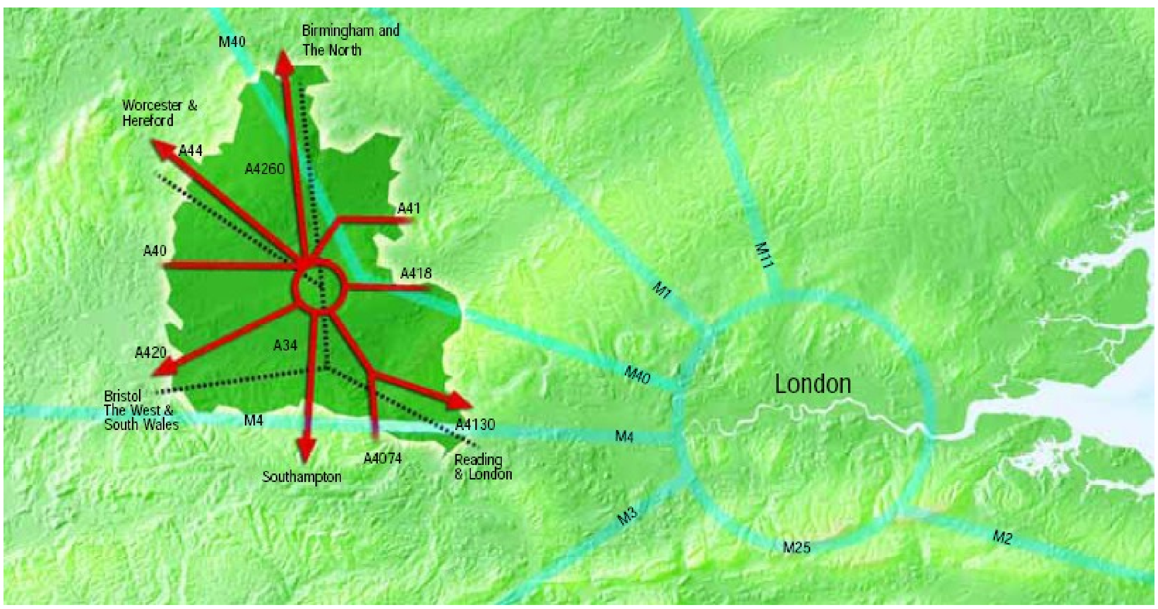
Oxfordshire in context:

Introduction to Oxfordshire

A county in the heart of England and centred on the renowned city of Oxford, Oxfordshire is an accessible "city region" with good links to London and Birmingham and a wide and beautiful rural hinterland.

- Oxfordshire contains parts of three areas of outstanding natural beauty in the Cotswolds, the Chiltern Hills and the North Wessex Downs, which between them cover almost a quarter of the county.

Figure 1 Oxfordshire



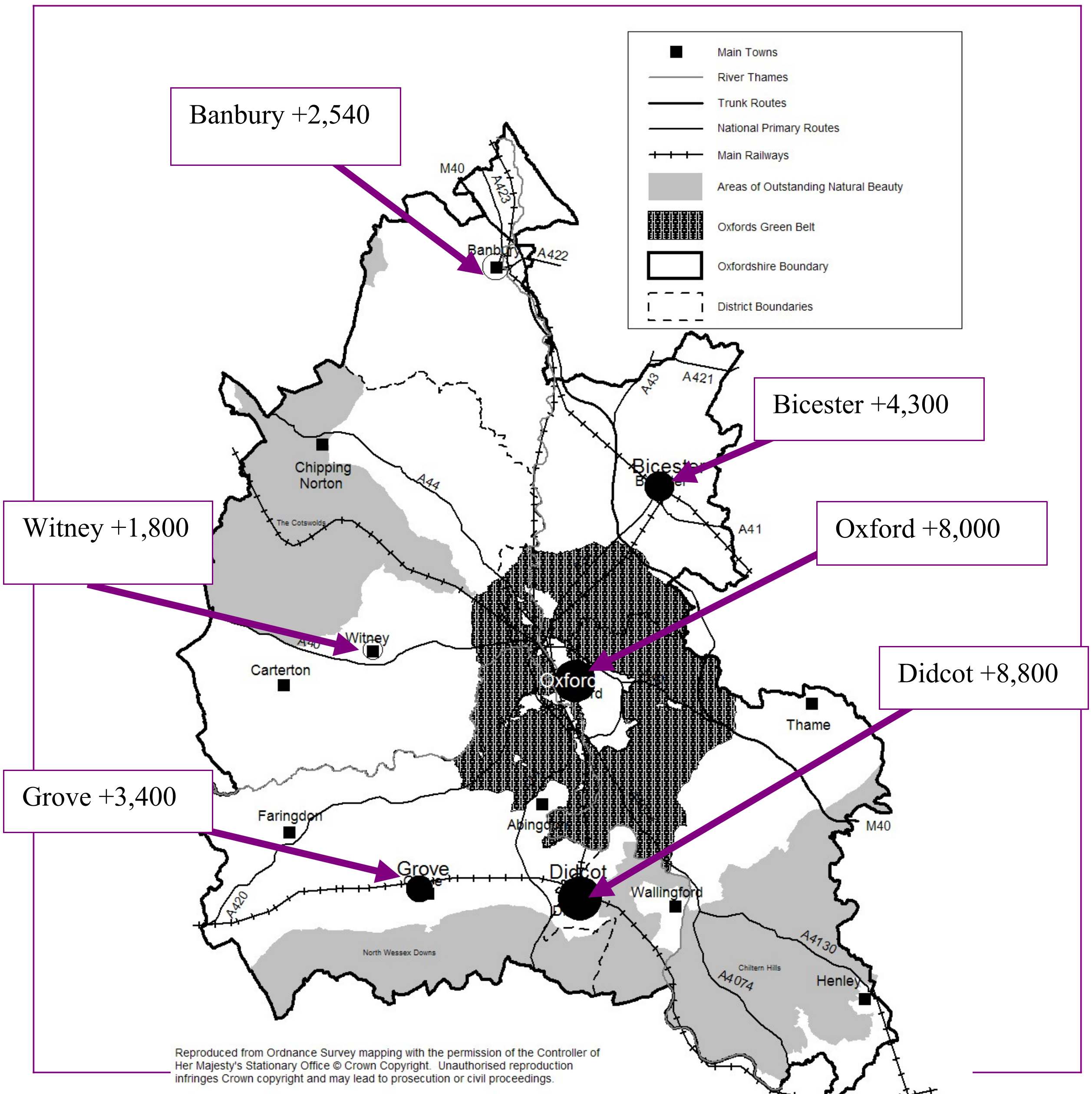
From Economic Development Strategy for Oxfordshire 2006-2016

2.2 Home to over 630,000 people, Oxfordshire is also the South East region's least densely populated county with over three quarters of its population living outside the city of Oxford and almost half living in settlements of less than 10,000 people.

Growth in housing

3.1 The new South East Plan will say how many dwellings are to be built in the county by 2026. The draft South East plan proposed over 47,000 new dwellings in the county between 2006 and 2026 with major developments in the built up areas of Oxford and at Bicester, Didcot and Wantage & Grove. The Panel who examined the South East Plan recommended to Government that the number of dwellings to be built between 2006 and 2026 should be increased to 54,600. The Government are expected to publish proposed changes to the Plan in summer 2008 and to approve the Plan in 2009.

