FINAL REPORT

AECOM

Economic Needs Assessment

West Oxfordshire District Council

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Delivering a better world

Prepared for:

West Oxfordshire District Council

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1. Executive Summary

1.1. Introduction

1.1.1. AECOM was commissioned by West Oxfordshire District Council to undertake an Economic Needs Assessment. The study sets out a detailed evidence base to allow for an appropriate supply and mix of employment land and premises to be planned for, and provides a strategy for balancing supply and demand. It forms part of the evidence base to inform the review of the Local Plan and the future approach to the provision, protection, release and enhancement of employment land and premises.

1.1.1. The National Planning Policy Framework (NPPF)[1] outlines the principles that Local Planning Authorities should follow in preparing their evidence base to inform employment land policies. The need for Local Planning Authorities to produce an up-to-date employment land evidence base and the suggested format is outlined in national Planning Practice Guidance (PPG)[2]. The approach to the study reflects the requirements and directions of this guidance.

1.1.2. The scope of the study includes employment land defined as office and industrial land and businesses, falling under the following use classes:

Offices:

- E(g)(i) Offices; and
- E(g)(ii) Research and Development.

Industrial:

- E(g)(iii) Light industrial;
- B2 General industrial; and
- B8 Storage or distribution

1.1.3. The study also considers the Sui Generis (SG) use class, within land in employment uses, although this is not central to the Employment Study and forecasting of demand for land for SG uses is not considered.

1.1.4. The area of assessment is the whole of West Oxfordshire district. Where sites do not meet the size-orientated criteria for assessment as set out by the PPG, the stock represented by these is still captured in the study within the total floorspace calculations, and property market analysis.

1.2. Strategic and Policy Context

1.2.1. The NPPF provides overarching guidance on the Government's development aims and describes the Government's vision for building a strong, competitive economy. It emphasises that Local Plans and Economic Needs Assessments should present robust evidence to support clearly defined designations and allocations of land for employment uses. It sets out a series of recommendations which policymakers should follow to help create conditions in which businesses can invest.

[1] Ministry of Housing, Communities and Local Government, (2024); National Planning Policy Framework
[2] Ministry of Communities, Housing and Local Government, (2019); Planning Practice Guidance.

1.2.2. The need for an evidence base to assist in understanding existing business needs, local circumstances and market conditions is also emphasised in the national PPG. The PPG is a web-based resource providing detailed guidance on the implementation of the NPPF which undergoes regular updates. Guidance includes 'Housing and Economic Land Availability Assessments', which was updated in July 2019 and 'Housing and Economic Needs Assessments' which was updated in December 2020.

1.2.3. At the local level, policies such as the Industrial Strategy for Oxfordshire and West Oxfordshire Economic Snapshot place a focus on fostering economic growth by capitalising on the respective areas' strengths and unique characteristics, ranging from locational qualities, infrastructure, and skilled workforce, to attract investment and enhance business opportunities.

1.2.4. In West Oxfordshire, the current Local Plan places a focus on sustainable economic growth and sets out multiple policies of relevance to employment land needs and the rural economy in the district.

1.3. Functional Economic Market Area

1.3.1. The PPG requires local planning authorities (LPAs) to assess development needs in consideration of other LPAs in a relevant functional economic market area (FEMA), to be defined as part of needs assessments. Analysis of West Oxfordshire's travel to work area, housing market area, property market area, and economic governance and partnerships area, indicates that the district is relatively self-contained economically, with some important connections from an economic/governance partnership perspective, market characteristics (housing and commercial property markets) and connectivity (travel to work and transport infrastructure.

1.3.2. Based on key considerations of housing and property market areas, connectivity via the road and rail network, economic governance partnerships, and the local authorities representing key locations in relation to worker flow sit can be reasonably concluded that West Oxfordshire is particularly connected to four other local authority areas: Cherwell, Oxford, South Oxfordshire, and Vale of White Horse.

1.4. West Oxfordshire's Economic Performance

1.4.1. By 2041, West Oxfordshire is expected to see an overall population increase of 5.8%, driven primarily by a rise in the 65 and over age group, driving an ageing population. This increase is likely to require supporting growth in demand for housing, community facilities, infrastructure and employment land and floorspace over the Local Plan period in West Oxfordshire.

1.4.2. West Oxfordshire had a higher economic activity rate at 64.9% than comparator geographies in 2021, and a lower unemployment rate.

1.4.3. The manufacturing sector is the largest employment sector in West Oxfordshire and the district shows strong growth in the business administration and support services and professional, scientific and technical sectors in terms of job numbers. Conversely, the motor trades, and mining quarrying and utilities sectors show decline in terms of job numbers across the district.

1.5. Current Supply

1.5.1. AECOM's qualitative survey of existing supply of employment land within West Oxfordshire comprised a site visit and desk-based research of 63 clusters. The

assessment of existing supply was conducted based on a set of site appraisal criteria (agreed with the Council in advance) from which detailed analysis was carried out to identify the typologies of employment land within the district.

1.5.2. The assessment concludes that most clusters surveyed are functioning well, have high occupancy rates and support a diverse range of business types. Scores for each of the domains are mixed, with many clusters scoring well for building age and condition, but poorly for domains such as access to services and amenities and public transport. This owes to the presence of smaller centres in West Oxfordshire and associated public transport infrastructure. It is important to consider however that metrics such as access to services and public transport are particularly important for office and R&D premises as these sites tend to be high density and less easily served by on-site facilities and personal transport. Meanwhile, for industrial businesses which are often served by facilities on-site, poor access to amenities is likely to be less of an issue.

1.5.3. The district has an abundant supply of small, often good quality developments in rural and outlying areas. These clusters are characterised by converted agricultural and industrial buildings and light industrial business typologies. Many are occupied by small and start-up businesses. Farm diversification is a key element of the economy in the district, and rural sites have generally been occupied by the same (typically family-owned) businesses for a long time. The rural economy is linked to tourism more broadly in the district, and there is a lot of evidence of agricultural clusters being diversified with the opening of cafes of retail stores that attract tourists.

1.5.4. Meanwhile, the clusters located in or near to main towns tend to be much larger and are occupied by general industrial, storage and distribution, or office typologies, with industrial firms taking advantage of proximity to major roads such as the A40 and A44. Transport accessibility is however a key constraint in the district, and while the larger and higher performing industrial clusters tend to be located with direct or indirect access to the major road network, clusters less well connected to the road network are often smaller, offering older/poorer quality buildings, limited formal public realm and access to amenities.

1.5.5. While there is a strong focus in on the industrial market in the district, there is also a number of recent high-quality office development schemes. Witney accounts for most of the district's office accommodation and there are many business centre sites such as Des Roche Square near to the town. These developments offer variable terms and are key in enabling small businesses to enter the property market.

1.5.6. There is an opportunity for the district to capitalise on core growth sectors, with an existing positive presence of major logistics, aerospace, pharmaceutical, and advanced manufacturing businesses such as Airbus, Abbott Diabetes, Owen Mumford, Siemens and Lotus F1 occupying large sites in the district. A number of clusters are identified as having high growth potential, with Tungsten Park and Sedac Business Centre offering -new high-quality space suitable for industrial and logistics uses.

1.5.7. Sites are generally well let, with little evidence of vacancy or dereliction. Vacant spaces that were observed tend to be in new clusters such as Tungsten Park. A key vacant site however is the former Noble Foods plot, adjacent to Lakeside Industrial Estate. The space has been vacant since 2021 and offers 3.5ha of industrial space with good access to the A40.

1.6. Property Market Assessment

Office Market [E(g)(i) and E(g)(ii)]

1.6.1. The office market in West Oxfordshire is comprised of 235 properties and accommodates approximately 120,899 m^2 of floorspace. The district accommodates 13.4% of office properties within the FEMA, though only accounts for 7.4% of the FEMA's total office floorspace – the Vale of White Horse and Oxford City being the main focus of such supply in the FEMA. This demonstrates that the supply of office floorspace in West Oxfordshire is centred around small and medium sized premises dominated by SME occupiers whose typical requirements are shaped by affordability. The principal office areas in the district are located around the main settlements of Witney, Eynsham and Chipping Norton. Whilst industrial uses make up most of the employment space in the district generally, there are a number of recent high-quality office development schemes and business centres evident in these three settlements.

1.6.2. The analysis indicates that, whilst demand for office floorspace in the district has fluctuated over the last 13 years, the small size of the offer means that this is at an enduringly low base. It has a higher vacancy rate than the FEMA but for both areas this is lower than optimal market levels of 8-10% and lower compared to SE and England. The demand for office space in West Oxfordshire is also reflected in its average rental values, which are significantly lower than the FEMA, SE and England averages. There have been mainly negative net absorption rates from 2020 likely due at least in some part to changes in working practices but skewed by there being few transactions in what is and, has historically always been, a small market. The positive net absorption rates recorded in Q1 and Q2 2024 indicate a pattern of market activity which points to favourable market conditions being present that convey stability, if not growth. In general, office developments across the district offer flexible terms which means they enable small businesses to enter the property market.

Industrial Market [E(g)(iii), B2 and B8]

1.6.3. The light industrial market in West Oxfordshire is small, comprised of 34 properties, accommodating approximately 37,697 m^2 of floorspace. West Oxfordshire accommodates 19.3% of properties within the FEMA and accounts for 17.5% of the FEMA's total light industrial floorspace. The average property size in West Oxfordshire is slightly smaller than the average in the FEMA, SE and England as a whole. At the time of writing there is no vacancy, rental values are lower than the FEMA, SE and England and have been decreasing since peaking in 2022. This indicates that the demand for light industrial premises is positive. However, this will at least in some part be due to the small size of the market dictating low levels of activity such that trend analysis is inherently less conclusive.

1.6.4. The general industrial market in West Oxfordshire is comprised of 101 properties and accommodates approximately 105,961 m^2 of floorspace. West Oxfordshire accommodates 16.0% of properties within the FEMA, but only accounts for 9.7% of the FEMA's total office floorspace. General industrial premises in West Oxfordshire are more likely to accommodate local, smaller businesses due to lack of strategic road access. Smaller businesses typically need less space and so the average property size in West Oxfordshire is significantly smaller than recorded in the FEMA and elsewhere. Meanwhile, the average rental value in West Oxfordshire has experienced a significant increase and currently stands above all comparator geographies. Regarding net absorption rates, since 2020 these have been mainly negative. This would suggest that demand for such premises is generally muted across West Oxfordshire, which is corroborated by agents perceptions and an

expression of traditional sectors such as manufacturing having been in slow decline over time.

1.6.5. The storage and distribution market in West Oxfordshire is comprised of 99 properties and accommodates approximately 296,630 m^2 of floorspace. This represents around 16.3% of properties within the FEMA, and accounts for 12.3% of the FEMA's total storage and distribution floorspace. Properties are concentrated in Witney due to access to the A40, with an additional reservoir of supply concentrated in the Eynsham Woodstock sub-area. Trends in demand over the last 13 years indicate vacancy and availability rates locally have fluctuated, generally falling between 2012 and 2015, increasing until peaking in 2023 and falling again since Q3 2023.

1.6.6. Comparatively, vacancy rates are lower than recorded for both the FEMA and SE and sit below optimal frictional levels. Rents across West Oxfordshire have generally diverged from those reported for the FEMA, SE and England in recent years which is likely to be due to the lack of strategic roads in the district which storage and distribution occupiers rely on, this characteristic having become more critical with the expansion of e-commerce activities that have driven growth in the sector. However, West Oxfordshire experienced a sharp increase in rents in Q3 2024. Positive absorption rates indicate that the conditions within the sector locally are generally favourable within what is, in comparison to the other industrial types, a larger market albeit one unlikely to grow considerably due to an inherent lack of strategic road infrastructure throughout much of it, even accounting for planned improvements.

1.7. Future Demand

1.7.1. The approach to assessing future employment floorspace and land requirements is in line with Planning Practice Guidance on economic needs assessments. The future demand assessment considers three different approaches/scenarios to determine the future land requirements in West Oxfordshire:

- Scenario 1: Labour Demand – based on the land needed to accommodate expected employment growth in the local authority area, as per the latest employment forecasts from Experian.
- Scenario 2: Labour Supply – based on the latest population and housing growth projections, as derived from Office for National Statistics data and a Local Housing Needs Assessment.
- Scenario 3: Past Trends – trend-based scenario based on the continuation of historical net absorption rates, sourced from CoStar. This analyses the net absorption of floorspace – i.e. the quantum of net floorspace occupied over a period of time (i.e. move-ins minus move-outs) based on lease deals, a proxy measure of demand – by use class over the past 10 years and extrapolates these trends over the assessment period.
- Scenario 4: Policy-driven - based on employment levels that could be possible with an ambitious economic development strategy reflecting priority sectors as set out for Oxfordshire.

1.7.2. Analysis shows that up to 2041 there is a projected (net) requirement for between approximately 9,084 m^2 and 40,965 m^2 office floorspace in West Oxfordshire. This would translate to a land requirement for office uses of between 0.9 ha and 6.4 ha.

1.7.3. Considering industrial floorspace, the analysis predicts a net requirement for between 24,086 m^2 and 107,588 m^2. This would translate to a land requirement for industrial uses of between 3.5 ha and 25.0 ha.

Preferred Scenario

1.7.4. The scenarios set out within this section forecast varying changes in floorspace in West Oxfordshire across the Local Plan period; with varying growth outlooks forecast under Scenario 1 (Labour Demand), Scenario 2 (Labour Supply), Scenario 3 (Past Trends), and Scenario 4 (Policy-driven).

1.7.5. The preferred scenario proposed to be taken forward is therefore a hybrid of Scenario 1 (Labour Demand) for office uses and Scenario 3 (Past Take Up) for industrial uses. This hybrid scenario forecasts growth of 30,008 m^2 for office space (E(g)(i) and E(g)(ii) uses) and 107,588 m^2 of industrial space (E(g)(iii), B2 and B8 uses).

1.8. Comparison Between Supply and Demand

1.8.1. As set out in the supply assessment, a number of existing employment sites across the district represent potential pipeline for future development. This includes a number of vacant sites, and sites currently in low density use that could be suitable for future intensification. In addition West Oxfordshire District Council records of consented planning permissions for employment use that have not yet been built out indicate additional potential pipeline supply.

1.8.2. The employment clusters identified as having land allocated for development within Local Plan policy where all or a portion of which has yet to be developed for active employment use are:

- Oxfordshire Cotswold Garden Village Strategic Location for Growth (SLG) in which 40 ha land is allocated for office and light industrial space.
- East Chipping Norton Strategic Development Area (SDA) in which 5 ha land is allocated for office use.

1.8.3. If all approved planning applications concerning office floorspace in West Oxfordshire were to come forward for development, 1,490m^2 of floorspace would be delivered when both gains and losses are considered. Key applications driving this change are a development at Downs Road, Witney (application 21/02364/FUL) which is under construction, and Land South of Station Road (application number 22/02951/FUL).

1.8.4. If all approved planning applications concerning industrial floorspace in West Oxfordshire were to come forward for development, supply of industrial floorspace across the district would increase by 36,865m^2, again once gains and losses are considered. Key applications driving this change are the development at Downs Road, Witney (application 21/02364/FUL) which is under construction, and a development at Lakeside Industrial Park (application 23/00301/FUL).

1.8.5. The outcome of the comparison between employment land demand and available supply, based on the current portfolio of sites / allocations across the district, is set out in Table 1.1. This indicates that, taking into account pipeline sites, there is sufficient supply available to meet projected demand in West Oxfordshire over the Plan period.

Table 1.1 Summary of Demand vs Supply based on Preferred Scenario of Needs

	Preferred Scenario
Demand	
A) Net Office Land	4.5
B) Net Industrial Land	25.0
C) Total Demand [A+B]	***29.5***
Supply	
D) Vacant/undeveloped sites	45.0
E) Pipeline (ha)	3.7
F) Total Supply [D+E]	***48.7***
G) Total Supply – Total Demand [F-C]	**19.2**

1.9. Conclusions

1.9.1. The needs analysis forecasts increased demand for office and industrial floorspace within the district over the Local Plan period to 2041. Given the quantum of land available at designated sites, additional vacant sites and employment sites in the planning pipeline, this demand is not considered to require the allocation of additional sites in West Oxfordshire up to 2041 beyond those identified, comprised of two key sites: Oxfordshire Cotswold Garden Village SLG (40 ha) and East Chipping Norton (5 ha) which are considered to be justified and deliverable based on the evidence considered.

1.9.2. In practice, the selective protection of employment land and premises is recommended to ensure that the sites that are unlikely to come forward for employment use during the Local Plan period are not left vacant. This approach would ensure that the over protection of sites, which could result in the inefficient use of assets and blight and deter investment, does not occur. Similarly, the under protection of sites, whereby the market intervenes prematurely to short-term demand indicators and adversely impacts the long-term provision of employment land, also does not occur.

1.9.3. When forming employment land policies, the Council should follow a balanced approach such that the employment activities of all business sizes, from start-ups to large headquarters, are supported and encouraged. The Council should also recognise that demand will vary by type of space and will therefore be geographically varied.

1.9.4. The Council should monitor changes of employment land through planning permissions to ensure that sufficient land is available for economic growth over the plan period to 2041. A routinely updated Employment Land Trajectory (or similar) would be beneficial. This is whilst being dynamic enough to allow planning applications to be determined with the best available information to hand. This includes ensuring that Class E changes of use do not have an outsized impact on the integrity of employment areas through facilitating the introduction of non-employment uses.

2. Introduction

2.1. Study context

2.1.1. AECOM was commissioned by West Oxfordshire District Council ('the council') to undertake an Economic Needs Assessment ('ENA'), hereafter referred to as the 'study'. The study sets out a detailed evidence base in order to allow for an appropriate supply and mix of employment land and premises to be planned for, and provides a strategy for balancing supply and demand. The study forms part of the evidence base to inform the review of the Local Plan and the future approach to the provision, protection, release and enhancement of employment land and premises. This will enable and encourage future economic growth by supporting the needs of local businesses.

2.1.2. The National Planning Policy Framework (NPPF)[3] outlines the principles that Local Planning Authorities should follow in preparing their evidence base to inform employment land policies. The need for Local Planning Authorities to produce an up-to-date employment land evidence base and the suggested format is outlined in the national Planning Practice Guidance (PPG)[4]. The approach to the study reflects the requirements and directions of this guidance.

2.1.3. The scope of the study includes employment land, defined as office and industrial land, falling under the following use classes:

- Offices:
  - E(g)(i) Offices; and
  - E(g)(ii) Research and Development.
- Industrial:
  - E(g)(iii) Light industrial;
  - B2 General Industrial; and
  - B8 Storage and distribution.

2.1.4. The study also considers Sui Generis (SG) use class, within land in employment uses, although this is not central to the Employment Land Study and the forecasting of demand for SG land is not considered.

2.1.5. The area of assessment comprises the administrative area of the District Council. Within the area, allocated clusters of employment land ('sites') were identified using the West Oxfordshire Local Plan 2031[5] and consultants' review of available property market information. The study also includes all clusters surveyed as part of the Economy Study Update (2012)[6] and Economic Snapshot (2015)[7] studies where ongoing employment use was confirmed.

2.1.6. All employment land measuring 0.25 hectares (ha) or more has been assessed in this study, whereas sites smaller than this in size, where they are not identified within the cluster types listed above, i.e. allocated, are considered to form part of the total supply presented alongside property market information set out below.

[3] Ministry of Housing, Community & Local Government, (2024); National Planning Policy Framework.
[4] Ministry of Housing, Communities and Local Government (2019). Planning Practice Guidance.
[5] West Oxfordshire District Council, (2018); Local Plan 2031.
[6] West Oxfordshire District Council, (2012); Economy Study Update.
[7] West Oxfordshire District Council, (2015); Economic Snapshot.

2.2. Objectives

2.2.1. The main objectives of this study are to:

- Understand the existing situation: provide a supply-side assessment of the quantity and quality of the Council's current employment land provision and its suitability to continue to support employment; assess the extent of the Functional Economic Market Area (FEMA) of West Oxfordshire;
- Assess future needs and gap analysis: assess the likely future demand for employment floorspace and land in West Oxfordshire over the Local Plan period to 2041; quantitatively and qualitatively compare the supply of existing land against forecast future demand; and
- Provide recommendations and actions: set out evidence-based recommendations for appropriate employment land policies, including an assessment of the implications of higher jobs growth / higher housing delivery trajectories; aligning with broader local economic growth objectives and aspirations.

2.2.2. Within these broad objectives are several specific points of consideration, including:

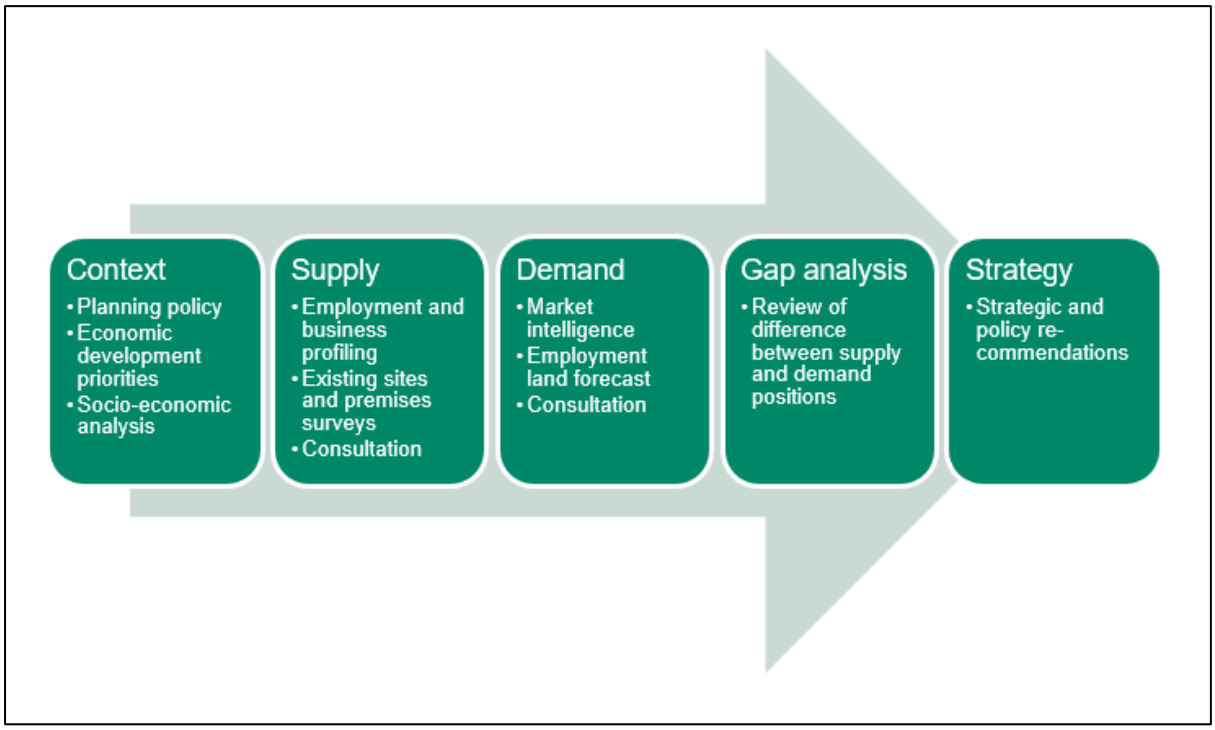
- The need to protect existing employment land in West Oxfordshire for employment purposes, particularly in the context of very high demand (and land values) for residential uses and in the context of additional pressure generated by recent changes to Permitted Development Rights (PDR);
- Ambitions to deliver economic growth and improve productivity, attract further investment, decrease out-commuting, support existing businesses and key sectors to grow sustainably (including the rural economy and tourism), and ensure local employment spaces adapt to provide the right conditions to meet future working needs (such as homeworking); and
- Drivers of growth and prospects for growth over the Local Plan period, particularly in the areas of Witney and Carterton which have grown strongly in recent years.

2.3. Approach

2.3.1. The National Planning Policy Framework (NPPF) outlines the principles that Local Planning Authorities should follow in order to prepare their evidence base which informs the development of employment land policies.

2.3.2. The need for Local Planning Authorities to produce an up-to-date employment land evidence base, along with the suggested format, is outlined in national Planning Practice Guidance ('PPG'), published in March 2014. The PPG is periodically updated; the 'Housing and Economic Needs Assessment' was updated in 2020. As such the methodology and tasks forming the approach to this ENA have been designed to conform to the PPG. This approach is illustrated in Figure 2.1.

Figure 2.1 Approach to the study



Source: AECOM.

2.3.3. To supplement the site surveys, forecasting data and desk-based research, AECOM hosted consultations with land and property agents, as well as local business stakeholders in order to gain further insight into the key drivers behind West Oxfordshire's employment land market.

2.4. Structure of report

2.4.1. The remainder of the report is structured as follows:

- **Section 3** presents a review of the relevant policy and strategic context including a review of local economic priorities;
- **Section 4** defines the Functional Economic Market Area ('FEMA');
- **Section 4** provides a comprehensive analysis of socio-economic baseline conditions relevant to the study;
- **Section 6** presents the key qualitative and quantitative results of the existing employment land supply assessment, reflecting the findings of site surveying;
- **Section 7** presents a review of the property market indicators in West Oxfordshire with reference to comparator geographies;
- **Section 8** sets out the forecast scenarios used within the study to inform the projected demand for employment floorspace over the Local Plan period;
- **Section 9** contains a quantitative comparison of projected supply and demand for employment land and floorspace; and
- **Section 9** presents the study's overall conclusions and recommendations.

3. Policy and literature review

3.1. Introduction

3.1.1. This section outlines the planning policy and strategic context relevant to employment land in the study area and wider regional and national area.

3.2. National

National Planning Policy Framework (NPPF) (2024)

3.2.1. The National Planning Policy Framework[8] (NPPF) consolidates the Government's economic, environmental, and social planning policies for England and provides overarching guidance on the Government's development aims. At the heart of the NPPF is a presumption in favour of sustainable development, which the Government states should be seen as a common theme running through plan-making and decision-taking.

3.2.2. In relation to the economy and employment land, the NPPF states that planning decisions should help create the conditions in which businesses can invest, expand, and adapt. They should support economic growth and productivity, taking into account both local business needs and wider opportunities for development. Decisions should also allow an area to build on its strengths, counter any weaknesses, and address any challenges of the future.

3.2.3. In addition, the Framework aims to identify strategic sites for local and inward investment, address potential barriers to investment, allow for new and flexible working practices, and enable a rapid response to changes in economic circumstances.

3.2.4. The NPPF encourages planning policies to establish a clear economic vision and strategy that actively promotes sustainable growth, aligning with national policies outlined in Invest 2035: The UK's Modern Industrial Strategy. The key sectors for growth and support referenced in this are advanced manufacturing, clean energy industries, creative industries, defence, digital and technology business, financial services, life sciences, and professional and business services.

Planning Practice Guidance (2019)

3.2.5. In March 2014 the Government published the national Planning Practice Guidance (PPG)[9], which is a web-based resource in support of the NPPF which undergoes regular updates. Guidance includes 'Housing and Economic Needs Assessments', which was updated in December 2020, and the 'Housing and Economic Land Availability Assessments', which was updated in July 2019.

