bespoke community centre for local residents. The project duration is circa 50 weeks with some spend requiring to be reprofiled to 2024/25.

Vehicle Replacement Programme

Reprofiling of £0.531m in to 2024/25. A review of the programme has been undertaken. Nationally there is delay in vehicle supply and thus delivery.

3.7 Performance Summary

3.8   The council has performed well against its seven KPIs for August, having achieved all but one of its targets. **See appendix 6 for the full list of targeted measures.**

The measure narrowly missed was the target for:

Average time taken to process Housing Benefit New Claims and council tax reduction (Days)

<u>August:</u> **Amber** - 18.11 days against a target of 18 days.

<u>Year to date:</u> **Green** - 16.35 days against a target of 18 days.

<u>Comments from the service:</u> The team is performing ahead of target for the year to date, so this month's high volume of claims will not have an impact of their performance for the year, as they expect to be back under target next month.

3.9   On the basis that there is very little monthly fluctuation for the five measures we monitor for trend analysis purposes, we are proposing to move this to quarterly reporting.

3.10 August Highlights

- We launched our 20 years of recycling campaign to celebrate the council and residents' dedication and commitment to recycling as much waste as possible.

- We launched the Brighter Futures Banbury Community Fund, offering grants for up to £3,000 to groups or not-for-profit organisations delivering activities across Ruscote, Neithrop and Grimsbury wards; grants are funded by Oxfordshire County Council's public health.

- During the summer holidays our Activate and Eat Holiday Club provided fun activities and meals to 151 children on free school meals. Also, 336 children attended our Activate Holiday Club.

3.11 Risk Update

3.12 Cherwell's risk management follows good practice guidance to help the Council to be an effective and efficient organisation; in line with this guidance the Risk Management Strategy is reviewed on an annual basis, taking into consideration any comments from the internal audit of risk management and feedback from the Accounts, Audit and Risk Committee.

3.13 This year's review was carried out from June to August 2023, including input and suggestions from the Accounts, Audit and Risk committee requested on 26 July 2023.

3.14 The updated Risk Strategy for 2023- 24 (see appendix 8) keeps the 5 x 5 risk matrix, as previously used, and our risk management principles remain unchanged; however, we have simplified the language.

3.15 The risk register for August shows there are no score changes for the month. Therefore, the overall position of all Leadership risks for this period remains as follows:

		Probability				
		1 - Remote	2 - Unlikely	3 - Possible	4 - Probable	5 - Highly Probable
Impact	5 - Catastrophic			L08		
	4 - Major		L09	L03-L06-L07 - L11-L14	L01	
	3 - Moderate		L04-L05-L10	L02-L12	L13	
	2 - Minor					
	1 - Insignificant					

The full Leadership Risk Register is attached in appendix 7.

4.0   Conclusion and Reasons for Recommendations

This report provides an update on progress made during August, to deliver the council's priorities, manage potential risks and remain within the agreed budget.

5.0   Consultation

This report sets out the performance, risk, and budgetary positions for the fifth month of this financial year, therefore no formal consultation or engagement is required.

In line with their respective terms of reference, the Accounts, Audit & Risk Committee reviews the risk register and risk strategy, the Budget Planning

Committee undertakes finance monitoring and the Overview and Scrutiny Committee performance monitoring.

6.0   Alternative Options and Reasons for Rejection

6.1   This report summarises the council's performance, risk, and financial positions for August, therefore there are no alternative options to consider. However, members may wish to request further information from officers for inclusion.

7.0   Implications

Financial and Resource Implications

7.1   Financial and Resource implications are detailed within sections 3.5 to 3.6 of this report.

Comments checked by:
Michael Furness, Assistant Director of Finance / Section 151 Officer, Tel: 01295 221845, Michael.Furness@cherwell-dc.gov.uk

Legal Implications

7.2   There are no legal implications arising directly from this report.

Comments checked by:
Shahin Ismail, Interim Head of Legal Services,
Shahin.Ismail@cherwell-dc.gov.uk

Risk Implications

7.3   This report contains a full update with regards to the council's risk position at the end of August 2023 within section 3.11. Also, attached as appendix 9, our updated Risk Strategy for 2023-24.

Comments checked by:
Celia Prado-Teeling, Performance Team Leader, Tel: 01295 221556
Celia.prado-teeling@cherwell-dc.gov.uk

Equalities and Inclusion Implications

7.4   There are no direct equalities and inclusion implications as a consequence of this report.

Comments checked by:
Celia Prado-Teeling, Performance Team Leader, Tel: 01295 221556
Celia.prado-teeling@cherwell-dc.gov.uk

Sustainability Implications

7.5   There are no direct sustainability implications as a consequence of this report.

Comments checked by:

Ed Potter, Assistant Director Environmental Services
Ed.Potter@cherwell-dc.gov.uk

8.0 Decision Information

Key Decision

Financial Threshold Met: Yes

Community Impact Threshold Met: No

Wards Affected:

All

Lead Councillors

Councillor Sandy Dallimore, Portfolio Holder for Corporate Services
Councillor Adam Nell, Portfolio Holder for Finance

Document Information

Appendix number and title
- Appendix 1 – Finance Capital August 2023
- Appendix 2 – Detailed Revenue Narrative on Forecast August 2023
- Appendix 3 – Virements and Aged debt August 2023
- Appendix 4 – Funding August 2023
- Appendix 5 – Use of reserves and grant funding August 2023
- Appendix 6 – Performance August 2023
- Appendix 7 – Leadership Risk Register August 2023
- Appendix 8 – Risk Strategy 2023 – 24

Background papers
None

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Appendix 1 - CHERWELL CAPITAL EXPENDITURE

Cost Centre	DESCRIPTION	BUDGET	YTD ACTUAL	PO COMMITMENTS	Forecast	RE-PROFILED BEYOND 2023/24	Current month Variances £000	Prior month Variances £000	Forecast Narrative	Forecast Narrative (private consumption)
40010	North Oxfordshire Academy Astroturf	183	0	0	80	103	-	-	Good progress made to date on scale,scope and nature of the project. Close working with the school. Next steps are to apply for pre-application planning advice and complete project costings.	Currently waiting for final costings and designs ahead of Pre App and Planning Permission. S106 funding is allocated to the construction of the new facility. Consideration to be given to the model of how this is delivered due to VAT implications
40019	Bicester Leisure Centre Extension	79	15	0	30	49	-	-	The project continues to progress as predicted. Outline costings for the project have been received. The next step is to complete a detailed business case prior to planning permission being sought.	The project continues to progress as predicted. Outline costings for the project have been received. Detailed Business Case to be worked through as part of next stage. S106 funding is allocated to this project for construction.
40083	Disabled Facilities Grants	1,432	585	75	1,432	0	-	-	Full spend anticapted.	This budget is an amalgam of £1.239m Better Care Fund allocation and £0.085m underspend from 2022-23 alongside £0.108m reprofiled from the Discretionary Grants budget. Full spend anticipated.
40084	Discretionary Grants Domestic Properties	150	18	0	150	0	-	-	This budget covers small repairs and larger essential repairs to vulnerable households. Demand is typically heavily weighted towards the winter months, no carry-forward into 2024/25 is currently expected.	This budget covers small repairs and larger essential repairs to vulnerable households. Demand is typically heavily weighted towards the winter months, no carry-forward into 2024/25 is currently expected.
40131	S106 Capital Costs	3,310	59	176	2,194	1,116	-	-	Cherwell holds developer contributions derived from s106 agreements for Town and Parish Councils for them to deliver agreed programmes of work. The pace of this delivery is outside the control of CDC officers; whilst it is anticiapted that many projects will be delivered close working with partners has enabled reprofiling of s106 to span into next year. The next significant reprofile will occur in November.	The budget allocation is for projects funded by S106. Due to the clauses of grant agreements, the passporting S106 funds is reliant upon timely project delivery by other bodies outside of the Council's control. It is currently anticipated that the majority of projects will be delivered in 2023/24.
40160	Housing Services - capital	160	0	0	0	160	-	-	Developer completions slower at NW Bicester than expected therefore final payment will be made to the developer in 2024/25.	Strategic housing contributions are delayed for North West Bicester due to slower completion rate by the developer
40213	Build Team Essential Repairs & Imp	116	0	0	116	0	-	-	Work is currently underway and it is likely that all capital expenditure will take place during financial year 2023/24.	Work is currently underway and it is likely that all capital expenditure will take place during financial year 2023/24.
40251	Longford Park Art	45	0	0	0	45	-	-	The final delivery of the public art programme is dependent on overall site handover which has been delayed by the developers. The remaining spend on the public art programme has been reprofiled to acknoledge this.	The budget will need to be reprofiled in to 2024/25 because of delays in transfer of land from the developer to new ownership. Therefore no public art is to be constucted until this process has been completed.
40262	Affordable Housing	1,156	41	56	1,156	0	-	-	The tender for these works will conclude shortly and the programme is anticiapted to begin on site in October. The overall scheme will complete in 24/25.	We have engaged design professionals to prepare the specification of works which are required to effect both the repair to the roof and the reinstatement of the living accommodation, which has been affected by the invasive investigative works which we have undertaken. The tender process will be completed shortly. The use of LAHF is linked to this spend.
40275	UKSPF - CDC community facilities x 3	0	10	0	0	0	-	-	Working in partnerhsip with communities on the scope of works to be procured. Full spend is anticipated.	The funding is for community centres to reinstate / refurbish quality working toilets and kitchens. The scale of the works requires is outside the capacity of the Community assocaitions.
	Wellbeing & Community	**6,631**	**727**	**307**	**5,158**	**1,473**	**0**	**0**		
40292	iTrent HR System Upgrades	30	0	0	30	0	-	-	The implementation of the main modules within iTrent is very nearly finished but we do still have other modules to explore and it is important that we maintain this capital expenditure to explore ROI these additional modules offer.	The implementation of the main modules within iTrent is very nearly finished but we do still have other modules to explore and it is important that we maintain this capital expenditure to explore ROI these additional modules offer.
	HR & OD	**30**	**0**	**0**	**30**	**0**	**0**	**0**		
	Chief Executive	**6,661**	**727**	**307**	**5,188**	**1,473**	**0**	**0**		
40081	Bicester Town Centre Redevelopment	0	1	0	(0)	0	(0)	(1)	Project completed	Project completed
40111	Admiral Holland Redevelopment Project (phase 1b)	61	54	0	61	0	-	-	On target	Retention payment expected
40139	Banbury Health Centre - Refurbishment of Ventilation, Heating & Cooling Systems	104	0	0	104	0	-	-	On target	After investigations, it has been identified that funds for the works are recoverable from the service charge. Works tendered pending approval from Procurement and Contracts group to award the project.
40141	Castle Quay Waterfront	0	5	0	0	0	-	-	On target	Retentions to be paid in current financial year.
40144	Castle Quay	2,985	(69)	344	2,000	985	-	-	As part of the Castle Quay Development and the regeneration of Banbury, the Council is working closely and in partnership with a number of public and private organisations to repurpose parts of Castle Quay Shopping Centre to deliver a number of complimentary uses enabling the regeneration of Banbury. Once each element has been contractually agreed, work can commence.	As part of the Castle Quay Development and the regeneration of Banbury, the Council is working closely and in partnership with a number of public and private organisations to repurpose parts of Castle Quay Shopping Centre to deliver a number of complimentary uses enabling the regeneration of Banbury. Once each element has been contractually agreed, work can commence.
40162	Housing & IT Asset System joint CDC/OCC	26	0	0	26	0	-	-	Forecasting on target	Forecasting on target
40167	Horsefair, Banbury	55	0	0	55	0	-	-	The works design is now completed for paving to the footpath on Horsefair. Project to be procured quarter three of the 2023/24 financial year	The works design is now completed for paving to the footpath on Horsefair. Project to be procured quarter three of the 2023/24 financial year
40191	Bodicote House Fire Compliance Works	149	0	19	85	0	(64)	-	Assessment completed, with works being developed and scoped from the assessment	Assessment completed, with works being developed and scoped from the assessment
40197	Corporate Asbestos Surveys	50	0	0	50	0	-	-	Review to be undertaken as planned in quarter three of the 2023/24 financial year	Review to be undertaken as planned in quarter three of the 2023/24 financial year
40201	Works From Compliance Surveys	99	0	0	49	50	-	-	Works will be carried out in phases - current phase planned for quarter three of the 2023/24 financial year. The next phase is planned for the next financial year(2024/25)	Works will be carried out in phases - current phase planned for quarter three of the 2023/24 financial year. The next phase is planned for the next financial year(2024/25)
40203	CDC Feasibility of utilisation of proper Space	100	2	164	164	0	64	-	Investigation works ongoing due to be completed by quarter three of the financial year 2023/24	Investigation works ongoing due to be completed by quarter three of the financial year 2023/24