Figure 2 Oxfordshire's main sites of future housing development



NOTE: Witney and Banbury growth figures are to 2016 (Oxfordshire Structure Plan 2016), Bicester, Didcot and Grove are to 2026 (Figures as recommended by the South East Plan Examination Panel)

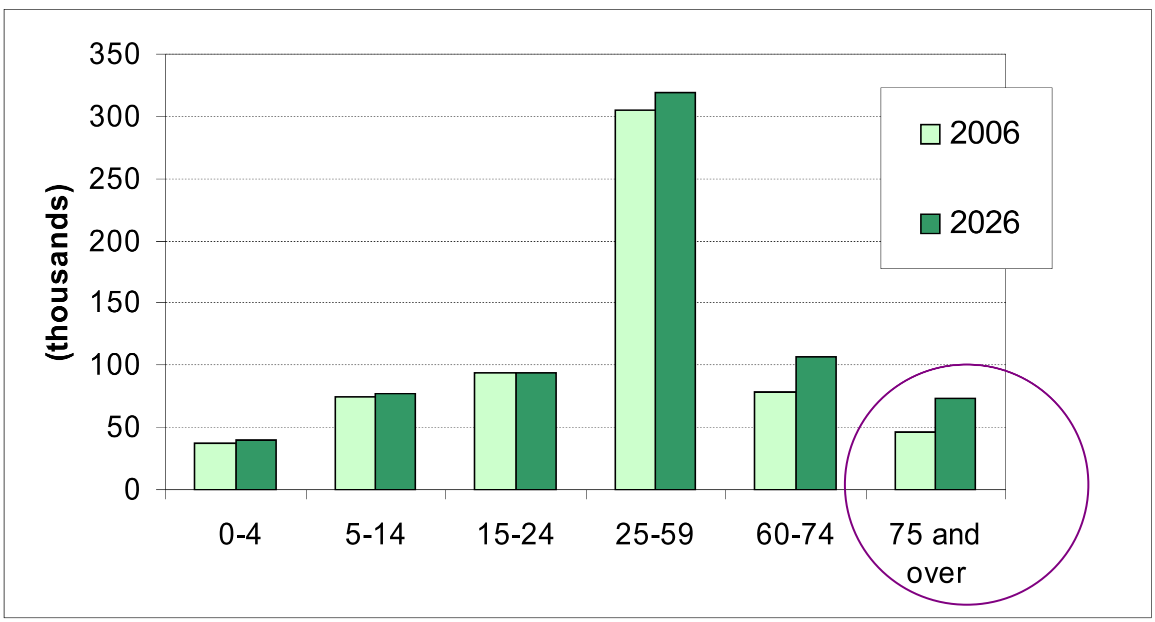
Accommodating the planned growth in housing is one of the known challenges facing Oxfordshire over the next 20 years.

Changing population

4.1 Over the next 20 years the number of older people living in Oxfordshire is expected to increase significantly.

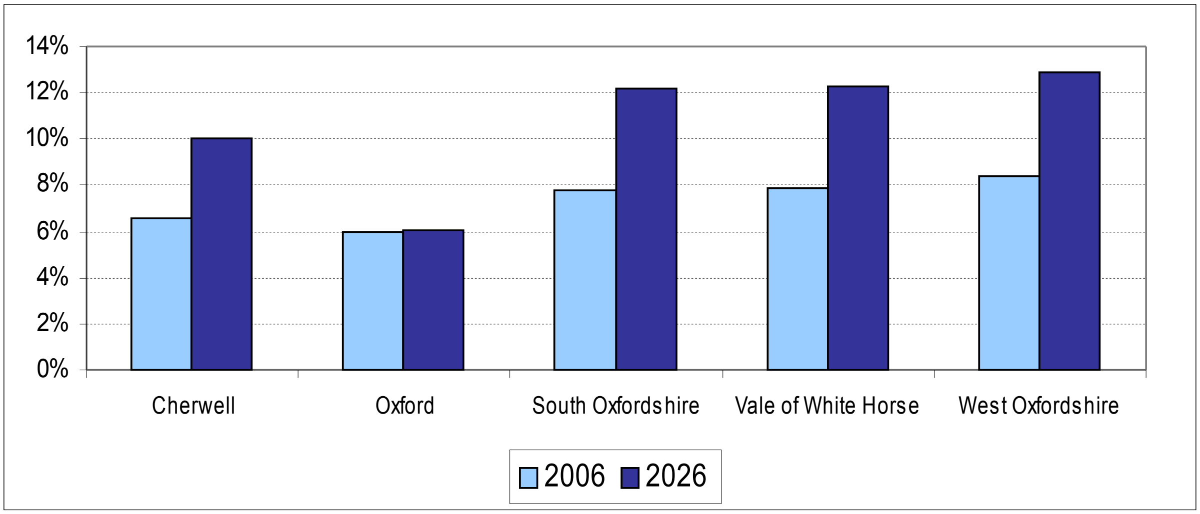
- Between 2006 and 2026 Oxfordshire's total population is forecast to grow by over 12%, whilst the number of people aged 75 and over is projected to grow by 60% over the same period. This trend is similar to that expected nationally and is driven by increasing life expectancy and the current age profile of the county.
- This growth would result in an additional 27,800 people aged over 75 years in Oxfordshire by 2026.
- The increase in the number of over 75s is much greater in the rural districts than in Oxford, with increases ranging from 65% in South Oxfordshire to over 80% in Cherwell. In contrast, the number of over 75s in Oxford is projected to increase by 16% from 2006 to 2026.

Figure 3 Projected change in population in Oxfordshire by age group 2006 to 2026



Source: ONS revised 2004-based population projections, crown copyright reserved

Figure 4 Change in the over 75 year age group as a percentage of total population, 2006 and 2026