3.2.6. The 'Housing and Economic Needs Assessments' PPG states that authorities need to prepare an evidence base to understand existing business needs, which will have to reflect local circumstances and market conditions. This includes assessing:

- 'the best fit functional economic market area (FEMA);
- the existing stock of land for employment uses within the area;

[8] Ministry of Housing, Communities & Local Government, (2024); National Planning Policy Framework.
[9] Ministry of Housing, Communities and Local Government, (2019); Planning Practice Guidance.

- the recent pattern of employment land supply and loss – for example based on extant planning permissions and planning applications (or losses to permitted development);
- evidence of market demand (including the locational and premises requirements of particular types of businesses) – sourced from local data and market intelligence, such as recent surveys of business needs, discussions with developers and property agents and engagement with business and economic forums;
- wider market signals relating to economic growth, diversification and innovation; and
- any evidence of market failure – such as physical or ownership constraints that prevent the employment site being used effectively.'

3.2.7. To provide an understanding of the underlying requirements for office, general business and warehousing sites, the PPG emphasises the importance of considering projections (based on past trends) and forecasts (based on future scenarios) and sites which have been developed for specialist economic uses. The PPG recommends that analysing supply and demand concurrently will enable conclusions to be drawn on whether there is a mismatch between quantitative and qualitative supply of and demand for employment sites. This, in turn, enables an understanding of which market segments are over-supplied and those which are undersupplied. By comparing availability of stock with particular requirements it is possible to identify any 'gaps' in local employment land provision.

3.2.8. 'Housing and economic land availability assessment' sets out a general methodology for assessing land availability but focuses primarily on the assessment of housing rather than employment land. With relevance to this study, the PPG requires local planning authorities to work with other local authorities within the functional economic market area when assessing availability of land (noting that the Levelling Up and Regeneration Act in 2023 set out the Government's intention to replace the 'duty to cooperate' as discussed below). The PPG also requires plan makers to be proactive in identifying as wide a range of sites as possible, including existing sites that could be improved, intensified or changed. The assessment of the suitability of sites for development should be guided by the relevant local development plan, regional, and national policy, as well as market and industry requirements.

Levelling Up and Regeneration Act (2023)

3.2.9. The Levelling Up and Regeneration Act[10] was given Royal Assent in October 2023 at which point it was enacted in law. The Act aims to *'speed up the planning system, hold developers to account, cut bureaucracy, and encourage more councils to put in place plans to enable the building of new homes*'[11]. A central tenet of the Act will be the introduction of National Development Management Policies (NPMPs) which will be given the same weight as local plans in decision-making on planning applications; the scope of which could be anything that concerns the development or use of land in England.

3.2.10. The Act proposes to replace the 'duty to cooperate' with the intention that a new 'flexible alignment policy' will be introduced by the Government[12], subject to

[10] HM Government, (2023); Levelling Up and Regeneration Act. Available at: https://www.legislation.gov.uk/ukpga/2023/55/contents
[11] Department for Levelling Up, Housing and Communities (now Ministry of Housing, Communities and Local Government), (2023); New laws to speed up planning, build homes and level up. Available at: https://www.gov.uk/government/news/new-laws-to-speed-up-planning-build-homes-and-level-up
[12] House of Commons Library, (2023); Planning reforms in England: Levelling Up and Regeneration Act 2023 and further changes.

regulations coming into force. Although not yet developed, the alignment policy will be used for 'developing infrastructure in common'. Some concerns have been raised that cooperation between local authorities may become disincentivised[13].

UK Modern Industrial Strategy (2025)

3.2.11. The Modern Industrial Strategy[14] was published in June 2025 and sets out the Government's 10-year plan, with a focus on long-term sustainable growth in the highest potential growth driving sectors, which is supportive of Net Zero, regional growth, and economic security and resilience, and works towards correcting the current productivity issues in the UK.

3.2.12. In other to correct the productivity issues, the Government sets out a mission to address four central factors for the Industrial Strategy as a matter of priority: persistently low levels of investment, underperforming major city regions, weak diffusion and adoption of technologies, ideas and processes and slowing market dynamism.

3.2.13. In regard to the highest potential growth driving sectors, eight sectors have been identified that will create the highest amount of opportunity for the economy and businesses based on existing and emerging strengths. These are: Advanced Manufacturing, Clean Energy Industries, Defence, Digital and Technologies, Financial Services, Life Services, and Professional and Business Services.

3.2.14. The strategy commits £86 billion to R&D, with major investments in advanced manufacturing, clean energy, digital, life sciences, creative industries, professional services, defence, and fintech. The plan also includes £2.8 billion for advanced-manufacturing R&D, and support for quantum, biomanufacturing, semiconductors, and AI. In addition, it outlines reforms in skills and technical education, infrastructure upgrades, and support for entrepreneurship via the British Business Bank.

3.2.15. Alongside the Industrial Strategy, the Government has published five out of eight Sector Plans for each of the growth-driving sectors. Each Sector Plan is bespoke and is developed with industry, setting out a vision of the sector's transformation by 2035. Five of the Sector Plans have been published with Life Sciences, Financial Services and Defence to follow in the future.

The Town and Country Planning (General Permitted Development) (England) Order 2015, as amended

3.2.16. In 2022, the Government amended the previous Town and County Planning (General Permitted Development) (England) (Order 2015)[15] which introduced permitted development rights (hereafter referred to as 'PDR') allowing certain building and development works to be carried out without the need of the normal planning process[16]. These rights exist under the General Permitted Development order (GDPO) and were introduced to facilitate housing growth to meet targets across England. New types of permitted development have been introduced to make it easier for people to extend their home, create new homes in existing buildings such as offices, shops and warehouses or demolish vacant previously classified B1(a), B1(b), B1(c) or C3 space and rebuild as residential.

[13] Royal Town Planning Institute, (2023); March 2023 NPPF consultation response. Available at: https://www.rtpi.org.uk/consultations-rtpi/2023/march/march-2023-nppf-consultation-response/
[14] HM Government, (2025); The UK's Modern Industrial Strategy.
[15] HM Government, (2016); The Town and Country Planning (General Permitted Development) (England) Order 2015, as amended.
[16] HM Government, (2016); The Town and Country Planning (General Permitted Development) (England) Order 2015, as amended.

3.2.17. The Town and Country Planning (General Permitted Development) (England) (Amendment) (No. 3) Order 2020 came into effect on 31 August 2020. This dealt with PDRs for demolition and rebuilding as residential. Article 4 of the 2020 Order added a new class ZA to the 2015 Order, dealing with demolition of buildings and construction of new dwellings in their place. To fall within the scope of this new PDR, the building to be demolished must:

- have been built before 1 January 1990;
- be vacant, redundant or free-standing; and
- fall within the following use-classes on 12 March 2020:
  - B1(a) offices
  - B1(b) research and development
  - B1(c) industrial processes (light industrial)
  - C3 residential (only applicable for free-standing, purpose-built residential blocks of flats).

3.2.18. This PDR is subject to the prior approval process and the building must have been vacant for at least six months prior to the date of the application for prior approval.

3.2.19. The current Use Classes were last updated on 1 September 2020. Class B now comprises B2 General Industrial and B8 Storage and Distribution, while previously classified B1(a), B1(b) and B1(c) uses are now as follows:

- E(g)(i): Offices to carry out any operational or administrative functions;
- E(g)(ii) Research and development of products or processes; and
- E(g)(iii) Industrial processes.

3.3. Strategic/regional

OxLEP Industrial Strategy for Oxfordshire (2018)

3.3.1. Oxfordshire Local Enterprise Partnership (OxLEP) (now Enterprise Oxfordshire as of April 2025) published a Local Industrial Strategy (LIS)[17] in 2018 in which it sets out a vision for Oxfordshire to become a '*top three global innovation ecosystem'*. In order to achieve this, four pillars to this vision are specified:

- 'Pillar I: A globally connected and competitive innovation economy;
- Pillar II: A powerhouse for commercialising transformative technologies;
- Pillar III: A living laboratory solving the UK's Grand Challenge; and
- Pillar IV: A skills system creating opportunities at every stage of life'.

3.3.2. Specifically, the stated ambitions for economic growth in Oxfordshire to 2040 are to:

- 'Double the Oxfordshire economy to be worth £46bn GVA;
- Deliver a minimum of 2% per annum growth in productivity;
- Create a minimum of 108,000 net new private sector jobs in Oxfordshire; and
- [Contribute] towards the Government's 2.4% R&D target.'

3.3.3. The LIS highlights the challenges associated with business floorspace, noting: '*Oxfordshire will also support business growth through addressing the lack of*

[17] OxLEP, (2018); The Oxfordshire Industrial Strategy.

business and innovation space'. The particular challenges identified include flexible laboratory and innovation space as well as Grade A office space.

3.3.4. The Strategy sets out with respect to the achievement of the ambitions of Pillar II, one of many actions described, the necessary '*transformation of science and technology parks and creation of new hubs'* to create a network of global hubs and international clusters, including in West Oxfordshire: Carterton & RAF Brize Norton Industrial Hub, and West Oxfordshire Science Park in Eynsham.

OxLEP Strategic Economic Plan for Oxfordshire (2023)

3.3.5. The OxLEP (now Enterprise Oxfordshire) Strategic Economic Plan[18] sets out a vision for Oxfordshire as a 'vibrant, sustainable, inclusive, world-leading economy, driven by innovation, enterprise and research excellence'.

3.3.6. The Plan is organised around four programmes in order to achieve the vision, namely: people, place, enterprise, and connectivity. With reference to place, the Plan describes the importance of '*providing a quality environment that supports and sustains growth; and offering the choice of business premises…needed to support sustainable growth'*.

3.3.7. The Plan also references the Local Plans across Oxfordshire and highlights the scale of growth anticipated, such that there are an additional 85,600 jobs between 2011 and 2031. The main area for employment growth anticipated will be in the central 'knowledge spine' of the Oxfordshire area, as shown in Figure 3.1 below. Since the Economic Plan and figure were produced in 2023, Oxford North has also become a strategic economic asset of particular relevance to West Oxfordshire.

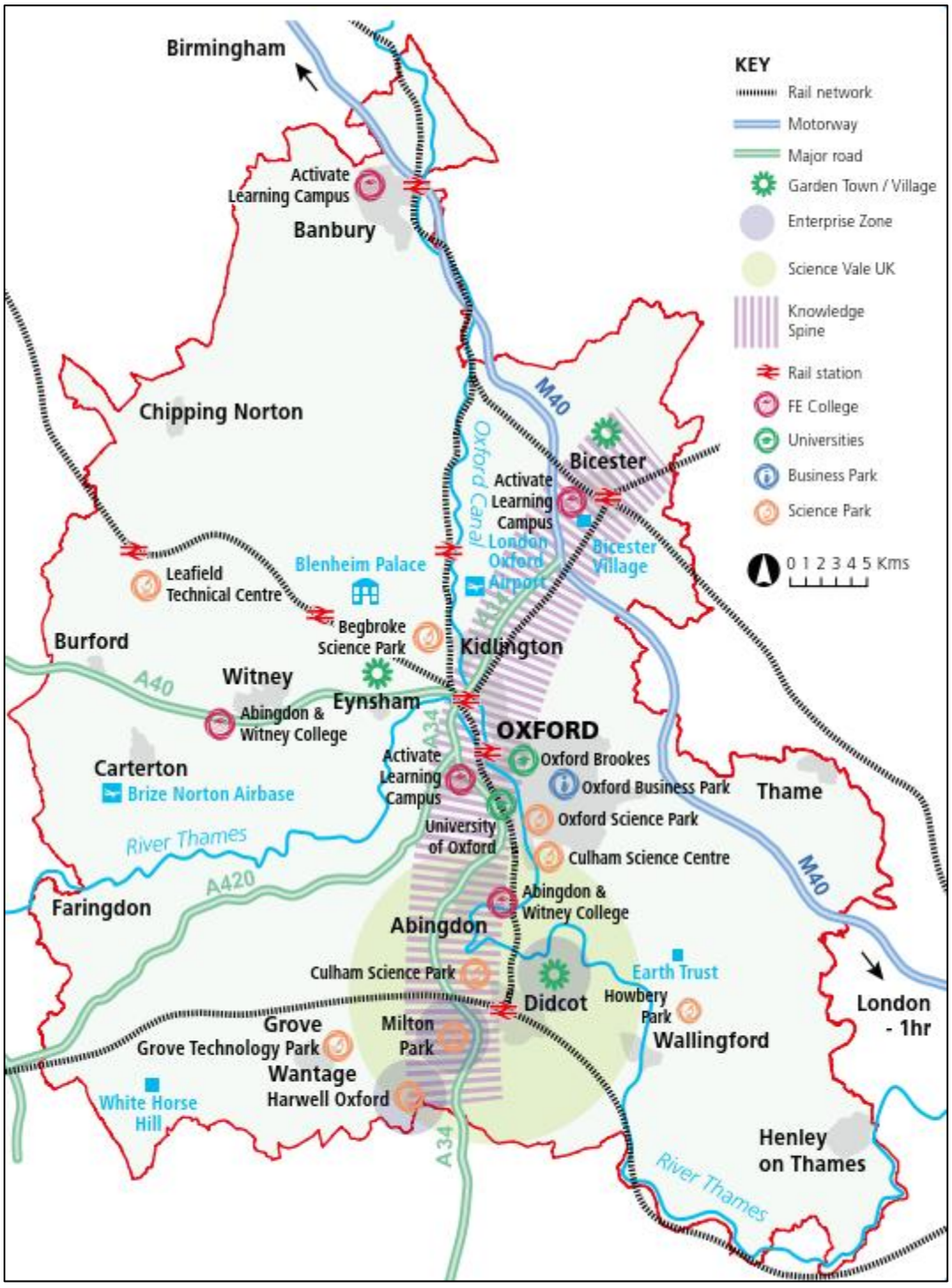
3.3.8. At the time of writing, Enterprise Oxfordshire is undertaking a refresh of its Strategic Economic Plan, establishing the economic priorities for Oxfordshire up to 2033. The Strategic Economic Plan is underpinned by four key objectives:

- 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 2050.
- Ensure that Oxfordshire's places are sustainable and inclusive, and that local communities flourish.

3.3.9. The document has not been formally adopted at the time of writing.

[18] OxLEP, (2023); The Oxfordshire Strategic Economic Plan.

Figure 3.1 Oxfordshire's strategic economic assets



Source: OxLEP, (2016); Strategic Economic Plan for Oxfordshire (Figure 3).

OxLEP Skills Community Employment Plan Evidence Base (2023)

3.3.10. This document[19] updates and builds on the first edition of the Community Employment Plan (CEP) Evidence Paper which was endorsed by the Oxfordshire Growth Board in 2017. CEPs are employer-led initiatives which can be required through the planning process, either as a S106 obligation or as a planning condition. It should be emphasised that developers and contractors can voluntarily lead these initiatives on developments, as some Local Plans encourage use at

[19] OxLEP Skills, (2023); Community Employment Plan Evidence Paper 2023.

application. At the West Oxfordshire level, CEPs are referenced in context within the adopted Local Plan 2031 and are referred to within the Developer Contributions Draft SPD.

3.3.11. It is noted that CEPs developed in partnership with developers, local authorities and skills providers can play an important role in achieving the vision of national policy documents such as the NPPF and ensure alignment between the jobs created and the availability of a skilled local labour force to the benefit of all parties.

Oxford to Cambridge: Science, Innovation and Technology Business Premises Study (2025)

3.3.12. Published in February 2025, this study[20] analysed the current and future stock of business premises in the science, innovation and technology (SIT) industry across Oxfordshire and Greater Cambridge. It placed a particular emphasis on the sectors of digital tech; future energy; engineering; automotive; space; future mobility; robotics; quantum Computing; AI and machine learning; life sciences and agri-tech. The study found that there are various types of premises used by SIT businesses in the region such as wet labs, dry labs, offices, workshops and high-spec industrial spaces, and custom industrial facilities.

3.3.13. Notably, the report found that gaps exist in employment in certain SIT sectors such as software development, cyber security, and specialised technical fields. Meanwhile, it was identified that the region exhibits strengths in sectors such as life sciences, although this is mainly concentrated in Greater Cambridge.

3.3.14. The study found a pipeline of new office and R&D floorspace across the region driven by increasing demand, particularly for wet lab space. Greater Cambridge and Oxfordshire lead the way with a significant quantum of committed and pipeline floorspace, particularly for R&D activities.

3.3.15. It was also identified that SIT businesses prefer locations offering high quality, modern workspaces, access to a larger cluster for knowledge exchange, attractive surroundings with amenities, and strong public transport connectivity. Potential infrastructure pressures were also highlighted in the area including energy constraints and transport infrastructure which are particularly challenging in Oxfordshire.

3.4. Local

West Oxfordshire Local Plan 2031 (2018)

3.4.1. The Local Plan[21] adopted by West Oxfordshire District Council in 2018 sets out guiding development strategies and objectives to aid decision making with regard to planning in the local authority area in the period to 2031.

3.4.2. Among the core objectives, the “sustainable economic growth” objective sets out policies of relevance to employment land needs and the rural economy in West Oxfordshire, in particular:

- Policy E1: Land for Employment. The following provision has been identified to meet employment needs in the district:
  - Witney Sub-Area - 18ha to the west of Witney including 10ha to be provided as part of the West Witney (North Curbridge) urban extension and

[20] Oxford to Cambridge Pan-regional Partnership / Iceni Projects, Carter Jonas, HDR, (2025); Science, Innovation and Technology Business Premises Study (2025)
[21] West Oxfordshire District Council, (2018); West Oxfordshire Local Plan 2031.

8ha within the existing employment area around Downs Road through existing commitments and previous Local Plan allocations.

  - Carterton Sub-Area – 6ha including land at West Oxon Business Park, land at Ventura Park (4.5ha) and land east of Monahan Way (1.5ha) with further consideration to be given to additional sites for employment use in appropriate locations.
  - Chipping Norton Sub-Area - 5 hectares of employment land to be provided as part of the Land East of Chipping Norton Strategic Development Area (SDA).
  - Oxfordshire Cotswolds Garden Village – around 40 hectares of employment land in the form of a campus-style 'science park' to be taken forward through an Area Action Plan (AAP).
  - Other Towns Villages and Rural Areas – At least 5ha within existing commitments with 2ha at Lakeside Standlake (previous Local Plan allocation).

- Policy E2: Supporting the Rural Economy:
  - Evidence indicates that businesses in rural areas are typically engaged in similar activities to those in urban areas with a high proportion of service-based activities, although businesses tend to be smaller and there is more home working and self-employment.
  - In the interest of sustainable development, the strategy directs larger businesses and employers to Witney, Carterton, Chipping Norton and the Eynsham area which have generally better transport connections but continues to support the rural economy through a positive approach towards homeworking flexible working practices, small rural business premises and diversifying the land-based sector.
  - The land-based sector remains important to protecting home food production which is of increased importance as the world population continues to increase.
  - Diversification into non-agricultural activities can be vital to the continuing viability of many farm businesses. The need to protect home food production is important to reduce food miles and profitable farming is also the most cost-effective means of delivering environmental and landscape management benefits.
- Policy E3: Re-use of non-residential buildings:
  - This policy indicates that traditional buildings can be re-used for employment, tourism and community uses to support the rural economy when the following criteria are met: existing form and design of the building positively contributes to the character of the area; and buildings are capable of conversion to the proposed use without needed alterations which would harm the form of the original building; and the buildings are suitably located for the scale and type of the proposed use.
  - The re-use of non-traditional buildings, including modern farm buildings, for employment, tourism and community uses will also be supported if the following criteria are met: the general character and form of the buildings are not harmful to the surroundings; and the scale and type of use is suitable to its location and will not result in excessive alterations to the host building.

West Oxfordshire Economic Snapshot (2015)

3.4.3. The West Oxfordshire Economic Snapshot[22] was produced to inform the West Oxfordshire Local Plan 2031 (2018). It provided evidence and advice on current and future economic development needs and priorities in West Oxfordshire and key issues such as the balance between jobs and housing and the allocation of employment land.

3.4.4. The Economic Snapshot provided an overview of the economic profile of the district, which found that West Oxfordshire had a well-balanced industrial structure with good representation in the light industrial and private service sectors. The resident workforce was reported to be well qualified and employment rates were very high, though many residents work outside the district, with Oxford being the principal commuting destination. Commuting links with London are not strong, perhaps reflecting the poor rail connectivity in the district. Despite this, the report finds that the district had relatively low productivity due to higher value activities cluster in Oxford, Thames Valley and London, where critical mass and agglomeration benefits are greater. The tight employment market, together with a high value residential market and constrained supply of development land, also has implications in terms of the district's ability to attract new inward investment.

3.4.5. The report also assessed the commercial property market in which demand was "*modest*" but was beginning to increase. It found that there had been a lack of new supply for some time at the time of writing in 2015, and it was the absence of new, replacement stock that was causing the greatest concern in the commercial property market. At the same time there have been a few employment sites lost to residential development.

West Oxfordshire Economy Study (2007) & Economy Study Update (2012)

3.4.6. The West Oxfordshire Economy Study[23] was published in 2007 and was a key part of the evidence base in the development of the previous West Oxfordshire Local Plan (2006). At the time the study was prepared, the onset of the recession in the wider economy was not foreseen. The West Oxfordshire Economy Study Update[24] was then published in 2012 to update the Economy Study 2007 where new data and information was available.

3.4.7. It highlights that West Oxfordshire has a relatively diverse economy with businesses spread throughout the main towns and rural areas. The area has a long history associated with manufacturing (e.g. Blankets) and engineering (Smiths Industries) along with other key business sectors:

- Manufacturing, Scientific and Technical Industries – including safety equipment, motorsport, medical equipment, and engineering.
- Retail – the area's town centres are generally vibrant with low vacancies but West Oxfordshire's 'High Streets' will face challenges due to the growth in online retailing and development in competing centres such as Oxford.
- Tourism – a sector estimated to be worth £255m to the local economy, reflecting the area's attractive environment, Cotswold towns and villages, River Thames and attractions such as Blenheim Palace and the Cotswold Wildlife Park.

[22] CAG Consultants, (2015); West Oxfordshire Economic Snapshot.
[23] Nathaniel Lichfield and Partners, (2007); West Oxfordshire Economy Study.
[24] West Oxfordshire District Council, (2012); West Oxfordshire Economy Study Update.

- Military Aviation – RAF Brize Norton is located adjacent to Carterton and is one of the largest strategic air transport bases in the country. Other businesses such as the AirTanker aerospace consortium and Serco are also engaged in the activity of the base.
- Rural economy – whilst employment in agriculture is small (2%) and declining in line with the national trend, it remains an important sector for the management of West Oxfordshire's attractive countryside and rural communities. Otherwise, businesses in rural areas are engaged in similar sectors to those in urban areas although tend to be smaller and there is more home working and self-employment. High speed broadband is a particular requirement facilitating their success.

3.4.8. In regard to the commercial property market, the studies found that demand for premises in West Oxfordshire was considered lower than for other areas of Oxfordshire (e.g. Bicester, Milton Park and Harwell), with most interest geared towards industrial type premises and mostly locally generated. Some market views attributed the relative lack of inward investment enquiries to transport constraints with areas of more demand being on the A34 corridor. This study was however undertaken 12 years ago, and this ENA therefore considers whether this position has changed or not.

Rural Facilities and Services in West Oxfordshire (2023)

3.4.9. Following West Oxfordshire receiving UK Shared Prosperity Fund (UKSPF) funding, this research piece[25] was produced to help establish a clear baseline of current rural service provision in West Oxfordshire and set out how the Council can support key rural services moving forwards. The focus of the study covers all communities within the district, understanding that both small and larger service centres contribute to the wellbeing of residents.

3.4.10. Following recent economic shocks such as Brexit and the COVID-19 pandemic, the reports finds that the most significant decline in business numbers (since 2016) has related to banks, post offices, village shops, and pubs. This largely reflects a similar decline being experienced in other rural areas nationwide.

3.4.11. The availability of UKSPF monies provides an opportunity for the council to invest in the current service provision in the district and take proactive steps to support the network of businesses when they are facing pressures. The report offers various recommendations for West Oxfordshire District Council. Those related to this study area are to:

- Actively promote community-led or parish plans as a way of encouraging residents to engage in a dialogue about rural facilities and services;
- Run a programme of training for parish and town councils, parish meetings and ward councillors in respect of rural service provision to reach grassroots businesses sooner;
- Incentivise the use of community buildings and churches as "host" facilities, to create more multi-service hubs; and
- Create a programme of advice and support for rural businesses, focusing on energy efficiency and robust financial management.

[25] Plunkett Foundation, (2023); West Oxfordshire rural facilities and services research 2023.

4. Functional Economic Market Area

4.1. Introduction

4.1.1. Planning Practice Guidance requires local planning authorities (LPAs) to assess development needs working with other LPAs in the relevant functional economic market area (FEMA) in line with the duty to co-operate (now rescinded). It adds that local communities, partner organisations, businesses, business representative organisations and higher education institutions, among others, should be involved in the preparation of the evidence base in relation to development needs.

4.1.2. The PPG states that economic needs should be assessed in relation to the functional economic market area whilst identifying and recognising smaller sub-markets with specific features and 'market segments'. The PPG advises that there is no standard approach to defining a functional economic market area but notes in Paragraph 012 that:

'*the geography of commercial property markets should be thought of in terms of the requirements of the market in terms of the location of premises, and the spatial factors used in analysing demand and supply, often referred to as the functional economic market area'*.

4.1.3. The PPG adds that it is possible to define functional economic market areas by taking account of a number of factors. These factors, which have been considered in the analysis below, include:

- Travel to work areas;
- Political, administrative, economic governance and partnership areas;
- Transport and infrastructure networks;
- Housing market areas; and
- Commercial property market areas.

4.2. Travel To Work Area (TTWA)

4.2.1. The PPG recommends the use of Office for National Statistics (ONS) Travel To Work Areas (TTWAs), which are based on commuting data only.

4.2.2. The PPG does not prescribe a threshold of self-containment (people who live and work in the same area) to help define the FEMA. For the purposes of defining the FEMA, the ONS definition of TTWAs have been adopted, which states that:

'*the current criterion for defining the TTWAs is that generally at least 75% of an area's resident workforce work in the area, and at least 75% of the people who work in the area also live in the area…however, for areas with a working population in excess of 25,000, self-containment rates as low as 66.7% are accepted'*.[26]

4.2.3. The lower 66.7% threshold for self-containment for origin and destination commuting is therefore appropriate in the case of West Oxfordshire, which has a working population in excess of 25,000.

4.2.4. As part of its Census data, the ONS publishes Origin-Destination data (also known as commuter flow data) which includes travel-to-work patterns of individuals. Data

[26] Office for National Statistics, (2015); Changes to Travel to Work Areas: 2001 to 2011.

derived from the Census 2021 dataset was published in October 2023. As the date of collection of this data was in 2021 during the COVID-19 pandemic, caution is advised by ONS around using Origin-Destination data for planning and policy purposes owing to the likelihood that national lockdowns, associated guidance and furlough measures may have affected commuting behaviours at the time of data collection[27]. However, this impact is likely to be more pronounced in certain locations, particularly those with high proportions of office working, compared to others.