Code	Project								Comment	Comment
40219	Community Centre - Works	54	0	0	54	0	-	-	Banbury Museum atruim stairwell works, currently in design with completion due in quarter three of the financial year 2023/24	Banbury Museum atruim stairwell works, currently in design with completion due in quarter three of the financial year 2023/24
40224	Fairway Flats Refurbishment	362	0	0	0	362	-	-	This project is within the asset review which will be completed in quarter three of the financial year 2023/24.Works to be reprofiled for 2024/25.	This project is within the asset review which will be completed in quarter three of the financial year 2023/24.Works to be reprofiled for 2024/25.
40226	Thorpe Lane Depot - Decarbonisation Works	0	(12)	0	0	0	-	-	On target	End of defects period retention payments due
40227	Banbury Museum - Decarbonisation Works	0	0	20	20	0	20	20	End of defects period retention payments due	End of defects period retention payments due
40228	Franklins House - Decarbonisation Works	0	(4)	0	0	0	-	-	On target	End of defects period retention payments due
40230	Whitelands - Decarbonisation Works	0	(0)	0	0	0	-	-	On target	End of defects period retention payments due
40231	Bicester Leisure Centre - Decarbonisation Works	0	(42)	0	0	0	-	-	On target	End of defects period retention payments due
40232	Kidlington Leisure Centre - Decarbonisation Works	0	(27)	0	0	0	-	-	On target	End of defects period retention payments due
40233	Spiceball Leisure Centre - Decarbonisation Works	0	(33)	0	0	0	-	-	On target	End of defects period retention payments due
40239	Bicester East Community Centre	1,371	38	1,138	771	600	-	-	Start date on site is September 2023. £1.371m of capital funding remains allocated to deliver this bespoke community centre for local residents. The project duration is circa 50 weeks with some spend requiring to be reprofiled to 2024/25.	Start date on site is September 2023. £1.371m of capital funding remains allocated to deliver this bespoke community centre for local residents. The project duration is circa 50 weeks with some spend requiring to be reprofiled to 2024/25.
40241	Thorpe Place Roof Works	35	0	1	35	0	-	-	Carrying out drone survey of roof to identfy condition ready for scoping and design.	Carrying out drone survey of roof to identfy condition ready for scoping and design.
40242	H&S Works to Banbury Shopping Arcade	127	0	15	127	0	-	-	Works currently in design together with review with investigations on potential partial recoverability fron tenant service charge.	Works currently in design together with review with investigations on potential partial recoverability fron tenant service charge.
40246	Banbury Museum Pedestrian Bridge	3	0	3	3	0	-	-	On target	£3K retention due in Oct 23
40249	Retained Land	260	0	91	260	0	-	-	Completion of site surveys in quarter 3 which will lead to completion of remedial works completed anticipated by quarter 4 of the financial year 2023/24	Completion of site surveys in quarter 3 which will lead to completion of remedial works completed anticipated by quarter 4 of the financial year 2023/24
40252	Expiring Energy Performance Certificates plus Associated works	96	20	0	96	0	-	-	Works instructed and surveys in train, completion by end of quarter three of the financial year 2023/24, with remedials being developed after surveys.	Works instructed and surveys in train, completion by end of quarter three of the financial year 2023/24, with remedials being developed after surveys.
40253	Energy Performance Certificates Gov't Implementation of target B - Strategic Plan	60	18	0	60	0	-	-	Works instructed and surveys in train, completion by end of quarter three of the financial year 2023/24	Works instructed and surveys in train, completion by end of quarter three of the financial year 2023/24
40254	Thorpe Lane Depot - Renewal of Electrical Incoming Main	171	1	0	171	0	-	-	Works are currently designed pending tender of the Electrical supply infrastructure. Works to be coordinated with the District Network Operator to install the new sub station, who are engaged. Waiting for dates from the DNO.	Works are currently designed pending tender of the Electrical supply infrastructure. Works to be coordinated with the District Network Operator to install the new sub station, who are engaged. Waiting for dates from the DNO.
40255	Installation of Photovoltaic at CDC Property	79	0	0	79	0	-	-	This will now take place along with the new capital works planned for 2023/24	This will now take place along with the new capital works planned for 2023/24
40263	Kidlington Leisure New Electrical M	20	0	0	20	0	-	-	Project to install new electrical main for Kidlington leisure centre. Expected to start Q3 2023/24 so balance expected to be spent during this period.	Project to install new electrical main for Kidlington leisure centre. Expected to start Q3 2023/24 so balance expected to be spent during this period.
40279	Spiceball Sports Centre - Solar PV Car Ports	180	0	7	90	90	-	-	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery quarter one of the financial year 2024/25	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery quarter one of the financial year 2024/25
40280	Kidlington Sports Centre - Solar PV Car Ports	137	0	0	72	65	-	-	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery quarter one of the financial year 2024/25	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery quarter one of the financial year 2024/25
40281	North Oxfordshire Academy - Solar Panels	18	0	0	18	0	-	-	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery quarter four of the financial year 2023/24	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery quarter four of the financial year 2023/24
40282	Community Centre Solar Panels	108	0	0	50	58	-	-	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site.	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site.
40283	Thorpe Lane - Solar Panels	34	0	0	34	0	-	-	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery Q4 2023/24	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery Q4 2023/24
40284	Thorpe Lane - Heater Replacement (Gas to Electric)	28	0	0	28	0	-	-	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery quarter 4 of the financial year 2023/24	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery quarter 4 of the financial year 2023/24
Property		**6,772**	**(49)**	**1,800**	**4,582**	**2,210**	**20**	**20**		
40256	Processing Card Payments & Direct Debits	20	0	0	20	0	-	-	This PCI Project is on Target to be completed this year	This PCI Project is on Target to be completed this year
Finance	**Finance**	**20**	**0**	**0**	**20**	**0**	**0**	**0**		
40237	Council Website & Digital Service	122	13	0	122	0	-	-	Work underway to select a product to form basis of Unified CRM Platform. Platform in place and initial Pilot expected to complete Q4.	On target
40274	Digital Futures Programme	0	0	113	0	0	-	-	Continuation of Flytipping AI and RPA proof of concepts. Futurework/pilots will fall under Digital Futures Programme.	Works planned for 23/24

Code	Project								Notes	Notes
40285	Digital Strategy	350	84	0	350	0	-	-	Year one of the Digital Future strategy looks to: 1) Implemented a Data Lakehouse platform as a foundation to the Data and Analytics strategy . 2)Improve cyber security by aligning with a standard framework and implementing additional security measures (by end of Dec 2023) 3) Move all online files to sharepoint to reduce hosting costs (by end Oct 2023) 4) Implement new devices to monitor Fly Tipping in two locations.	Year one of the Digital Future strategy looks to: 1) Implemented a Data Lakehouse platform as a foundation to the Data and Analytics strategy . 2)Improve cyber security by aligning with a standard framework and implementing additional security measures (by end of Dec 2023) 3) Move all online files to sharepoint to reduce hosting costs (by end Oct 2023) 4) Implement new devices to monitor Fly Tipping in two locations.
ICT		**472**	**98**	**114**	**472**	**0**	**0**	**0**		
Resources		**7,264**	**49**	**1,914**	**5,074**	**2,210**	**20**	**20**		
40062	East West Railways	137	57	78	137	0	-	-	The capital fund has been set up to enable the Council's costs to be recharged when responding to enquiries and regulatory applications, involving for example environmental and land drainage matters, made in connection with the EWR project. This is in partnership with England's Economic Heartland.	The capital fund has been set up to enable the Council's costs to be recharged when responding to enquiries and regulatory applications, involving for example environmental and land drainage matters, made in connection with the EWR project. This is in partnership with England's Economic Heartland.
40286	Transforming Market Square Bicester	1,000	0	0	475	525	-	-	£0.475m for commissioning design and consultation work in 2023/24 (for the final plans for Market Square Public Realm) with the remaining budget to be reprofiled in to 2025/26 for continuation of the programme	£0.475m for commissioning design and consultation work in 2023/24 (for the final plans for Market Square Public Realm) with the remaining budget to be reprofiled in to 2025/26 for continuation of the programme
40124	Spring Gardens	0	(70)	0	0	0	-	-	Capital receipt received from Trowers & Hamlins in respect of 10 Spring Walk. Will be moved to the capital receipts reserves	Capital receipt received from Trowers & Hamlins in respect of 10 Spring Walk. Will be moved to the capital receipts reserves
40287	UK Shared Prosperity Fund (UK SPF) Year Two Investment Plan Programme	117	0	0	117	0	-	-	UKSPF capital grant will be fully spent in 2023/24 on the following £0.030m improvement to town centres & high streets £0.035m improvements to CDC community facilities £0.002m Bridge Street Community Garden £0.050m contribution to NOA 3G pitch	UKSPF capital grant will be fully spent in 2023/24 on the following £0.030m improvement to town centres & high streets £0.035m improvements to CDC community facilities £0.002m Bridge Street Community Garden £0.050m contribution to NOA 3G pitch
40288	UKSPF Rural Fund	132	0	0	132	0	-	-	Investment in capacity building and infrastructure support for local civil society and community groups. A grant funding scheme will be established to enable village halls and other community buildings to maximise their potential though key infrastructure improvements and acquisitions.	Investment in capacity building and infrastructure support for local civil society and community groups. A grant funding scheme will be established to enable village halls and other community buildings to maximise their potential though key infrastructure improvements and acquisitions.
	Growth & Economy	**1,386**	**(13)**	**78**	**861**	**525**	**0**	**0**		
40015	Car Park Refurbishments	46	0	0	46	0	-	-	Anticipating full spend in 2023/24. This to continue the projects of pay on exit sites across the district and upgrading of pay machines from 3G to 4G.	Anticipating full spend in 2023/24. This to continue the projects of pay on exit sites across the district and upgrading of pay machines from 3G to 4G.
40026	Off Road Parking	18	0	0	0	0	(18)	(18)	Budget no longer required - saving	Budget no longer required
40028	Vehicle Replacement Programme	1,731	0	618	1,200	531	-	-	Reprofiling of £0.531m in to 2024/25. A review of the programme has been undertaken. Nationally there is delay in vehicle supply and thus delivery	Reprofiling of £0.531m is required in to 2024/25. A review of the programme has taken place and due to vehicle supply chain issues has resulted in a delay.
40186	Commercial Waste Containers	25	0		25	0	-	-	Anticipating full spend in quarter 4 of 2023/24.	Anticipating full spend in quarter 4 of 2023/24.
40187	On Street Recycling Bins	18	0	0	18	0	-	-	Anticipating full spend in 2023/24. Sites have been identified for refurbishments.	Anticipating full spend in 2023/24. Sites have been identified for refurbishments.
40188	Thorpe Lane Depot Capacity Enhancement	0	7	0	7	0	7	7	Retention payments paid in 2023/24	Delayed retention payments made.
40216	Street Scene Furniture and Fencing project	48	12	0	40	8	-	-	£0.040m to be spent in 2023/24 at various play and open spaces. Anticipating reprofiling of £0.08.	£0.040m to be spent in 2023/24 at various play and open spaces. Anticipating reprofiling of £0.023m in to 2024-25 due to ongoing issue with lease and land ownership.
40217	Car Parking Action Plan Delivery	18	0	0	18	0	-	-	Anticipating full spend in 2023/24. Project is part of ongoing review of Car Park Action Plan.	Anticipating full spend in 2023/24. Project is part of ongoing review of Car Park Action Plan.
40218	Depot Fuel System Renewal	35	0	0	0	35	-	-	Anticipating reprofiling of £0.035m in to 2024/25. This will be reviewed as the new Bicester Depot site progresses.	Anticipating reprofiling of £0.035m in to 2024/25. This will be reviewed as the new Bicester Depot site progresses.
40222	Burnehyll- Bicester Country Park	159	17	4	95	64	-	-	Anticipating reprofiling of £0.064m into 2024/25. Project delivery programme is under review	Anticipating reprofiling of £0.064m into 2024/25. The budget requires reprofiling due to the project not progressing as predicted when the capital bid was submitted.
40248	Solar Panels at Castle Quay	53	0	0	0	0	(53)	(53)	Delivery and scope of project to be reviewed	Budget no longer required for this financial year. It is believed the bid/project is out of date so a review of the requirements on site is required and a new bid to be submitted when review completed.
40257	Additional Commercial Waste Containers	10	0	0	10	0	-	-	Anticipating full spend in quarter 4 of 2023/24	Anticipating full spend in quarter 4 of 2023/24.
40258	Kidlington Public Convenience Refurbishment	90	0	0	90	0	-	-	Anticipating full spend in quarter 4 of 2023/24	Anticipating full spend in quarter 2 of 2023/24.
40259	Market Equipment Replacement	15	0	0	15	0	-	-	Anticipating full spend in quarter 4 of 2023/24	Anticipating full spend in quarter 4 of 2023/24.
40260	Land for New Bicester Depot	2,989	26	0	2,989	0	-	-	Anticipating full spend in 2023/24. Expecting purchasing of site to be finalised in quarter 3.	Anticipating full spend in 2023/24. Expecting purchasing of site to be finalised in quarter 3.
40278	Development of New Land Bicester Depot	2,775	0	0	500	2,275	-	-	Scoping underway. Spend will require re profiling in line with programme - detail to be confirmed as work is undertaken	A project team has been established to design and refurbish the site being acquired. Some slippage will be required in to 2024/25, this will be confirmed as the project progresses.
40289	Computer Software Upgrade for Vehicle Management	12	0	0	12	0	-	-	Anticipating full spend in quarter 4 of 2023/24	Anticipating full spend in quarter 4 of 2023/24.
40291	New Commercial Waste IT System	25	0	0	25	0	-	-	Anticipating full spend in 2023/24	Anticipating full spend in 2023/24.
	Environmental Services	**8,067**	**62**	**622**	**5,090**	**2,913**	**(64)**	**(64)**		