Source: ONS revised 2004-based population projections, crown copyright reserved

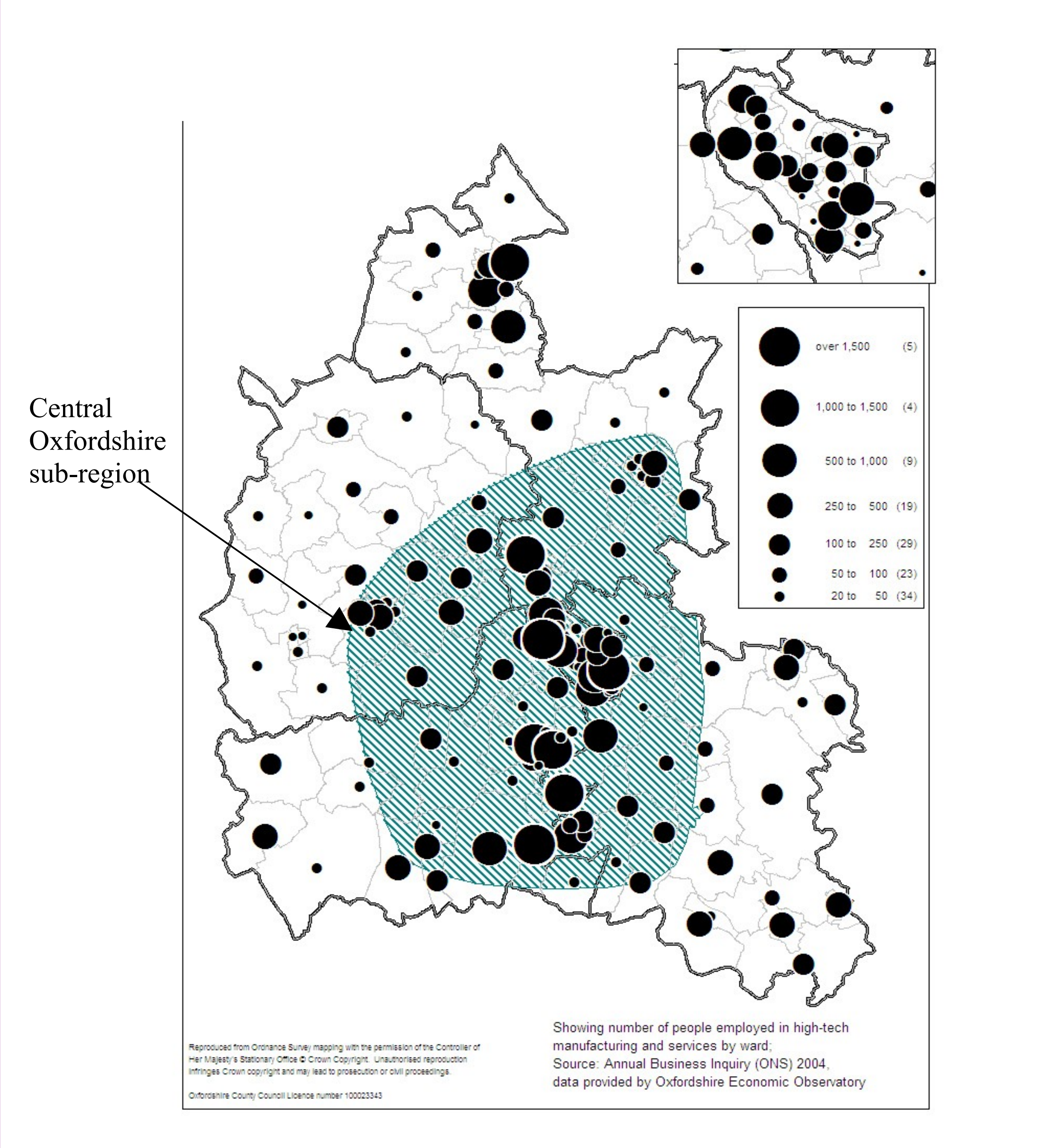
The **changing age profile of the population** will present opportunities and challenges for Oxfordshire's public service providers, businesses and communities in the future.

Global Competitiveness

5.1 Oxfordshire has one of the strongest economies in the South East and is globally competitive in areas such as high performance engineering, bio-science, and medical instruments and publishing.

5.2 The growth of hi-technology employment has extended beyond Oxford city, notably in the corridor running south from Oxford to the county boundary, an area which includes centre's such as Harwell, Milton Park and the Rutherford Appleton laboratory.

Figure 5 People employed in hi-tech manufacturing and services in Oxfordshire (2004)



Source: Annual Business Inquiry (ONS) 2004, number of people employed in hi-tech manufacturing and services by ward. Data provided by the Oxfordshire Economic Observatory. Map created by the Oxfordshire Data Observatory, OS License number 100023343

5.3 The global economy is undergoing a major transformation as economic activity becomes increasingly flexible, divisible and dispersed across continents.

- This is reflected, for example, in changes being made by developed countries to outsource manufacturing and assembly in low-cost locations and concentrate on high value added, knowledge-intensive activities such as R&D and design.

5.4 The rise of China, India and other emerging economies as locations for production is particularly significant.

- China and India accounted for 43% of global output growth between 2001 and 2004.
- China and India accounted for 22% of global output in 2005, and this is expected to rise to 27% by 2015. Over the same period, the share of the group of 7 industrialised (G7) nations is expected to decline from 42% to 36%.
- Between 1990 and 2004, China's exports increased at a rate of 19% per annum, and India's increased by 16% per annum[1].
- China and India, and other emerging economies, are investing heavily in the skills to enable them to compete with advanced economies in a range of new higher value added activities. For example, China currently educates around 2 million graduates a year, compared with 250,000 in the UK[2].

Maintaining global competitiveness in Oxfordshire's key sectors is central to the long term prosperity of the county.

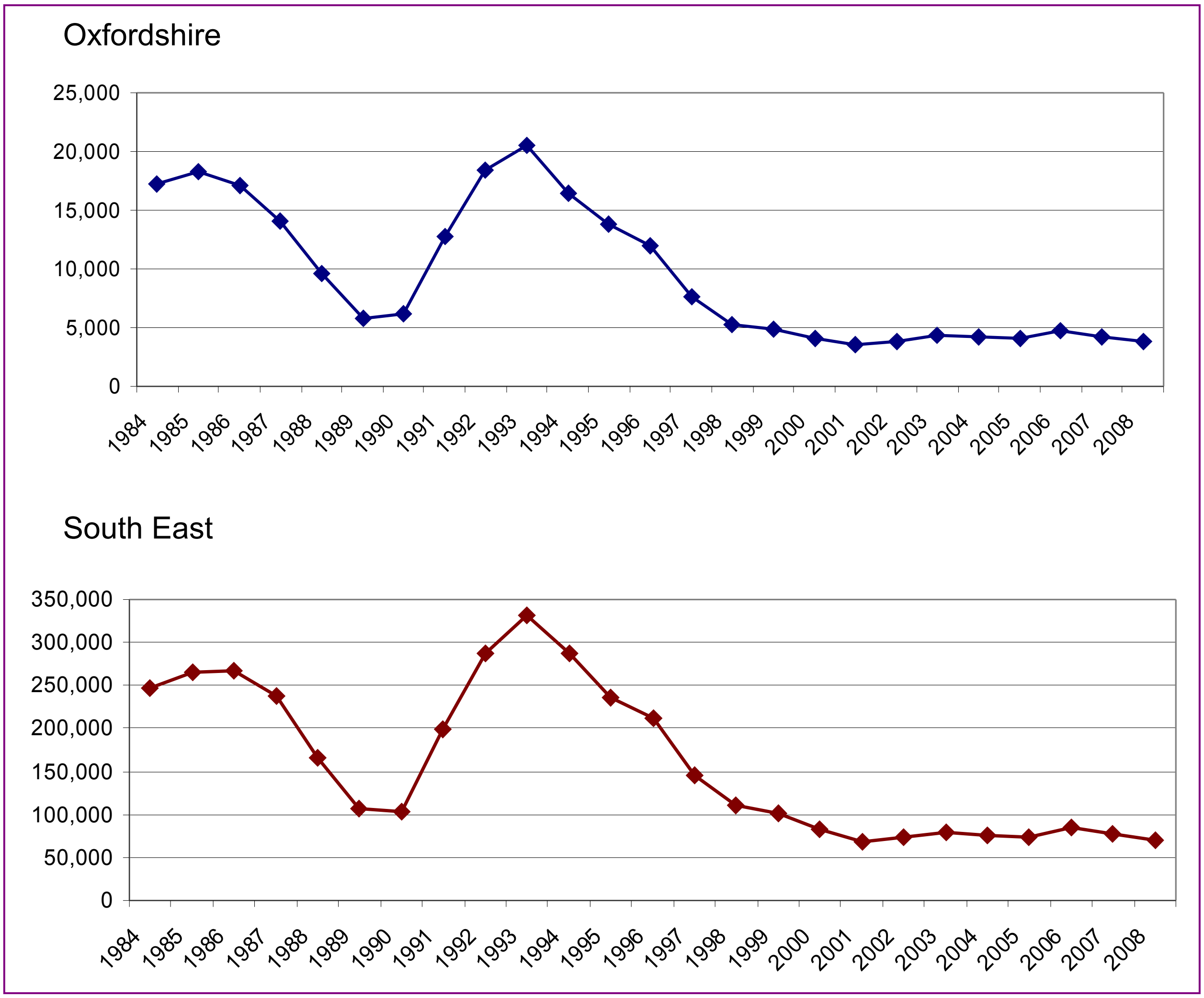
[1] SEEDA (2006), The Regional Economic Strategy 2006-2016: The Evidence Base, October 2006.
[2] HM Treasury & DTI (2006), Productivity in the UK 6: Progress and New Evidence, March 2006.