4.2.5. Further consideration given to the difference between 2011 and 2021 Census data to elicit the robustness of commuter flow data in 2021, as presented in Appendix A, confirms that any effect is in all likelihood subdued in West Oxfordshire. There is evidence to suggest that some degree of hybrid working has been sustained following the pandemic[28]. On balance, it is deemed appropriate to consider Origin-Destination data in the context of West Oxfordshire derived from the 2021 Census dataset to be sufficiently reflective of current commuting patterns to be used when defining the FEMA.

4.3. Inflow self-containment

4.3.1. Detailed Origin-Destination data for 2021 indicates that West Oxfordshire has a working population of 30,999, of which 18,583 live within the West Oxfordshire area. This represents a share of 59.9%, which does not meet the ONS 66.7% threshold of self-containment definition of travel to work areas. Therefore, the next most significant local authority area in terms of being an origin of worker inflow to the West Oxfordshire area, Cherwell, has also been considered to form part of the inflow self-containment area. On this basis, the data suggests from an inflow perspective that there is a TTWA (above the ONS 66.7% threshold self-containment definition of TTWAs) comprising West Oxfordshire and Cherwell. Detailed Origin-Destination data (inflows) is presented in Table 4.1 for the top ten local authority origins for the West Oxfordshire workforce.

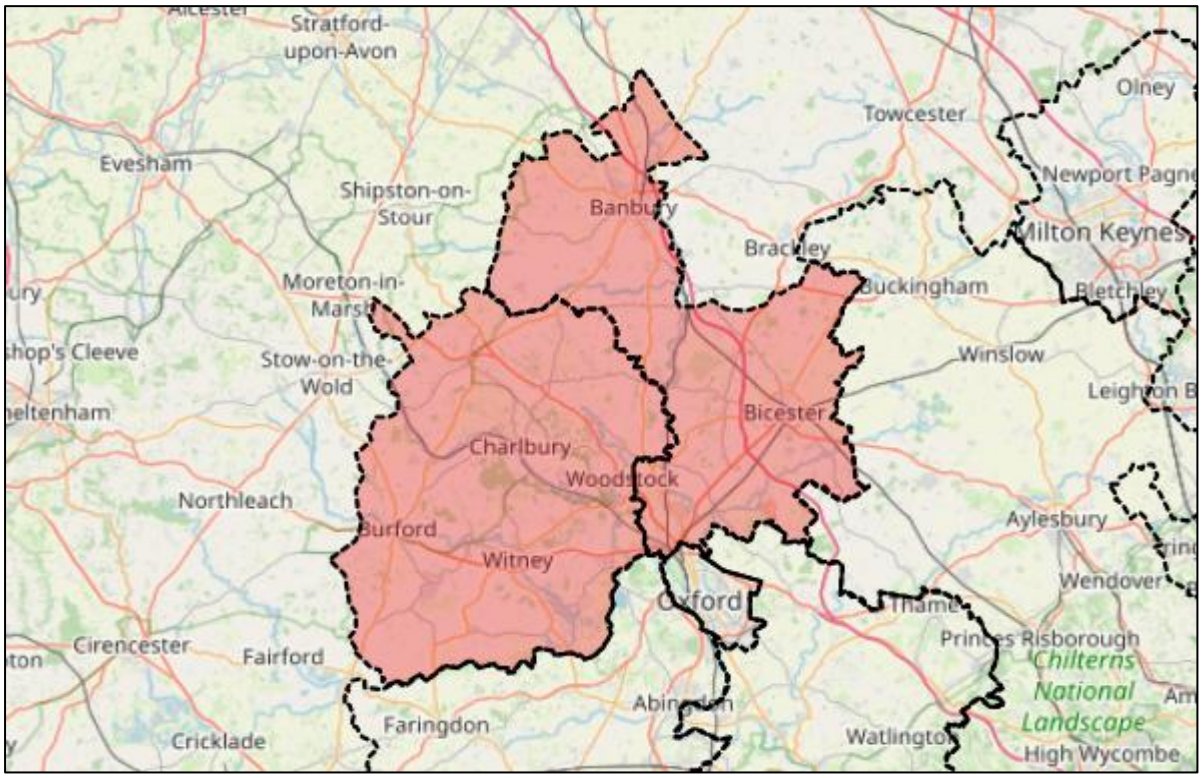
Table 4.1 Workforce inflows to West Oxfordshire

Usual place of residence	Workplace in West Oxfordshire	Self-containment
West Oxfordshire	18,583	59.9%
Cherwell	2,464	67.9%
Vale of White Horse	1,925	74.1%
Cotswold	1,249	78.1%
Oxford	931	81.1%
Swindon	875	84.0%
South Oxfordshire	426	85.3%
Wiltshire	338	86.4%
Stratford-on-Avon	305	87.4%
West Northamptonshire	269	88.3%

Source: Office for National Statistics, (2022); Origin-destination data, England and Wales: Census 2021.

[27] Office for National Statistics, (2023); Origin-destination data, England and Wales: Census 2021. Accessed at: https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/bulletins/origindestinationdataenglandandwales/census2021
[28] Office for National Statistics, (2023); Characteristics of homeworkers, Great Britain: September 2022 to January 2023.

Figure 4.1 Inflow self-containment in West Oxfordshire



Source: Nomis.

4.4. Outflow self-containment

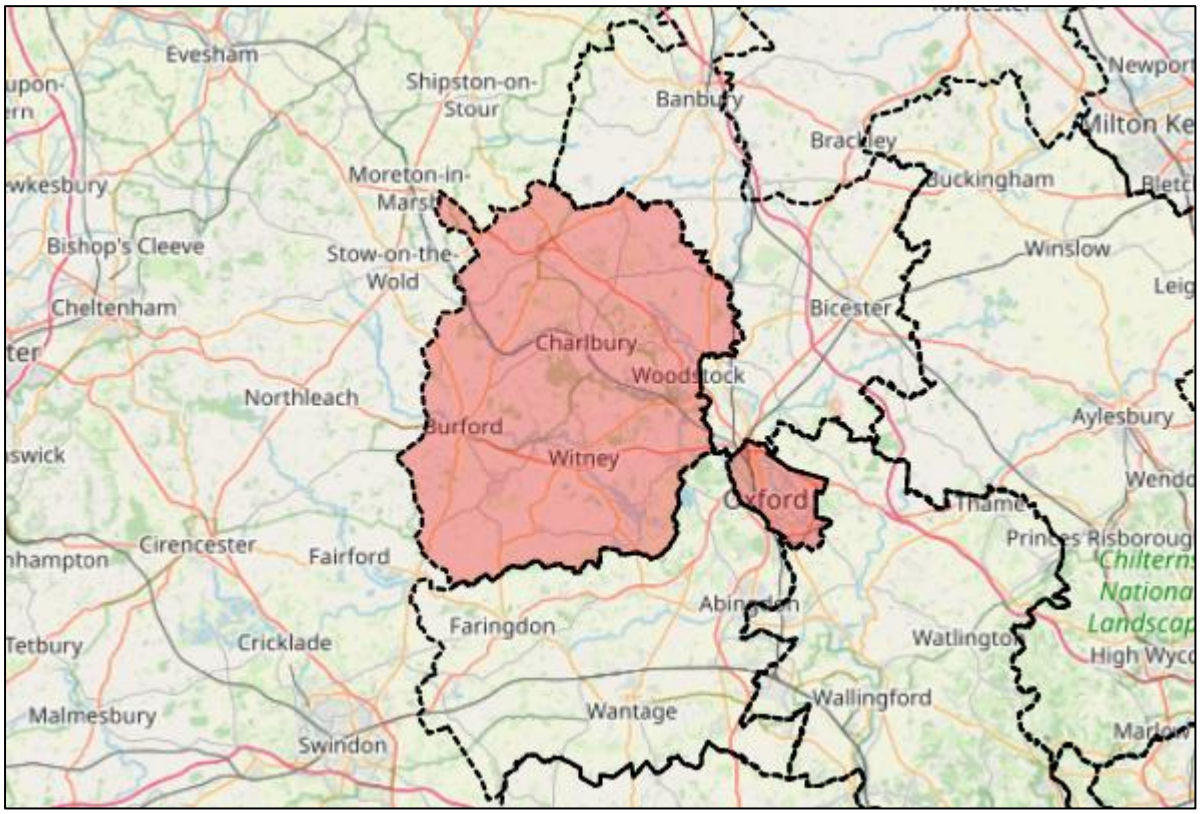
4.4.1. Detailed Origin-Destination data indicates that West Oxfordshire has a population (residents aged 16 and over in employment) of 29,860, of which 18,583 work in West Oxfordshire. This represents a share of 62.2%, which is below the 66.7% threshold adopted as the ONS threshold definition of TTWAs. Based on this definition, West Oxfordshire would not be considered to be self-contained as a travel to work area. Therefore, applying the same logic as previously employed, the next most significant local authority area as a workplace destination for West Oxfordshire residents, Oxford, has been included. Detailed Origin-Destination data (outflows) is presented in Table 4.2 for the top ten local authority workplace destinations for West Oxfordshire residents.

Table 4.2 Resident outflows from West Oxfordshire

Usual workplace	Residents of West Oxfordshire	Self-containment
West Oxfordshire	18,583	62.2%
Oxford	3,954	75.5%
Cherwell	2,542	84.0%
Vale of White Horse	1,752	89.9%
Cotswold	559	91.7%
South Oxfordshire	467	93.3%
Swindon	251	94.1%
Buckinghamshire	205	94.8%
West Northamptonshire	148	95.3%
Stratford-on-Avon	104	95.7%

Source: Office for National Statistics, (2023); Origin-destination data, England and Wales: Census 2021.

Figure 4.2 Outflow self-containment in West Oxfordshire



Source: Nomis.

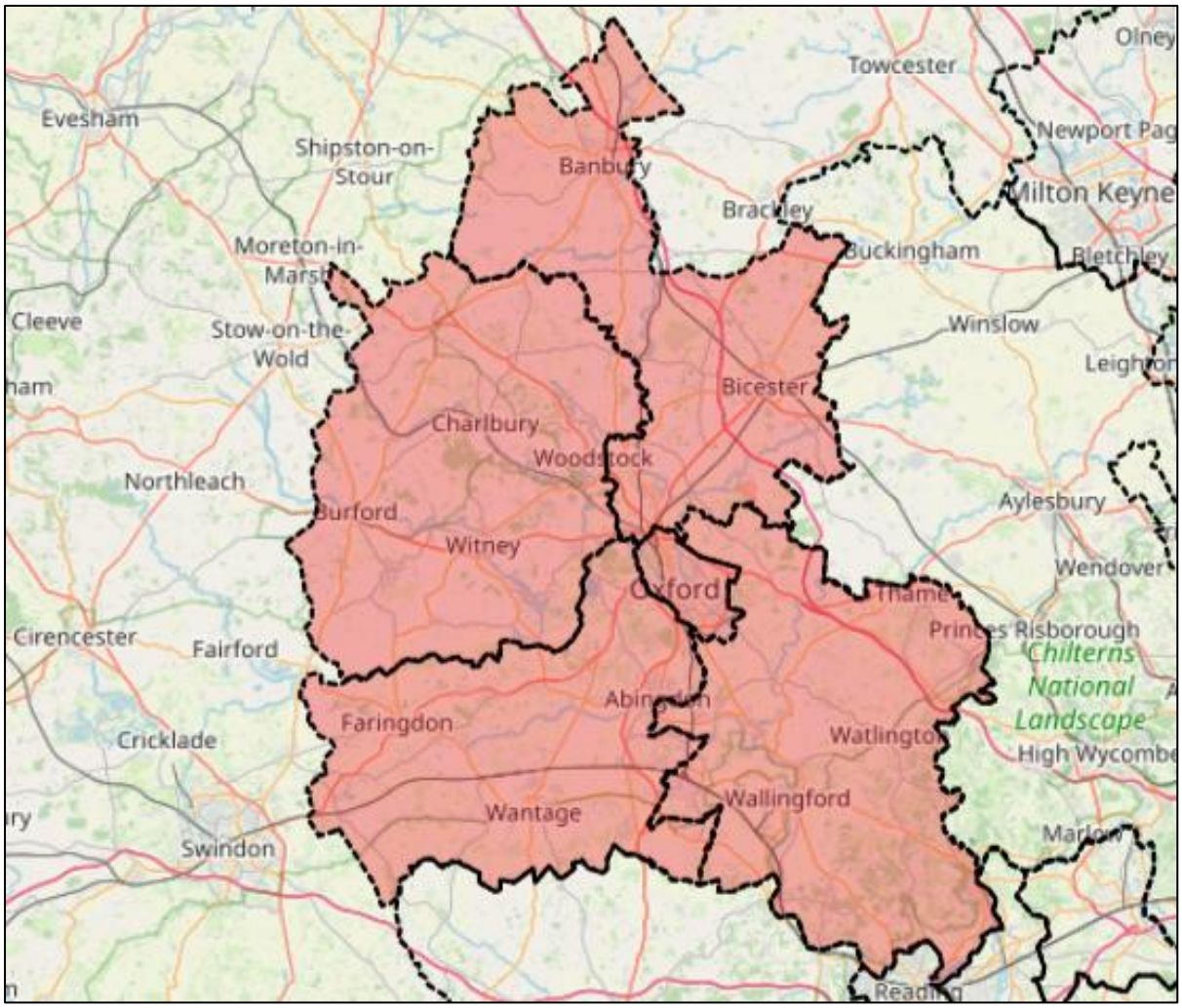
4.5. Political, administrative, economic governance and partnership areas

4.5.1. Oxfordshire County Council is the authority for the five districts of Oxfordshire (West Oxfordshire, Oxford, Cherwell, South Oxfordshire and Vale of White Horse), and provides a range of services to its residents. The Council is managed by a Cabinet consisting of ten elected councillors. Its Strategic Plan[29] emphasises the role of collaboration between partners to foster participatory local democracy, as well as securing employment, apprenticeships and business support.

4.5.2. There are a number of political and economic governance partnerships[30] which cement the relationship between the five local authorities of Oxfordshire, including but not limited to: Oxfordshire Leaders Joint Committee (formerly the Future Oxfordshire Partnership), Enterprise Oxfordshire, Oxfordshire Inclusive Economy Partnership, Oxfordshire Innovation Engine, and Oxfordshire Association of Local Councils. The Oxfordshire area is shown in Figure 4.3.

[29] Oxfordshire County Council, (2023); Strategic plan 2023 – 2025.
[30] West Oxfordshire District Council, (2023); Strategic Partnership Update. Available at: https://www.westoxon.gov.uk/about-the-council/plans-and-policies/partnerships/

Figure 4.3 Oxfordshire (political, administrative, economic governance and partnership area)



Source: Nomis.

4.6. Transport networks

4.6.1. Similarly to the commute to work assessment, an analysis of the transport network is a useful indicator of the potential FEMA for West Oxfordshire. The average commute time can be applied in order to understand the catchment area (inflow commuting of workforce), as well as the extent of the area of potential employment for local residents (outflow commuting of workforce). This defines the employment market area.

4.6.2. The average commute time in the UK is 54 minutes per day[31], or 63 minutes by rail[32], or the equivalent of 30 minutes' journey each way. It is recognised that some commuter journeys may be longer in duration that this.

4.6.3. However, for the purposes of developing a broadly representative FEMA, the principal employment market area is defined as the geographical area reachable from West Oxfordshire in the average commute time (from the outer boundaries of the local authority area by road, and from a train station within West Oxfordshire by rail).

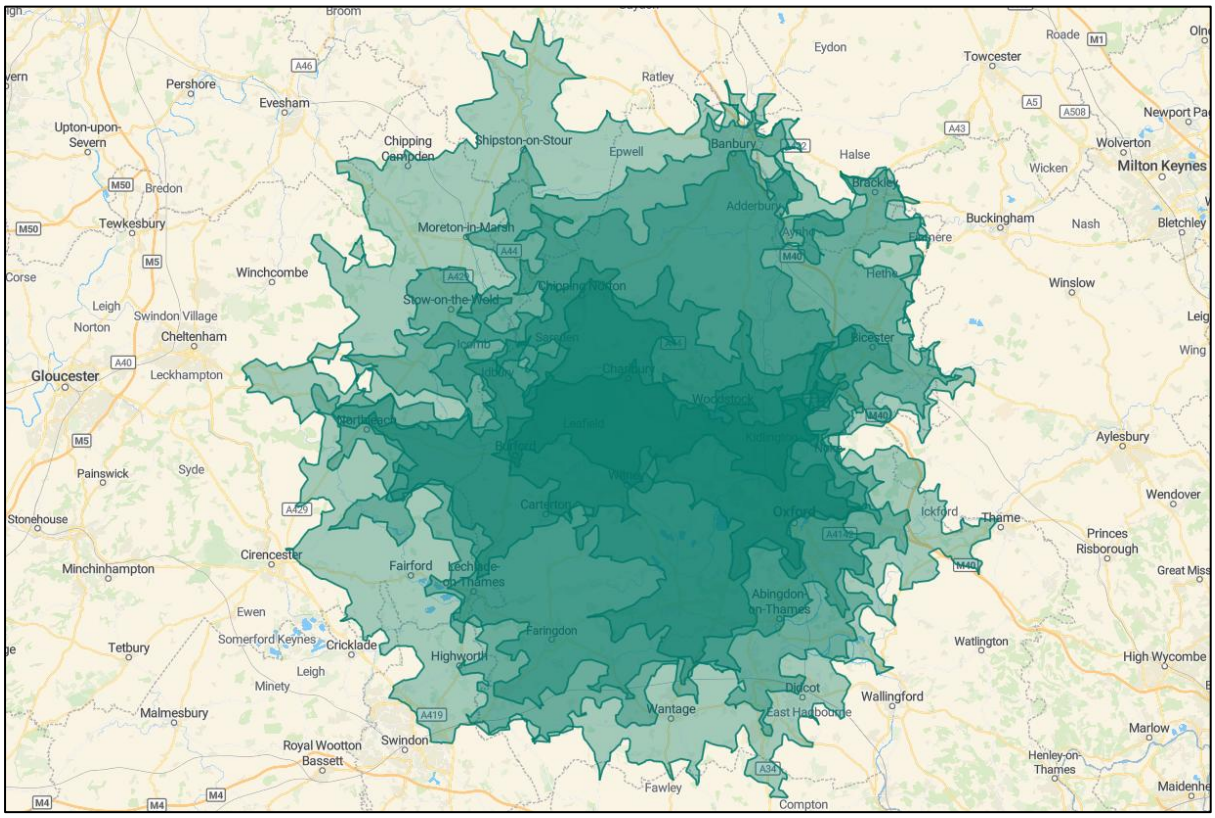
[31] Department for Transport, (2023); Modal comparisons (TSGB01): TSGB0111: Average time taken to travel to work by region of workplace and usual method of travel.
[32] Department for Transport, (2022); Transport Statistics Great Britain: 2022 Domestic Travel.

Road

4.6.4. The West Oxfordshire area is serviced by several strategic roads which provide direct links to large urban centres such as Oxford, Cheltenham and London. These roads include the A40 and A44. West Oxfordshire is also serviced by a range of secondary roads which mainly provide connections within the local authority area, or with neighbouring local authority areas.

4.6.5. Figure 4.4 illustrates the area that is within a 30-minute drive time by road from different starting points located within West Oxfordshire. The darker shades of green indicate the areas which are reachable from multiple different parts of West Oxfordshire within a 30-minute drive, whereas the lighter shades of green indicate areas which are only accessible within this timeframe from some parts.

Figure 4.4 West Oxfordshire 30-minute drive time road catchment area



Source: Smappen, (2024).

4.6.6. Ten local authorities are included within the shaded area. These are: West Oxfordshire, Cherwell, Oxford, Vale of White Horse, South Oxfordshire, Cotswold, Swindon, Stratford-upon-Avon, West Berkshire, Buckinghamshire.

Rail

4.6.7. There are eight train stations in West Oxfordshire: Hanborough, Charlbury, Kingham, Tackley, Shipton, Ascott-Under-Wychwood, Combe (Oxon), and Finstock[33], although rail travel only represents a small proportion of modes used to travel to work for West Oxfordshire residents. The major ultimate origin/destination station to/from these stations are Oxford and London Paddington.

4.6.8. Table 4.3 provides a list of stations which can be reached within 30 minutes (by rail) from a station within West Oxfordshire, not including those within the study area.

[33] Office for Road and Rail, (2024); Estimates of station usage (April 2022 – March 2023).

Table 4.3 Railway stations accessible within 30-minute rail journey from a railway station in West Oxfordshire

Railway station	Local authority
Oxford	Oxford
Moreton-in-Marsh	Cotswold
Honeybourne	Wychavon
Heyford	Cherwell

Source: Traveltime/AECOM analysis.

Bus

4.6.9. Bus services provide important public transport connections between the settlements of West Oxfordshire and more widely across the county and region. Bus services are primarily operated by Stagecoach and Oxford Bus Company. There are direct routes between Witney and Swindon, Witney and Abingdon, and various routes to Oxford City Centre. Additionally, there is route network connectivity across the region, including to destinations such as: Swindon, High Wycombe, Reading, Banbury, Cheltenham, Gloucester, Stroud and Bristol. West Oxfordshire Community Transport operate routes within the towns of Witney and Carterton.

4.6.10. It is recognised that these services provide important transport options for many commuters accessing employment opportunities, as well as those accessing vital social infrastructure such as healthcare, shops and education. Many commuters will rely on these services to access their workplace, especially where other public transport provision is sparse and/or they have no private car access. Around 2.0% of those residents of West Oxfordshire aged 16 or over in employment, or around 1,156 people, use a 'bus, minibus or coach' to travel to work[34].

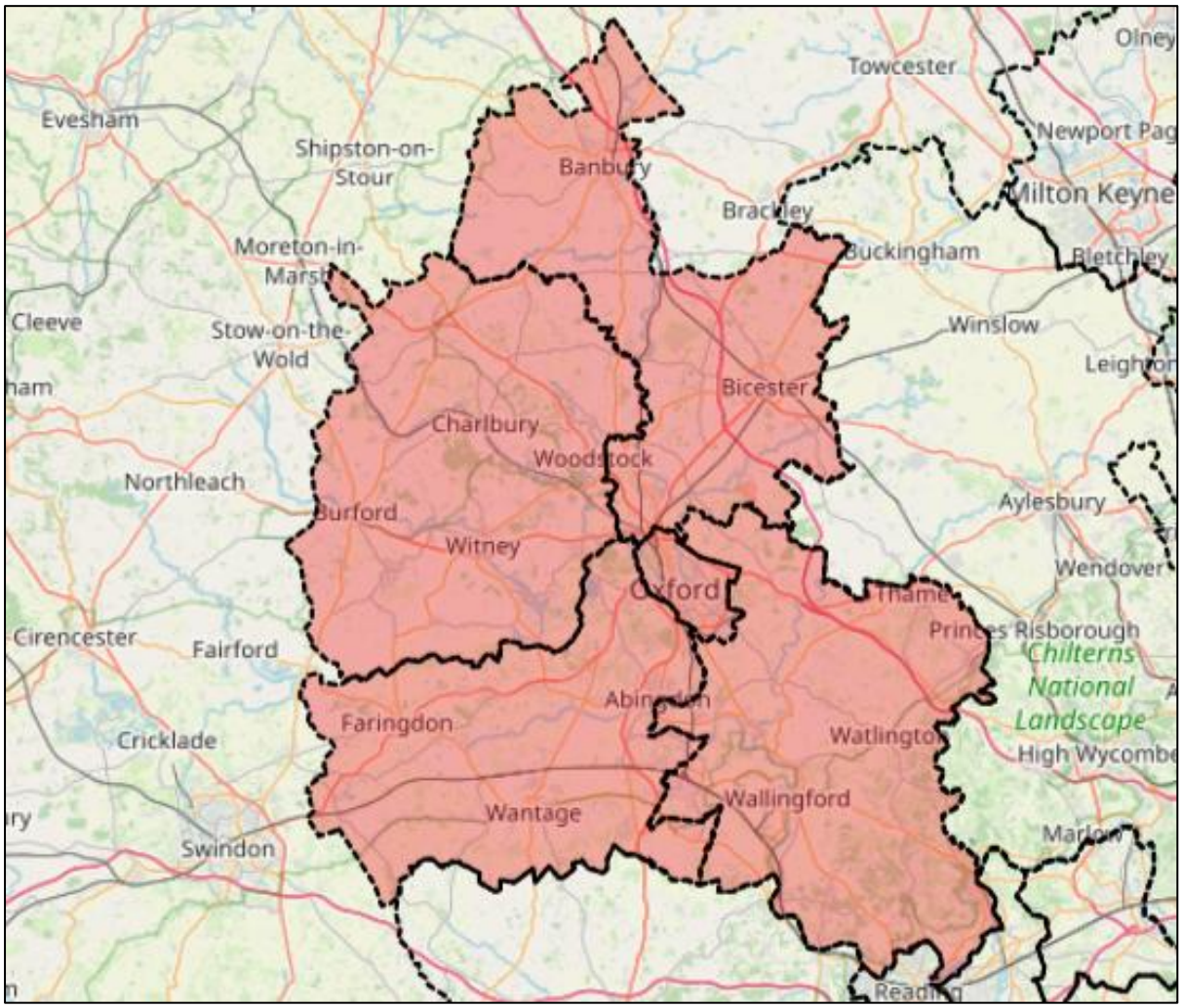
4.7. Property market area

Housing market area

4.7.1. The Oxfordshire Strategic Housing Market Assessment[35], published in 2014, defined housing market areas as reflective of '*the relationships between where people live and work, patterns of movement between homes, and differences in housing costs and trends in these*'. As such, it identified the Oxfordshire housing market area to comprise the majority of the five local authority areas of Oxfordshire, namely most of: West Oxfordshire, Cherwell, Oxford, South Oxfordshire and Vale of White Horse. This area is shown in Figure 4.5.

[34] Office for National Statistics, (2022); Census 2021. TS061 – Method used to travel to work.
[35] GL Hearn, (2014); Oxfordshire Strategic Housing Market Assessment.

Figure 4.5 Oxfordshire Strategic Housing Market Area



Source: Nomis.

4.7.2. In 2022, a Housing and Economic Needs Assessment[36] was commissioned by Cherwell District and Oxford City Councils which considered and assessed needs based on the Oxfordshire area, comprising the five local authority areas as highlighted in Figure 4.5. This built upon the Oxfordshire Growth Needs Assessment[37] published in 2021 which provided a detailed assessment of the Oxfordshire FEMA and found it to broadly align with the confines of the county and the five local authority areas as discussed.

Commercial property market area

4.7.3. The FEMA is also influenced by the commercial property market area in which West Oxfordshire is located. Commercial property market areas are geographic boundaries that serve to define core areas that are competitive with each other. Markets are defined by buildings presenting similar characteristics and are formed of non-overlapping areas (i.e. a place cannot be part of two property market areas at the same time).