Code	Name								Description	Description
40245	Enable Agile Working	15	0	0	15	0	0	0	The funding is intended to be used to purchase the technology needed to enable the teams to use our new case management system whilst 'on-site' carrying out inspection work, etc. We have trialed different tablets but have delayed the project since the release of the app that will support mobile working has been delayed. The app is now due for release in Late summer 23/24. The mobile working approach will potentially save approx. £1400 pa through reducing costs (mileage, printing and stationery) as well as making the inspection process more efficient, delivering an improved customer experience and realising a resource saving of 0.2 FTE. The ongoing cost of the app will be approx. £1500 pa.	The funding is intended to be used to purchase the technology needed to enable the teams to use our new case management system whilst 'on-site' carrying out inspection work, etc. We have trialed different tablets but have delayed the project since the release of the app that will support mobile working has been delayed. The app is now due for release in Late summer 23/24. The mobile working approach will potentially save approx. £1400 pa through reducing costs (mileage, printing and stationery) as well as making the inspection process more efficient, delivering an improved customer experience and realising a resource saving of 0.2 FTE. The ongoing cost of the app will be approx. £1500 pa.
	Regulatory Services	**15**	**0**	**0**	**15**	**0**	**0**	**0**		
40293	Planning - S106 Projects	160	160	0	160	0	0	0	S106 Funded contribution towards the construction and mechanisation of bridge over Oxford Canal (Canal and River Trust)	S106 Funded contribution towards the construction and mechanisation of bridge over Oxford Canal (Canal and River Trust)
	Planning and Development	**160**	**160**	**0**	**160**	**0**	**0**	**0**		
Communities		**9,628**	**209**	**701**	**6,126**	**3,438**	**(64)**	**(64)**		
Capital Total		**23,553**	**985**	**2,921**	**16,388**	**7,121**	**(44)**	**(44)**		

CHERWELL TOTAL CAPITAL PROJECT EXPENDITURE

CODE	DESCRIPTION	Total 23/24 Project Budget	Forecast	RE-PROFILED BEYOND 2023/24	23/24 Variance	Future Years Budget	Project Total Budget	Project Total forecast	Project Total Variance	Narrative
40010	North Oxfordshire Academy Astroturf	183	80	103	0	0	183	183	0	Good progress made to date on scale,scope and nature of the project. Close working with the school. Next steps are to apply for pre-application planning advice and complete project costings.
40019	Bicester Leisure Centre Extension	79	30	49	0	0	79	79	0	The project continues to progress as predicted. Outline costings for the project have been received. The next step is to complete a detailed business case prior to planning permission being sought.
40083	Disabled Facilities Grants	1,432	1,432	0	0	4,956	6,388	6,388	0	Full spend anticiapted.
40084	Discretionary Grants Domestic Properties	150	150	0	0	600	750	750	0	This budget covers small repairs and larger essential repairs to vulnerable households. Demand is typically heavily weighted towards the winter months, no carry-forward into 2024/25 is currently expected.
40131	S106 Capital Costs	3,310	2,194	1,116	0	0	3,310	3,310	0	Cherwell holds developer contributions derived from s106 agreements for Town and Parish Councils for them to deliver agreed programmes of work. The pace of this delivery is outside the control of CDC officers; whilst it is anticiapted that many projects will be delivered close working with partners has enabled reprofiling of s106 to span into next year. The next significant reprofile will occur in November.
40160	Housing Services - capital	160	0	160	0	0	160	160	0	Developer completions slower at NW Bicester than expected therefore final payment will be made to the developer in 2024/25.
40213	Build Team Essential Repairs & Improvements	116	116	0	0	0	116	116	0	Work is currently underway and it is likely that all capital expenditure will take place during financial year 2023/24.
40251	Longford Park Art	45	0	45	0	0	45	45	0	The final delivery of the public art programme is dependent on overall site handover which has been delayed by the developers. The remaining spend on the public art programme has been reprofiled to acknoledge this.
40262	Affordable Housing	1,156	1,156	0	0	0	1,156	1,156	0	The tender for these works will conclude shortly and the programme is anticipated to begin on site in October. The overall scheme will complete in 24/25.
40275	UKSPF - CDC community facilities x 3	0	0	0	0	0	0	0	0	Working in partnerhsip with communities on the scope of works to be procured. Full spend is anticipated.
Wellbeing & Community		**6,631**	**5,158**	**1,473**	**0**	**5,556**	**12,187**	**12,187**	**0**	
40292	iTrent HR System Upgrades	30	30	0	0	120	150	150	0	There are further iTrent modules to explore and it is important that we maintain this capital expenditure to explore ROI these additional modules offer.
HR & OD		**30**	**30**	**0**	**0**	**120**	**150**	**150**	**0**	
Chief Executives		**6,661**	**5,188**	**0**	**0**	**5,676**	**12,337**	**12,337**	**0**	
40111	Admiral Holland Redevelopment Project (phase 1b)	61	61	0	0	0	61	61	0	On target
40139	Banbury Health Centre - Refurbishment of Ventilation, Heating & Cooling Systems	104	104	0	0	0	104	104	0	On target

Code	Project									Notes
40144	Castle Quay	2,985	2,000	985	0	0	2,985	2,985	0	As part of the Castle Quay Development and the regeneration of Banbury, the Council is working closely and in partnership with a number of public and private organisations to repurpose parts of Castle Quay Shopping Centre to deliver a number of complimentary uses enabling the regeneration of Banbury. Once each element has been contractually agreed, work can commence.
40162	Housing & IT Asset System joint CDC/OCC	26	26	0	0	0	26	26	0	Forecasting on target
40167	Horsefair, Banbury	55	55	0	0	0	55	55	0	The works design is now completed for paving to the footpath on Horsefair. Project to be procured quarter three of the 2023/24 financial year
40191	Bodicote House Fire Compliance Works	149	85	0	(64)	0	149	85	(64)	Assessment completed, with works being developed and scoped from the assessment
40197	Corporate Asbestos Surveys	50	50	0	0	0	50	50	0	Review to be undertaken as planned in quarter three of the 2023/24 financial year
40201	Works From Compliance Surveys	99	49	50	0	0	99	99	0	Works will be carried out in phases - current phase planned for quarter three of the 2023/24 financial year. The next phase is planned for the next financial year(2024/25)
40203	CDC Feasibility of utilisation of proper Space	100	164	0	64	0	100	164	64	Investigation works ongoing due to be completed by quarter three of the financial year 2023/24
40219	Community Centre - Works	54	54	0	0	0	54	54	0	Banbury Museum atruim stairwell works, currently in design with completion due in quarter three of the financial year 2023/24
40224	Fairway Flats Refurbishment	362	0	362	0	0	362	362	0	This project is within the asset review which will be completed in quarter three of the financial year 2023/24.Works to be reprofiled for 2024/25
40227	Banbury Museum - Decarbonisation Works	0	20	0	20	0	0	20	20	End of defects period retention payments due
40239	Bicester East Community Centre	1,371	771	600	0	0	1,371	1,371	0	Start date on site is September 2023. £1.371m of capital funding remains allocated to deliver this bespoke community centre for local residents. The project duration is circa 50 weeks with some spend requiring to be reprofiled to 2024/25.
40241	Thorpe Place Roof Works	35	35	0	0	0	35	35	0	Carrying out drone survey of roof to identfy condition ready for scoping and design.
40242	H&S Works to Banbury Shopping Arcade	127	127	0	0	0	127	127	0	Works currently in design together with review with investigations on potential partial recoverability fron tenant service charge.
40246	Banbury Museum Pedestrian Bridge	3	3	0	0	0	3	3	0	On target
40249	Retained Land	260	260	0	0	0	260	260	0	Completion of site surveys in quarter 3 which will lead to completion of remedial works completed anticipated by quarter 4 of the financial year 2023/24
40252	Expiring Energy Performance Certificates plus Associated works	96	96	0	0	0	96	96	0	Works instructed and surveys in train, completion by end of quarter three of the financial year 2023/24, with remedials being developed after surveys.
40253	Energy Performance Certificates Gov't Implementation of target B - Strategic Plan	60	60	0	0	0	60	60	0	Works instructed and surveys in train, completion by end of quarter three of the financial year 2023/24
40254	Thorpe Lane Depot - Renewal of Electrical Incoming Main	171	171	0	0	0	171	171	0	Works are currently designed pending tender of the Electrical supply infrastructure. Works to be coordinated with the District Network Operator to install the new sub station, who are engaged. Waiting for dates from the DNO.
40255	Installation of Photovoltaic at CDC Property	79	79	0	0	0	79	79	0	This will now take place along with the new capital works planned for 2023/24
40263	Kidlington Leisure New Electrical Main	20	20	0	0	0	20	20	0	Project to install new electrical main for Kidlington leisure centre. Expected to start Q3 2023/24 so balance expected to be spent during this period.
40279	Spiceball Sports Centre - Solar PV Car Ports	180	90	90	0	0	180	180	0	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery quarter one of the financial year 2024/25