Economic stability

6.1 15 years ago, in the early 1990s, unemployment would have been a major issue for Oxfordshire.

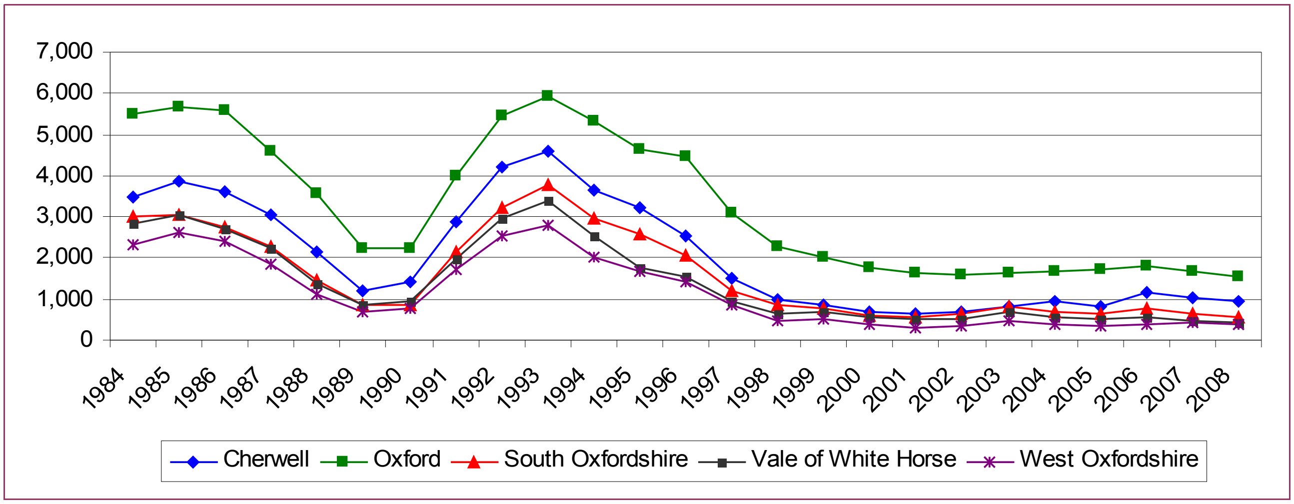
- Claimant count data - which now reports the number of people taking up Job Seeker Allowance - shows a very stable picture in Oxfordshire over the past 9 years and the pattern of change in Oxfordshire between 1984 and 1998 mirrored that of the South East (see charts below).
- Note that there is a lack of long term reliable data at a county level which would provide a more complete picture of historical unemployment - i.e. including those on other benefits such as disability allowance.

Figure 6 People claiming benefit – Oxfordshire and South East



Source: Claimant counts, ONS Crown copyright reserved, downloaded from NOMIS

Figure 7 People claiming benefit - Districts



The **context of recent economic stability in the South East and Oxfordshire** is important to recognise in the development of the new strategy for the county.

Skills

7.1 Despite the relatively favourable position on employment, Oxfordshire ranks poorly on education, skills and training – a difference which is especially apparent in the more deprived areas of the county.

- All 12 of Oxfordshire's most deprived areas rank in the worst 10% nationally on the education, skills and training domain (see table below).

Figure 8 Contribution of Education, Skills and Training deprivation to most deprived areas of Oxfordshire – shaded boxes highlight where an area is in the worst 10% in England

Super Output Area name	District		Overall Index	Income	Employ-ment	Health	Educatn, Skills & Training	Barriers to Housing & Services	Crime and Disorder	Living Environ-ment
Northfield Brook 68	Oxford	1								
Barton and Sandhills 13	Oxford	2								
Barton and Sandhills 14	Oxford	3								
Blackbird Leys 20	Oxford	4								
Northfield Brook 69	Oxford	5								
Banbury Ruscote 50	Cherwell	6								
Banbury Ruscote 54	Cherwell	7								
Blackbird Leys 18	Oxford	8								
Rose Hill and Iffley 76	Oxford	9								
Rose Hill	Oxford	10								

and Iffley 77										
Littlemore 52	Oxford	11								
Blackbird Leys 17	Oxford	12								

Note: table shows most deprived Super Output Areas (SOA) in Oxfordshire listed in order, where Northfield Brook 68 (the name of the SOA in Northfield Brook ward) is the most deprived in the county. Shaded areas highlight those areas that rank in the worst 10% of areas in England on that particular domain.
Source: CLG, Index of Deprivation 2007

Oxfordshire's **relatively poor position on skills** has potential implications for the future of the local economy.

Health inequalities

8.1 Although overall an affluent county and with a life expectancy significantly higher than England, Oxfordshire still shows a 17 year difference in life expectancy between wards.

- The wards with the lowest life expectancy in Oxfordshire are Carfax (figures combined with Holywell) (73.0 years, 95% confidence interval 69.9 – 76.0) and Blackbird Leys (75.0 years, CI 73.3 – 76.6).
- Wards with the highest life expectancy are Bicester South (90.7 years, CI 72.3 -109.0) and Shrivenham (88.6 years, CI 85.1 – 92.1).
- Life expectancy for men in Oxford City is significantly lower than in other parts of the county.

(Life expectancy calculated using SEPHO Life Expectancy tool (V1), Crown Copyright 2006).

8.2 The number of older people is increasing and in particular those aged over 85 will increase by 78% from 2006 to 2026 (from 12,800 to 22,800). Older people are more likely to suffer from poor health, low income and social isolation. Growth is highest in the rural parts of the county.