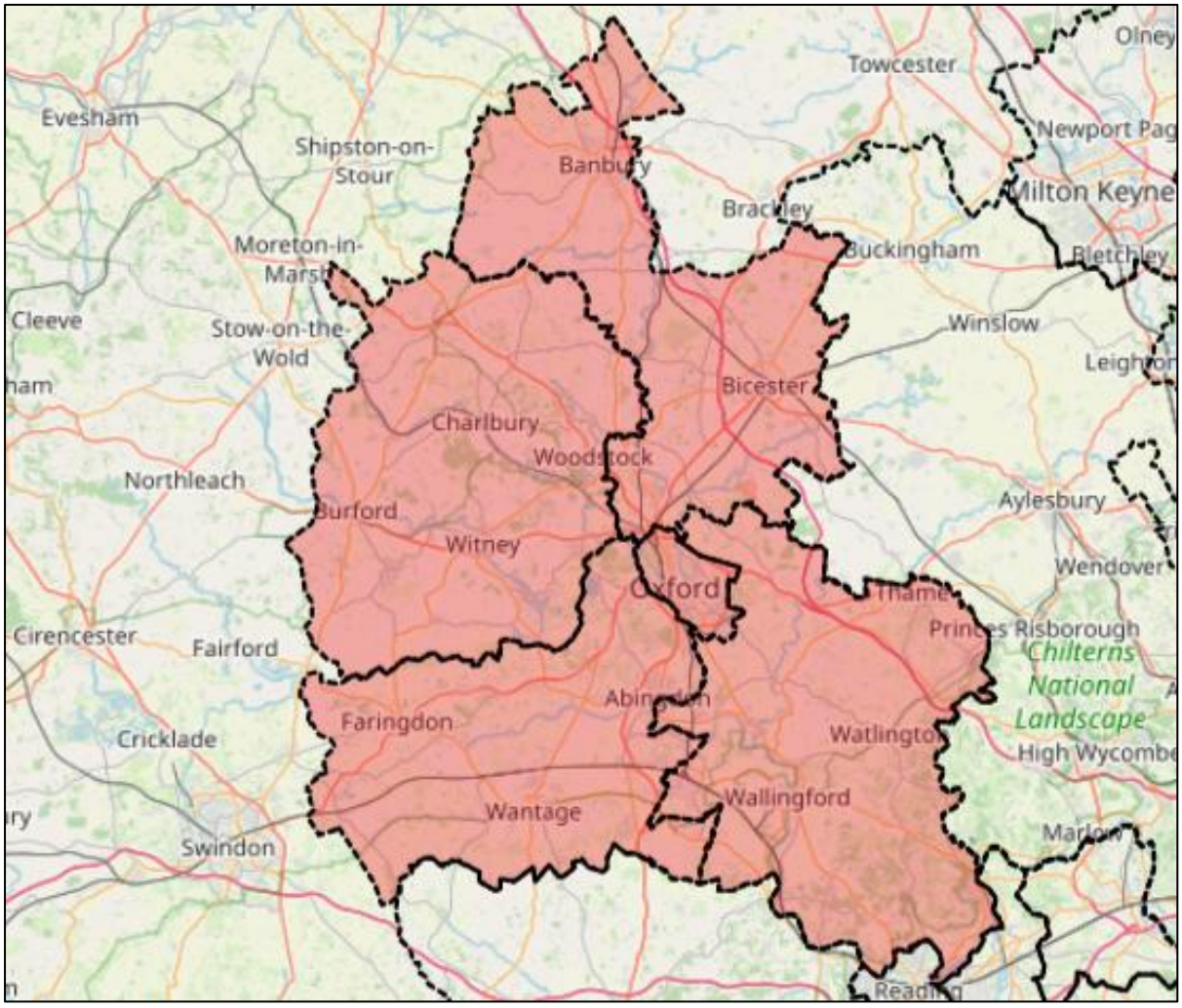
4.7.4. For the purposes of defining the FEMA, it is relevant to consider both office and industrial property markets. CoStar, the most comprehensive database of real estate data throughout the UK, is a useful source of information and provides pre-

[36] Cherwell District and Oxford City Councils/Iceni/jg Consulting/Cambridge Econometrics, (2022); Housing and Economic Need Assessment.
[37] Oxfordshire Growth Board/Iceni/jg Consulting/Cambridge Econometrics, (2021); Oxfordshire Growth Needs Assessment.

defined office and industrial property market areas for the UK. CoStar defined markets have therefore been assumed as part of the analysis.

4.7.5. Both the office and industrial markets are defined as comprising the local authority areas of Oxfordshire, namely: West Oxfordshire, Cherwell, Oxford, South Oxfordshire and Vale of White Horse. This area is shown in Figure 4.6.

Figure 4.6 Oxfordshire commercial property market area



Source: Nomis.

4.8. Summary

4.8.1. West Oxfordshire is relatively self-contained economically, with some important connections from an economic/governance partnership perspective, market characteristics (housing and commercial property markets) and connectivity (travel to work and transport infrastructure.

4.8.2. Based on the assessment conducted in this section, and as summarised in Table, it can be reasonably concluded that West Oxfordshire is particularly connected to four other local authority areas:

- Cherwell (by virtue of inflow self-containment, road and rail network connections, housing market area, growth, housing and economic needs area, property market area, and economic/governance partnerships);

- Oxford (by virtue of outflow self-containment, road and rail network connections, housing market area, growth, housing and economic needs area, property market area, and economic/governance partnerships);
- South Oxfordshire (by virtue of road network connections, housing market area, growth, housing and economic needs area, property market area, and economic/governance partnerships); and
- Vale of White Horse (by virtue of road network connections, housing market area, growth, housing and economic needs area, property market area, and economic/governance partnerships).

Table 4.4 Summary of FEMA analysis

Local authority	Inflow self-containment (2011)	Outflow self-containment (2011)	Inflow self-containment (2021)	Outflow self-containment (2021)	Road network	Rail network	Housing market area[38]	Growth, housing and economic needs areas[39]	Property market area	OxLEP/ Oxfordshire County Council
West Oxfordshire	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**
Cherwell			**X**		**X**	**X**	**X**	**X**	**X**	**X**
Oxford		**X**		**X**	**X**	**X**	**X**	**X**	**X**	**X**
Vale of White Horse					**X**		**X**	**X**	**X**	**X**
South Oxfordshire					**X**		**X**	**X**	**X**	**X**
Wychavon						X				
Cotswold					X	X				
Swindon					X					
Stratford-upon-Avon					X					
West Berkshire					X					
Buckingham-shire					X					

[38] GL Hearn, (2014); Oxfordshire Strategic Housing Market Assessment.
[39] Cherwell District and Oxford City Councils/Iceni/jg Consulting/Cambridge Econometrics, (2022); Housing and Economic Need Assessment.

5. Socio-economic profile

5.1. Introduction

5.1.1. This section profiles the FEMA (i.e. West Oxfordshire, Cherwell, Oxford, Vale of White Horse, and South Oxfordshire) using key socio-economic indicators. The analysis forms an understanding of the local economic strengths and weaknesses that may impact upon the economic market. Key indicators provided include:

- Labour market statistics such as population, economic activity, deprivation, and qualifications of residents; and
- Economic indicators such as jobs by sector, business counts, earnings, and business demography.

5.1.2. To provide a comparative assessment, West Oxfordshire is benchmarked against the FEMA, the South East region and national averages.

5.2. Labour market profile

Population and age

5.2.1. The future economic needs of West Oxfordshire will be driven in part by trends in the size of the resident population. West Oxfordshire's population increased by 9.0% between 2011 and 2021 (from 104,779 to 114,237)[40,41]. The growth in this area is slightly lower than that recorded in the FEMA (10.9%), but greater than that recorded across the South East region (7.5%) and England (6.6%).

5.2.2. The population in West Oxfordshire is expected to increase by 5.8% (to 119,750) between 2024 and 2041[42]. The population growth in the district to 2041 is anticipated to be slightly greater than that within the FEMA (5.3%), across the South East region (5.0%), but slightly lower than England as a whole (6.1%). This increase is likely to require supporting growth in demand for housing, community facilities, infrastructure and employment land and floorspace over the Local Plan period in West Oxfordshire.

5.2.3. The greatest growth in population by age cohort between 2024 and 2041 is expected to be among those aged over 65 in West Oxfordshire (35.1%), the FEMA (33.0%), the South East region (30.7%), and England (29.9%). The working age population (aged 16 to 64) in West Oxfordshire is expected to decrease by 3.2% over the same period. A smaller magnitude of change in the working age cohort is expected at the wider geographies of the FEMA (-0.4%), South East region (-0.6%) and England (+1.4%).

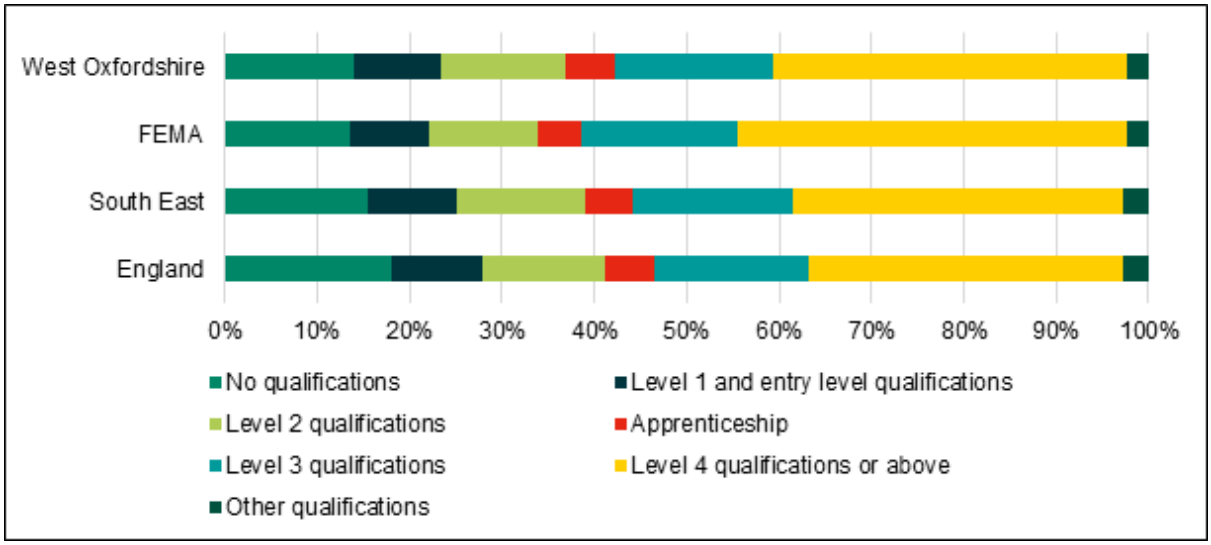
Qualifications

5.2.4. The proportion of West Oxfordshire residents aged 16 and over with a degree-level or above (Level 4+) qualification is approximately 38.3%[43]. This represents lower proportion to that recorded in the FEMA (42.0%) and a greater proportion of the population who hold degree-level qualifications than is recorded for the South East region (35.8%) and England (33.9%). It is also evident that a smaller proportion of the population hold no qualifications in West Oxfordshire (13.9%) and the FEMA

[40] Office for National Statistics, (2011); Census 2011.
[41] Office for National Statistics, (2021); Census 2021.
[42] Office for National Statistics, (2020): Population Projections.
[43] Office for National Statistics, (2021); Census 2021.

(13.5%) when compared to the South East region and England (15.4% and 18.1% respectively).

Figure 5.1 Qualification level as a proportion of usual residents aged 16 and over



Source: Office for National Statistics, (2021); Census 2021.

Economic activity and unemployment

5.2.5. In 2021, the economic activity rate for residents aged 16 and over in West Oxfordshire was 64.9%, higher than the FEMA (63.7%), the South East (62.2%), and England (62.2%)[44]. In addition, the unemployment rate was lower in the district than in the FEMA, the South East and nationally.

Deprivation

5.2.6. There is a very low incidence of deprivation within West Oxfordshire[45]. Out of 317 local authorities across England, West Oxfordshire is ranked as the 301st most deprived, with 1st being the most deprived. This indicates that West Oxfordshire is amongst the least deprived local authorities nationally.

5.2.7. At Lower layer Super Output Area (LSOA) level[46], almost two thirds (62%) of the LSOAs in West Oxfordshire are ranked within the top 20% least deprived in the country, a higher proportion than in the FEMA (47%). Only 6% of the LSOAs within the district fall within the top 40% most deprived compared to 11% in the FEMA.

5.3. Local economic profile

Jobs by sector

5.3.1. A high proportion of employment in West Oxfordshire is within the manufacturing broad industrial group reflecting 12.6% (6,000) of all jobs compared with 7.0% in the FEMA, 5.8% in the South East and 7.5% in England[47].

5.3.2. Between 2017 and 2022, the employment sectors which experienced the largest proportional growth in West Oxfordshire were the business administration and support services sector (+55.6%) and the professional, scientific and technical

[44] Office for National Statistics, (2021); Census 2021.
[45] Ministry of Housing, Communities and Local Government, (2019); English indices of deprivation.
[46] LSOAs are ONS-defined small geographic areas across England designed to allow data reporting across small areas. Each LSOA in England is of a similar population size, with an average of 1,500 residents of 650 households.
[47] Office for National Statistics, (2023); Business Register and Employment Survey 2022.

sector (+50.0%)[48]. Conversely, the sectors which recorded the greatest proportional loss of employment were the motor trades (-33.3%) and mining, quarrying and utilities (-25.0%) sectors. Overall, West Oxfordshire recorded an increase in employment of 2,950 between 2017 and 2022 (+6.6%).

Business stock / demography

5.3.3. In 2023, there were 6,500 businesses located in West Oxfordshire[49]. Micro-businesses (defined as companies employing up to nine employees) represent the vast majority of all businesses in the district (85.5%), which is broadly in line with the rate for the FEMA (83.4%), the South East (85.1%), and England (84.6%).

Table 4.5 Businesses by employment size band

	West Oxfordshire	FEMA	South East	England
Micro (0 to 9) (%)	85.5	83.4	85.1	84.6
Small (10 to 49) (%)	12.3	13.5	12.1	12.4
Medium (50 to 249) (%)	1.9	2.7	2.4	2.6
Large (250+) (%)	0.2	0.4	0.4	0.4

Source: Office for National Statistics, (2022); UK Business Counts; Local units by industry and employment size band. Note: figures do not always sum due to rounding.

5.3.4. Of all businesses in West Oxfordshire, the professional, scientific and technical sector represents the largest proportion of total businesses at 16.4%, followed by construction at 13.4%. These sectors also represent the largest share of businesses in the FEMA, South East, and England. Forecasts in 2014 showed that there was high potential for growth in number of businesses in the engineering, motorsport and food production sectors[50]. It is important to note however that due to the date of this publication, this may be different now.

5.3.5. VAT registration and de-registration rates for West Oxfordshire provide an indication of the entrepreneurial characteristics of the area. Between 2017 and 2022, there have generally been more registrations than de-registrations, however in 2022 (the latest available dataset) there were 30 more de-registrations with 495 registrations and 525 de-registrations[51].

Occupational profile

5.3.6. With regard to occupational profile, 25.0% of working age residents in West Oxfordshire are employed in 'professional' occupations[52]. This represents the highest proportion of any occupation, but is a considerably lower share than recorded in the FEMA (40.7%). It is however in line with proportions in the South East (28.3%), and England (27.0%).

5.3.7. Furthermore, the proportion of working age residents in 'manager, director, or senior official' positions is lower in West Oxfordshire at 6.5% when compared to 10.5% in the FEMA, 12.7% in the South East, and 11.2% across England.

[48] Office for National Statistics, (2018); Business Register and Employment Survey 2017.
[49] Office for National Statistics, (2023); UK Business Counts.
[50] Cambridge Econometrics (2014). Economic Forecasting to Inform the Oxfordshire Strategic Economic Plan and Strategic Housing Market Assessment.
[51] Office for National Statistics, (2023); Business demography, UK.
[52] Office for National Statistics, (2024); Annual Population Survey (January 2023 to December 2023).

Earnings

5.3.8. The median annual gross pay for full time workers who reside in West Oxfordshire was £36,330 in 2023[53]. This was slightly lower than earnings in the FEMA, but similar to that across the South East and England. Workplace-based earnings show that for those who work in West Oxfordshire, annual gross pay was £35,736, again less than earnings for those working across the FEMA, South East, and England. The difference between resident-based and workplace-based earnings is indicative of a prevalence of out-commuting from the district to access higher-paying jobs elsewhere.

[53] Office for National Statistics, (2022); Annual Survey of Hours and Earnings – Resident and Workplace Analysis

6. Supply of employment land

6.1. Introduction

6.1.1. This section provides a summary of the characteristics of the current and future supply of employment land in West Oxfordshire based on alignment with current and future market demand. It also highlights locational characteristics of different employment sectors, and trends in these, to help to understand spatial drivers of growth today and in the future.

6.2. Portfolio of employment sites

6.2.1. A total of 63 employment clusters form the basis of this assessment. These comprise one Strategic Development Area, one Strategic Location for Growth, 12 Main Existing Employment Areas (Local Plan designations), and 49 Other Employment Areas identified via the 2015 and 2012 Economic Studies, and through discussions with the Council.

6.2.2. It should be noted that the employment sites identified in the assessment of the current supply capture the floorspace across the employment land use classes that sits within designated land or is within an employment land parcel which is greater than 0.25ha. The study recognises that there is additional floorspace which lies dispersed in land parcels smaller than 0.25ha outside the identified employment clusters. Similarly, the employment sites identified below also incorporate non B/E(g) uses, and therefore the cluster size is not equivalent to the supply of B/E(g) use land in the district.

6.2.3. The assessment of the existing stock has been conducted on a sub-area basis in line with the adopted Local Plan 2031. The five sub-areas in the district are as follows:

- Chipping Norton sub-area;
- Burford - Charlbury sub-area;
- Carterton sub-area;
- Witney sub-area; and
- Eynsham - Woodstock sub-area.

6.2.4. These sub-areas are presented on Figure 6.1 below.

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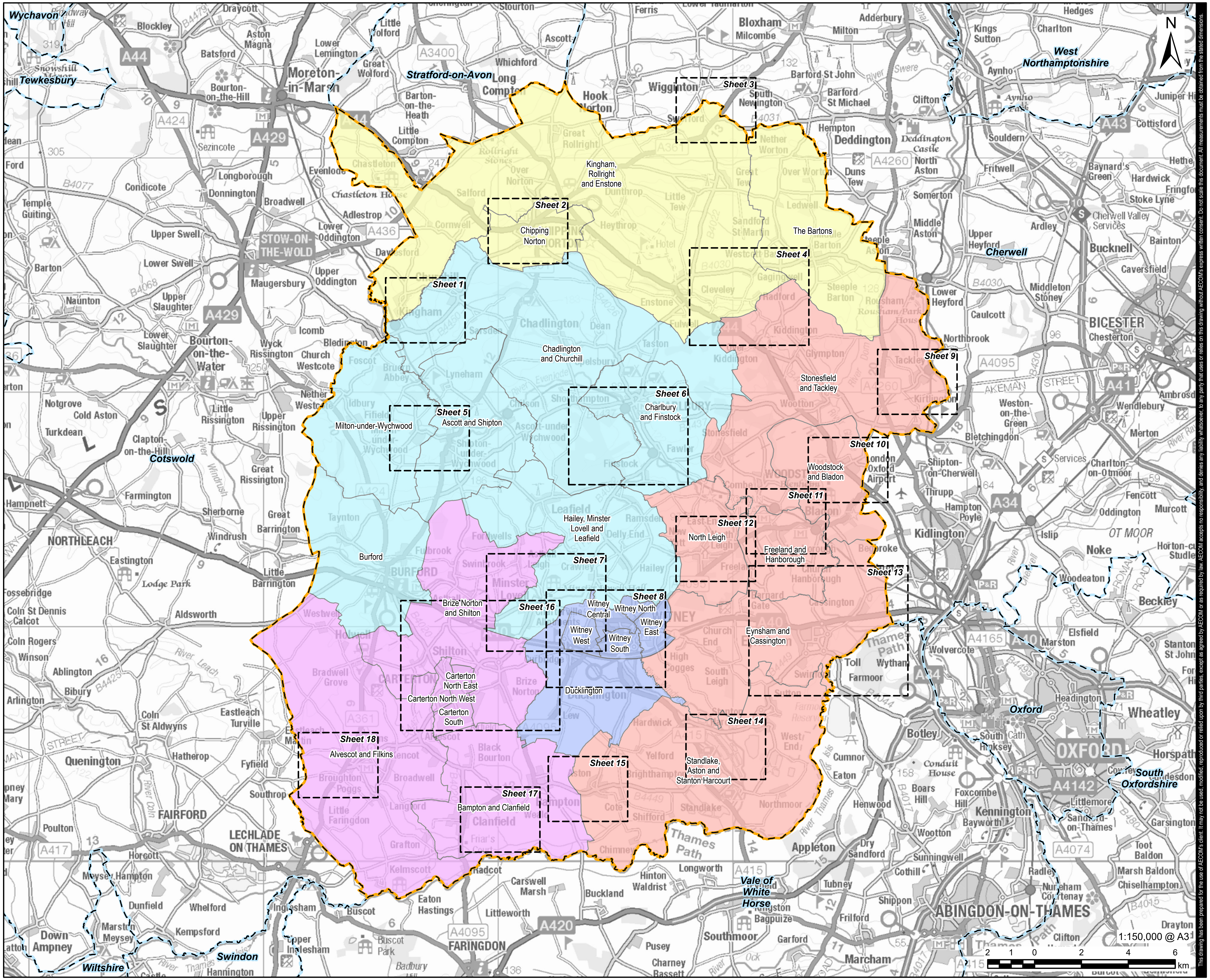

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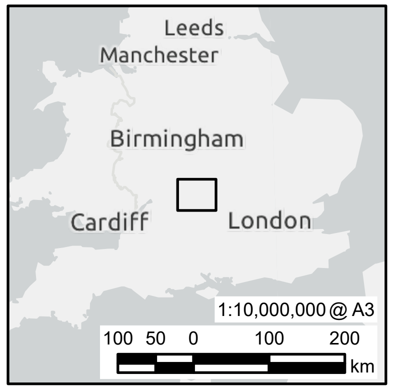
LEGEND

- West Oxfordshire Local Authority
- Other Local Authority
- Sheet Extent - Figure 3

Sub-Area

- Burford Charlbury Sub Area
- Carterton Sub Area
- Chipping Norton Sub Area
- Eynsham Woodstock Sub Area
- Witney Sub Area



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ISSUE PURPOSE

Economic Needs Assessment

PROJECT NUMBER

60734215

FIGURE TITLE

Overview Map

FIGURE NUMBER

Figure 6-1

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6.2.5. The locations of the clusters which have been assessed are shown on the following maps (Figure 6.2 to Figure 6.6) by sub-area.

6.2.6. Detailed information on each cluster, comprising site reference number to allow cross-referencing between maps and discussion in this report, site name, sub-area, business use / occupier typologies, and employment / land uses are shown in the relevant sub-sections below (Table 6.2 and Table 6.3).