Code	Name									Comments
40280	Kidlington Sports Centre - Solar PV Car Ports	137	72	65	0	0	137	137	0	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery quarter one of the financial year 2024/25
40281	North Oxfordshire Academy - Solar Panels	18	18	0	0	0	18	18	0	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery quarter four of the financial year 2023/24
40282	Community Centre Solar Panels	108	50	58	0	0	108	108	0	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site.
40283	Thorpe Lane - Solar Panels	34	34	0	0	0	34	34	0	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery Q4 2023/24
40284	Thorpe Lane - Heater Replacement (Gas to Electric)	28	28	0	0	0	28	28	0	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery quarter 4 of the financial year 2023/24
Property		**6,772**	**4,582**	**2,210**	**20**	**-**	**6,772**	**6,792**	**0**	
40256	Processing Card Payments & Direct Debits	20	20	0	0	0	20	20	0	This PCI Project is on Target to be completed this year
Finance Total		**20**	**20**	**0**	**0**	**0**	**20**	**20**	**0**	
40237	Council Website & Digital Service	122	122	0	0	0	122	122	0	Work underway to select a product to form basis of Unified CRM Platform. Platform in place and initial Pilot expected to complete Q4.
40285	Digital Strategy	350	350	0	0	0	350	350	0	Year one of the Digital Future strategy looks to: 1) Implemented a Data Lakehouse platform as a foundation to the Data and Analytics strategy . 2)Improve cyber security by aligning with a standard framework and implementing additional security measures (by end of Dec 2023) 3) Move all online files to sharepoint to reduce hosting costs (by end Oct 2023) 4) Implement new devices to monitor Fly Tipping in two locations.
ICT		**472**	**472**	**0**	**0**	**0**	**472**	**472**	**0**	
Resources		**7,264**	**5,074**	**0**	**20**	**0**	**7,264**	**7,284**	**0**	
40062	East West Railways	137	137	0	0	4,189	4,326	4,326	0	The capital fund has been set up to enable the Council's costs to be recharged when responding to enquiries and regulatory applications made in connection with the EWR project.
40286	Transforming Market Square Bicester	1,000	475	525	0	3,250	4,250	4,250	0	Investment to transform the Market Square into a multi-purpose space and "community hub" which will transform and help regenerate Bicester town centre
40287	UK Shared Prosperity Fund (UK SPF) Year Two Investment Plan Programme	117	117	0	0	162	279	279	0	Improvements to town centres and highstreets and community facilities
40288	UKSPF Rural Fund	132	132	0	0	395	527	527	0	Investment in capacity building and infrastructure support for local civil society and community groups in 2023/24. Investment in micro and small rural based businsses in 2024/25.
Growth & Economy		**1,386**	**861**	**525**	**-**	**7,996**	**9,382**	**9,382**	**0**	
40015	Car Park Refurbishments	46	46	0	0	0	46	46	0	Full spend anticipated by March 2024
40026	Off Road Parking	18	0	0	(18)	0	18	0	(18)	Budget no longer required
40028	Vehicle Replacement Programme	1,731	1,200	531	0	5,242	6,973	6,973	0	Full spend anticipated by March 2025
40186	Commercial Waste Containers	25	25	0	0	0	25	25	0	Full spend anticipated in quarter 4 of 2023-24.
40187	On Street Recycling Bins	18	18	0	0	0	18	18	0	Full spend anticipated in quarter 4 of 2023-24.
40188	Thorpe Lane Depot Capacity Enhancement	0	7	0	7	0	0	7	7	Delayed retention payments made.
40216	Street Scene Furniture and Fencing project	48	40	8	0	12	60	60	0	Full spend anticipated by March 2026
40217	Car Parking Action Plan Delivery	18	18	0	0	0	18	18	0	Full spend anticipated by March 2024
40218	Depot Fuel System Renewal	35	0	35	0	24	59	59	0	Full spend anticipated by March 2025
40222	Burnehyll- Bicester Country Park	159	95	64	0	0	159	159	0	Full spend anticipated by March 2025
40248	Solar Panels at Castle Quay	53	0	0	(53)	0	53	0	(53)	Budget no longer required for this financial year. It is believed the bid/project is out of date so a review of the requirements on site is required and a new bid to be submitted when review completed.
40257	Additional Commercial Waste Containers	10	10	0	0	0	10	10	0	Full spend anticipated in quarter 4 of 2023-24.
40258	Kidlington Public Convenience Refurbishment	90	90	0	0	0	90	90	0	Full spend anticipated in quarter 2 of 2023-24.
40259	Market Equipment Replacement	15	15	0	0	0	15	15	0	Full spend anticipated in quarter 4 of 2023-24.

Code	Name									Notes
40260	Land for New Bicester Depot	2,989	2,989	0	0	10	2,999	2,999	0	Full spend anticipated by March 2024 - Expecting purchasing of site to be finalised in quarter 2.
40278	Development of New Land Bicester Depot	2,775	500	2,275	0	1,200	3,975	3,975	0	Full spend anticipated by March 2025 - this will be confirmed as the project progresses.
40289	Computer Software Upgrade for Vehicle Management	12	12	0	0	0	12	12	0	Full spend anticipated by March 2024
40291	New Commercial Waste IT System	25	25	0	0	0	25	25	0	Full spend anticipated by March 2024
Environmental		**8,067**	**5,090**	**2,913**	**(64)**	**6,488**	**14,555**	**14,491**	**(64)**	
40245	Enable Agile Working	15	15	0	0	0	15	15	0	The funding is intended to be used to purchase the technology needed to enable the teams to use our new case management system whilst 'on-site' carrying out inspection work, etc. We have trialed different tablets but have delayed the project since the release of the app that will support mobile working has been delayed. The app is now due for release in Late summer 23/24. The mobile working approach will potentially save approx. £1400 pa through reducing costs (mileage, printing and stationery) as well as making the inspection process more efficient, delivering an improved customer experience and realising a resource saving of 0.2 FTE. The ongoing cost of the app will be approx. £1500 pa.
Regulatory Services		**15**	**15**	**0**	**0**	**0**	**15**	**15**	**0**	
40293	Planning - S106 Projects	160	160	0	0	0	160	160	0	S106 Funded contribution towards the construction and mechanisation of bridge over Oxford Canal (Canal and River Trust)
Planning and Development		**160**	**160**	**0**	**0**	**0**	**160**	**160**	**0**	
Communities		**9,628**	**6,126**	**3,438**	**(64)**	**14,484**	**24,112**	**24,048**	**(64)**	
Capital Total		**23,553**	**16,388**	**7,121**	**(44)**	**20,160**	**43,713**	**43,669**	**(64)**	

Appendix 2 - Report Details – Additional Revenue narrative

<u>Chief Executive</u>

Chief Executives are forecasting an underspend of (£0.180m) against a budget of £5.671m (3.2%). Directorate is working efficiently to deliver high quality services within its budget envelope.

HR & OD	
£0.000m Variance	HR are forecasting to remain on budget at present.
Variation to July's Forecast £0.000m	

Wellbeing & Housing	
Variation (£0.150m) underspend	Higher than expected maintenance costs due to inflation has resulted in several minor increases in expenditure across the board. Income has remained on track. This has reduced the anticipated underspend at year end.
Variation to July's Forecast (£0.040m)	Reduction in the year end underspend due to necessary maintenance costs. Scrutinising the programmed actions in all projects and manging the timing to maximise income and reduce further expenditure where possible.

Customer Focus	
Variation (£0.030m) underspend	We are currently predicting an underspend of (£0.030m) at year end by managing vacancies and supplier costs to offset the drop in land charges income caused by volatile market conditions.
Variation to July's Forecast (£0.005m)	Additional (£0.005m) saving on translation costs as Housing Services are sharing the use of this service and funded by grant

Resources

Resources are forecasting £0.187m overspend against a budget of £5.244m (3.6%). There are tight managerial controls within the resources directorate that have enabled a small forecast overspend. An understanding on the election costs is underway, and the team will work towards mitigating this further.

Finance	
Variation £0.000m Overspend	The Service forecasts a number of minor overspends and underspends resulting in an overall forecast in line with the budget.
Variation to July's Forecast £0.000m	

Legal & Democratic	
Variation £0.115m Overspend	Overspend is due to: 1) higher than anticipated costs of delivering the District Elections. 2) as with Property, and as previously reported, the Legal team is being rebuilt post decoupling and agency staff is being used to fill posts whilst actively recruiting to the vacant roles.
Variation to July's Forecast £0.085m	These extra costs are partly offset by an underspend in Legal and Procurement because of vacant posts.

ICT	
Variation £0.000m	ICT are forecasting to remain on budget at present.
Variation to July's Forecast £0.000m	

Property	
Variation £0.072m Overspend	As previously reported, the Property team are being rebuilt post decoupling to provide the best level of service possible. Whilst this rebuild is being undertaken, agency support is required to the fill the resource in the interim.
Variation to July's Forecast (£0.007m)	

Communities

Communities are forecasting an overspend of £0.657m against a budget of £8.749m, (7.5%).

The directorate has looked carefully across all the service budget areas to identify savings to support the external cost pressure arising from changing gate fees for recycled materials.

Planning & Development Variation £0.191m Overspend	Planning and Development presently has a projected overspend of £0.191m due largely to income projections being lower than expected and agency costs. Some in year saving has been made to assist the overall position (£0.075m).
	The expected outturn is £0.150m different to last month largely due to lower income expectations for Building Control as well as some extended agency cost.
Variation to July's Forecast £0.150m	Recruitment and agency costs will continue to be managed closely having regard to future income expectations with the aim of a balanced outturn.
Growth & Economy Variation (£0.090m) Underspend	The additional 2023/24 UK Shared Prosperity Funding allocations have allowed the service to make mitigating cuts to the service budget to support the pressures reported elsewhere in the directorate.
Variation to July's Forecast £0.000m	Postponement of the Economic Prosperity Strategy has also enabled some in-year savings to be made.
Environmental Variation £0.556m Overspend	The forecasted pressure of £0.556m within Environmental Services is primarily due to changes in the global market for recycled materials falling as recycling processing costs have increased. Commodity prices are currently very volatile and this could change during the year.
Variation to July's Forecast £0.135m	Changes in legislation for bulky waste collections have resulted in an increase in resources required to carry out the service in addition to forecasting a reduction in income.

	A reduction in Car Parking income is anticipated however this is offset by a reduction in costs as a result of the new management contracts.
	We hold monthly meetings with our recycling reprocessor and monitor individual commodity prices on a monthly basis.
	The service is reviewing its staffing requirements to minimise fluctuations in resources in the waste service area.
	Negotiations are taking place with OCC to attempt to improve and reduce the additional costs incurred for bulky waste collections.
Regulatory	
Variation £0.000m	Regulatory Services and Community Safety are forecasting a balanced outturn.
Variation to July's Forecast £0.000m	

Executive Matters

Executive Matters is forecasting an underspend of (£0.008m) against the budget of £3.695m (-0.20%).

Interest	
Variation (£0.008m) underspend	Executive Matters are forecasting an over recovery of net interest amounting to (£0.627m). This windfall surplus is offset by a request to move £0.627m to the Commercial Risk Reserve.
Variation to July's Forecast (£0.000m)	

Policy Contingency

Policy Contingency is forecasting on target against a budget of £4.814m, (0.00%)

Policy Contingency	
Variation £0.000m	Policy Contingency is forecasting to remain on budget at present.
Variation to July's Forecast £0.000m	

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Appendix 3 - Virement Summary

Virement Movement

This table shows the movement in Net Budget from July to August 2023.

Virements - Movement in Net Budget	£m
Directorate Net Budget - July 2023	19.410
Directorate Net Budget - August 2023	19.474
Movement	**0.064**

Breakdown of Movements	£m
Allocations from/to Reserves	
Other	
Non-Executive Director recruitment costs for Graven Hill from Policy Contingency	£0.036
Shareholder Legal costs from Policy Contingency	£0.028
Total	**£0.064**

Aged Debt Summary

The below graph shows the movement in sundry aged debt from June 2023 to August 2023.