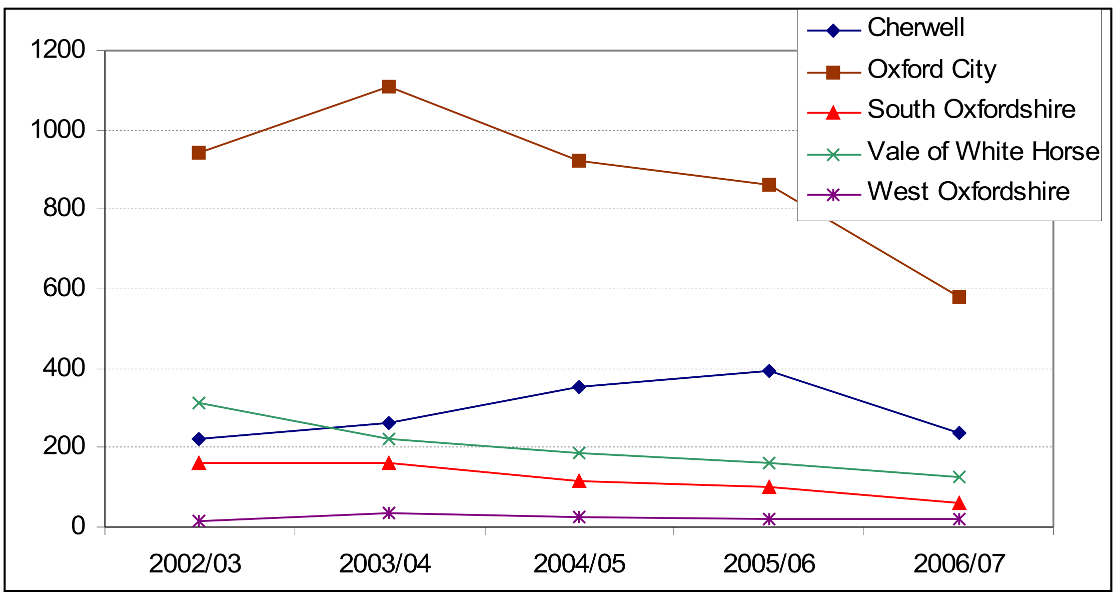
8.3 The number of younger disabled people with physical and learning disabilities is increasing. They are more likely to need support to lead a full life than the general population. The incidence of obesity is increasing with its attendant health problems.

Homelessness

8.4 Homelessness rates are higher than the regional average in Oxford with just over four households per 1,000 households resident in the city being accepted as homeless in 2006/07, compared with two households per 1,000 for the region (and less than 2 per 1,000 in the other Oxfordshire districts).

8.5 The number of households in temporary accommodation has fallen in all districts over the past five years.

Figure 9 Households in temporary accommodation, 2002/03 to 2006/07



Source: CLG 2007 Housing Strategy Statistical Appendix

Oxfordshire's **health inequalities** have potential implications for the future of the local economy, individuals and communities.

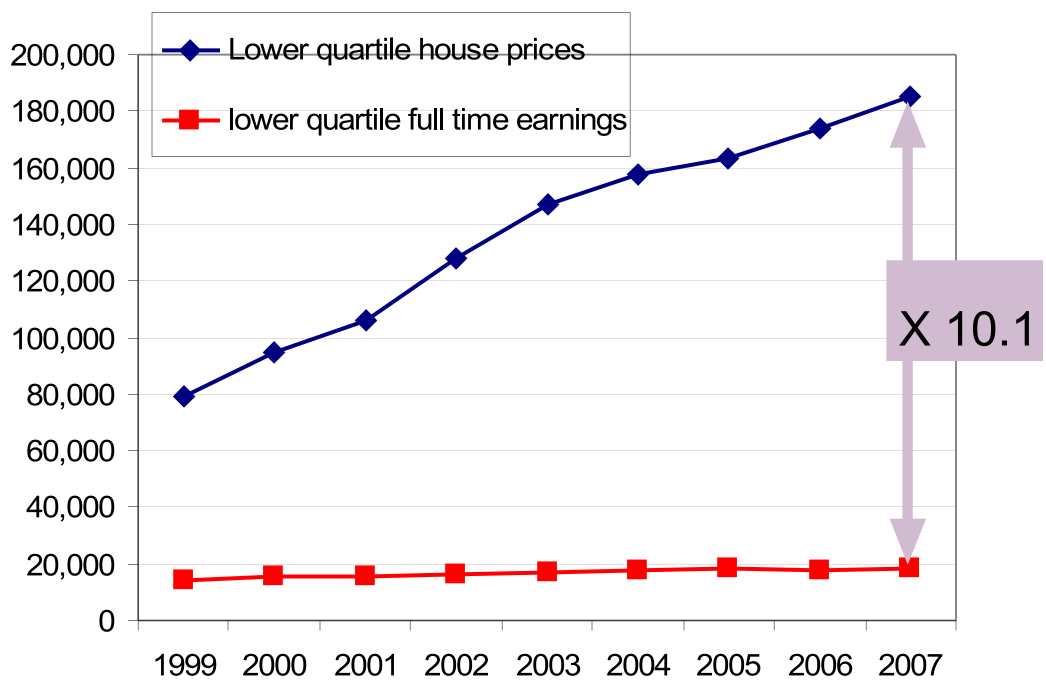
Cost of housing

9.1 In 2007, Oxfordshire was ranked the third most expensive county in England for housing[3].

- Oxfordshire's lower quartile (lowest 25%) house price in 2007 was £185,000. Outside of London, only the counties of Surrey (£217,460) and Buckinghamshire (£186,500) have more expensive housing than Oxfordshire.

9.2 House prices have increased each year since 1999 and the least expensive properties in Oxfordshire are now 10 times the lowest incomes (see chart below).

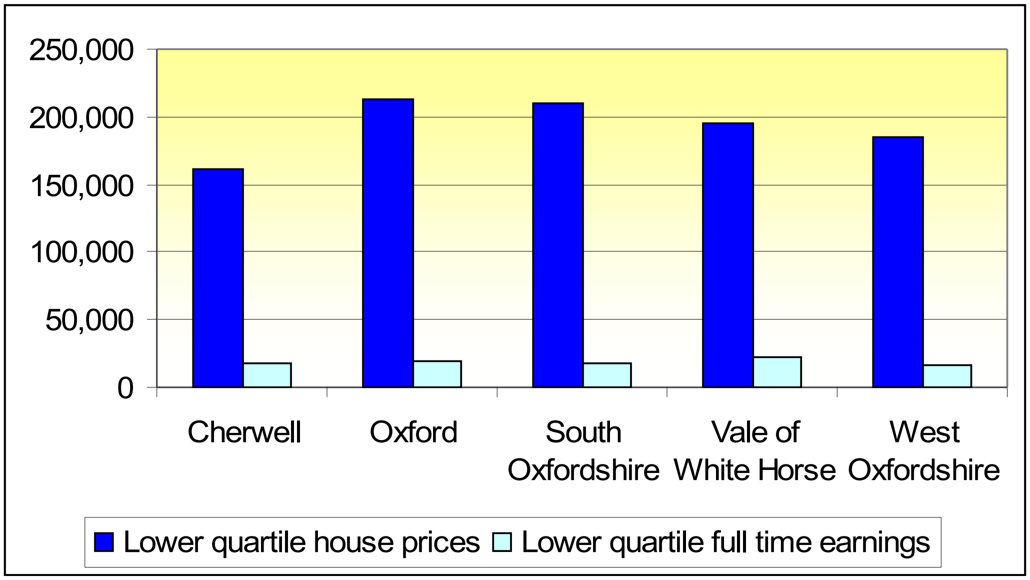
Figure 10 Oxfordshire lower quartile house prices vs lower quartile earnings



Source: Lower quartile house prices from CLG; Earnings from Annual Survey of Hours and Earnings (ONS)

[3]Table 587 Housing market: lower quartile house prices based on Land Registry data downloaded from www.communities.gov.uk Does not include London or Unitary Authorities