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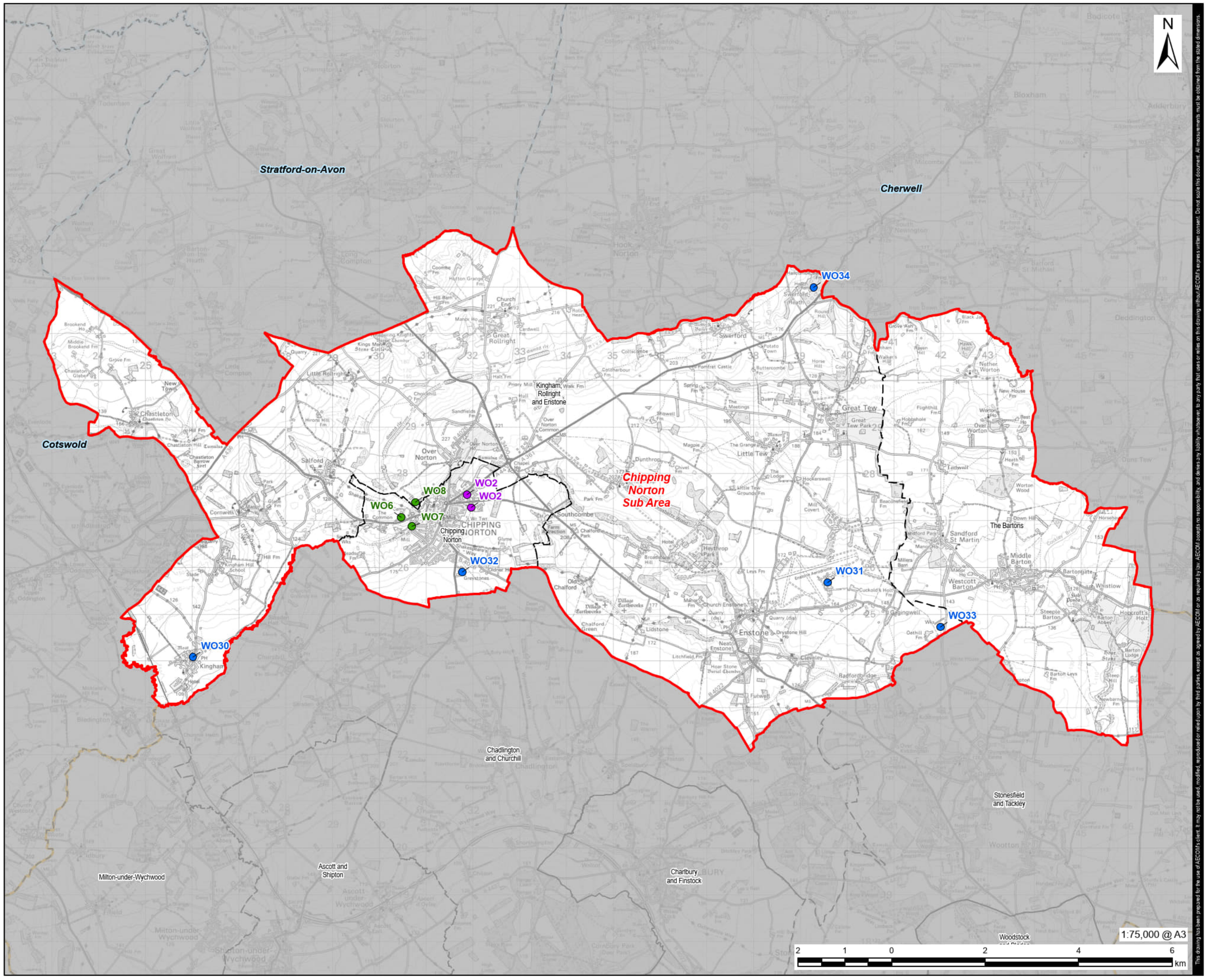

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LEGEND

- Chipping Norton Sub Area
- Ward Boundary
- West Oxfordshire Local Authority
- Other Local Authority

Employment Land Sites

- Strategic Development Area
- Main Existing Employment Area
- Other Employment Cluster

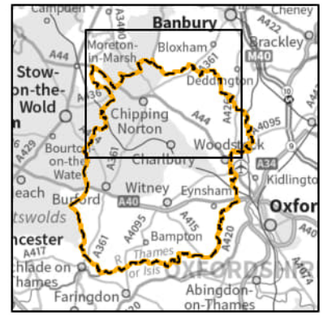

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FIGURE TITLE

Sub-Area Map - Overview
Chipping Norton Sub Area
Sheet 1 of 5

FIGURE NUMBER

Figure 2

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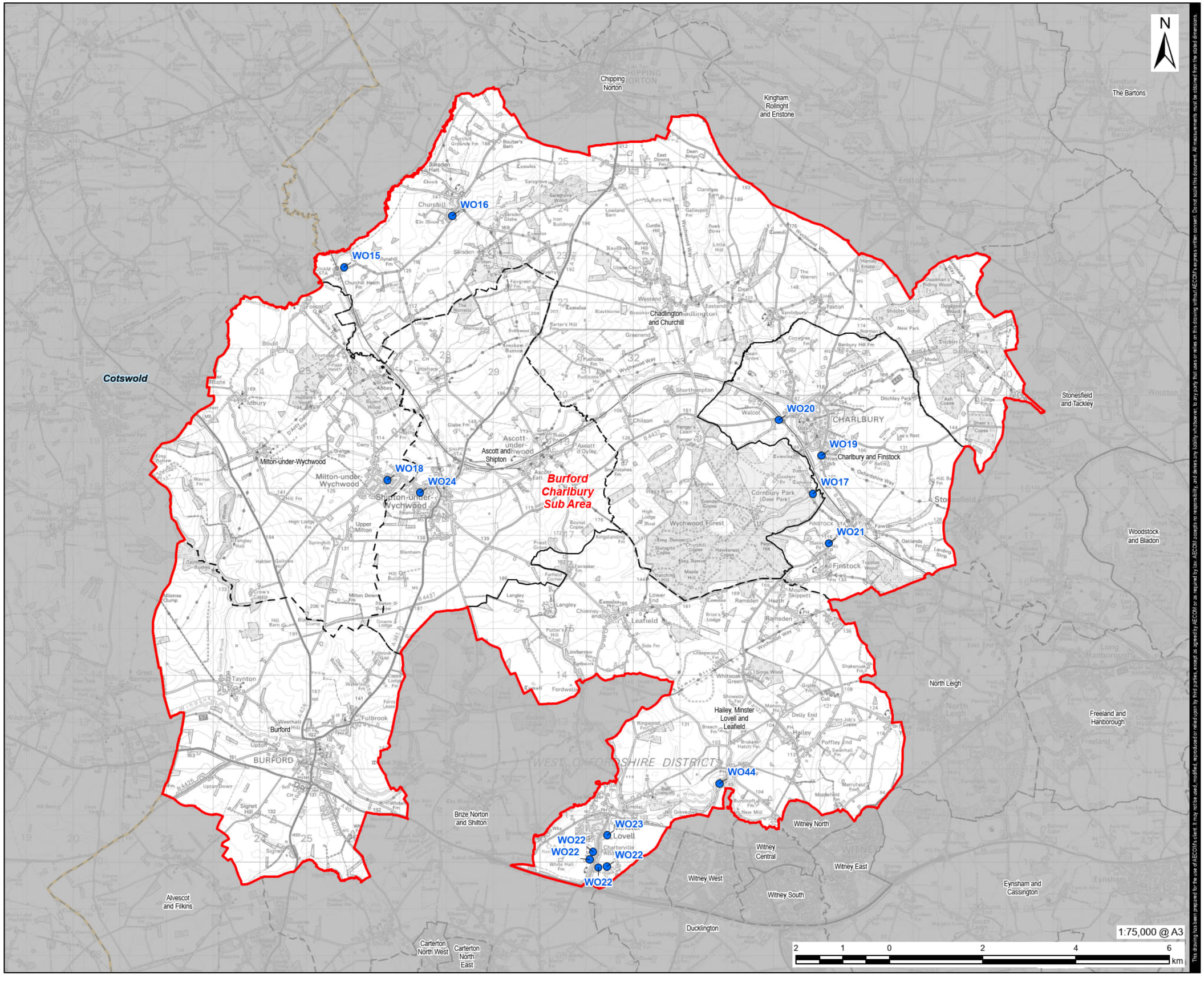

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LEGEND

- Burford Charlbury Sub Area
- Ward Boundary
- West Oxfordshire Local Authority
- Other Local Authority

Employment Land Sites

- Other Employment Cluster

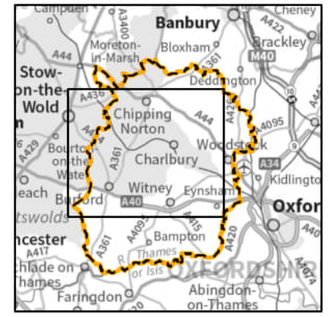

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FIGURE TITLE

Sub-Area Map - Overview
Burford Charlbury Sub Area
Sheet 2 of 5

FIGURE NUMBER

Figure 2

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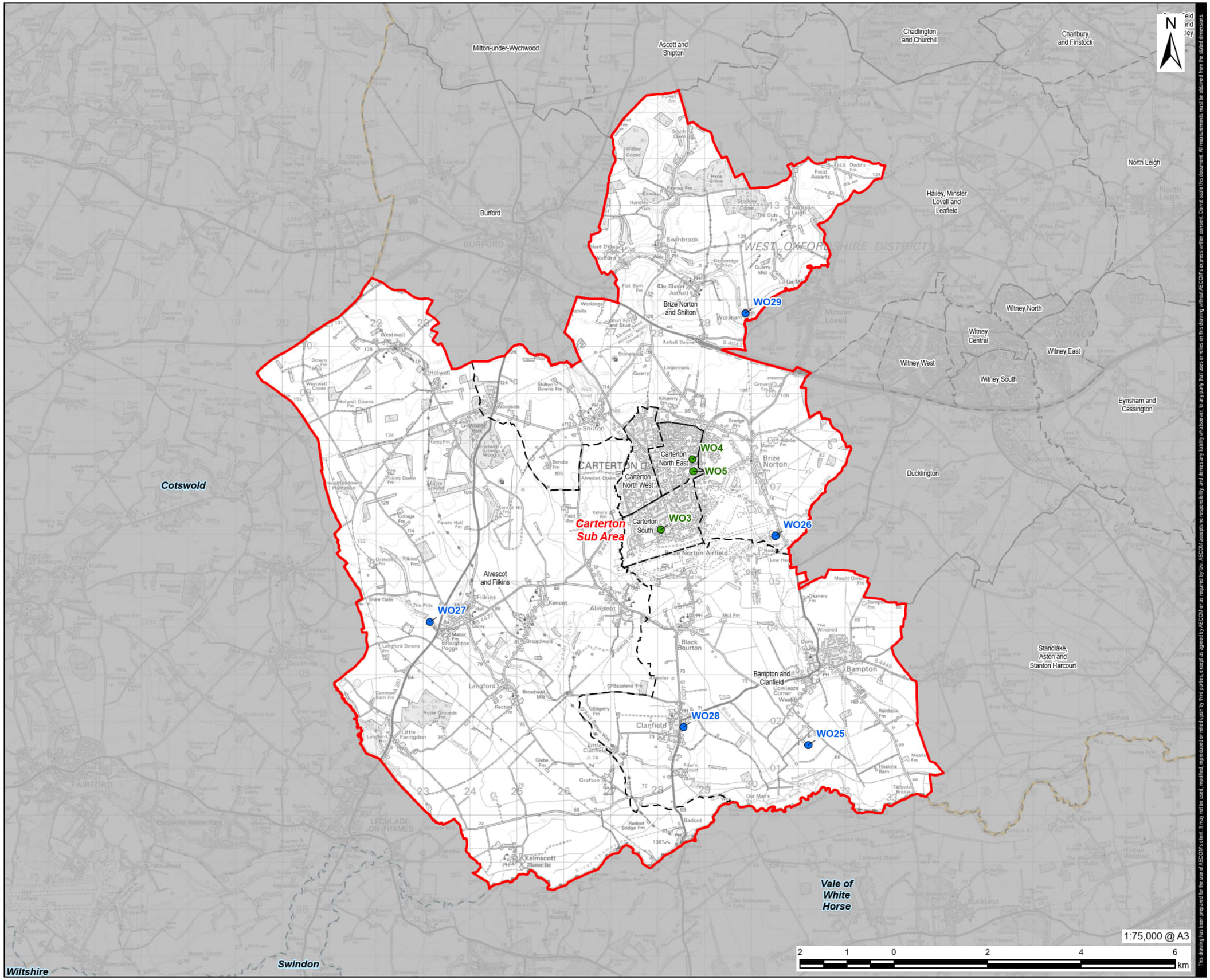

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LEGEND

- Carterton Sub Area
- Ward Boundary
- West Oxfordshire Local Authority
- Other Local Authority

Employment Land Sites

- Main Existing Employment Area
- Other Employment Cluster

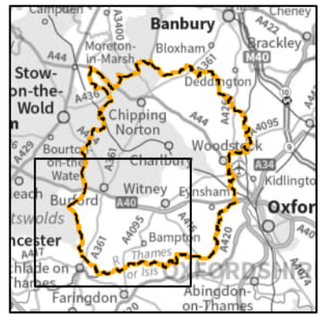

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FIGURE TITLE

Sub-Area Map - Overview
Carterton Sub Area
Sheet 3 of 5

FIGURE NUMBER

Figure 2

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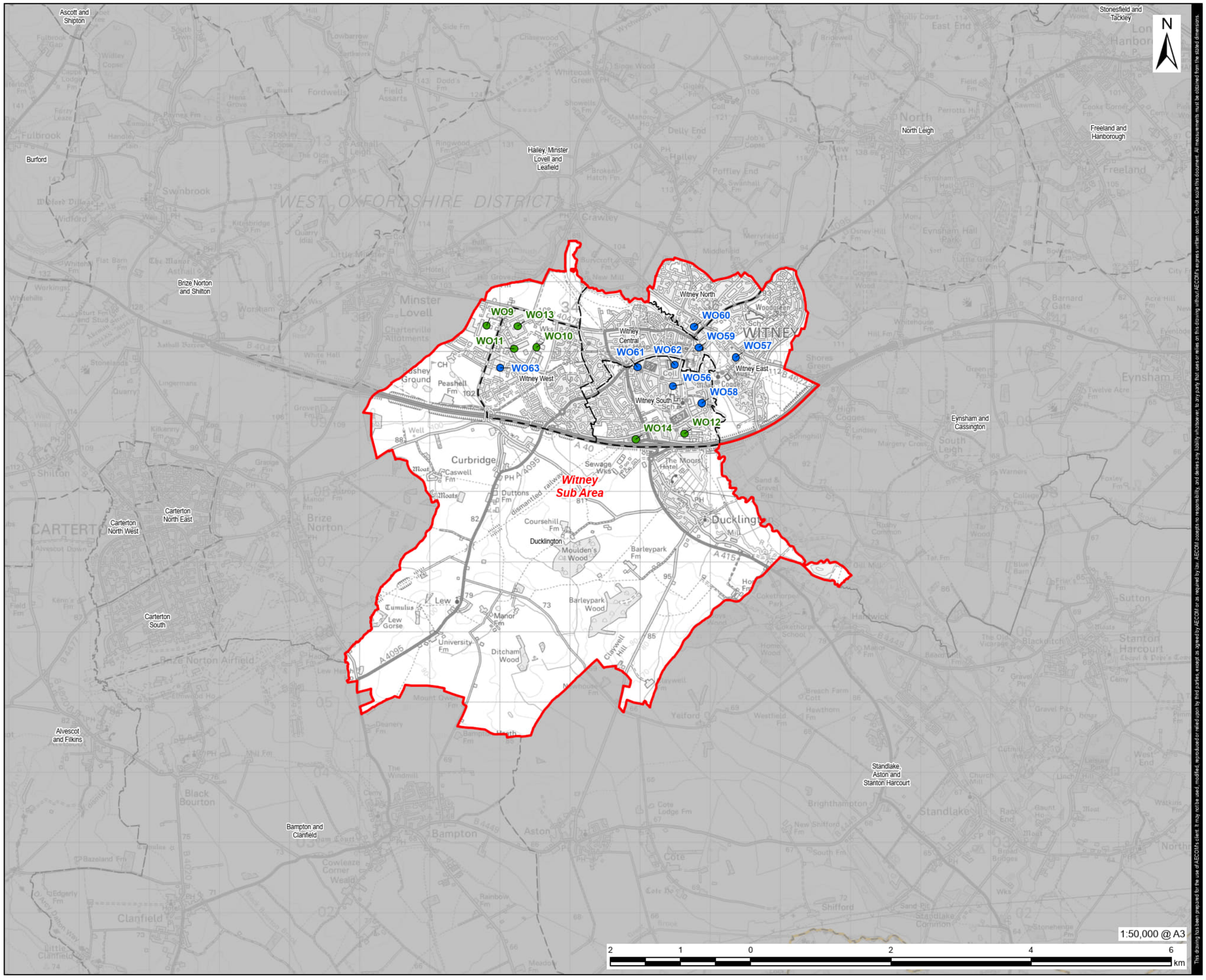

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LEGEND

- Witney Sub Area
- Ward Boundary
- West Oxfordshire Local Authority
- Other Local Authority

Employment Land Sites

- Main Existing Employment Area
- Other Employment Cluster

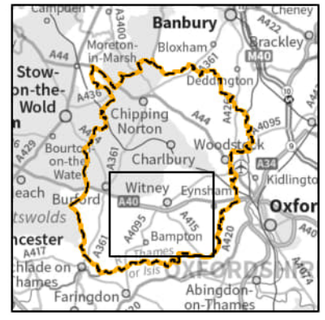

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FIGURE TITLE

Sub-Area Map - Overview
Witney Sub Area
Sheet 4 of 5

FIGURE NUMBER

Figure 2

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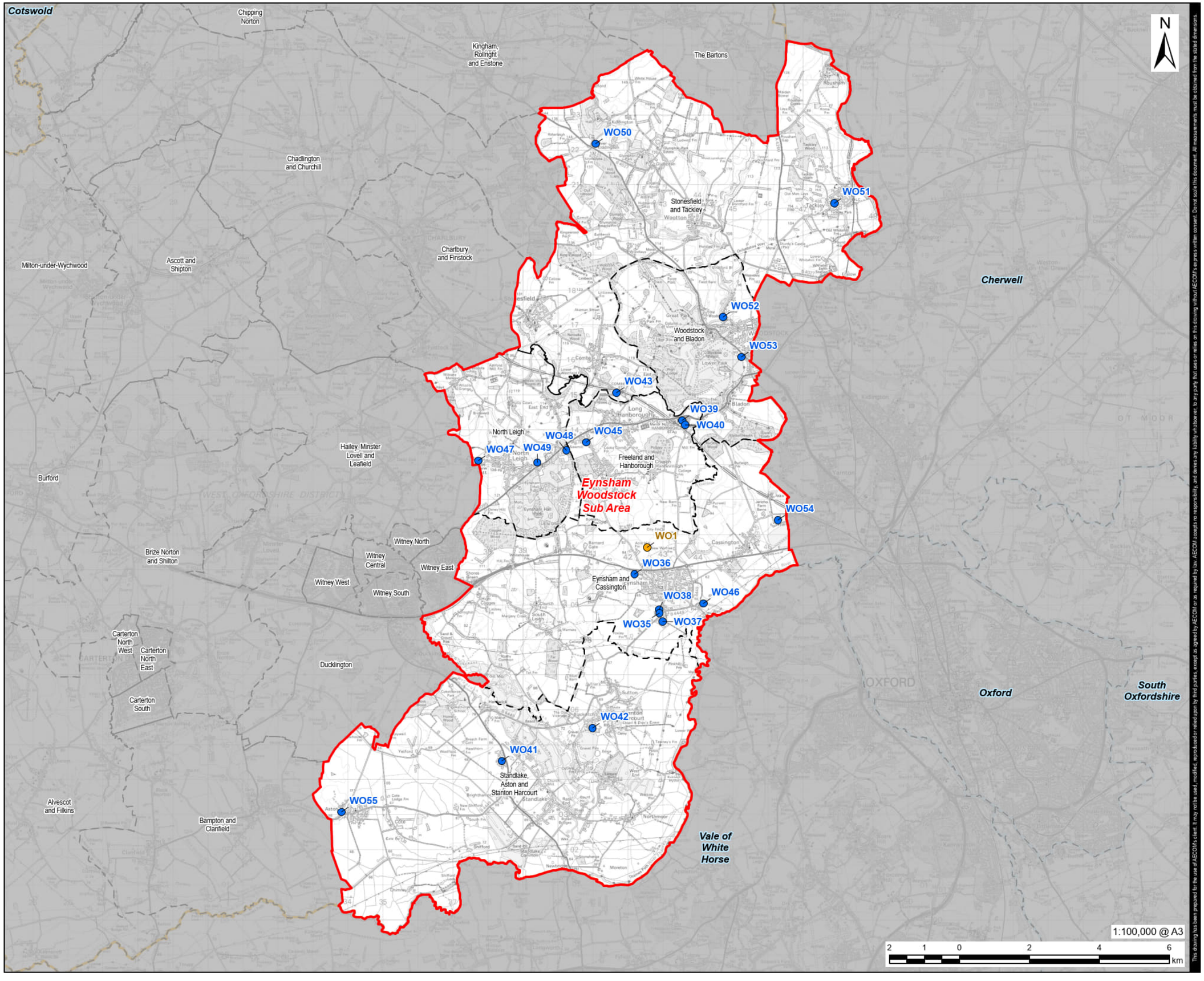

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LEGEND

- Eynsham Woodstock Sub Area
- Ward Boundary
- West Oxfordshire Local Authority
- Other Local Authority

Employment Land Sites

- Strategic Location for Growth
- Other Employment Cluster

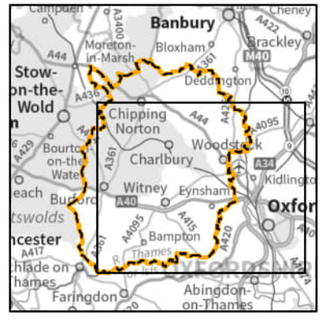

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FIGURE TITLE

Sub-Area Map - Overview
Eynsham Woodstock Sub Area
Sheet 5 of 5

FIGURE NUMBER

Figure 2

6.3. Assessment of employment clusters

6.3.1. A detailed assessment of the characteristics of employment land in West Oxfordshire was undertaken. This was informed by a list of criteria based on our experience and drawing on the PPG, and the 2015 and 2012 Economic Studies (to identify where change has taken place), with reference to specific priorities of the Council. The assessment was comprised of a desk-based investigation and a site survey in August 2024. This section presents the overall findings of the site assessment.

6.3.2. There are a number of requirements for businesses in the district's core and growth sectors and wider influences on demand for employment land. Reflecting this, the assessment considered various domains against a scoring criteria, as set out in Table 6.1.

Table 6.1 Employment cluster assessment criteria

Domain	Rationale	Scoring criteria
Building age Building condition	Market demand for better quality spaces that are attractive enough to earn employees' commute, support evolving work patterns, and offer a competitive advantage. This is linked to the need for functionality (e.g. sufficient eaves height and flexible, collaborative workspace), companies' Environmental Social and Governance (ESG) commitments and wider drivers in relation to minimum energy efficiency standards.	RAG assessment **Green** – Very good / good in terms of building age (i.e. year of build) and quality (condition, level of maintenance, suitability, and attractiveness of units to occupiers). **Amber** – Good / average / poor in terms of building age (i.e. year of build) and quality (condition, level of maintenance, suitability, and attractiveness of units to occupiers). **Red** – Poor / very poor in terms of building age (i.e. year of build) and quality (condition, level of maintenance, suitability, and attractiveness of units to occupiers).
Quality of public realm, environment and surroundings	The quality of the public realm is a key consideration across sectors and uses. Whereas historically this would have been more of a consideration for office uses – for which it remains a greater driver – industrial and logistics investors are increasingly looking to accommodate future growth in more of a business park environment incorporating high quality public realm and access to amenities on or in proximity to sites.	RAG assessment **Green** – Very good / good in terms of appearance, evidence of managed site; quality of environment (i.e. lighting, greening, signage). **Amber** – Good / average / poor in terms of appearance, evidence of managed site; quality of environment (i.e. lighting, greening, signage). **Red** – Poor / very poor in terms of appearance, evidence of managed site; quality of environment (i.e. lighting, greening, signage).
Access to services, facilities and amenities	Access to services and amenities is important for businesses. The presence of these services enhances employee satisfaction and wellbeing by providing convenient options during breaks or after work. This can lead to higher productivity and employee retention. Additionally, for businesses that frequently host clients or visitors, proximity to	RAG assessment **Green** – Very good / good in terms of proximity to town or local centre with wide range of services nearby (i.e. shops, facilities, amenities including restaurants and shops). **Amber** – Good / average / poor in terms of proximity to town or local centre with some / few services nearby.

Domain	Rationale	Scoring criteria
	quality services and amenities contributes to a positive impression and can play a role in fostering successful business relationships. Access to services, facilities and amenities is particularly important for office occupiers where these are higher density as workers are less easily served by on-site facilities and personal transport.	**Red** – Poor / very poor in terms of proximity to town or local centre, a remote isolated site, with no local services or amenities.
Access for commercial traffic to strategic / major road network	Transport connectivity is a key determinant of inward investment, with access to staff, customers and the supply chain key considerations for businesses across production and services sectors. Connectivity in terms of access to the strategic road network a key driver, is particularly important for industrial and logistics businesses.	RAG assessment **Green** – Direct access to the major road network (A40/A44). **Amber** – Indirect access within 0-5 km of the strategic road network. **Red** – Locations that are over 5 km away with limited or no access to the strategic road network.
Access by public transport	Proximity to public transport is an important consideration for businesses to be able to access a wide and diverse pool of labour, both from local communities and as a means to access requisite skills. This is particularly the case for office employment, which benefits from greater workforce mobility.	RAG assessment **Green** – indicates multiple public transport options (2 or more) i.e. sufficient access by bus and train. **Amber** – indicates at least one sufficient public transport option (i.e. bus). **Red** – indicates no / extremely poor access by public transport.
Compatibility of surrounding land uses	The presence of sensitive uses neighbouring a site (e.g. residential properties) can limit operations by causing environmental conflicts relating to traffic, parking, noise, visual impact/screening and emissions, and therefore limit the attractiveness of a site particularly for industrial uses.	Narrative assessment Considers the degree to which the site is a well-established large employment area with no incompatible surrounding land use or identifies the presence of adjoining users and the sensitivity of such uses.

6.3.3. In addition to the criteria in Table 6.1, consideration has been given to: the suitability of the sites for meeting the needs of core or growth sectors (e.g. logistics, advanced manufacturing, data centres, and laboratories); presence of affordable workspace; presence of vacant or derelict buildings; potential for intensification; and evidence of carbon efficiencies.

6.3.4. While the assessment highlights the highly suitable employment areas that best align with the requirements of West Oxfordshire's key sectors and growth aspirations, it is important to note that lower quality employment areas can also perform an important function within the local economy, such as by supporting vital, if lower amenity, uses or providing more affordable space for businesses, and the assessment should be viewed in this context.

6.3.5. Given the large number of employment areas identified, the information presented in this section is broken down by classification:

- Local Plan 2031 designations (Strategic Employment Clusters and Main Existing Employment Areas)

- Other Employment Clusters (clusters identified in the 2015 and 2012 Economic Studies or via discussion with the Council)

Local Plan 2031 designations (Strategic Employment Clusters and Main Existing Employment Areas)

6.3.6. The identified occupier typologies, business types, employment uses, and land uses within the Local Plan designation employment clusters are shown in Table 6.2.

Table 6.2 Local Plan designation clusters and uses

Ref.	Name	Sub-area	Size (ha)	Business use/occupier typologies	Employment/land uses
WO1	Oxfordshire Cotswolds Garden Village[54]	Eynsham	40.0	Office, R&D	E(g)(i); E(g)(ii)
WO2	East Chipping Norton Strategic Development Area	Chipping Norton	2.78	Office; Sui Generis	E(g)(i); Sui Generis
WO3	Carterton South Industrial Estate	Carterton	6.51	General industrial; light industrial	B2; E(g)(iii)
WO4	Ventura Park	Carterton	4.02	General industrial; light industrial; office; Sui Generis	B2; E(g)(iii); E(g)(i); Sui Generis
WO5	West Oxfordshire Business Park	Carterton	8.16	General industrial; storage and distribution; light industrial	B2; B8; E(g)(iii)
WO6	Primsdown Industrial Estate / Worcester Road Industrial Estate	Chipping Norton	3.25	General industrial; office; R&D; light industrial; Sui Generis	B2; E(g)(i); E(g)(ii); E(g)(iii); Sui Generis
WO7	Station Road Industrial Estate	Chipping Norton	3.08	Storage and distribution; light industrial; Sui Generis	B8; E(g)(iii); Sui Generis
WO8	Elmsfield Industrial Estate	Chipping Norton	1.04	Light industrial; Sui Generis	E(g)(iii); Sui Generis
WO9	Bromag Industrial Estate / Minster Industrial Estate	Witney	21.66	General industrial; storage and distribution; office	B2; B8; E(g)(i)
WO10	De Havilland Way	Witney	10.80	General industrial	B2
WO11	Range Road	Witney	14.02	General industrial; storage and distribution	B2; B8
WO12	Station Lane Industrial Estate	Witney	20.06	General industrial; office; light industrial; Sui Generis	B2; E(g)(i); E(g)(iii); Sui Generis

[54] Now referred to as Salt Cross Garden Village

Ref.	Name	Sub-area	Size (ha)	Business use/occupier typologies	Employment/land uses
WO13	Windrush Industrial Estate	Witney	16.02	General industrial; storage and distribution	B2; B8
WO14	Thorney Leys Industrial Park	Witney	3.48	Office; light industrial; day nursery	E(g)(i); E(g)(iii); E(f)

6.3.7. The assessment of the characteristics of the Local Plan designation clusters is shown in Table 6.3. The RAG rating indicates the performance of the employment area against key criteria, with green indicating a good performance (suitable against the criterion to support employment activities), amber an average performance and red a poor performance (unsuitable against the criterion to support employment activities), with narrative commentary against the remaining domain.