Aged Debt Summary - August 2023
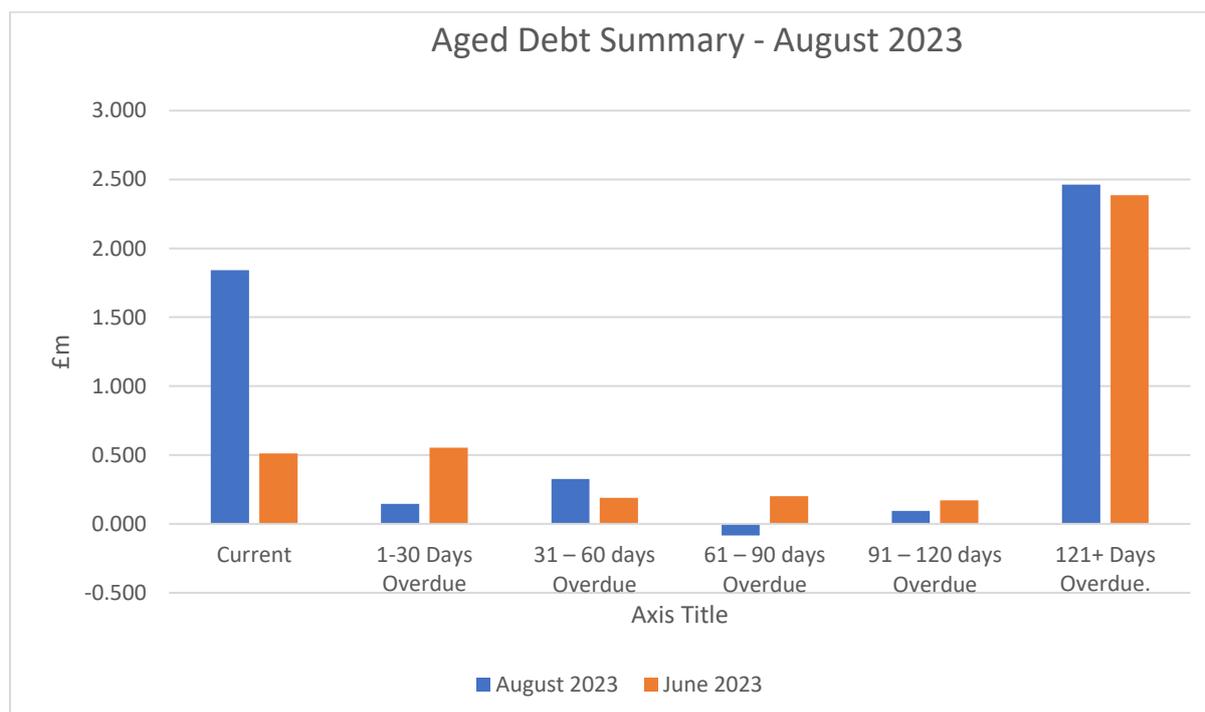
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Appendix 4 - Funding for 2023/24

Specific Funding received since budget was set

Dept.	Grant Name	Funding
		£
DLUHC	Elections New Burdens	66,593
DLUHC	Homelessness Prevention Grant	508,605
DLUHC	Local Council Tax Support Scheme Grant	177,020
DLUHC	Domestic Abuse Grant	36,284
DLUHC	Tenant satisfaction measures new burdens	5,172
Home Office	Syrian Resettlement scheme	53,996
Home Office	Asylum seeker dispersal grant	210,750
Home Office	Afghan relocations and assistance policy	221,870
		1,280,290

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Appendix 5 - Reserves and Grant Funding

Uses of/ (Contributions to) Reserves

Specific requests

Directorate	Type	Description	Reason	Amount £m
Resources	Earmarked	Market Risk Reserve	Over-recovery of Treasury Income	(0.627)
			Total Earmarked Reserves	**(0.627)**

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Appendix 6 - Business Plan measures

Housing that meets your needs

Ref	Portfolio Holder	Director/Lead Officer	Actual	Target	R.A.G	YTD Actual	YTD Target	YTD R.A.G
BP1.2.01 Number of Homeless Households living in Temporary Accommodation (TA)	Cllr N Mawer	▪ Nicola Riley ▪ Yvonne Rees	36 households	40 households	★	33 households	40 households	★
Commentary Numbers continue to remain consistent and within our KPI. The Housing Team continues to work ahead of crisis situations to resolve housing issues before the need of temporary accommodation is required. There are currently 81% of cases open to early help or prevention duties								
BP1.2.06 Average time taken to process Housing Benefit New Claims and council tax reduction (Days)	Cllr A Nell	▪ Michael Furness ▪ Stephen Hinds	18.11 days	18.00 days	●	16.35 days	18.00 days	★
Commentary The team is performing ahead of target for the year to date, so this month's high volume of claims will not have an impact of their performance for the year, as they expect to be back under target next month.								
BP1.2.07 Average time taken to process Housing Benefit Change Events & council tax reduction (Days)	Cllr A Nell	▪ Michael Furness ▪ Stephen Hinds	3.44 days	8.00 days	★	3.56 days	8.00 days	★
Commentary The team continues to report ahead of target for both month and year to date, please note this target is aligned with national targets.								

An enterprising economy with strong and vibrant local centres

Ref	Portfolio Holder	Director/Lead Officer	Actual	End of Year target	R.A.G
BP3.2.01 % of Council Tax collected, increase Council Tax Base	Cllr A Nell	▪ Michael Furness ▪ Stephen Hinds	47.61%	97%	⭐

Commentary

Please note the actual reported reflects the cumulative figure collected to date. End of year target is 97%

Ref	Portfolio Holder	Director/Lead Officer	Actual	End of Year target	R.A.G
BP3.2.02 % of Business Rates collected, increasing NNDR Base	Cllr A Nell	▪ Michael Furness ▪ Stephen Hinds	51.21%	97%	⭐

Commentary

Please note the actual reported reflects the cumulative figure collected to date. End of year target is 97%

Healthy, resilient and engaged communities

Ref	Portfolio Holder	Director/Lead Officer	Actual	Target	R.A.G	YTD Actual	YTD Target	YTD R.A.G
BP4.2.01 Number of Visits/Usage of contracted & directly managed sports facilities	Cllr N Simpson	▪ Nicola Riley ▪ Yvonne Rees	112,079 visits	109,999 visits	⭐	573,774 visits	540,525 visits	⭐

Commentary

Usage figures at Bicester, Kidlington and Spiceball Leisure Centres are all showing an increase against the same month last year. Numbers are slightly down against August 2023 at Bicester/Kidlington, however this will be linked to lower school use numbers/swimming lesson attendees etc.

Healthy, resilient and engaged communities

Ref	Portfolio Holder	Director/Lead Officer	Actual	Target	R.A.G	YTD Actual	YTD Target	YTD R.A.G
BP4.1.02 Support Community Safety and Anti-Social Behaviour Prevention Activities	Cllr P Chapman	▪ Ian Boll ▪ Tim Hughes	Delivering to plan	Delivering to plan	★	Delivering to plan	Delivering to plan	★

Commentary

During August the Community safety team continued to support our communities, participating in events such as Summerfest, Banbury play day and delivering "Have your Say" events in local areas, undertaking shared patrols with police colleagues and liaising with partners in addressing rough sleeper issues linked to ASB.

A diverse number of activities are delivered across the district to prevent anti-social behaviour, especially in our most deprived areas, engaging with young people in those communities, and working closely with partners to engage, and better understand, the roots of ASB in those areas; and working on preventing it with activities such as the football programme at the Mosque, Senior Youth Club, Sports sessions senior youth, vocal band and others occurring weekly in August.

Finally, the team is working with the Banbury Youth Community Engagement to deliver youth outreach sessions across Banbury to engage and speak to young people, identify issues, and support the development of youth initiatives for the town. Information is fed into the Cherwell Young People, Play & Wellbeing partnership which has community safety and Police representation.

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Appendix 7 - Leadership Risk Register August 2023

Table 1 – Summary of all risks in the Leadership Risk Register with residual scores (after controls) and rating for August 2023.

High Risk (16-25) – requires active management to bring score down when possible and maintain it at an acceptable level.

Medium Risk (10 -15) - a robust contingency plan may suffice, together with early warning mechanisms to detect any deviation from the profile.

Low Risk (1-9) - good housekeeping may require some controls to reduce the probability if this can be done cost effectively, but management to ensure the impact remains low should be adequate. Re-asses frequently to ensure condition remains the same.

Risk Name	Risk Scores August	
	Residual Score ▾	**Rating**
L01 Financial resilience	16	▲
L08 Cyber Security	15	●
L03 CDC Local Plan	12	●
L06 Safeguarding the Vulnerable - Operational and partnership actions-	12	●
L07 Health and safety	12	●
L11 Financial sustainability	12	●
L13 Major Infrastructure Projects and Programmes	12	●
L14 Workforce Strategy	12	●
L02 Statutory functions	09	★
L12 Corporate Governance	09	★
L09 Safeguarding the vulnerable - Internal procedures-	08	★
L04 Business Continuity	06	★
L05 Emergency Planning (EP)	06	★
L10 Sustainability of Council owned companies and delivery of planned financial and other objectives	06	★

Table 2 - Overall position of all the risks contained within the Leadership Risk Register for August 2023 including their impact and probability scores (after controls).

		Probability				
		1 - Remote	**2 - Unlikely**	**3 - Possible**	**4 - Probable**	**5 - Highly Probable**
Impact	**5 - Catastrophic**			L08		
	4 - Major		L09	L03-L06-L07-L11-L14	L01	
	3 - Moderate		L04-L05-L10	L02-L12	L13	
	2 - Minor					
	1 - Insignificant					

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Name and Description of risk	Potential impact	Inherent (gross) risk level (before Controls)			Controls	Lead Member	Risk owner	Risk manager	Residual risk level (after existing controls)			Mitigating actions (to address control issues)	Comments	Last updated
		Probability	Impact	Rating					Probability	Impact	Rating			
L01 - Financial resilience – Failure to react to external financial impacts, new policy and increased service demand. Poor investment and asset management decisions.	Reduced medium and long term financial viability	4	4	16	Medium Term Revenue Plan reported regularly to members.	Councillor A Nell	Michael Furness	Joanne Kaye	4	4	16	Budget setting will not be an annual event		Risk reviewed on 06/09/23 - Mitigating actions updated
	Reduction in services to customers				Balanced medium term and dynamic ability to prioritise resources							Finance support and engagement with programme management processes		
	Increased volatility and inability to manage and respond to changes in funding levels				Highly professional, competent, qualified staff							Financial forecasts of resources for 2024/25 and 2025/26 have assumed a reduction in resources compared to February 2023 assumptions. The budget for 2023/24 was agreed with savings proposals identified to contribute to addressing these reductions. Close monitoring of the delivery of the savings programme will take place throughout 2023/24 with mitigations required if slippage was identified.		
	Reduced financial returns (or losses) on investments/assets such as in subsidiaries.				Good networks established locally, regionally and nationally.									
	Inability to deliver financial efficiencies				Strong shareholder function and relationships with subsidiaries							Integration and continued development of Performance, Finance and Risk reporting		
	Exposure to commercial pressures in relation to regeneration projects.				Financial returns from the subsidiaries are not included in the MTFS until they are reasonably assured to materialise.							Internal Audits being undertaken for core financial activity and capital as well as service activity		
	Poor customer service and satisfaction				National guidance interpreting legislation available and used regularly.							Introduction and implementation of an Asset Management Strategy		
	Increased complexity in governance arrangements				Progress regeneration plans in a coordinated manner. Participate in Oxfordshire Treasurers' Association's work streams.							Investment Strategy agreed annually		
	Lack of officer capacity to meet service demand				Review of best practice guidance from bodies such as CIPFA, LGA and NAO.							Posts are filled by appropriately qualified individuals		
	Lack of financial awareness and understanding throughout the council				Treasury management and capital strategies in place Investment strategies in place Regular financial and performance monitoring in place.							Regular involvement and engagement with colleagues across the county		
	Increased inflation in the costs of capital schemes				Independent third party advisers in place Regular bulletins and advice received from advisers Property portfolio income monitored through financial management arrangements on a regular basis.							Regular member training and support		
	Increased inflation in revenue costs				Independent third party advisers in place							Regular utilisation of advisors as appropriate		
					Asset Management Strategy in place and embedded							Summarise and distribute announcements to CLT		
					Transformation Programme in place to deliver efficiencies and increased income in the future							Timely and good quality budget monitoring reports, particularly property income and capital		
												Work is underway to maximise the impact of the available space in Banbury town centre		
L02 - Statutory functions – Failure to meet statutory obligations and policy and legislative changes are not anticipated or planned for.	Legal challenge	3	4	12	Embedded system of legislation and policy tracking In place, with clear accountabilities, reviewed regularly by Directors.	Councillor S Dallimore	Stephen Hinds	Shiraz Sheikh	3	3	9	Ensure Committee forward plans are reviewed regularly by senior officers.		Risk reviewed on 06/09/23 - Comments updated
	Loss of opportunity to influence national policy / legislation				Clear accountability for responding to consultations with defined process to ensure Member engagement							Ensure Internal Audit plan focusses on key leadership risks.		
	Financial penalties				National guidance interpreting legislation available and used regularly							Establish corporate repository and accountability for policy/legislative changes taking into consideration all of the Council's functions.		
	Reduced service to customers				Risks and issues associated with Statutory functions incorporated into Directorate Risk Registers and regularly reviewed.							External support secured for key corporate projects including Growth Deal and IT Transformation Programme.		
	Inability to deliver council's plans				Clear accountability for horizon scanning, risk identification / categorisation / escalation and policy interpretation in place							Learning and development opportunities identified and promoted by the Chief Executive and Directors. First tranche of Senior Leadership training/development begins in August, and is cascaded throughout 2022/23. Staff briefings on rules and procedures by MO		
	Exposure to commercial pressures				Robust Committee forward plans to allow member oversight of policy issues and risk management, including Scrutiny and Audit									
	Reduced resilience and business continuity				Internal Audit Plan risk based to provide necessary assurances							Review Directorate/Service risk registers.		
	Reduced staff morale, increased workload and uncertainty may lead to loss of good people				Strong networks established locally, regionally and nationally to ensure influence on policy issues. In addition two Directors hold leading national roles							Ensure Committee forward plans are reviewed regularly by senior officers.		
					Senior Members aware and briefed regularly in 1:1s by Directors							Ensure Internal Audit plan focusses on key leadership risks.		
					Arrangements in place to source appropriate interim resource if needed							Establish corporate repository and accountability for policy/legislative changes taking into consideration all of the Council's functions.		
					Ongoing programme of internal communication							External support secured for key corporate projects including Growth Deal and IT Transformation Programme.		
					Programme Boards in place to oversee key corporate projects and ensure resources are allocated as required.							Learning and development opportunities identified and promoted by the Chief Executive and Directors. First tranche of Senior Leadership training/development begins in August, and is cascaded throughout 2022/23. Staff briefings on rules and procedures by MO		
					Extended Leadership Team (ELT) Meetings established to oversee and provide assurance on key organisational matters including resourcing.							Review Directorate/Service risk registers.		