Figure 11 District lower quartile house prices vs lower quartile earnings, 2007



Source: Lower quartile house prices from CLG; Earnings from Annual Survey of Hours and Earnings (ONS)

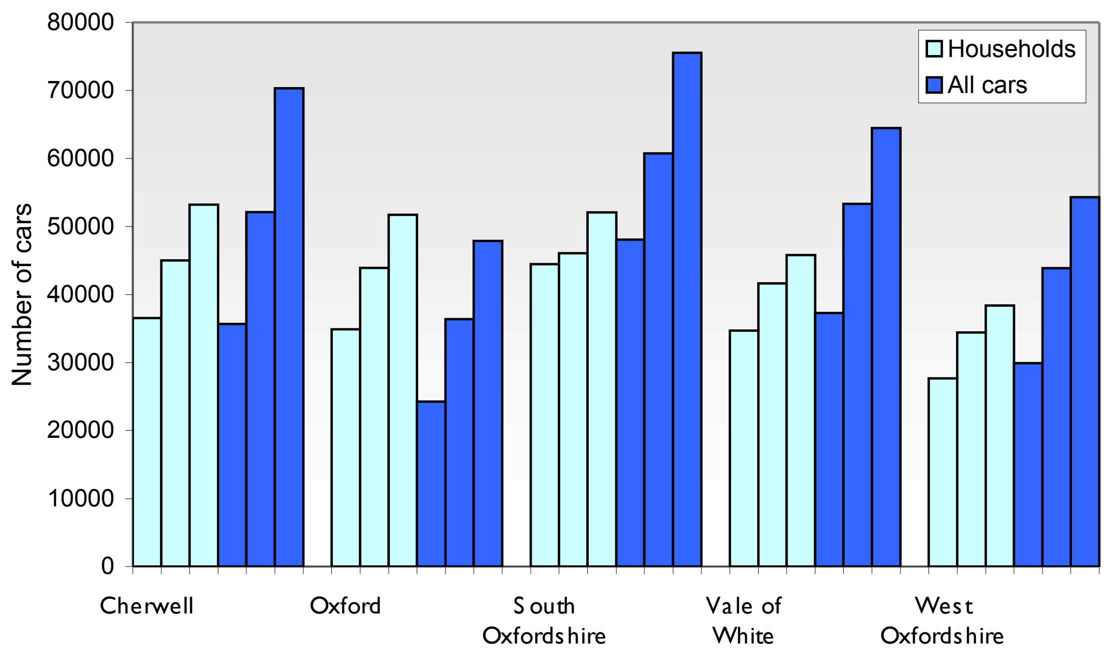
Affordability of market housing in Oxfordshire remains an issue for the county and impacts the economy, local services and the future of communities.

Car ownership

10.1 Historical census surveys have shown a huge increase in car ownership and a significant increase in the proportion of people travelling longer distances to get to work.

- In the twenty years from 1981 to 2001, the total number of cars owned by Oxfordshire households went from 175 thousand to over 300 thousand, an increase of 78%. This is more than double the growth of households (35%) over the same period.

Figure 12 Growth in the number of households and the number of cars in 1981, 1991 and 2001



Source: Census surveys, ONS, Crown copyright reserved

10.2 It is likely that the number of cars on Oxfordshire's roads will continue to grow as a result of not only additional households in the county, but also an increase in the number of driving licences held by Oxfordshire's residents.

- Currently 87% of men and 71% of females in the South East hold driving licences. These figures could be set to rise, especially among women, as the National Travel Survey[4] suggests that the rate of licence holding outside London could be heading towards 90%.

[4] Dept of Transport (sample survey, last data 1999-2001), percent of people aged 17 and over

Increasing dependence on car travel in Oxfordshire has implications for local services, community life and the environment.

Climate change

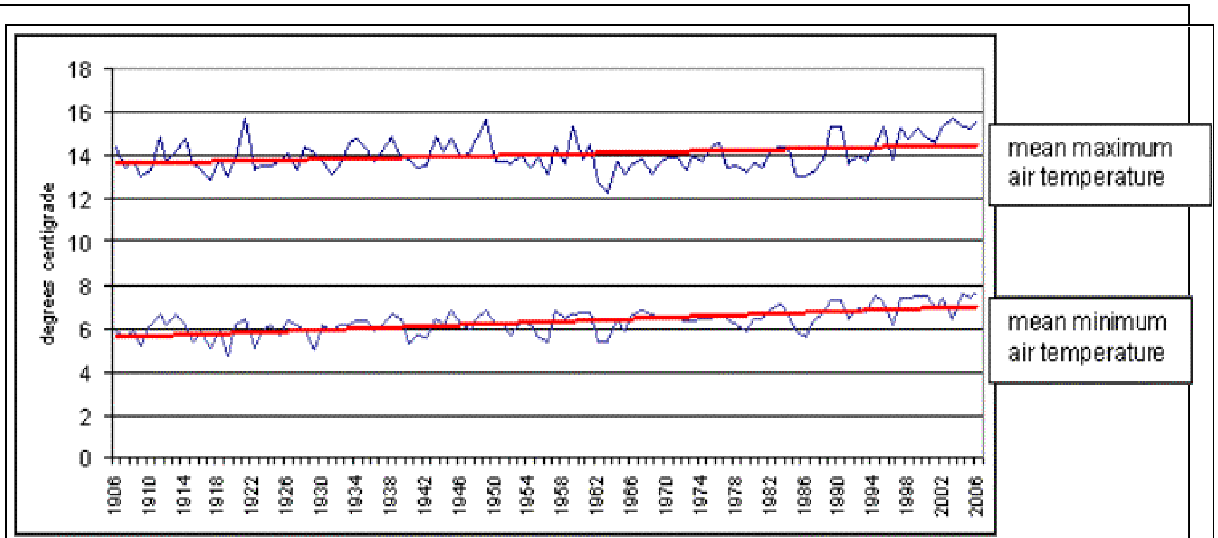
11.1 According to the Intergovernmental Panel on Climate Change Fourth Assessment Report (2007)[5] :

> *Warming of the climate system is unequivocal, as is now evident from observations of increases in global average air and ocean temperatures, widespread melting of snow and ice, and rising global average sea level.*

11.2 The report predicts global temperature increases of 0.2 °C per decade over the next 20 years (compared with 0.6 °C overall from 1901 to 2000). Best estimates of average surface warming during the 21st century range from 1.8 and 4.0 °C dependant on the extent of global action taken to mitigate the problem.

11.3 In Oxford, records from the Radcliffe Observatory show that temperatures in the post-1986 decade are the warmest on record by a considerable margin.