Table 6.3 Assessment of Local Plan designation clusters

Ref	Name	Size	Use	Building age	Building condition	Public realm and environment	Access to services, facilities and amenities	Commercial access to major road network	Access to public transport	Compatibility with surrounding land uses
No.	-	Land area (ha)	Land use	RAG	RAG	RAG	RAG	RAG	RAG	Narrative
WO1	Oxfordshire Cotswold Garden Village Strategic Location for Growth (SLG)	40.0	E(g)(i); E(g)(ii)							This site is yet to be developed. Due to the nature of the proposed employment land use (business and science park), no negative impacts are expected on surrounding land uses.
WO2	East Chipping Norton Strategic Development Area (SDA)	2.78	E(g)(i); Sui Generis							The employment land allocated as part of this SDA has not yet been developed. Once operational, the site is expected to be similar in use to neighbouring sites such as Cromwell Park, and so no negative effects on surrounding uses are expected.
WO3	Carterton South Industrial Estate	6.51	B2; E(g)(iii)							The cluster is surrounded by residential properties and is adjacent to RAF Brize Norton. Due to the nature of the site uses and businesses operating, there is unlikely to be negative impact on these surrounding land uses.
WO4	Ventura Park	4.02	B2; E(g)(iii); E(g)(i); Sui Generis							The cluster is close to residential properties and is adjacent to Broadshires Health Centre and Carterton Leisure Centre. No negative effects are expected on these uses.
WO5	West Oxfordshire Business Park	8.16	B2; B8; E(g)(iii)							The cluster is surrounded by residential streets and is adjacent to Broadshires Health Centre and RAF Brize Norton. Due to the nature of the site uses and businesses operating, there is unlikely to be negative impact on these surrounding land uses.
WO6	Primsdown Industrial Estate / Worcester Road Industrial Estate	3.25	B2; E(g)(i); E(g)(ii); E(g)(iii); Sui Generis							There is a community use adjacent to the cluster; Chipping Norton Cemetery. The cluster is also close to Chipping Norton town centre. No negative effects are expected on these uses.
WO7	Station Road Industrial Estate	3.08	B8; E(g)(iii); Sui Generis							There are residential and community uses nearby. The cluster is adjacent to residential properties and Bliss Tweed Mill (a historical landmark), and Fitzalan Wood. It is also close to Chipping Norton town centre. No negative effects are expected on these uses.
WO8	Elmsfield Industrial Estate	1.04	E(g)(iii); Sui Generis							The cluster is adjacent to a few residential properties and a community orchard. It is also close to Chipping Norton town centre. Due to the nature of the site uses, there is unlikely to be negative impact on these surrounding land uses.
WO9	Bromag Industrial Estate / Minster Industrial Estate	21.66	B2; B8; E(g)(i)							The cluster is adjacent to residential streets, and close to community and recreational uses such as Witney Golf Centre and Minster Lovell Hall. No negative effects are likely on these receptors due to the nature of the site uses.
WO10	De Havilland Way	10.80	B2							The cluster is close to residential streets, and adjacent to Deer Park Wood and Witney Sports and Social Club. However, no negative effects are likely on these receptors due to the nature of the activities taking place on site.
WO11	Range Road	14.02	B2; B8							The cluster is adjacent to residential streets, close to Witney Golf Centre and Minster Lovell Hall. Due to the nature of the cluster uses, there is unlikely to be negative impact on these surrounding land uses.
WO12	Station Lane Industrial Estate	20.06	B2; E(g)(i); E(g)(iii); Sui Generis							The cluster is in close proximity to Thorney Leys Business Park, and community and recreational uses such as Witney Town Pavillion, The Leys playground, and Ducklington Lake. No negative effects are likely on these receptors due to the nature of the activities taking place on site.
WO13	Windrush Industrial Estate	16.02	B2; B8							The cluster is near to residential streets, close to Witney Golf Centre and Minster Lovell Hall, and adjacent to Deer Park Wood and Witney Sports and Social Club. No negative effects are likely on these receptors due to the nature of the uses in the cluster.
WO14	Thorney Leys Industrial Park	3.48	E(g)(i); E(g)(iii); E(f)							The cluster is in close proximity to Station Lane Industrial Estate, residential properties, and a large B&Q store. As the site is predominantly office in use, no negative effects are expected on these surrounding uses.

Suitability of sites for meeting the needs of core or growth sectors

6.3.8. This section will review the potential of the Local Plan designation clusters to accommodate major or catalyst businesses operating in the Council's growth sectors.

6.3.9. Capitalising on and contributing to the Oxfordshire high tech and knowledge economy, Oxfordshire Cotswolds Garden Village (WO1) is set to provide 40 hectares of business land in the form of a campus style science park. Although there are a number of 'campus style' science parks in Oxfordshire, there are currently none in West Oxfordshire. The principle of delivering a new science park in this location is reflective of the economic strength of Eynsham and its close relationship to Oxford and the Oxfordshire knowledge spine, presenting the opportunity for high-technology university spinouts and development and research opportunities.

6.3.10. As part of the East Chipping Norton Strategic Development Area, Policy CN1 of the Local Plan indicates that 5ha of additional business space will be provided to the north of London Road in order to provide a good level of 'critical mass' and to allow for potential occupation by large format employers.

6.3.11. In Carterton, there is large presence of military and aerospace businesses following the shift of activities from RAF Lyneham to RAF Brize Norton. RAF Brize Norton is one of the largest employers in the district, and employs approximately 7,000 staff, combining military and civilian support staff[55]. Occupiers at nearby West Oxfordshire Business Park and Ventura Park include Airbus and Airborne Systems.

6.3.12. Some of the sites in Table 6.2 are also home to large-scale medical businesses. At Primsdown Industrial Estate in Chipping Norton, Owen Mumford is a major occupier which operates as a global manufacturer of medical devices. This business is the largest employer in the town and has a substantial presence.

6.3.13. The clusters to the west of Witney, Range Road, Station Lane Industrial Estate, and De Haviland Way, currently support large scale manufacturing and logistics uses, with occupiers such as Abbott Diabetes, Owen Mumford and Royal Mail. The nature of these clusters, such as large buildings and direct access to the A40, mean that they house businesses operating in the Council's growth sectors.

Presence of affordable workspace

6.3.14. The majority of clusters in Table 6.2 contain light industrial uses, primarily workshops and studios, some of which are likely to be affordable.

Presence of vacant or derelict buildings

6.3.15. Within the clusters listed in Table 6.2, buildings are generally well-let and there is little evidence of vacancy or derelict buildings. There are however some vacant buildings in Carterton South Industrial Estate that are currently being marketed. Much of the stock in the cluster is relatively old but accommodates a wide variety of industrial uses, and the vacant buildings could be suitable for manufacturing or engineering uses.

6.3.16. There is also some vacancy at West Oxfordshire Business Park, and additional units are currently under construction to the north of the site. As mentioned above, this cluster contains a considerable concentration of aerospace businesses, and so new occupiers could expand this presence.

[55] Royal Air Force (2024). Our Organisation: Stations: RAF Brize Norton. [online] Available at: https://www.raf.mod.uk/our-organisation/stations/raf-brize-norton/#:~:text=RAF%20Brize%20Norton%2C%20in%20Oxfordshire,civilian%20staff%20and%201%2C200%20contractors.

Potential for intensification

6.3.17. Regarding the existing clusters in Table 6.2, many are densely packed, particularly the large industrial clusters to the west of Witney. Therefore, intensification opportunities are generally limited.

Evidence of carbon efficiencies

6.3.18. Both locally and nationally, there the transition to a low carbon economy is a key economic priority and the Local Plan highlights that West Oxfordshire has the potential to deliver greater carbon savings through new renewable energy infrastructure. On this basis, the assessment has considered whether there is any evidence of carbon efficiencies at the employment clusters.

6.3.19. In general, there is little evidence of carbon efficiencies at the clusters listed in Table 6.4. However, there is some evidence of electric vehicle charging points at Ventura Park, Bromag Industrial Estate, and Windrush Industrial Estate.

Other Employment Clusters

6.3.20. The identified occupier typologies, business types, employment uses, and land uses within the Other Employment Clusters are shown in Table 6.4.

Table 6.4 Other Employment Clusters and uses

Ref	Name	Sub-area	Size (ha)	Business Use/Occupier Typologies	Employment /Land Uses
WO15	Langston Priory	Burford Charlbury	0.86	Light industrial	E(g)(iii)
WO16	Mount Manor / Mount Farm Workshops	Burford Charlbury	0.34	Light industrial	E(g)(iii)
WO17	Southill Business Park	Burford Charlbury	0.97	Office; Sui Generis	E(g)(iii); Sui Generis
WO18	Groves Timber Yard / Groves Industrial Estate	Burford Charlbury	1.41	General industrial; storage and distribution; light industrial	B2; B8; E(g)(iii)
WO19	Factory premises Charlbury / Woodstock Road	Burford Charlbury	0.36	General industrial	B2
WO20	Old Pill Factory	Burford Charlbury	0.55	Light industrial; day nursery	E(g)(iii); E(f)
WO21	Manor Barns Business Centre	Burford Charlbury	0.62	Office	E(g)(i)
WO22	Dudley Engineering, B E Skips, Bushey Ground, Bennetts Yard	Burford Charlbury	1.89	Storage and distribution; light industrial	B8; E(g)(iii)
WO23	East of Brize Norton Road	Burford Charlbury	1.92	General industrial; storage and distribution	B2; B8
WO24	Wychwood Business Park	Burford Charlbury	0.71	Office; light industrial; day nursery	E(g)(i); E(g)(iii); E(f)
WO25	Bampton Business Centre (North and South)	Carterton	4.60	General industrial; office; light industrial	B2; B8; E(g)(i)
WO26	Viscount Court Industrial Estate	Carterton	2.34	General industrial; light industrial	B2; E(g)(iii)

Ref	Name	Sub-area	Size (ha)	Business Use/Occupier Typologies	Employment /Land Uses
WO27	Broughton Poggs Business Centre	Carterton	1.69	Storage and distribution	B8
WO28	Clanfield Workshops	Carterton	0.35	General industrial; light industrial	B2; E(g)(iii)
WO29	Worsham Mill	Carterton	1.35	Office	E(g)(i)
WO30	Threshers Yard	Chipping Norton	0.59	Light industrial	E(g)(iii)
WO31	Enstone Airfield / Business Park (restricted access)	Chipping Norton	12.86	General industrial; Sui Generis	B2; Sui Generis
WO32	Greystones Industrial Estate	Chipping Norton	0.7	Office; light industrial; day nursery	E(g)(i); E(g)(iii); E(f)
WO33	Lotus F1 technical facility / Renault F1 (Restricted access)	Chipping Norton	6.99	R&D	E(g)(ii)
WO34	Swerford Heath Farm	Chipping Norton	0.70	Storage and distribution	B8
WO35	Oasis Business Park	Eynsham	1.94	Office	E(g)(i)
WO36	Elm Place	Eynsham	0.6	Office	E(g)(i)
WO37	Oakfield Industrial Estate	Eynsham	10.16	General industrial; storage and distribution; office; R&D; light industrial	B2; B8; E(g)(i); E(g)(ii); E(g)(iii)
WO38	Old Station Way	Eynsham	1.44	General industrial; office; R&D	B2; E(g)(i); E(g)(ii)
WO39	Hanborough Business Park	Eynsham	6.87	General industrial; storage and distribution; office	B2; B8; E(g)(i)
WO40	Blenheim Office Park	Eynsham	2.79	General industrial; office; R&D	B2; E(g)(i); E(g)(ii)
WO41	Lakeside Industrial Estate	Eynsham	7.94	General industrial; storage and distribution	B2; B8
WO42	Stanton Harcourt Industrial Estate	Eynsham	9.51	General industrial; storage and distribution	B2; B8
WO43	Blenheim Palace Sawmill	Eynsham	2.33	General industrial; office	B2; E(g)(i)
WO44	Crawley Mill Industrial Estate	Eynsham	1.77	General industrial; storage and distribution	B2; B8
WO45	Wroslyn Road Industrial Estate	Eynsham	0.98	General industrial	B2
WO46	Siemens	Eynsham	5.18	General industrial; office	B2; E(g)(i)
WO47	New Yatt Business Park	Eynsham	0.94	Light industrial	E(g)(iii)
WO48	Eynsham Park Sawmill	Eynsham	1.34	Storage and distribution; light industrial	B8; E(g)(iii)
WO49	North Leigh Business Park	Eynsham	1.02	General industrial; office	B2; E(g)(i)

Ref	Name	Sub-area	Size (ha)	Business Use/Occupier Typologies	Employment /Land Uses
WO50	Gate Farm	Eynsham	0.48	Office	E(g)(i)
WO51	Court Farm Barns	Eynsham	0.35	Office	E(g)(i)
WO52	Green Lane	Eynsham	1.05	General industrial	B2
WO53	The Cowyards Blenheim	Eynsham	0.64	Office	E(g)(i)
WO54	Worton park	Eynsham	0.78	Office	E(g)(i)
WO55	Aston Works	Eynsham	0.32	Office; light industrial	E(g)(i); E(g)(iii)
WO56	Eagle Industrial Estate	Witney	0.69	Light industrial	E(g)(iii)
WO57	Newland Industrial Estate	Witney	0.69	Storage and distribution; light industrial	B8; E(g)(iii)
WO58	Des Roches Square	Witney	0.79	Office	E(g)(i)
WO59	Waterside Court (restricted)	Witney	0.27	Office	E(g)(i)
WO60	Spinners Yard, Scrap Yard, West End Industrial Estate	Witney	0.70	Office; light industrial; Sui Generis	E(g)(i); E(g)(iii); Sui Generis
WO61	Bus depot/car repairs	Witney	0.32	Storage and distribution	B8
WO62	BT depot/timber yard	Witney	0.63	Sui Generis	Sui Generis
WO63	Tungsten Park	Witney	10.0	General industrial; storage and distribution; office; R&D	B2; B8; E(g)(i); E(g)(ii)

Table 6.5 Assessment of other employment clusters

Ref	Name	Size	Use	Building age	Building condition	Public realm and environment	Access to services, facilities and amenities	Commercial access to major road network	Access to public transport	Compatibility of surrounding land uses
No.	-	Land area (ha)	Land use	RAG	RAG	RAG	RAG	RAG	RAG	Narrative
WO15	Langston Priory	0.86	E(g)(iii)							The site is located nearby to a few detached residential properties and adjacent to a retirement home. No negative effects are expected on these uses.
WO16	Mount Manor / Mount Farm Workshops	0.34	E(g)(iii)							There are residential properties surrounding the site and a few B&B/accommodation sites nearby e.g. Greystones Barn. No negative effects are likely.
WO17	Southill Business Park	0.97	E(g)(iii); Sui Generis							The cluster is located within Cornbury Park Estate and close to the park's stately home. Due to the uses on site, no negative effects are likely.
WO18	Groves Timber Yard / Groves Industrial Estate	1.41	B2; B8; E(g)(iii)							The cluster is surrounded by residential streets and is opposite Milton-under-Wychwood FC playing fields. No negative effects are expected on these uses.
WO19	Factory premises Charlbury / Woodstock Road	0.36	B2							There is an equestrian centre nearby the cluster. A small level of noise was observed from the cluster which could affect the residential properties which are adjacent to the site.
WO20	Old Pill Factory	0.55	E(g)(iii); E(f)							Charlbury train station is adjacent to the cluster. No negative effects are likely.
WO21	Manor Barns business centre	0.62	E(g)(i)							This cluster is characterised fully by offices. There are residential properties nearby the cluster but due to the activities taking place on site, no negative effects are expected on these uses.
WO22	Dudley Engineering, B E Skips, Bushey Ground, Bennetts Yard	1.89	B8; E(g)(iii)							There are residential properties nearby the cluster. No negative effects are expected on these uses.
WO23	East of Brize Norton Road	1.92	B2; B8							There are residential properties nearby the cluster. No negative effects are expected on these uses.
WO24	Wychwood Business Park	0.71	E(g)(i); E(g)(iii); E(f)							There are a few residential properties adjacent to the cluster, and Wychwood Primary School nearby. Due to the nature of the business park (predominantly offices), no negative effects are expected.
WO25	Bampton Business Centre (North and South)	4.60	B2; B8; E(g)(i)							The business centre is split over two sites (North and South) with farmland in between. No negative effects are expected on this use.
WO26	Viscount Court Industrial Estate	2.34	B2; E(g)(iii)							RAF Brize Norton is adjacent to the cluster. No negative effects are expected on this use.
WO27	Broughton Poggs Business Centre	1.69	B8							There are no proximate uses to the cluster.
WO28	Clanfield Workshops	0.35	B2; E(g)(iii)							There are a few residential properties nearby. No negative effects are expected on these uses.
WO29	Threshers Yard	1.35	E(g)(i)							Residential properties surround the cluster, Kingham Village Hall is opposite on West Street. As the site is fully office use, no negative effects are likely on these surrounding uses.
WO30	Worsham Mill	0.59	E(g)(iii)							A few residential properties are adjacent to the cluster. No negative effects are expected on these uses.
WO31	Enstone Airfield / Business Park (restricted access)	12.86	B2; Sui Generis							The cluster is located adjacent to Enstone Airfield, a Flight Training School and members club. No negative effects are likely on this use.
WO32	Greystones Industrial Estate	0.7	E(g)(i); E(g)(iii); E(f)							The cluster is adjacent to Chipping Norton Rugby Club and Bowls Club. No negative effects are expected on these uses.

Ref	Name	Size	Use	Building age	Building condition	Public realm and environment	Access to services, facilities and amenities	Commercial access to major road network	Access to public transport	Compatibility of surrounding land uses
No.	-	Land area (ha)	Land use	RAG	RAG	RAG	RAG	RAG	RAG	Narrative
WO33	Lotus F1 technical facility / Renault F1 (Restricted access)	6.99	E(g)(ii)							The cluster is located near to Oathill Farm. However, no negative effects are likely on the farm.
WO34	Swerford Heath Farm	0.70	B8							Adjacent to the cluster is Heath Farm Holiday Cottages. Despite their proximity, no negative effects are likely due to the nature of the businesses on site.
WO35	Oasis Business Park	1.94	E(g)(i)							This cluster is fully office use. It is adjacent to a few residential properties, and close to Eynsham town centre. However, due to the nature of the activities on site, no negative effects are expected on these uses.
WO36	Elm Place	0.6	E(g)(i)							The cluster is adjacent to residential properties, and close to Eynsham Wood and the Eynsham Park & Ride facility. As the site is office use, no negative effects are likely on these uses.
WO37	Oakfield Industrial Estate	10.16	B2; B8; E(g)(i); E(g)(ii); E(g)(iii)							There are a few residential properties nearby. Old Station Way cluster is adjacent to the cluster, and Eynsham Fire Station is adjacent. No negative effects are expected on these uses.
WO38	Old Station Way	1.44	B2; E(g)(i); E(g)(ii)							There are a few residential properties nearby, Oakfield Industrial Estate cluster is adjacent, and Eynsham Fire Station is adjacent.
WO39	Hanborough Business Park	6.87	B2; B8; E(g)(i)							The Churchill Court hotel is adjacent to the cluster. There is a small number of residential properties in the surrounding area, and Blenheim Office Park is adjacent to the cluster. No negative effects are expected on these uses.
WO40	Blenheim Office Park	2.79	B2; E(g)(i); E(g)(ii)							The Churchill Court hotel is adjacent to the cluster, there is a small number of residential properties in the surrounding area, and Hanborough Business Park is adjacent to the cluster. No negative effects are expected on these uses.
WO41	Lakeside Industrial Estate	7.94	B2; B8							The cluster is adjacent to Stanton Harcourt Lake and Stanton Harcourt Industrial Estate. No negative effects are likely on these uses.
WO42	Stanton Harcourt Industrial Estate	9.51	B2; B8							This cluster is adjacent to Stanton Harcourt Lake and Lakeside Industrial Estate. No negative effects are likely on these uses.
WO43	Blenheim Palace Sawmill	2.33	B2; E(g)(i)							The cluster is located within a very rural location with no proximate uses.
WO44	Crawley Mill Industrial Estate	1.77	B2; B8							The cluster is near to Crawley village but there are no immediate proximate uses.
WO45	Wroslyn Road Industrial Estate	0.98	B2							There are residential properties surrounding the cluster, and two schools 300m south east of the cluster. A mild level of noise was observed which could impact adjacent residential properties.
WO46	Siemens	5.18	B2; E(g)(i)							This cluster is adjacent to Eynsham Allotment Association allotments. Despite the proximity, no negative effects are likely on this use.
WO47	New Yatt Business Park	0.94	E(g)(iii)							A few residential properties and Glenfield Cottage holiday home are adjacent to the cluster. There is potential for noise pollution and traffic associated with the cluster on the holiday home.
WO48	Eynsham Park Sawmill	1.34	B8; E(g)(iii)							There are no proximate uses near to the cluster.
WO49	North Leigh Business Park	1.02	B2; E(g)(i)							There are multiple residential properties adjacent to the cluster, and North Leigh Football Club is located opposite.
WO50	Gate Farm	0.48	E(g)(i)							A few residential properties are adjacent to the cluster. Due to the predominant office use on site, no negative effects are likely on these surrounding uses.

Ref	Name	Size	Use	Building age	Building condition	Public realm and environment	Access to services, facilities and amenities	Commercial access to major road network	Access to public transport	Compatibility of surrounding land uses
No.	-	Land area (ha)	Land use	RAG	RAG	RAG	RAG	RAG	RAG	Narrative
WO51	Court Farm Barns	0.35	E(g)(i)							Recreational facility Tackley Water Garden (Grade II listed) is located east of the cluster. Despite its sensitivity, no negative effects are likely due to the office-based activities taking place on site.
WO52	Green Lane	1.05	B2							Community use Woodstock Lawn Cemetery is located north east of the site. No negative effects are likely on these uses.
WO53	The Cowyards Blenheim	0.64	E(g)(i)							This site is fully occupied by office use businesses. The cluster is adjacent to Blenheim Palace grounds but no negative effects are likely on this.
WO54	Worton park	0.78	E(g)(i)							Worton Hall events venue is adjacent to the cluster. As the use on site is fully office, no negative effects are likely on surrounding uses.
WO55	Aston Works	0.32	E(g)(i); E(g)(iii)							Residential properties are adjacent to the cluster. No negative effects are likely on these uses.
WO56	Eagle Industrial Estate	0.69	E(g)(iii)							The cluster is located in Witney town centre where there is an abundance of shops, and a few residential properties nearby. Due to the nature of the activities in the cluster, no negative effects are likely on these uses.
WO57	Newland Industrial Estate	0.69	B8; E(g)(iii)							The cluster is surrounded by residential streets, and in close proximity to community and recreational facilities King George V Play Area and King George's Field. No negative effects are likely on these uses.
WO58	Des Roches Square	0.79	E(g)(i)							The cluster is close to residential properties, a large Sainsbury's and Bishops Farm Mil (a renovated mill turned into seven apartments). No negative effects are expected on these uses.
WO59	Waterside Court	0.27	E(g)(i)							The cluster is adjacent to Windrush Leisure Centre, and very close to Woolgate Centre shopping centre. No negative effects are expected on these uses.
WO60	Spinners Yard, Scrap Yard, West End Industrial Estate	0.7	E(g)(i); E(g)(iii); Sui Generis							Residential properties are adjacent to the cluster. No negative effects are expected on these uses.
WO61	Bus depot/car repairs	0.32	B8							Residential properties surround the cluster. No negative effects are expected on these uses.
WO62	BT depot/timber yard	0.63	Sui Generis							The cluster is opposite the Woolgate Centre shopping centre, and is located behind Witney high street. No negative effects are expected on these uses.
WO63	Tungsten Park	10.0	B2; B8; E(g)(i); E(g)(ii)							The cluster is adjacent to residential streets, and close to Witney Golf Centre. No negative effects are expected on these uses.

Suitability of sites for meeting the needs of core or growth sectors

6.3.21. A key site in the district that is contributing to meeting the needs of core sectors is Tungsten Park in Witney. The site was completed in 2023 and provides 458,000 sq. ft of high-quality warehousing and industrial floorspace across 12 units. The cluster home to businesses across automotive, defence, medical and logistics sectors such as Certikin International, a swimming pool and wet leisure equipment manufacturer, Meech International, manufacturer of static control equipment, web cleaning systems and energy efficient compressed air technology, and Venture Engineering.

6.3.22. The district also has particular specialisms including biomedical equipment manufacture and engineering. Siemens is a major occupier in the district, and its site in Eynsham is used for the design and manufacture of MRI superconducting magnets. This cluster is a large, modern manufacturing facility with two storey offices to the front and large manufacturing unit to the rear. It should be noted however that some of the operations at the Eynsham site are expected to move to the newly permitted Siemens Healthineers development in Bicester.

6.3.23. Oakfield Industrial Estate is a very large industrial estate with wide roads capable of accommodating logistics vehicles. A portion of the site has recently been developed into Sedac Business Park, a brand new light industrial and storage distribution business park with 12 units. The rest of the cluster is in poorer condition and would benefit from modernisation to attract new businesses.

6.3.24. Stanton Harcourt Industrial Estate is currently expanding, and a large logistics facility is under construction within the cluster. All other buildings are occupied by storage and distribution companies such as CEVA Logistics. The site is geared towards logistics and storage typologies and could be intensified, however access to the A40 could be constrained by narrow and winding roads which would be unsuitable for heavy HGV traffic.

Presence of affordable workspace

6.3.25. Within the more rural or outlying clusters, there is a noticeable presence of workshops and light industrial units suggesting affordability. This was particularly evident at Langston Priory, Clanfield Workshops, Threshers Yard, and Eynsham Park Sawmill.

6.3.26. Greystones Industrial Estate is owned by West Oxfordshire District Council and is comprised of a range of older converted farm buildings to form lower specification, small industrial units.

Presence of vacant or derelict buildings

6.3.27. In general, clusters in Table 6.5 are well let and there is limited evidence of vacant or derelict buildings. Vacancy was observed at two new sites which have not been fully let yet: Tungsten Park and Oakfield Industrial Estate (Sedac Business Park). These two clusters offer high-quality general industrial and storage and distribution space and are currently being marketed.

6.3.28. Another notable vacant plot is the former Noble Foods site adjacent to Lakeside Industrial Estate. The site comprises a 3-storey office/reception to the front, with a modern warehouse/production area to the rear. There is also additional older warehousing and offices to the rear and west of the site. The site covers 3.5ha and has good links to the A40, suitable for manufacturing and logistics uses.

Evidence of carbon efficiencies

6.3.29. There is limited evidence of carbon efficiencies at the sites in Table 5.5, however solar panels were observed at Worsham Mill, Swerford Heath Farm, Oasis Business Park, Court Farm Barns, and Green Lane. In addition, there are electric

vehicle charging points available at Tungsten Park, Blenheim Office Park, Worsham Mill.

6.4. Locational requirements of specific sectors

Logistics

6.4.1. The logistics sector is seen as essential for securing prosperity, achieving levelling up ambitions, and enabling domestic and international trade[56]. West Oxfordshire has no motorways within the local authority area although is connected to the wider strategic road network via the A40 and A44 roads, albeit these experience significant congestion issues. There are around 650 employees within the logistics sector[57] in West Oxfordshire, representing around 1% of employees[58]; the area is considered to be not dense in terms of logistics activity[59]. Between 2015 and 2022, employment in the logistics sector in West Oxfordshire has declined by 13%, compared to growth in the South East region in the equivalent sector of +38%, and +42% across England more widely.