Name and Description of risk	Potential impact	Inherent (gross) risk level (before Controls)			Controls	Lead Member	Risk owner	Risk manager	Residual risk level (after existing controls)			Mitigating actions (to address control issues)	Comments	Last updated
		Probability	Impact	Rating					Probability	Impact	Rating			
L03 - CDC Local Plan - Failure to ensure sound, up to date local plan remains in place for Cherwell resulting in poor planning decisions such as development in inappropriate locations, inability to demonstrate an adequate supply of land for housing and planning by appeal	Poor planning decisions leading to inappropriate growth in inappropriate place.	4	4	16	Local Development Scheme (LDS) is actively managed and reviewed, built into Service Plan, and integral to staff appraisals of all those significantly involved in Plan preparation and review	Councillor D Sames	Ian Boll	David Peckford	3	4	12	Annual (Authority) Monitoring Reports presented to the Executive on plan making and policy effectiveness. A report will be prepared at the end of the calendar year.	A consultation draft of the emerging Local Plan was approved by the Council's Executive on 4 September. The consultation will commence in September. An updated Local Development Scheme containing a revised programme for preparation of the Local Plan was approved at the same meeting. A further consultation on the proposed Plan will take place in Autumn 2024.	Risk reviewed on 07/09/2023 - Comments updated
	Negative (or failure to optimise) economic, social, community and environmental gain				Team capacity and capability kept under continual review with gaps and pressures identified and managed at the earliest opportunity.							An updated LDS is scheduled to be presented to the Executive in September.		
	Negative impact on the council's ability to deliver its strategic objectives, including its commitments within the Oxfordshire Housing & Growth Deal											Programme built into Directorate level objectives (e.g. via Service Plans) and staff appraisals; on-going preparation of the Local Plan is a service priority.		
	Increased costs in planning appeals											A draft Plan is being presented to the Executive in September. Project management of the Local Plan process continues.		
	Reputational damage with investor community of Cherwell as a good place to do business created by uncertainty/ lack of policy clarity				On-going review of planning appeal decisions to assess robustness and relevance of Local Plan policies							Regular Corporate Director, Lead Member and Members Advisory Group briefings		
L04 - Business Continuity - Failure to ensure that critical services can be maintained in the event of a short or long term incident impacting on the delivery of the Council operations	Inability to deliver critical services to customers/residents	4	4	16	Business continuity strategy, statement of intent and framework in place and all arrangements overseen by a Business Continuity Steering Group	Councillor P Chapman	Ian Boll	Tim Hughes	2	3	6	BC exercises to be arranged		Risk reviewed on 07/09/2023 - No changes
	Financial loss/ increased costs				Services prioritised and ICT recovery plans reflect those priorities and the requirements of critical services							BC Impact assessments and BCPs being updated and reviewed by OCC's Emergency Planning team with supporting document management system being implemented.		
	Loss of important data				ICT disaster recovery arrangements in place with data centre and cloud services reducing likelihood of ICT loss and data							Business Continuity Statement of Intent and Framework due to be reviewed to align with new incident management framework		
	Inability to recover sufficiently to restore non-critical services before they become critical				Incident management team identified in Business Continuity Framework							Cross-council BC Steering Group meets regularly to identify BC improvements needed; BC Steering Group has been reconvened, need to ensure engagement across all service areas.		
	Loss of reputation				All services undertake annual business impact assessments and updates of business continuity plans									
	Reduced service delivery capacity in medium term due to recovery activity				Cross-council Business Continuity Steering Group meets regularly to identify Business Continuity improvements needed									
L05 - Emergency Planning (EP) - Failure to ensure that the local authority has plans in place to respond appropriately to a civil emergency fulfilling its duty as a category one responder	Inability of council to respond effectively to an emergency	4	4	16	Incident Management Framework in place and key contact lists updated monthly.	Councillor P Chapman	Ian Boll	Tim Hughes	2	3	6	Emergency plan contacts list updated monthly and reissued to all duty managers periodically. Available on ELT Teams channel.		Risk reviewed on 07/09/23 - No changes
	Unnecessary hardship to residents and/or communities				Emergency Planning Lead Officer defined with responsibility to review, test and exercise plan and to establish, monitor and ensure all elements are covered							Supporting officers for incident response reviewed and identified across some areas, to ensure they are reviewed and updated across all service areas.		
	Risk to human welfare and the environment				Expert advice and support provided by Oxfordshire County Council's Emergency Planning Team under partnership arrangements.									
	Legal challenge				Council Duty Directors attend training relating to role prior to joining duty director rota and have refresh training annually									
	Potential financial loss through compensation claims				Multi agency emergency exercises conducted to ensure readiness									
	Ineffective Cat 1 partnership relationships				Active participation in Local Resilience Forum (LRF) activities									
	Reputational damage				On-call rota being maintained and updated to reflect recent staffing changes									

Name and Description of risk	Potential impact	Inherent (gross) risk level (before Controls)			Controls	Lead Member	Risk owner	Risk manager	Residual risk level (after existing controls)			Mitigating actions (to address control issues)	Comments	Last updated
		Probability	Impact	Rating					Probability	Impact	Rating			
L06 - Safeguarding the Vulnerable – Operational and partnership actions-Failure to work effectively with partners to identify and protect vulnerable people in the district and disrupt exploitation leaving vulnerable people at risk or subject to exploitation**.**	Increased harm and distress caused to vulnerable individuals and their families.	4	4	16	Engagement with the Oxfordshire partnerships protocol review to identify improvements to local arrangements in support of the strategic partnerships. Outcomes of review to be implemented.	Councillor P Chapman	Ian Boll	Tim Hughes	3	4	12	Need to re-engage with Oxfordshire partnerships protocol review to ensure outcomes relevant to CDC to be implemented		Risk reviewed on 07/09/23 - No changes
	Council subject to external reviews				Child Exploitation prevalence report reviewed with LPA Commander following each CE sub-group meeting.							Exploitation concerns and actions discussed routinely at Joint Agency Tasking and Co-ordination meetings on a monthly basis		
	Criminal investigations potentially compromised				Community based exploitation disruption coordinated through the Joint Agency Tasking and Coordination Process.									
	Potential financial liability if council deemed to be negligent.													
	Reputational damage to the council.													
L07 - Health and safety Failure to ensure effective arrangements are in place for Health and Safety.	Unsafe services leading to fatality, serious injury & ill health to employees, service users or members of the public	5	4	20	Corporate H&S governance arrangements and policies are regularly reviewed and updated by the Corporate H&S Team and monitored by the H&S Assurance Board.	Councillor S Dallimore	Claire Cox	Ruth Wooldridge	3	4	12	Corporate H&S Auditing and Inspection programme on track. Reports issued to managers and actions tracked for completion. Work ongoing with 2 audits per calendar month.		Risk reviewed on 01/09/2023 - No changes
	Criminal prosecution for failings Breach of legislation and potential for enforcement action.				Directors and service leads are responsible for ensuring H&S arrangements are in place within their areas or responsibility. Managers are responsible for ensuring operational health and safety risks are assessed and effective control measures implemented.							Work still in progress with service areas around the corporate H&S register, which will be managed and monitored with a focus on the depots as our highest risk areas.		
	Financial impact (compensation or improvement actions)				Consultation with employee representatives via employer and union consultative committees (Unison)							Post decoupling senior management will have monthly monitoring of H&S matters as a standing item at senior management meetings.		
	Reputational Impact				Corporate H&S Training provided via corporate learning and development programme. Training for operational risks may be organised by services.							Relevant and required policies and procedures are being reviewed.		
					H&S performance monitored by accident and incident reports and corporate H&S auditing and inspection programme.							Working with service areas to ensure that suitable risk assessments are in place.		
					H&S information is disseminated via internal communications and updates to ELT and other relevant meetings.									

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Name and Description of risk	Potential impact	Inherent (gross) risk level (before Controls)			Controls	Lead Member	Risk owner	Risk manager	Residual risk level (after existing controls)			Mitigating actions (to address control issues)	Comments	Last updated
		Probability	Impact	Rating					Probability	Impact	Rating			
L08 - Cyber Security -If there is insufficient security with regards to the data held and IT systems used by the councils and insufficient protection against malicious attacks on council's systems then there is a risk of: a data breach, a loss of service, cyber- ransom.	Financial loss / fine	4	5	20	File and data encryption on computer devices	Councillor S Dallimore	Stephen Hinds	David Spilsbury	3	5	15	A series of all-Council staff awareness sessions and members given presentations with the Police Cyber Security Advisor.		Risk reviewed on 06/09/202 - Mitigating actions updated
	Prosecution – penalties imposed				Managing access permissions and privileged users through AD and individual applications							All staff reminded to be vigilant to unexpected emails due to the heightened risk of cyber-attack due to escalating tensions in Eastern Europe and at critical periods such as the run up to Elections		
	Individuals could be placed at risk of harm				Schedule of regular security patching							Cyber Security advice and guidance regularly highlighted to all staff.		
	Reduced capability to deliver customer facing services				Vulnerability scanning							Cyber Security is mandatory e-learning for all staff to be completed annually and is part of new starters induction training.		
	Unlawful disclosure of sensitive information				Malware protection and detection							Cyber Security Officer has reviewed advice and provided assurance on our compliance.		
	Inability to share services or work with partners				Effective information management and security training and awareness programme for staff							External Health Check undertaken each year and Cabinet Office PSN compliance reviewed and certified each year to ensure the infrastructure is secure to connect to the PSN.		
	Loss of reputation				Password and Multi Factor Authentication security controls in place							Internal Audit completed cyber audits with no major issues or significant risks identified.		
	Increased threat to security due to most staff working from home				Robust information and data related incident management procedures in place							IT implemented an intrusion prevention and detection system which is monitored, and regular actions are implemented from the resulting reports.		
					Appropriate robust contractual arrangements in place with all third parties that supply systems or data processing services							IT Officer has specific responsibility for Cyber Security and we have engaged a specialist partner to advise on industry best practices and standards.		
					Appropriate plans in place to ensure ongoing PSN compliance							Microsoft Multi-Factor Authentication is embedded to authenticate users providing an enhanced level of cyber security.		
					Adequate preventative measures in place to mitigate insider threat, including physical and system security									
					Insider threat mitigated through recruitment and line management processes									
					A complete restructure and update of the technical approach for the infrastructure has resulted in a move to a zero trust model.									
					Advice received from NCSC on specific activity alerts, the increased threat of globalised ransomware and malware attacks.									