Figure 13 Mean maximum and minimum monthly temperatures, Oxford, 1906 to 2006



Source: Oxfordshire University Centre for the Environment; UK Meteorological records for the Radcliffe Observatory, Oxford. (http://www.geog.ox.ac.uk/research/rms/series.php)

[5] IPCC Summary for Policymakers http://www.ipcc.ch/SPM2feb07.pdf

11.4 Climate change has both positive and negative implications for Oxfordshire (see below).

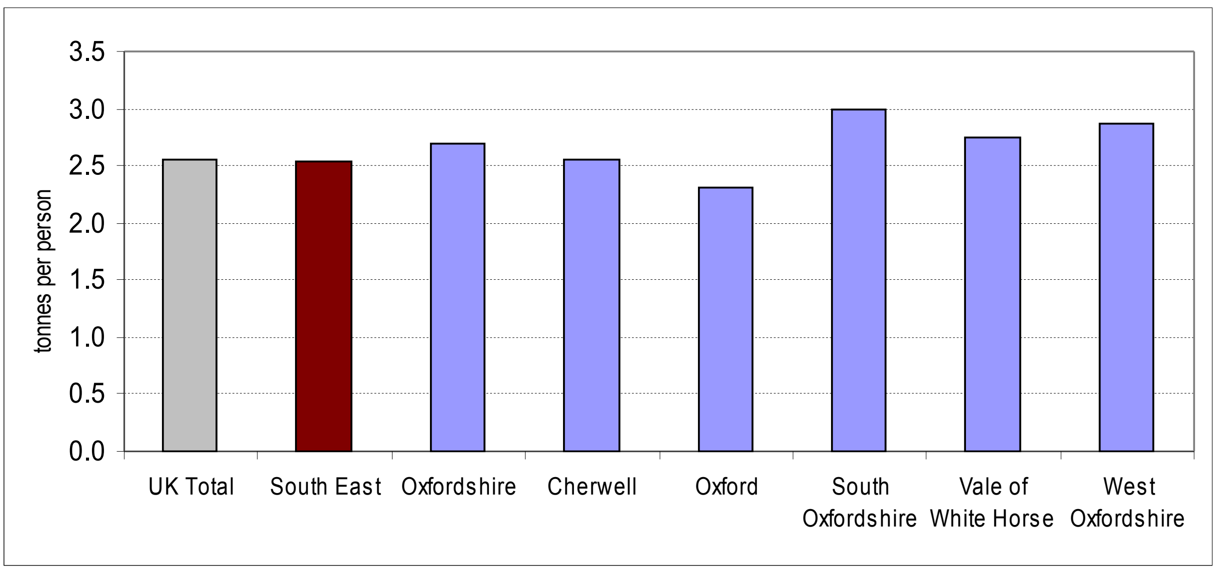
Figure 14 Possible consequences of climate change in Oxfordshire

Impact of climate change		*Which may give rise to*
Lower rainfall and higher temperatures in summer months	→	Increase in heat-related deaths, air pollution-related deaths and hospital admissions, skin cancers and food-borne diseases Increase in fire and crime incidents Pressure on water resources Possible impact on quality of drinking water New leisure and tourism opportunities
Increased vulnerability to floods and storms	→	Health impacts of contaminated flood water Cost of flood disruption - flooding in Oxfordshire in 1998 is estimated to have caused £12m of damage to homes, businesses and services.
Changes in agricultural patterns and natural habitats	→	Falling yields for some crops Opportunity to introduce new crops Changes to wildlife - some changes in species behaviour such as breeding patterns for birds, frogs and newts are already being observed in Oxfordshire
Increased environmental awareness	→	Growing demand for environmental technology products Communities becoming involved with environmental issues

11.5 Domestic carbon dioxide (CO_2) emissions account for about 26% of the total emissions in Oxfordshire. Domestic emissions in Oxfordshire's rural districts are above regional and national averages.

- The highest emission rate is in South Oxfordshire (3.0 tonnes CO_2 per person) and the lowest in Oxford (2.3 tonnes CO_2 per person).
- CO_2 emissions follow the pattern of gas and electricity consumption that are both highest in South Oxfordshire district.

Figure 15 Domestic CO_2 emissions per capita (2005)



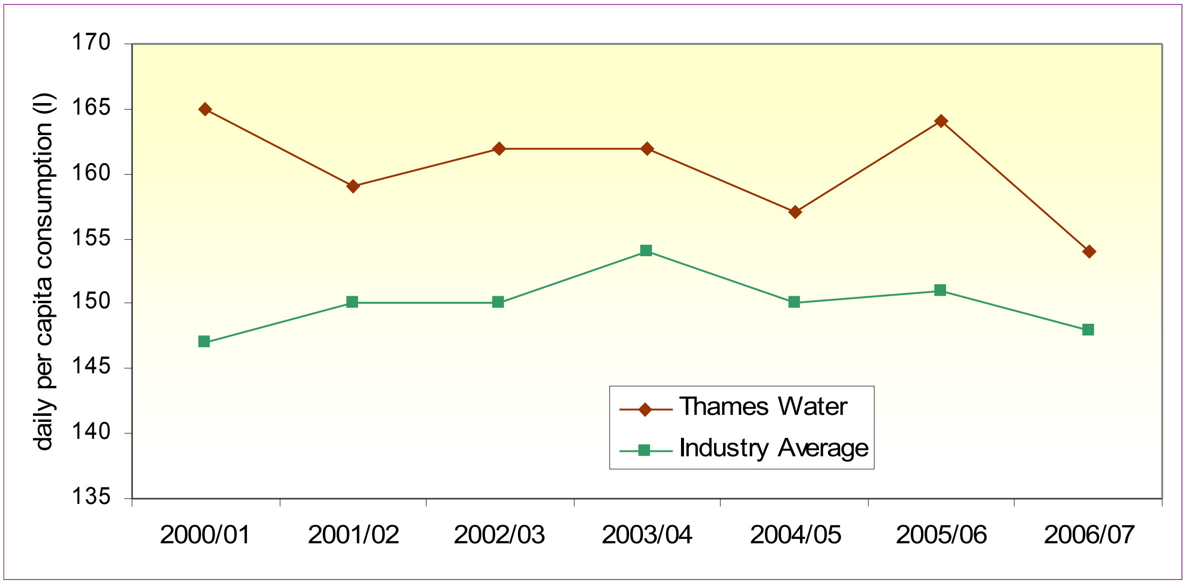
Source: CO_2 report produced for Defra by AEA Energy and Environment, (experimental statistics)

11.6 Road transport accounts for about one third of overall CO_2 emissions in Oxfordshire.

Climate change is expected to present significant challenges and opportunities for Oxfordshire.

Resources

Figure 16 Average daily household water consumption, Thames Water vs England & Wales average



Source: Office of Water Services (Ofwat). Security of supply, leakage and the efficient use of water reports

12.1 Per capita consumption of water is predicted to increase by up to 5% by 2029-30[6] due in part to increasing number of households and decreasing household size. Lower rainfall and hotter summers as a result of climate change would put further demand on water resources.

12.2 Households in Oxfordshire produced 491.8 kg of waste per person in 2006-07, the second lowest amount of any county in England (note that county data includes waste taken to recycling centres). 38% of household waste in Oxfordshire was recycled.

12.3 Efforts to reduce growth in waste per person will be made more difficult if there is a continuing decline in the number of people per household. The projected increase in households in the county is likely to result in an overall increase in waste production.

The projected increase in households in Oxfordshire and potential effects of climate change are likely to put further pressure on the natural environment and resources.

Growth in housing is likely to increase overall levels of waste.