6.4.2. The main locations for logistics occupiers are to the north west and south of Witney (Tungsten Park, Station Lane Industrial Estate, Range Road), and at Stanton Harcourt (Stanton Harcourt Industrial Estate) and south of Eynsham (Oakfield Industrial Estate, Old Station Way). Key occupiers of floorspace in the logistics sector are CEVA Logistics, AirSea Packing Holdings, Chris Hayter Transport, Certikin, Donaldson Timber Systems, and Smurfit Westrock.

6.4.3. Logistics operations require premises with desirable attributes: motorway access, proximity to markets, proximity to appropriate skills, proximity to amenities, developable capacious sites, potential for unimpeded 24-hour working, good availability of services including broadband connectivity, and inter-modal facilities[60]. It is recommended by the British Property Federation[61] that sites meeting these criteria should be protected/brought forward by policy. Additionally, it is recognised that the delivery of homes should not be to the detriment of availability of land for freight and logistics, both in terms of competing needs for land and environmental constraints.

6.4.4. Third-party logistics ('3PL')/transport and high street retail are the primary occupiers of warehouse space nationally; 3PL and online retail have represented the main uses which have taken on considerable amounts of additional space in the period between 2015 and 2024[62]. The popularity of e-commerce requires last-mile delivery fulfilment centres near to customer bases. The impact of this is increased demand for distribution premises serving this purpose near to existing residences, and looking forward, near to new housing development[63]. Logistics units serving e-commerce needs are typically either national distribution centres, regional distribution centres, last mile fulfilment facilities or pick up points, as described in terms of space, land and locational requirements in Table 6.6.

[56] Department for Transport, (2022); Future of freight: a long term plan.
[57] The logistics sector has been defined as comprising the three Standard Industrial Classification codes: 492 - Freight rail transport; 494 – Freight transport by road and removal services; and 521 – Warehousing and storage. This accords with the approach taken in Frontier Economics, (2022); The Impact of Logistics Sites in the UK. Available online: https://logistics.org.uk/CMSPages/GetFile.aspx?guid=d3e3d23c-2dca-4b0a-8406-0d126c71eb4d&lang=en-GB
[58] Office for National Statistics, (2024); Business Register and Employment Survey 2022.
[59] Frontier Economics, (2022); The Impact of Logistics Sites in the UK.
[60] British Property Federation/Savills, (2022); Levelling Up – The Logic of Logistics. A report demonstrating the wider economic social and environmental benefits of the industrial and logistics sector.
[61] British Property Federation, (2021); BPF Employment Land Manifesto.
[62] UKWA, (2024); The size and make-up of the UK warehousing sector – 2024.
[63] British Property Federation/Turley, (2019); What Warehousing Where? Available online: https://bpf.org.uk/our-work/research-and-briefings/what-warehousing-where/#:~:text=What%20Warehousing%20Where?%20The%20report%20provides%20key%20recommendations%20for%20both

Table 6.6 Typical typology of e-commerce logistics units

Typology	Characteristics	Locational requirements
National distribution centres	46,000 – 93,000+ m^2 on up to 40 hectares	• In the centre or spine of the country • Have direct access to motorways, Strategic Rail Freight Infrastructure (SRFI), ports and airports • Are in close proximity to labour • Have a large power supply
Regional distribution centres	19,000 – 46,000 m^2 on 2+ hectares	*Not described*
Last mile fulfilment	Up to 9,290 m^2 on minimum 2 hectare site	• Concentration of population • Trends in online spend • Labour force characteristics • Sustainable access • Whether the market can be accommodated within existing facilities
Pick up points	A location to which consumer travels to collect a parcel such as locker facilities in urban (town) locations or existing retail stores	Convenient locations in close proximity to consumer residence, workplace or commute route

Source: British Property Federation/Turley, (2019); What Warehousing Where?

6.4.5. The logistics industry plays a key role in enabling an efficient and sustainable supply of goods for consumers and businesses, and contributes more broadly to economic growth, but has distinct locational requirements that need to be considered as discussed in this section. In West Oxfordshire, employment in the logistics sector is low and has declined in recent years, despite the presence of major logistics occupiers across the district. Despite its road connectivity challenges, the district has the opportunity to capitalise on sectors likely to occupy logistics facilities such as 3PL and online retail which have grown considerably over the last decade. Growth in logistics across the district could provide numerous economic benefits, and it is suggested that a new site employing around 1,500 people could generate an estimated additional 1,000 jobs in the local area as related service suppliers set up shop and hire new people[64].

Rural economy and tourism

6.4.6. The predominant land use in West Oxfordshire is agricultural[65], and the district has a distinct rural nature; the western area of district lies within the Cotswolds National Landscape and the rural economy is an important component of the district's economy more widely. To address uncertainty surrounding '*diminishing subsidies, rising costs, climate change and the growing importance of sustainability, food and energy security*', diversification of income streams for farm businesses and estates has become increasingly important; a steadily increasing amount of farm business income is derived from diversification activities[66]. Whereas diversification activities comprising providing services and use of facilities are still undertaken, increasingly more varied activities (such as tourism, farm shops, and on-site leisure activities) have become more common[67]. Agricultural premises can also host a variety of additional employment-supporting functions beyond those solely related to farming

[64] Frontier Economics, (2022); The Impact of Logistics Sites in the UK.
[65] Department for Levelling Up, Housing and Communities (2022). Land use in England, 2022.
[66] Savills, (2021); Rural Diversification. Available online: https://pdf.euro.savills.co.uk/uk/rural---other/rural-diversification---2021.pdf
[67] Savills, (2023); Rural tourism and leisure. Available online: https://www.savills.co.uk/research_articles/229130/353440-0?t

activities, including light industrial activities in workshops, (self-) storage, and cafes and food preparation, for example.

6.4.7. Much of the employment land and premises in West Oxfordshire which is located outside of large business parks/industrial estates within the main settlements tends to be in light industrial use, and sometimes hosted within diversified farm estates and converted agricultural premises. These premises can be smaller, of lower quality and therefore potentially more affordable for smaller businesses than brand new stock. Clusters such as Southill Business Park, Langston Priory, and Eynsham Park Sawmill have units which typify this typology of employment premises.

6.4.8. The Government recently engaged in consultation[68] on potential changes to permitted development rights (PDR) affecting agricultural diversification and development on agricultural units:

- With regard to agricultural buildings not solely in agricultural use (i.e. for light industrial or storage uses), such buildings do not currently have the right to be converted under PDR, however consultation responses were sought about whether such buildings should be afforded PDR to allow for conversion to residential uses. It was envisaged that PDR would not be extended to buildings already supporting agricultural diversification such as farm shops or buildings. If applied, this PDR could increase the scope of buildings in agricultural settings supporting various light industrial or storage functions to which PDR for conversion to residential uses could be invoked.
- Consultation responses were also sought with regard to the existing right allowing the change of use of a building from agricultural to flexible commercial use. The Government's intention was to broaden the scope of buildings which can benefit from the right in order to '*create more opportunities for rural diversification and support the rural economy'*. This would include extending the right beyond storage and distribution (Use Class B8), hotels (Use Class C1), and Commercial, Business and Service (Use Class E) to also include outdoor sports, recreation or fitness, and also general industrial uses (Use Class B2), although the latter would likely be limited to the processing of raw goods produced on-site. Furthermore, it was proposed that the PDR would extend to allow mixed uses under the right. The maximum quantum of floorspace is also proposed to be increased which would allow for more buildings to change use.

Science, digital, innovation and R&D

6.4.9. The Government since being elected in July 2024 has taken a positive and supportive approach towards the importance of key sectors as drivers of economic growth. The NPPF released in December 2024 for example emphasised '*planning policies should set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth, having regard to the national industrial strategy' and 'pay particular regard to facilitating development to meet the needs of a modern economy, including by identifying suitable locations for uses such as laboratories, gigafactories, data centres, digital infrastructure, freight and logistics*'.

6.4.10. Moreover, the Industrial Strategy Green Paper[69] published by the Government in October 2024 expands on this focus on economic growth by establishing a focus on existing strengths (for example in services and advanced manufacturing such as

[68] Department for Levelling Up, Housing and Communities, (2023); Consultation on additional flexibilities to support housing delivery, the agricultural sector, businesses, high streets and open prisons; and a call for evidence on nature-based solutions, farm efficiency projects and diversification. Available online: https://www.gov.uk/government/consultations/permitted-development-rights/consultation-on-additional-flexibilities-to-support-housing-delivery-the-agricultural-sector-businesses-high-streets-and-open-prisons-and-a-call-f

[69] HM Government, (2024); Invest 2035: The UK's Modern Industrial Strategy.

pharmaceuticals and aerospace) and emerging strengths in new technologies, systems and processes (comprising R&D, innovation and skills).

6.4.11. In West Oxfordshire there are a range of occupiers of employment space whose activities are engaged in many of these key existing and emerging sectors, aligning with national, regional and local economic growth aspirations. Table 6.7 gives some examples of businesses within these sectors and the types and locations of space which are occupied.

Table 6.7 Sectors, types of space and locations

Key sectors	Examples of businesses and locations	Characteristics of workspace
Pharmaceuticals and MedTech (Life Sciences)	• Siemens: design and manufacture of MRI superconducting magnets, occupy bespoke premises in Eynsham • Abbott Diabetes Care, manufacture of diabetes care monitoring and testing medical equipment • Owen Mumford: medical device manufacturer, occupy large premises in Chipping Norton and Woodstock	• Locating within healthy ecosystems/clusters of start-ups or similar businesses[70] • Access to medical professionals or teaching hospitals in which to perform trials • Proximity to high performing universities which may provide labour and spin-out opportunities • Incubator centres, innovation spaces, high quality offices, lab space
Aerospace	• Airbus: West Oxfordshire Business Park adjacent to RAF Brize Norton, Carterton • Airborne Systems: Ventura Park nearby to RAF Brize Norton, Carterton	• Typically large facilities with the capacity to expand over time[71]
Advanced manufacturing	• Alpine F1 team, located at bespoke facility formerly known as Renault F1 site • Rimac, located in brand new premises in Tungsten Park, Witney	• Bespoke premises typically including high-quality offices and lab spaces
Digital		• Demand for data centres[72] • Physical clustering of companies around established markets • Proximity to skills near tech hubs, innovation centres and universities • Digital infrastructure connectivity • Intelligent or smart buildings • Smart warehouses in proximity to urban centres, with (automated) micro-fulfilment capabilities[73]

6.4.12. The presence of the University of Oxford, which consistently ranks as one of the top universities in the world is also a driver of innovation given its contribution of new

[70] Cushman and Wakefield, (2024); Locating Science: The Life Sciences Landscape in the UK.
[71] ADS, (2024); Aerospace Sector – UK Outlook 2024.
[72] Savills, (2022); European Data Centres: Deep dive in the data sphere.
[73] Knight Frank, (2021); Tech solutions enabling better use of small, urban spaces.

patents and spin-out organisations. These spin-out organisations, as well as businesses seeking to locate within the Oxfordshire knowledge economy ecosystem often want to locate near to the university, or in locations where good connectivity to the university is available.

6.5. Summary

6.5.1. AECOM's qualitative survey of existing supply of employment land within West Oxfordshire comprised a site visit and desk-based research of 63 clusters. The assessment of existing supply was conducted based on a set of site appraisal criteria (agreed with the Council in advance) from which detailed analysis was carried out to identify the typologies of employment land within the district.

6.5.2. The assessment concludes that most clusters surveyed are functioning well, have high occupancy rates and support a diverse range of business types. Scores for each of the domains are mixed, with many clusters scoring well for building age and condition, but poorly for domains such as access to services and amenities and public transport. This owes to the presence of smaller centres in West Oxfordshire and associated public transport infrastructure. It is important to consider however that metrics such as access to services and public transport are particularly important for office and R&D premises as these sites tend to be high density and less easily served by on-site facilities and personal transport. Meanwhile, for industrial businesses which are often served by facilities on-site, poor access to amenities is likely to be less of an issue.

6.5.3. The district has an abundant supply of small, often good quality developments in rural and outlying areas. These clusters are characterised by converted agricultural and industrial buildings and light industrial business typologies. Many are occupied by small and start-up businesses. Farm diversification is a key element of the economy in the district, and rural sites have generally been occupied by the same (typically family-owned) businesses for a long time. The rural economy is linked to tourism more broadly in the district, and there is a lot of evidence of agricultural clusters being diversified with the opening of cafes of retail stores that attract tourists.

6.5.4. Meanwhile, the clusters located in or near to main towns tend to be much larger and are occupied by general industrial, storage and distribution, or office typologies, with industrial firms taking advantage of proximity to major roads such as the A40 and A44. Transport accessibility is however a key constraint in the district, and while the larger and higher performing industrial clusters tend to be located with direct or indirect access to the major road network, clusters less well connected to the road network are often smaller, offering older/poorer quality buildings, limited formal public realm and access to amenities.

6.5.5. While there is a strong focus in on the industrial market in the district, there is also a number of recent high-quality office development schemes. Witney accounts for most of the district's office accommodation and there are many business centre sites such as Des Roche Square near to the town. These developments offer variable terms and are key in enabling small businesses to enter the property market.

6.5.6. There is an opportunity for the district to capitalise on core growth sectors, with an existing positive presence of major logistics, aerospace, pharmaceutical, and advanced manufacturing businesses such as Airbus, Abbott Diabetes, Owen Mumford, Siemens and Lotus F1 occupying large sites in the district. A number of clusters are identified as having high growth potential, with Tungsten Park and Sedac Business Centre offering brand-new high-quality space suitable for industrial and logistics uses.

6.5.7. Sites are generally well let, with little evidence of vacancy or dereliction. Vacant spaces that were observed tend to be in new clusters such as Tungsten Park. A key vacant site however is the former Noble Foods plot, adjacent to Lakeside Industrial Estate. The space has been vacant since 2021 and offers 3.5ha of industrial space with good access to the A40.

7. Property market profile

7.1. Introduction

7.1.1. This section presents analysis of the commercial property markets in West Oxfordshire. Reference is also made to comparator geographies, namely the FEMA as identified in Section 4, sub-areas within West Oxfordshire, the South East (SE) region as a whole, and England. This reflects the fact that the commercial property market in West Oxfordshire is not self-contained, and instead forms part of a much wider market area encompassing the FEMA and region to some extent, varying somewhat by type of floorspace.

7.1.2. Data presented in this section is derived from CoStar which represents a comprehensive database of up-to-date property market data. Trends are presented where applicable, otherwise data for 2024 Quarter 3 (Q3) is shown, being the most recent period for which complete data is available. Analysis presented considers all properties for which information is available and no minimum threshold size has been applied to the data. All data presented reflects that which is available and is subject to gaps and inaccuracies.

7.1.3. Employment-generating properties comprised of office, light industrial, general industrial, and storage and distribution types are considered, in line with the definition of employment land. The relationship between historic and new planning use classes, their relationship to CoStar primary and secondary property type classification, and the nomenclature adopted for this report, are shown in Table 7.1 below. It is recognised that there are other property types which may contribute to employment use activity, but these will not be analysed for the purposes of this evidence base.

Table 7.1 Property type classification

Pre-2021 Planning Use Class	New Planning Use Classes	CoStar Primary Type	CoStar Secondary Type
B1a (revoked) – Offices	E(g)(i) – Offices to carry out any operational or administrative function	Office	• All
B1b (revoked) – Research and Development (R&D)	E(g)(ii) – Research and Development	Industrial	• R&D
B1c (revoked) – Industrial Processes	E(g)(iii) – Uses which can be carried out in a residential area without detriment to its amenity: industrial processes	Light industrial	• Light distribution • Light manufacturing • Showroom (light industrial)
B2 – General industrial (other than E(g))	B2	Industrial	• Food processing • Manufacturing • Service
B8 – Storage and Distribution	B8	Industrial	• Distribution • Warehouse • Truck terminal • Refrigeration / cold storage • Showroom (industrial)

Source: AECOM.

7.1.4. In this section, reference is made to use classes using the new Planning Use Class Order: E(g)(i); E(g)(iii); E(g)(iii); B2; and B8.

7.1.5. According to CoStar records, there are no properties which are predominantly in research and development use (R&D) (E(g)(iii) uses) identified in West Oxfordshire., However these activities will occur to some extent within the stock of employment land and are most likely to be recorded within office typologies in the CoStar records. As such, analysis of the office market in this section is presented as covering both E(g)(i) and E(g)(ii) uses.

7.1.6. The section is divided into four sub-sections covering the office [E(g)(i)/(ii)] and the light industrial [E(g)(iii)], general industrial [B2], and storage and distribution [B8] markets and provides an assessment of local and sub-regional property/floorspace by analysing the following key property market indicators:

- Total building stock and floorspace;
- Average premises size;
- Market rental values; and
- Vacancy, availability and net absorption.

7.2. Office market [E(g)(i)/ii)]

7.2.1. This section presents findings relating to the office property market in West Oxfordshire, along with some comparisons to both the FEMA, sub-areas, SE and England. The principal office areas in West Oxfordshire are located in the sub-areas of Eynsham Woodstock and Witney, primarily in the main settlements.

Premises and floorspace

7.2.2. CoStar data indicates the office market in West Oxfordshire is comprised of 235 properties, i.e. buildings in office use or an office component within a mixed-use building, accommodating 120,899 m^2 net internal area (NIA) floorspace, including existing space, and space under renovation.

7.2.3. Table 7.2 shows the number of office properties and the corresponding floorspace (in m^2) for West Oxfordshire, the FEMA, sub-areas, SE and England. West Oxfordshire accommodates 13.4% of properties within the FEMA, but only accounts for 7.4% of the FEMA's total office floorspace. The data also shows that the average building size in West Oxfordshire (514 m^2) is significantly lower than the average in the FEMA (930 m^2), the South East (989 m^2) and England (1,171 m^2). This demonstrates that the supply of office floorspace in West Oxfordshire is centred around small and medium sized premises. Across the sub-areas, Eynsham and Witney account for 74% of the total floorspace within West Oxfordshire (40,633 $m^2$and 49,143 m^2respectively).

Table 7.2 Office properties [E(g)(i) use] - buildings and floorspace

Geography	Amount of floorspace (m^2)	Number of premises	Average premises size (m^2)
West Oxfordshire	120,899	235	514
FEMA	1,627,674	1,751	930
South East	17,580,589	17,783	989
England	116,973,983	99,878	1,171
Burford - Charlbury sub-area	10,530	26	405
Carterton sub-area	9,725	15	648
Chipping Norton sub-area	10,868	32	340
Eynsham - Woodstock sub-area	40,633	84	484

Geography	Amount of floorspace (m^2)	Number of premises	Average premises size (m^2)
Witney sub-area	49,143	78	630

Source: CoStar (2024).

Rental values

7.2.4. Table 7.3 presents the average rental values (£/m^2/yr) recorded in Q3 2024 for office floorspace in West Oxfordshire, the FEMA, sub-areas, SE and England. It shows that West Oxfordshire has a significantly lower average rental value for office floorspace (£177/m^2/yr) compared to the FEMA (£304/m^2/yr), and SE (£278/m^2/yr). This is in part a reflection of the market being concentrated in smaller premises than is typical across these areas, naturally catering more for SMEs, with campus style offices occupied by larger firms being more prevalent within the FEMA (particularly in the Vale of White Horse and Oxford City) and generally across the SE. Across the sub-areas, the median average rental values in Burford Charlbury (£176/m^2/yr), Eynsham Woodstock (£177/m^2/yr) and Carterton (£172/m^2/yr) are similar to the average in West Oxfordshire. However, the rental values for Chipping Norton and Witney present lower average rental values (£167/m^2/yr).

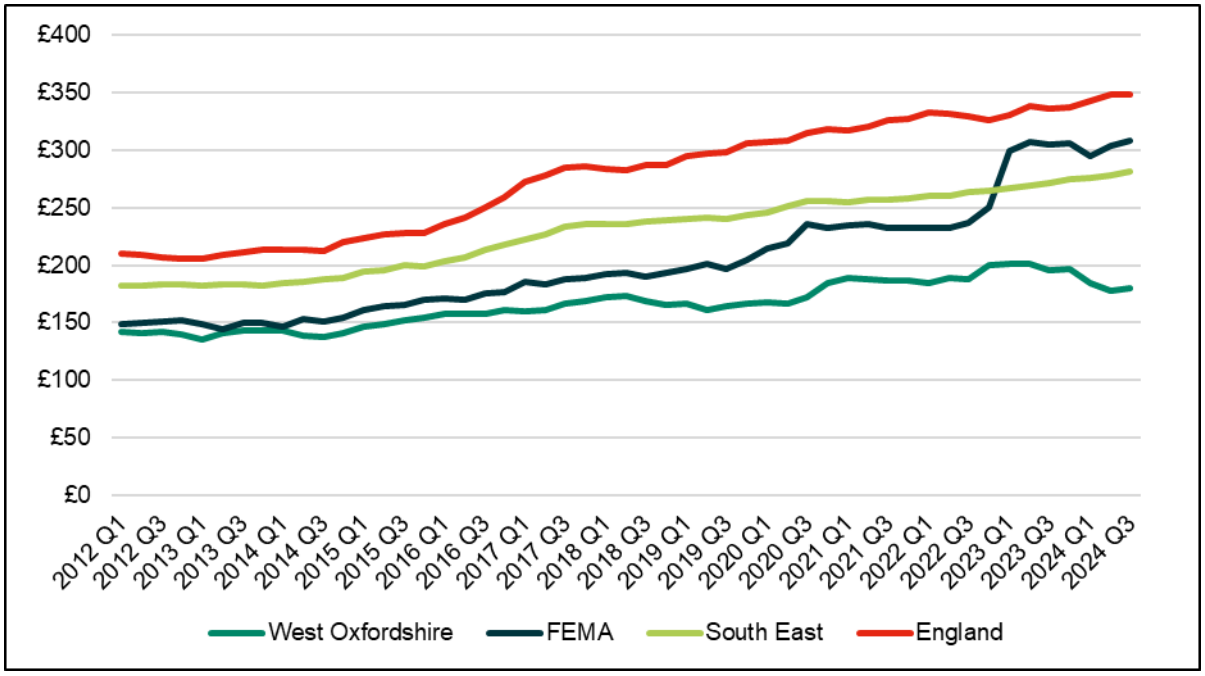
Table 7.3 Office properties – average rental values (£/m^2/yr)

Geography	Average rental value (£/m^2/yr)
West Oxfordshire	£177
FEMA	£304
South East	£278
England	£348
Burford Charlbury sub-area	£159 - £193
Carterton sub-area	£155 - £189
Chipping Norton sub-area	£152 - £182
Eynsham Woodstock sub-area	£161 - £193
Witney sub-area	£152 - £183

Source: CoStar (2024).

7.2.5. Figure 7.1 presents the change in rental values for office properties in West Oxfordshire, the FEMA, SE and England between Q1 2012 and Q3 2024. Average rents has increased by 26.8% in West Oxfordshire over this period; a notably lower rate of increase recorded across the FEMA (+107.8%), SE (+53.8%) and England (+65.7%). In the SE and UK markets, the upward trend in rents have been principally driven by the “flight to quality”, particularly since the Covid19 pandemic where changing working practices have put new, attractive, premises in highly accessible locations in high demand because they help attract staff to the office and are future-proofed against changes in regulations related to energy efficiency. The local West Oxfordshire market is focused more on smaller premises, dominated by SME occupiers, whose typical requirements are shaped more by affordability. Similarly, changes in working practices have had a less pronounced effect on commuting patterns in areas such as this where use of private car to travel to work predominates.

Figure 7.1 Office properties – average rental values (£/m²/yr) between Q2 2012 and Q3 2024



Source: CoStar (2024).

Vacancy, availability and net absorption rates

7.2.6. MHCLG guidance requires that evidence of market failure such as physical or ownership constraints that prevent employment sites being used effectively is considered. Therefore, this section presents data on vacancy, availability, and absorption rates of office premises in West Oxfordshire, the FEMA, sub-areas, SE and England.

7.2.7. CoStar records 'vacancy' in terms of space which is unoccupied and marketed. Table 7.4 shows the vacancy rate for office floorspace in West Oxfordshire, along with the FEMA, sub-areas, SE and England, in Q3 of 2024. West Oxfordshire has a similar floorspace vacancy rate (6.0%) to the FEMA (6.1%) but lower than the SE (8.2%) and England (8.1%) averages. Across the sub-areas, Chipping Norton and Eynsham Woodstock each present higher vacancy rate than is recorded for West Oxfordshire as a whole (11.1% and 8.2% respectively), with Witney presenting a lower vacancy rate (5.4%). Because individually each sub-area has a low amount of stock in absolute terms, vacancy is concentrated in few premises. Burford Charlbury and Carterton have significantly lower vacancy rates (0.4% and 0.0% respectively) which is a reflection of a lack of churn in these locations shaped by their very low supply.

7.2.8. Availability as recorded in CoStar encompasses floorspace that is available for re-let i.e. encompassing both vacant space and space being let but occupied. As also shown in Table 7.4, the availability rate of office floorspace in West Oxfordshire (7.2%) is lower than the FEMA (7.9%), SE (9.2%) and England (8.7%) averages. Across the sub-areas, the same patterns as recorded above for the vacancy rates are observed.

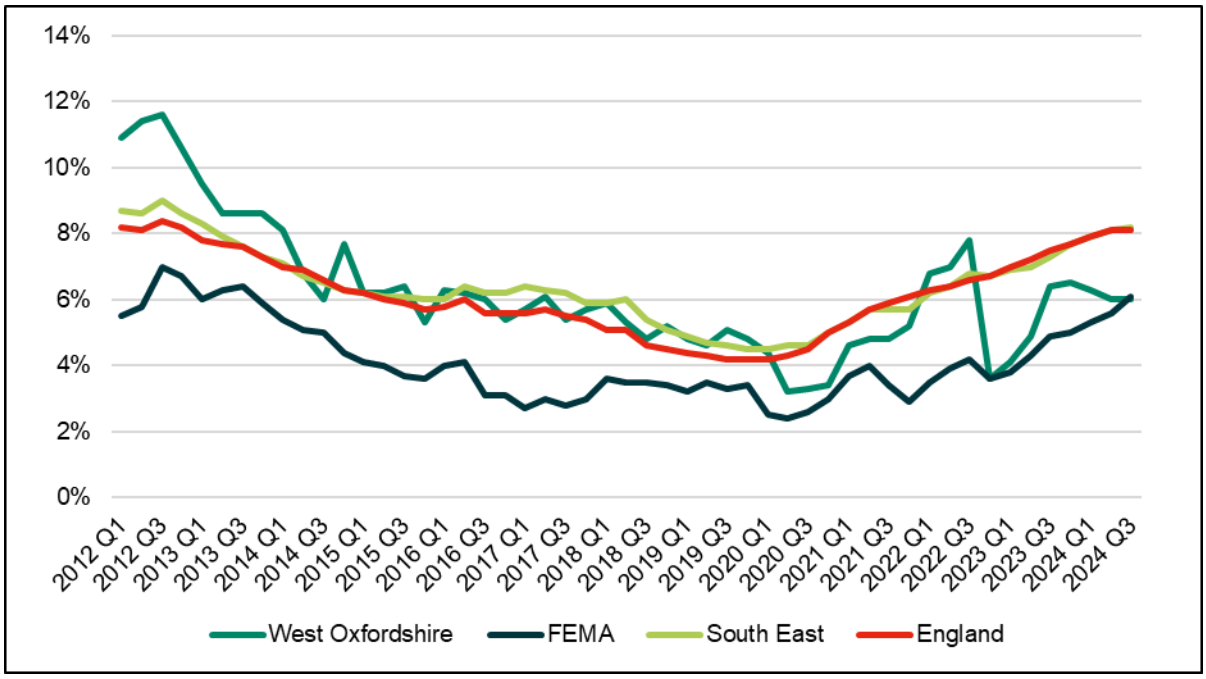
Table 7.4 Vacancy and availability rates of office floorspace in Q3 2024

Geography	Vacant floorspace (m^2)	Vacancy rate (%)	Availability rate (%)
West Oxfordshire	7,235	6.0%	7.2%
FEMA	98,764	6.1%	7.9%
South East	1,434,083	8.2%	9.2%
England	9,487,242	8.1%	8.7%
Burford Charlbury sub-area	46	0.4%	0.4%
Carterton sub-area	0	0.0%	0.0%
Chipping Norton sub-area	1,204	11.1%	9.4%
Eynsham Woodstock sub-area	3,351	8.2%	7.7%
Witney sub-area	2,633	5.4%	5.4%

Source: CoStar (2024).