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Name and Description of risk	Potential impact	Inherent (gross) risk level (before Controls)			Controls	Lead Member	Risk owner	Risk manager	Residual risk level (after existing controls)			Mitigating actions (to address control issues)	Comments	Last updated
		Probability	Impact	Rating					Probability	Impact	Rating			
L09 - Safeguarding the vulnerable - Internal procedures- Failure to follow our internal policies and procedures in relation to safeguarding vulnerable adults and children or raising concerns about their welfare.	Increased harm and distress caused to vulnerable individuals and their families Council could face criminal prosecution Criminal investigations potentially compromised Potential financial liability if council deemed to be negligent Reputational damage to the council	4	4	16	Safeguarding lead in place and clear lines of responsibility established Safeguarding Policy and procedures in place Information on the intranet on how to escalate a concern Mandatory training and awareness raising sessions are now in place for all staff. Safer recruitment practices and DBS checks for staff with direct contact Data sharing agreement with other partners Attendance at Children and Young People Partnership Board (CYPPB) Annual Section 11 return compiled and submitted as required by legislation.	Councillor P Chapman	Yvonne Rees	Nicola Riley	2	4	8	Action plan acted upon and shared with Overview and scrutiny committee once a year Annual refresher and new training programmes including training for new members Continue to attend safeguarding board sub groups as necessary to maintain high levels of awareness within the system and compliance with latest practice Corporate monitoring of all referrals Ensure web pages remain up to date Monitoring of implementation of corporate policies and procedures to ensure fully embedded Regular internal cross departmental meetings to discuss safeguarding practice	August continued internal safeguarding training and updated process with LCSS , Domestic Abuse link worker embedded in housing team.	Risk reviewed on 08/09/2023 - Comments updated
L10 - Sustainability of Council owned companies and delivery of planned financial and other objectives - Failure of council owned companies to achieve their intended outcomes or fail to meet financial objectives	Unclear governance leading to lack of clarity and oversight in terms of financial and business outcomes Failure of council owned companies to achieve their intended outcomes or fail to meet financial objectives Lack of understanding at officer and member level about the different roles of responsibilities required when managing council owned companies	3	5	15	Annual business planning in place for all companies to include understanding of the link between the Council's strategic objectives being delivered and financial impact for the council. A regular Shareholder Representative meeting takes place, a Shareholder Liaison Meeting including the S.151 Officer and Monitoring Officer takes place on a quarterly basis and a Shareholder Committee meeting on a quarterly basis. A governance review is being undertaken and initial recommendations have been approved by the Shareholder Committee. Regular meetings are in place between the Council's S.151 Officer and the relevant company Finance Directors. Financial planning for the companies undertaken that will then be included within our own Medium Term Financial Strategy. Financial risks are routinely reported by the Shareholder Representative to the Shareholder Committee. Clear governance arrangements are in place. Sound monitoring in place of both business and financial aspects of the companies and the impact on overall council performance through the Shareholder Representative meetings and through the reporting to the Corporate Leadership Team monthly. Training in place for those undertaking Director roles relating to the companies.	Councillor B Wood	Stephen Hinds	Kerry Wincott	2	3	6	A Shareholder Representative was appointed and regular governance arrangements are in place. Resilience and support being developed across business to support and enhance knowledge around council companies. Skills and experience being enhanced to deliver and support development, challenge and oversight. Work with one company to ensure long term support arrangements are put in place.		Risk reviewed on 06/09/2023 - No changes

Name and Description of risk	Potential impact	Inherent (gross) risk level (before Controls)			Controls	Lead Member	Risk owner	Risk manager	Residual risk level (after existing controls)			Mitigating actions (to address control issues)	Comments	Last updated
		Probability	Impact	Rating					Probability	Impact	Rating			
L11 - Financial sustainability of third-party suppliers and contractors	The financial failure of a third party supplier and contractors results in the inability or reduced ability to deliver a service to customers or provide goods needed. A reduced supply market could also result in increased costs due to the council's loss of competitive advantage. Reduced resilience and business continuity Increased complaints and/or customer dissatisfaction Increased costs and/or financial exposure to the Council due to having to cover costs or provide service due to failure of third party supplier of contractor	3	4	12	Ensure contract management in place review and anticipate problems within key service suppliers and partners Business continuity planning arrangements in place in regards to key suppliers Ensuring that proactive review and monitoring is in place for key suppliers to ensure we are able to anticipate any potential service failures Intelligence unit set up procurement Hub to monitor supplier and contractor market Analysis of third party spend undertaken to identify and risk assess key suppliers/contractors	Councillor A Nell	Shiraz Sheikh	Michael Sullivan	3	4	12	Creditsafe UK tool purchased to allow Procurement to carry out supplier credit checks when required. Service areas to ensure supplier suitability checks have been carried out prior to award of contract and hold meetings as required with suppliers to review higher risk areas and ensure risks are being managed. Reminders to be sent to all who have Procurement/Contract Management responsibility to regularly meet with key suppliers and partners to gain early understanding of any issues arising. Services areas to keep the key suppliers under regular check including running financial checks.	Creditsafe UK tool now operational .Guidance is being developed for service areas to ensure that a contract management process is followed on a regular basis. This will include regular checks on Creditsafe UK to check on financial health; service areas will be advised to confirm that business continuity arrangements are in place and to seek evidence of regular reviews of this as part of the contract management process. Service areas to provide details of all current contracts to Procurement to enable analysis of third party spend to identify and risk assess key suppliers and contractors and to identify areas of duplication of costs.	Risk reviewed on 07/09/23 - No changes
L12 - Corporate Governance - Failure of corporate governance leads to negative impact on service delivery or the implementation of major projects providing value to customers.	Threat to service delivery and performance if good management practices and controls are not adhered to. Risk of ultra vires activity or lack of legal compliance Risk of fraud or corruption Risk to financial sustainability if lack of governance results in poor investment decisions or budgetary control. Failure of corporate governance in terms of major projects, budgets or council owned companies impacts upon financial sustainability of the council. Inability to support Council's democratic functions / obligations (e.g. return to physical public meetings and public access to meetings). Elements of the COVID-19 response and recovery work may be compromised, delayed or not taken forwards.	4	4	16	Clear and robust control framework including: constitution, scheme of delegation, ethical walls policy etc. Clear accountability and resource for corporate governance (including the shareholder role). Integrated budget, performance and risk reporting framework. Corporate programme office and project management framework. Includes project and programme governance. Internal audit programme aligned to leadership risk register. Training and development resource targeted to address priority issues; examples include GDPR, safeguarding etc. HR policy framework. Annual governance statement process undertaken for 2021/22 connects more fully and earlier with ELT and CLT. Annual Review of the Constitution by the MO with member involvement and approval by the Full Council	Councillor S Dallimore	Stephen Hinds	Shiraz Sheikh	3	3	9	The Annual Governance Statement was produced and has been published and approved by the Audit, Accounts and Risk Committee. The Corporate Governance Assurance Group continues to map governance processes to ensure visibility and to refresh them.		Risk reviewed on 06/09/23 - No changes

Name and Description of risk	Potential impact	Inherent (gross) risk level (before Controls)			Controls	Lead Member	Risk owner	Risk manager	Residual risk level (after existing controls)			Mitigating actions (to address control issues)	Comments	Last updated
		Probability	Impact	Rating					Probability	Impact	Rating			
L13 - Monitoring and management of Major Infrastructure Projects and Programmes - Failure to properly manage and monitor the various residual Oxfordshire Housing and Growth Deal infrastructure projects.	Failure to actively manage the various Infrastructure Projects and Programmes, particularly in relation to those being delivered by Oxfordshire County Council, could lead to delays or failure to deliver timely obligations, which could lead to HM Government holding back some or all of its funding, or requiring repayment. Delivery of Infrastructure projects fail to accelerate housing delivery as commercial pressures impact house builders	4	5	20	Need to establish appropriate officer and stakeholder governance structures to support effective programme delivery. Need to institute regular and effective dialogue with developers.	Councillor D Ford	Ian Boll	Robert Jolley	4	3	12	Establishment of appropriate officer and stakeholder governance structures to support effective programme delivery Institute regular and effective dialogue with developers		Risk reviewed on 06/09/23 - No changes
L14 - Workforce Strategy The lack of effective workforce strategies could impact on our ability to deliver Council priorities and services.	Limit our ability to recruit, retain and develop staff Impact on our ability to deliver high quality services Overreliance on temporary staff Additional training and development costs	3	4	12	Analysis of workforce data and on-going monitoring of issues. Key staff in post to address risks (e.g. strategic HR business partners) Weekly Vacancy Management process in place Ongoing service redesign will set out long term service requirements .	Councillor S Dallimore	Yvonne Rees	Claire Cox	3	4	12	There are indications that specific service areas are beginning to experience recruitment difficulties for professional roles. HR is working with the relevant directors to consider alternative resourcing methods. Development of new L&D strategy, including apprenticeships. Development of relevant workforce plans. Development of specific recruitment and retention strategies. It is planned for CDC to develop a framework that suits the needs of all services ensuring that the Council has access to a much wider pool of staffing agencies at competitive rates. The new IT system has been implemented to improve our workforce data and continues to be develop to improve our ability to interrogate and access key data (ongoing) in order to inform workforce strategies.		Risk reviewed on 08/08/2023 - No changes

Cherwell District Council

Risk Strategy 2023 - 2024

Report of Assistant Director Customer Focus

1.0   Introduction

1.1   This strategy outlines Cherwell District council's overall approach to managing risk, Its fundamental aim is to help the council identify and manage risk.

1.2   What is Risk Management and why do we have it?

Risk arises when there is uncertainty about the future, reflecting the possibility that an event or series of events may adversely affect the council's ability to deliver its strategic priorities.

Through understanding risks, decision-makers (councillors and managers) will be better able to evaluate the impact of a particular decision or action on the achievement of the councils' strategic priorities.

1.3   What is Cherwell District Council's Risk Appetite?

Risk management should not focus upon risk avoidance, but on the identification and management of an acceptable level of risk. The council aims to proactively identify, understand, and manage the risks inherent in services and associated with business/service plans, policies, and strategies, so as to support responsible, informed risk taking and as a consequence, aim to achieve measurable value. The council provides a supportive culture but will not support reckless risk taking.

Appropriately managed and controlled risk-taking and innovation will be encouraged where it supports the delivery of the councils' strategic priorities.

Focus will be on the council's ambitions for increasing income generation and self-sufficiency through sound investments, effective asset management, commercialisation opportunities and programmes of regeneration.

Any risks associated with these plans will be managed through the appropriate mechanisms, ensuring due diligence has taken place; these include sound business cases, effective project management and working with external partners for specialist advice. Channels will be in place to report risks into the relevant management and democratic committees to ensure full transparency and allow any actions to be taken as necessary.

2.0   Risk Management Processes

2.1   How we manage risk

Understanding and managing threats or risks comes down to four very simple questions:
1.   What's the worst that could happen to us?
2.   What's the likelihood of it happening?
3.   What would be the impact if it did?
4.   What can we do about it? (how can we prevent it from happening, or what can we put in place to manage it if it should?)

The four steps of risk management
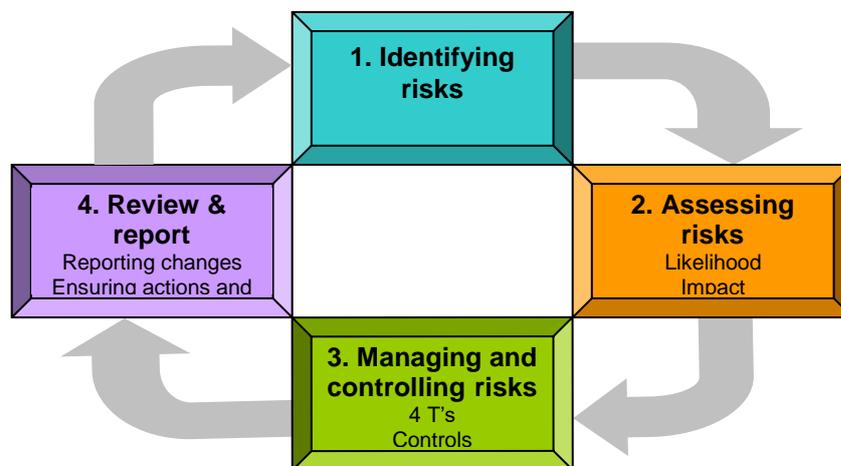
Our approach is to use a simple 4 stage process of identification, assessment, management, and review to ensure our risks are recorded and effectively managed. This approach is described in the four sections below.