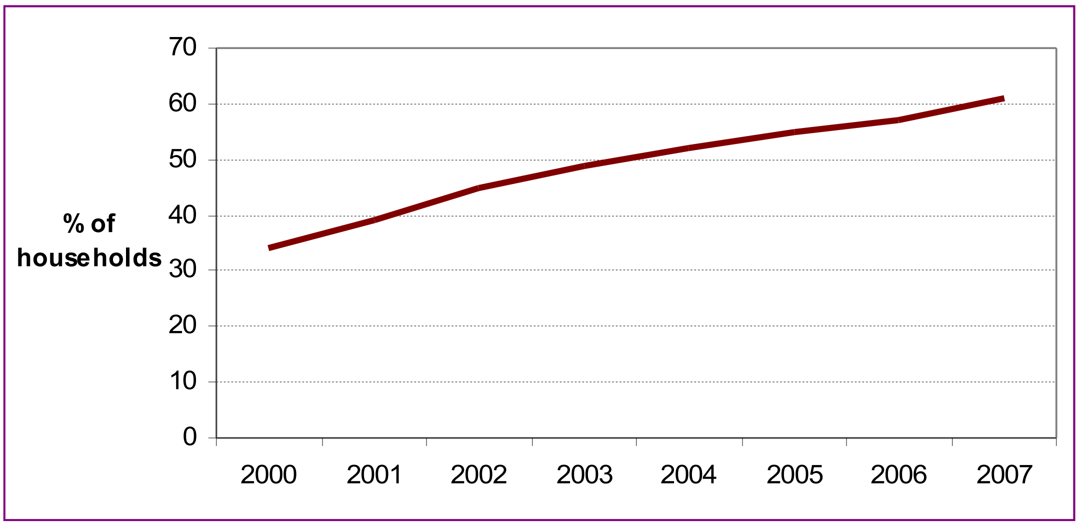
[6] Thames Water: Upper Thames major resource development, Needs & Alternatives report 2006

Social trends

13.1 The internet continues to revolutionise not only shopping and information services but also social interaction and political participation.
13.2 Access to the internet by households nationally is continuing to rise. In 2007 61% of households in Great Britain had internet access, an increase of 7% since 2006.

- 65% of households in the South East region have access to the internet.

Figure 17 Percent of households with access to the internet – Great Britain



Source: National Statistics

13.3 There is still a large divide between the young and the old. Only 4 per cent of the 16 to 24 age group have never used the Internet, compared with 71 per cent of the 65+ age group[7].
13.4 The higher an individual's income, the more likely he or she is to have accessed the Internet. In 2007, 92 per cent of adults with an income of £36,400 or more had used the Internet in the 3 months prior to interview, compared to 51 per cent of those earning £10,400 or less.
13.5 One of the conclusions of the 2005 study by BT "The digital divide in 2025" was that:

> "…the consequences of being digitally excluded in 2025 are likely to be more severe as technology penetrates more and more aspects of our lives, and as society increasingly expects and functions around the expectation of access and engagement with new technologies"[8].

[7] http://www.statistics.gov.uk/pdfdir/inta0807.pdf (2007 Internet Access First release, ONS)
[8] http://www.btplc.com/Societyandenvironment/PDF/Digitaldivide2025.pdf (The Digital Divide in 2025, BT)

In 20 years the *digital divide* may no longer affect older people, but may remain an issue for those on lower incomes.

Future development of internet and mobile technologies is open to speculation, but significant change is very likely.

13.6 The factor considered most important to thriving communities by members of Oxfordshire's citizen's panel[9] was "low levels of crime, drugs and anti-social behaviour".

13.7 Oxfordshire's rural districts experience lower levels of crime compared with Thames Valley and South East averages, however the rate in Oxford city is significantly above the national average.

Table 1 Crime rate per 1,000 population 2006/07

	Rate per 1,000 population	Position (out of 377 where 1st equals lowest rate)
Cherwell	41	= 114th
Oxford	77	= 324th
South Oxfordshire	39	= 95th
Vale of White Horse	31	= 36th
West Oxfordshire	30	= 34th
Thames Valley	57	-
England and Wales	61	-

Source: Home Office, British Crime Survey 2007

13.7 Although Oxford city has a crime rate well above other districts in Oxfordshire, the results from an Oxfordshire Citizen's Panel survey carried out in 2007 showed that residents in Oxford feel safer walking alone in their community than residents in Cherwell.

[9] Oxfordshire Citizen's Panel July – September 2007

Table 2 Percentage of panel members who feel safe.

	Walking alone in your community after dark	Walking alone in your community during the day	Being alone in home – dark	Being alone in home - day
Cherwell	63%	97%	92%	98%
Oxford	65%	97%	93%	97%
South Oxfordshire	74%	98%	96%	99%
Vale of White Horse	72%	98%	97%	99%
West Oxfordshire	75%	95%	92%	96%
Oxfordshire total	69%	97%	94%	98%

Source: Oxfordshire Citizens' Panel 15, July - September 2007 (Base: 1798)

Fear of crime remains an issue in some parts of Oxfordshire. Disproportionately high fear of crime may be linked to lack of community identity and participation.

Active citizens

14.1 Communities in Oxfordshire are becoming actively involved in local assessments and plans and working together for their future.

- 36 community-led plans have been completed across the county since 2002 and a further 46 communities are in the process of developing a plan, meaning that about a quarter of local communities have or will have their own community plan.

14.2 A recent assessment of completed plans over 5 years[10] has found that the top actions and concerns raised were:

- Environment (including appearance, wildlife, sustainability and pollution)
- Access to services and travel
- Children & young people (especially activities for young people and children's playgrounds)
- Recreation leisure and culture (including meeting facilities and sports provision)
- Community safety
- Housing (especially affordable housing)

14.3 The economy was mostly an issue for market towns rather than smaller settlements.

14.4 A comparison of this recent analysis and a previous evaluation of community-led plans carried out in 2005, shows that the environment is a new priority. Both reports show that many actions proposed by communities were at a local level – i.e. requiring local solutions rather than action by public or private sector organisations.

14.5 Community-led plans have nationally recognised benefits for community cohesion and increasing local participation. Oxfordshire's communities themselves hope that community-led planning will create and support a strong sense of community identity.

Involvement in community-led planning can help build a sense of **local identity**.

[10] May 2007, Community-led plans in Oxfordshire, a report to the Oxfordshire Partnership by University of Gloucestershire – based on 31 community-led plans completed across the county between 2002 and spring 2007

14.6 There are at least 3,000 voluntary and community organisations in Oxfordshire, 1,000 of which are registered with the Oxfordshire Network of Voluntary and Community Organisations.
14.7 Recent research on behalf of the Oxfordshire Voluntary Infrastructure Development consortium estimated that 80,000 people give the equivalent of £40m voluntary effort each year in Oxfordshire.
14.8 This level of volunteering equates to around 16% of the adult population of Oxfordshire and may well be an underestimate. ONS estimates that nearly half of adults aged 16 and over in England participated in some form of volunteering activity in 2005 and over two-thirds got involved in informal volunteering.
14.9 There are indications that volunteering is under pressure as a result of:

- High levels of employment.
- Changing travel and work patterns leaving less time for volunteering.

Voluntary activity is under pressure with potential long-term consequences for vulnerable people, communities and the economy.

Participation and Access:

According to the 2006 "Active People" survey, participation in sport in Oxfordshire's rural districts – with the exception of South Oxfordshire - was above regional and national averages. The highest level of participation was in West Oxfordshire at 25.7% compared with 22.6% in the South East and 21% in England.

PARTICIPATION - The % of the adult population participating in at least 30 minutes of sport and active recreation (including walking and cycling) of at least moderate intensity on at least 3 occasions a week

Figure 18 Participation in sport

Source: Sport England 2006 Active People survey