2.2   Identifying Risks

To identify risks, think through the things that could prevent or hinder your team from achieving its business objectives. There are three parts to a risk – an **event** that has a **consequence** that leads to an **impact** on our objectives.

Typical risk phrasing could be.
loss of…
failure of…
failure to...   leads to …   resulting in…
lack of…
partnership with…
development of…

You will also need to identify whether the risk is:
*   **Leadership:** risks that are significant in size and duration and will impact on the reputation and performance of the Council as a whole and on its ability to

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deliver its strategic priorities. Also, risks to corporate systems or processes that underpin the organisation's overall governance, operation, and ability to deliver services.

- **Partnership:** risks to a partnership meeting its objectives or delivering agreed services/ projects.
- **Operational:** risks specific to the delivery of individual services/service performance/project.

Each one should have its own risk register within Unity, aimed at the different teams/audience, i.e., Leadership Risk register is managed by the Performance & Insight Team, updated, reviewed, and signed off by Managers and DLTs/CLT, and its ultimate audience are Executive members, Overview & Scrutiny, and our residents. The Performance Team can provide guidance to build your own Operational risk register within Unity.

2.3   Assessing Risk

Once a risk has been identified (of any type, Leadership, operational or project) it needs to be assessed. The assessment process considers the probability that the risk may occur and its potential impact. This allows for risks to be ranked and prioritised, as not all risks represent equal significance to the council.

There are two forms of risk:

- **Inherent/Gross risk:** the level of risk existing before any controls and/or treatment measures have been applied.

- **Residual risk:** the level of risk remaining after managing it through treatment and/or control measures. Please note that only the residual risk score will be included in the monthly reports.

The council uses a risk scoring matrix to work out the inherent risk rating (probability times impact). The owner of the risk undertakes this assessment. For a Leadership risk this is checked by the Performance & Insight team, for programme/ project risks by the relevant board and for operational risks by the Assistant Director.

Assessing probability

Scale / Level	Descriptor	Description
1	Remote	May only occur in exceptional circumstances (P < 2%)
2	Unlikely	Is unlikely to occur, but could occur at some time (2% < P < 25%)
3	Possible	Fairly likely to occur at some time, or in some circumstances (25% < P < 50%)
4	Probable	Will probably occur at some time, or in most circumstances (50% < P < 75%)
5	Highly Probable	Is expected to occur in most circumstances (P > 75%)

Description and definition of the impact of the risk should it occur (these are a guide)

Effect - Service Delivery	Effect – Financial	Effect -Health & Safety	Effect – Environment	Effect – Reputation
5 – Catastrophic				
Catastrophic disruption. Loss of service delivery for more than seven days	Huge financial loss >£1,000,000	Loss of life. Intervention by HSE	Significant local, national and/or international environmental damage	Extensive coverage in the national press and broadsheet editorial, and/or a national TV item
4 – Major				
Major disruption. Serious damage to ability to provide service. Loss of service for more than 48 hours but less than 7 days	Major financial loss >£100,000 - <£1,000,000	Extensive / multiple injuries. Intervention by HSE	Major damage to the local environment	Coverage in national broadsheets, the press, and/or low national TV reporting
3 – Moderate				
Noticeable disruption, some customers would be affected. Loss of service no more than 48 hours	High financial loss >£25,000 - <£100,000	Violence, threat or major injury – medical treatment required. Intervention by HSE	Moderate damage to the local environment	Coverage in the national tabloid press and/or extensive front page coverage in local press/ TV
2 – Minor				
Some disruption to internal business only – no loss of customer service	Medium financial loss >£5,000 -<£25,000	Minor injury – first aid treatment only required	Minor damage to the local environment	Minimal reputation damage. Minimal coverage in the local press
1 – Insignificant				
Insignificant disruption to internal business – no loss of customer service	Low financial loss <£5,000	No injuries	No, or insignificant environmental damage	No reputational damage

The inherent risk score is the 'likelihood' times the 'impact' calculated before controls have been put in place. The inherent risk score helps to make decisions about the significance of risks to the councils, and how they will be managed, the controls required and the treatment of the risk. A residual score is calculated in the same manner, but after controls have been implemented.

		Probability				
		Remote 1	Unlikely 2	Possible 3	Probable 4	Highly Probable 5
Impact	5 Catastrophic	5	10	15	20	25
	4 Major	4	8	12	16	20
	3 Moderate	3	6	9	12	15
	2 Minor	2	4	6	8	10
	1 Insignificant	1	2	3	4	5

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2.4 Managing and Controlling Risk

Residual risk Score	How the risk should be managed?
High Risk (16 to 25)	**Requires active management –** Risk requires active management to manage score down and maintain at an acceptable level
Medium Risk (10 – 15)	**Contingency plans –** A robust contingency plan may suffice together with early warning mechanisms to detect any deviation from the profile
Low Risk (1 – 9)	**Good housekeeping –** May require some risk mitigation to reduce the probability if this can be done in a cost effective manner, good housekeeping is always needed to ensure that the impact remains low. Re-assessing frequently to ensure conditions remain the same and to revise the possibility of de-escalation to the service operational risk.

The inherent risk rating will determine how the risk is controlled and managed with one of the Four Ts - treatment, toleration, transfer and terminate - as the main options (see below).

Once controls and actions to mitigate the risk have been identified a residual risk score should be assessed. The residual risk score, along with the controls and assurances then form the basis of monthly reviews; controls and residual score will be reported monthly to Executive and quarterly to Audit.

The Four Ts
The level of the inherent risk will help determine the best treatment for a risk, whether strategic or operational.

Tolerating	The councils may tolerate a risk where: • The risk is effectively mitigated by internal controls, even if it is a high risk • The risk cannot be mitigated cost effectively • The risk opens up greater benefits These risks must be monitored, and contingency plans should be put in place in case the risks occur.
Treating	This is the most widely used approach. The purpose of treating a risk is to continue with the activity which gives rise to the risk, but to bring the risk to an acceptable level by stablishing controls to either contain a risk to an acceptable level (the impact), or to reduce the likelihood; and additional assurances to ensure delivery of controls.
Terminating	Doing things differently and therefore removing the risk. This is particularly important in terms of project risk but is often severely limited in terms of the strategic risks of an organisation.
Transferring	Transferring some aspects of the risk to a third party, e.g., via insurance, or by paying a third party to take the risk in another way. This option is particularly good for mitigating financial risks, or risks to assets. However, it is a limited option – very few strategic risks are insurable and only around 15 -20% of operational risks can be insured against.

2.5   Review and report

Circumstances and business priorities can, and do, change, and therefore risks need to be regularly reviewed. Some risks will move down the priority rating, some may leave, and others will be identified. Risks are reviewed quarterly in more detail by the Accounts Audit and Risk Committee.

- Operational risks are updated quarterly and/or when needed at the service/directorate level, and a 6- monthly health check is undertaken at a corporate level.
- New leadership risks should be discussed with the Performance & Insight team; and a risk template should be completed for CLT approval, ensuring there is an effective assessment of the risk and identification of controls (this template will be provided by the Performance & Insight team, and you should return to them upon completion). Once the new leadership risk is approved by CLT the team will add to the Leadership Risk Register in Unity.
- New operational risks can be entered directly onto service risk registers.

3.0 Roles and Responsibilities

The overall responsibility for the effective management of risks rests with Full Council and the Executive (lead members/portfolio holders) as advised by CLT.

Who?	When?			
	Ongoing	**Monthly**	**Quarterly**	**Annually**
All employees	Consult the risk management guidance available on the Intranet when appropriate		Participate in risk discussions within teams as they would be with regards to performance management.	Attend risk management and risk escalation awareness training sessions.
Assistant Directors	Own relevant Leadership risk on the corporate risk register	• Use Directorate level meetings to monitor progress in delivering the risk management aspects of service plans is monitored at • Present risk reviews and monitoring monthly to CLT meetings	• Report on risk register management via our performance management platform, Unity. • Present risk reviews and monitoring monthly to Audit meetings, where appropriate.	• Complete a statement of assurance taking responsibility for their individual service / operational risk registers and the implementation of the management actions contained within it to feed into the Annual Governance Statement. • Ensure their Service Plans: -Identify operational risks associated with service delivery - Identify actions to control risks - Include key operational risk management activities

Who?	When?			
	Ongoing	**Monthly**	**Quarterly**	**Annually**
Portfolio Holder Corporate Services		• To review monthly reports and present any exceptions to the Executive		To review and sign off Risk Management Strategy yearly review.
Accounts, Audit and Risk Committee			• Receive risk management updates • Review the Leadership risk register	• Undertake an annual review of this strategy • Make recommendations to Executive if it is considered that any improvements or amendments are required.
Corporate Leadership Team (CLT)	Briefing Executive members to ensure they are aware of Leaderships risks affecting their service areas / portfolios and any improvements in controls which are proposed.	Take Risk Management as an agenda item at meetings.		• Update Leadership Risk Register and remove obsolete risks. • Prepare an Annual Governance Strategy in line with Regulation 4 of the Account and Audit Regulations (2003).
Executive	Act as risk champions	Receive and review an integrated finance, performance, and risk report.		• Approve an update of this strategy. • Agree Annual Governance Strategy in line with Regulation 4 of the Account and Audit Regulations (2003).
Internal Auditors	Refer to the councils' risk registers when planning audit work.			• Independently review the risk management strategy and process. • Complete risk based reviews of the key controls identified to mitigate the principal risk to the council's achievement of their strategic objectives.

Who?	When?			
	Ongoing	**Monthly**	**Quarterly**	**Annually**
Performance & Insight Team	• Manage the Leadership risk register (including management of the performance and risk software and making sure all risks are up to date). • Provide risk related training, support to managers, officers, and councillors.		• Facilitate regular discussions around Risk and Performance at service team meetings, reiterating the escalation process into CLT. • Prepare regular committee reports.	• Preparing and updating the risk management strategy. • Provide information for the Annual Governance Statement.
S.151 Officer				• Ensure the council has robust risk management strategies in place that effectively support the systems of internal control

3.1 Risk Management Responsibilities in Project Environments

Corporate Management CLT	Responsible for providing and ensuring adherence to the Risk and Opportunities Management Strategy
Programme Senior Responsible Owner	Accountable for risk management actions agreed at Programme Board level, following escalation from projects
Assistant Director	Accountable for risk management actions agreed at DMT following escalation from projects and operational risks within the Directorate
Project Sponsor	• Accountable for all risk management within the project, and for putting in place a risk management approach or strategy specific to the project. • Ensures all risks associated with the project business case are identified, assessed, and controlled. • Triggers an escalation
Senior user / customer / client board member	Responsible for ensuring all risks to users are identified, assessed, and controlled
Senior supplier board member	Responsible for ensuring all risks to delivery are identified, assessed, and controlled
Project Manager	• Creates the project-specific risk management approach as directed by the sponsor. • Responsible for creating and maintaining the risk register in line with requirements of the Risk and Opportunities Management Strategy, ensuring risk identification, assessment and control measures are implemented.

4.0 Version History

Version	Date	Section	Reviewer	Description of Amendment
0.5	01/07/2019	All	Louise Tustian (Insight Team Leader)	• Minor amendments reflecting separation of CDC and SNC.
0.6	31/01/2021	All	Louise Tustian (Head of Insight & Corporate Programmes)	• Annual review of strategy pre CEDR review.
0.7	01/05/2022	All	Celia Prado-Teeling (Interim Assistant Director – Customer Focus)	• Annual review of strategy pre CLT review.
0.8	02/10/2023	All	Shona Ware (Assistant Director – Customer Focus)	• Annual review of strategy. Formatting has been amended.

For information on versions before 2019 please contact the Performance and Insight team

4.1 Date of next review: April 2024

5.0 Contacts

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