7.2.9. Figure 7.2 shows the change in office floorspace vacancy rates between Q1 2012 and Q3 2024 for West Oxfordshire, the FEMA, SE and England. The vacancy rate in West Oxfordshire has decreased from 10.9% in Q1 2012 to 6.0% in Q3 2024. This represents the highest change in vacancy rates when compared to the FEMA (from 5.5% in Q1 2012 to 6.1% in Q3 2024), SE (from 8.7% in Q1 2012 to 8.2% in Q3 2024) and England (from 8.2% in Q1 2012 to 8.1% in Q3 2024).

Figure 7.2 Vacancy rate of office floorspace (%) between Q1 2012 and Q3 2024



Source: CoStar (2024).

7.2.10. Availability, as discussed, provides a view on vacant space and space being let but occupied. As such, this is higher than each size band's equivalent vacancy rate. The availability rate in West Oxfordshire has decreased from 14.7% in Q1 2012 to 7.2% in 2024. This represents the highest change in vacancy rates when compared to the FEMA (from 8.8% in Q1 2012 to 7.9% in Q3 2024), SE (from 11.2% in Q1 2012 to 9.2% in Q3 2024) and England (from 10.6 % in Q1 2012 to 8.7% in Q3 2024).

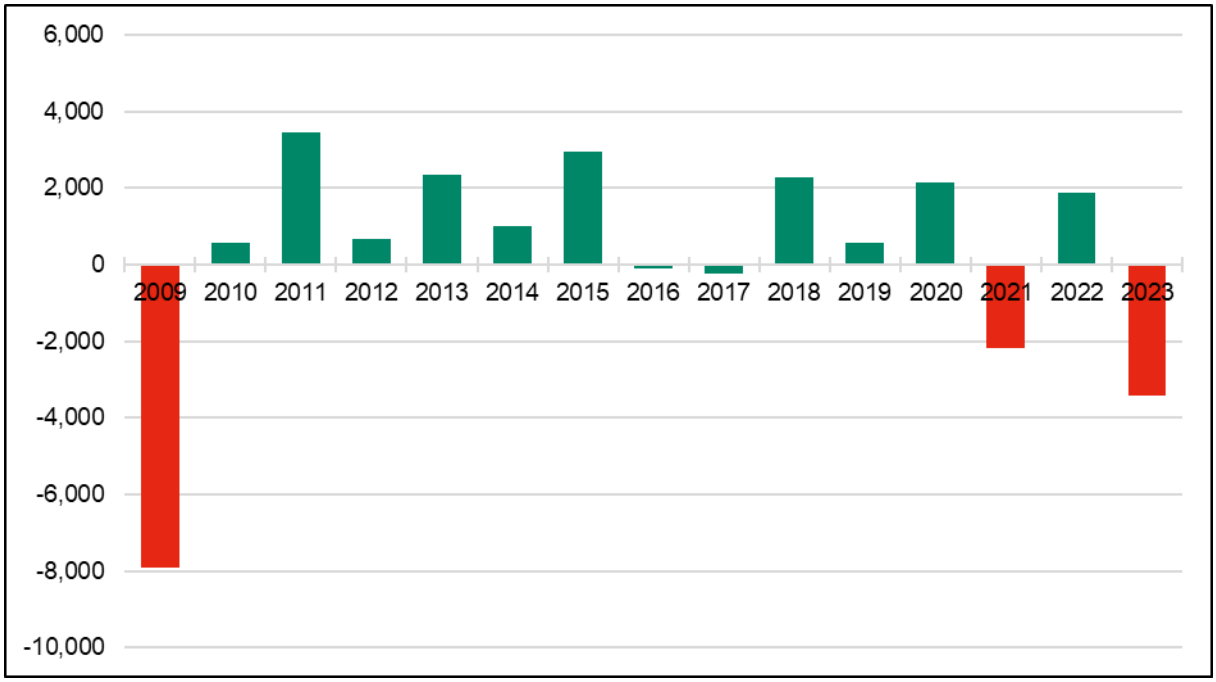
7.2.11. Whilst the observed strength of downward percentage changes in rates of vacancy and availability point, superficially, to a tightening in the office market in the district, caution is needed in drawing such conclusions in small market areas. Lower stock

levels recorded in single authority areas than wider market areas have a greater propensity to drive large changes in rates (upwards and downwards) than in comparator geographies where stock is aggregated and always therefore larger in extent. Each vacant premises accounts for a larger proportion of stock at a local level than for other areas, such that its occupancy or loss to other uses will drive bigger changes than they would in these other geographies. The particularly small size of the West Oxfordshire office market underpins this further. Nevertheless, the overall vacancy level for West Oxfordshire being lower than all other areas and the strength of its trend downwards points to the market performing quite well both generally and compared to historically.

7.2.12. Net absorption provides another angle on demand. The measure expresses the change in the overall quantum of occupied floorspace, typically recorded year on year. Positive annual net absorption means that a greater amount of space has been occupied from a given year to the next. Net absorption is not the reverse of vacancy as vacancy is an expression of the level of non-occupancy against total stock.

7.2.13. Figure 7.3 presents the net absorption of office floorspace in West Oxfordshire. Between 2009 and 2023 (the last year for which complete data is available), net absorption has fluctuated in West Oxfordshire. Negative net absorption rates have mostly occurred since 2020 which likely reflects to some degree the impact of COVID-19 on demand for office space through changed working practices to some degree, but is also underpinned by there being relatively few transactions within what is a very small market where movement in and out of space would typically be muted.

Figure 7.3 Net absorption of office floorspace in West Oxfordshire between 2009 and 2023 (m^2)



Source: CoStar (2024).

7.3. Light industrial market [E(g)(iii)]

7.3.1. This section presents findings related to the light industrial [E(g)(iii)] use class property market in West Oxfordshire, along with comparison to the wider FEMA, sub-areas within West Oxfordshire, SE and England.

Premises and floorspace

7.3.2. CoStar data indicates that the light industrial market in West Oxfordshire is comprised of 34 properties, with approximately 37,697m^2 net internal area (NIA) floorspace, including existing space, and space under renovation. It is important to note however that the categorisation of light and general industrial use is subjective to a degree due to fluidity and overlap between activities. Therefore, some light industrial properties may be counted within the general industrial category.

7.3.3. Table 7.5 shows the number of properties and the corresponding floorspace (in m^2) for West Oxfordshire, the wider FEMA, sub-areas, SE and England overall. West Oxfordshire accommodates around 19.3% of light industrial properties within the FEMA, and accounts for 17.5% of the FEMA's total light industrial floorspace. The data also shows that the average property size in West Oxfordshire is slightly smaller than the average in the FEMA, SE and England as a whole.

7.3.4. Across the sub-areas, Eynsham - Woodstock accommodates 35.2% of the light industrial properties in West Oxfordshire but only 10.8% of the floorspace. Eynsham - Woodstock therefore has a significantly smaller average premise size (338 m^2) when compared to the rest of sub-areas. Burford - Charlbury (1,907 m^2), Carterton (1,871 m^2) and Chipping Norton (2,456 m^2) have significantly higher average premises sizes when compared to West Oxfordshire as a whole.

Table 7.5 Light industrial properties [E(g)(iii) use] – buildings and floorspace

Geography	Amount of floorspace (m^2)	Number of premises	Average premises size (m^2)
West Oxfordshire	37,697	34	1,109
FEMA	215,123	176	1,222
South East	2,685,576	2,084	1,289
England	20,616,489	15,082	1,367
Burford Charlbury sub-area	1,907	1	1,907
Carterton sub-area	11,226	6	1,871
Chipping Norton sub-area	9,824	4	2,456
Eynsham Woodstock sub-area	4,062	12	339
Witney sub-area	10,677	11	971

Source: CoStar (2024).

Rental values

7.3.5. Table 7.6 presents the achieved average rental values in Q3 2024 for light industrial floorspace in West Oxfordshire, the FEMA, sub-areas, SE and England. It shows that West Oxfordshire has a somewhat lower but not markedly different average rental value for light industrial floorspace (£103/m^2/yr) than the FEMA (£105/m^2/yr), SE (£115/m^2/yr) and England as a whole (£116/m^2/yr).

7.3.6. Across the sub-areas, the lowest market rental values are recorded in the Eynsham Woodstock and Chipping Norton sub-areas, with the highest being in Burford Charlbury where there is only one premises in this use.

Table 7.6 Average rental values for light industrial floorspace (£/m^2/yr) in Q3 2024

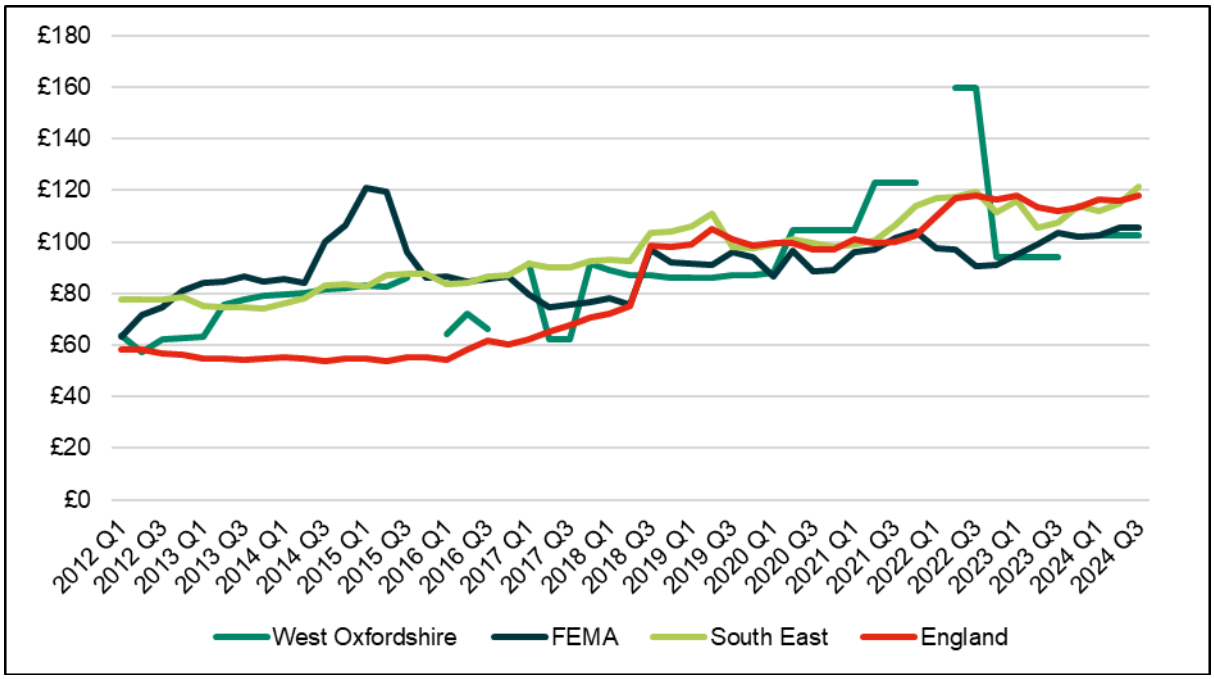
Geography	Average rental value (£/m^2/yr)
West Oxfordshire	£103
FEMA	£105

Geography	Average rental value (£/m²/yr)
South East	£115
England	£116
Burford Charlbury sub-area	£98 - £103
Carterton sub-area	£80 - £95
Chipping Norton sub-area	£79 - £97
Eynsham Woodstock sub-area	£76 - £93
Witney sub-area	£80 - £98

Source: CoStar (2024).

7.3.7. Figure 7.4 presents the changing rental values in West Oxfordshire, the FEMA, SE and England between Q1 2012 and Q3 2024 for this use[74]. The average rent has increased in West Oxfordshire by 61.9% since Q1 2012, higher than the increase in SE (+56.4%) but lower than the FEMA (+67.0%) and England (+101.5%) as a whole. This could be due to the small size of the market and the influence that the number of transactions can have on trend analysis, given that in some years this could be very few and thus more skewed than in larger markets. Over time achieved market rental values for light industrial floorspace has broadly tracked with the equivalent rates for wider geographies.

Figure 7.4 Average rental values for light Industrial floorspace (£/m²/yr) between Q1 2012 and Q3 2024



Source: CoStar (2024).

Vacancy, availability and net absorption rates

7.3.8. Table 7.7 shows the vacancy rate and availability rate for the light industrial market in West Oxfordshire, the FEMA, sub-areas, SE and England, in Q3 2024. Premises in West Oxfordshire are fully occupied and therefore the vacancy rate is zero. The vacancy in the FEMA (0.4%) is nearly zero, with both SE (3.3%) and England (2.7%) presenting slightly higher vacancy rates but below usual optimal/frictional vacancy levels for industrial premises of below 5%. The availability rate for West

[74] Please note that data for Q4 in 2015, 2016, 2021 and 2023 is not available from CoStar.

Oxfordshire (3.6%) is similar to the SE (3.7%) but higher than the FEMA (1.1%) and England as a whole (3.0%).

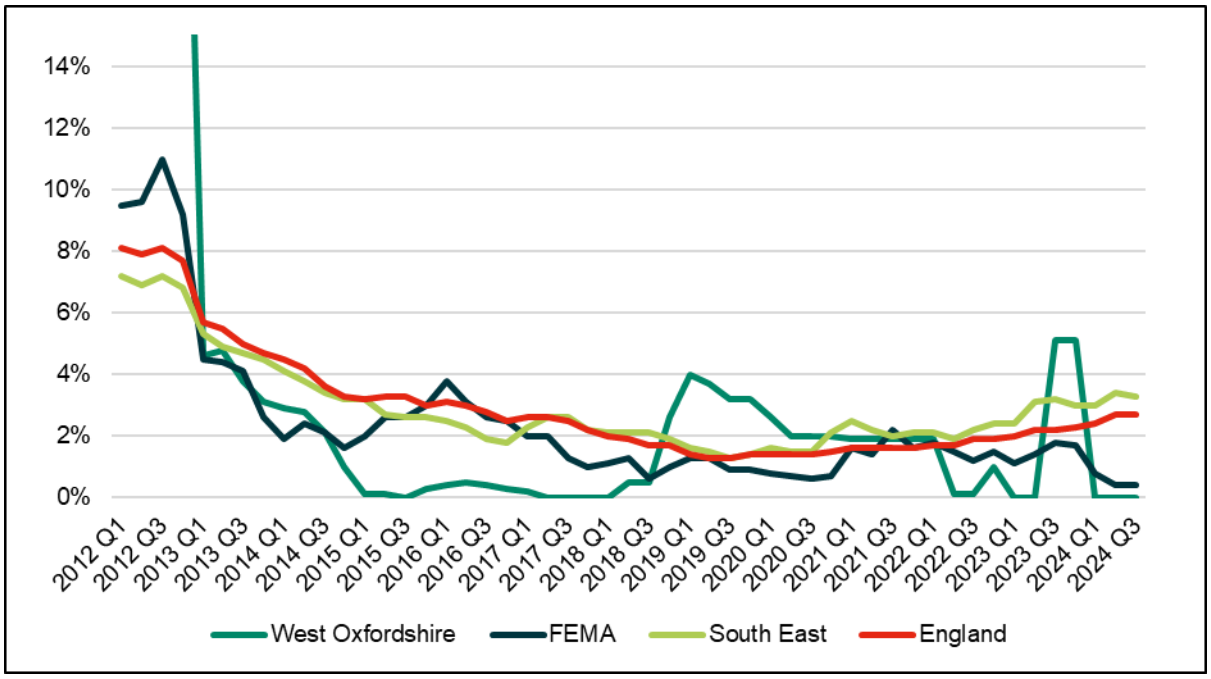
Table 7.7 Vacancy and availability rates of light industrial floorspace

Geography	Vacant floorspace (m^2)	Vacancy rate (%)	Availability rate (%)
West Oxfordshire	0	0.0%	3.6%
FEMA	779	0.4%	1.1%
South East	89,538	3.4%	3.7%
England	565,108	2.7%	3.0%

Source: CoStar (2024).

7.3.9. Figure 7.5 shows the change in light industrial floorspace vacancy rates between Q1 2012 and Q2 2024 for West Oxfordshire, the FEMA, SE and England. Vacancy rates in West Oxfordshire have decreased from 31.0% in Q1 2012[75] to 0.0% in 2024. With the exception of the anomalous rate in 2012, vacancy has remained very low since 2013 and has mostly fluctuated around no vacancy at all over this period. Rates are skewed by the low levels of premises and low churn between occupiers typical of a small market.

Figure 7.5 Vacancy of light industrial floorspace between Q1 2012 and Q3 2024

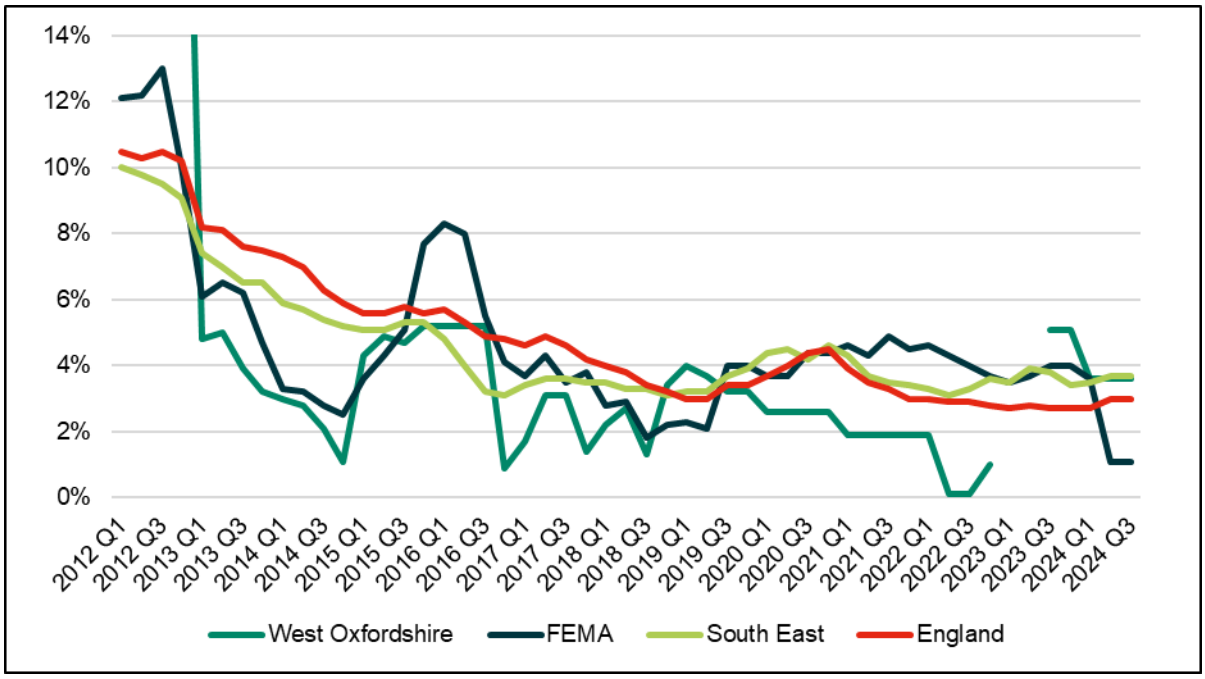


Source: CoStar (2024).

7.3.10. The availability rate in West Oxfordshire has decreased from 4.8% in Q1 2013 to 3.6% in Q3 2024. This represents the smallest change in rate of availability when compared to the FEMA (from 6.1% in Q1 2013 to 1.1% in Q3 2024), SE (from 7.4% in Q1 2013 to 3.7% in Q3 2024) and England (from 8.2 % in Q1 2013 to 3.0% in Q3 2024).

[75] Note this outlying figure has not been shown within the figure in order to aid interpretation of the data.

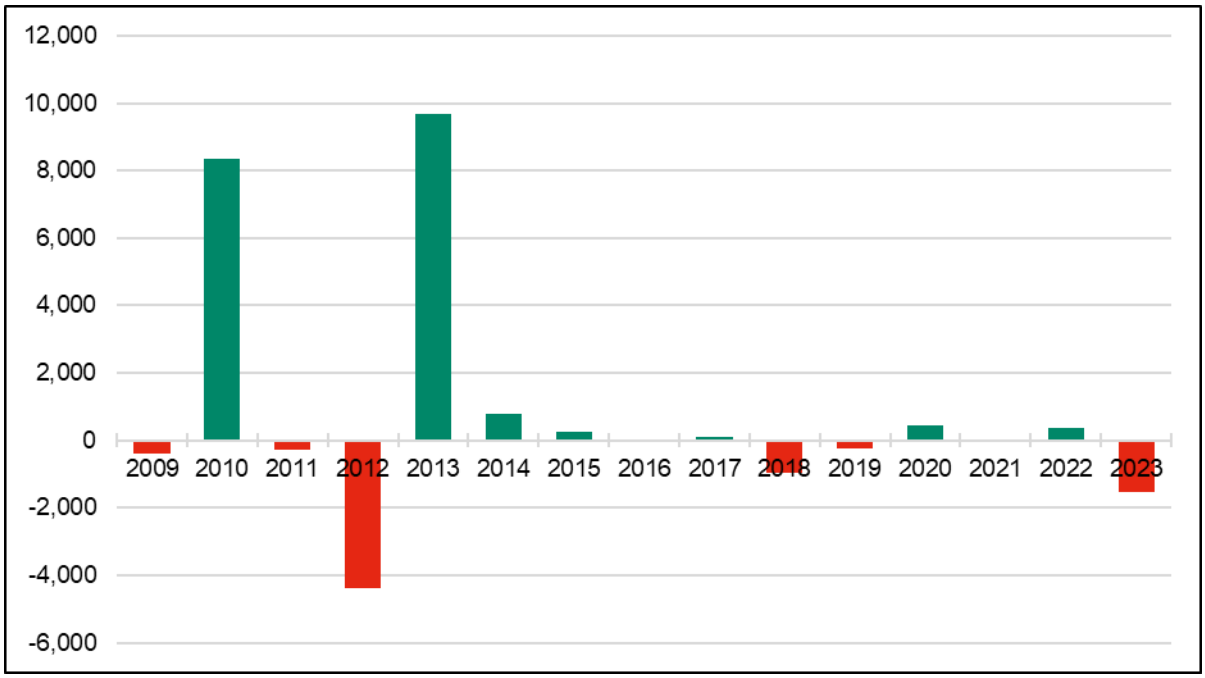
Figure 7.6 Availability of light industrial floorspace between Q1 2012 and Q3 2024



Source: CoStar (2024).

7.3.11. Figure 7.7 presents net absorption for light industrial floorspace in West Oxfordshire. Between 2013 and 2023 (the last year for which complete data is available), the rate of net absorption has been close to zero in West Oxfordshire potentially reflecting a lack of transactions amongst the type of space. Agents advised that occupiers understanding the constraints on supply may be disincentivised to move, and rather hold on to space in locations near to the local markets and communities which the types of business which occupy this space tend to serve.

Figure 7.7 Net absorption rate of light industrial floorspace in West Oxfordshire between 2009 and 2024 (m^2)



Source: CoStar (2024).

7.4. General industrial market [B2]

7.4.1. This section presents findings related to the general industrial [B2] use class in West Oxfordshire, along with comparison to both the wider FEMA, sub-areas in West Oxfordshire, SE and England.

Premises and floorspace

7.4.2. CoStar data indicates that the industrial market in West Oxfordshire is comprised of 101 properties, with approximately 105,961 m^2 net internal area (NIA) floorspace, including existing space, and space under renovation.

7.4.3. Table 7.8 shows the number of B2 industrial properties and the corresponding floorspace (in m^2) for West Oxfordshire, the wider FEMA, sub-areas in West Oxfordshire, SE and England overall. West Oxfordshire accommodates around 16.0% of general industrial properties within the FEMA, but accounts for only 9.7% of the FEMA's total industrial floorspace. The data also shows that the average property size in West Oxfordshire is significantly smaller than the average in the FEMA, SE and the average for England as a whole. This is reflective of the sometimes limited space for expansion of premises/delivery of new premises within clusters of employment sites.

7.4.4. Across the sub-areas, Witney accounts for around 41.6% of the properties within West Oxfordshire but only accounts for 26.0% of the floorspace. Eynsham Woodstock has a significantly higher average premises size (2,499 m^2) mainly driven by the property sizes of Siemens Magnet Technology (19,304 m^2), those at Horizon Technology Park (>9,290 m^2) and the former Noble Foods building at Standlake (10,717 m^2). There are a number of very large premises in the Witney sub-area however this sub-area is characterised by a wide range of property sizes.

Table 7.8 General industrial properties [B2 use] – buildings and floorspace

Geography	Amount of floorspace (m^2)	Number of premises	Average premises size (m^2)
West Oxfordshire	105,961	101	1,049
FEMA	1,094,742	633	1,729
South East	6,649,752	5,776	1,151
England	71,655,079	43,952	1,630
Burford Charlbury sub-area	1,234	4	309
Carterton sub-area	10,717	20	536
Chipping Norton sub-area	18,931	16	1,183
Eynsham Woodstock sub-area	47,485	19	2,499
Witney sub-area	27,593	42	657

Source: CoStar (2024).

Rental values

7.4.5. Table 7.9 presents average achieved rental values in Q3 2024 for general industrial spaces in West Oxfordshire, the FEMA, sub-areas, SE and England[76]. It is shown that West Oxfordshire has an average rental value for industrial floorspace of £125/m^2/yr, which is notably higher than the FEMA (£90/m^2/yr), SE (£114/m^2/yr) and England (£85/m^2/yr).

[76] Please note that for the sub-areas, building level rental values have been averaged which are estimates. Therefore there are slight discrepancies compared to the wider area rental values.

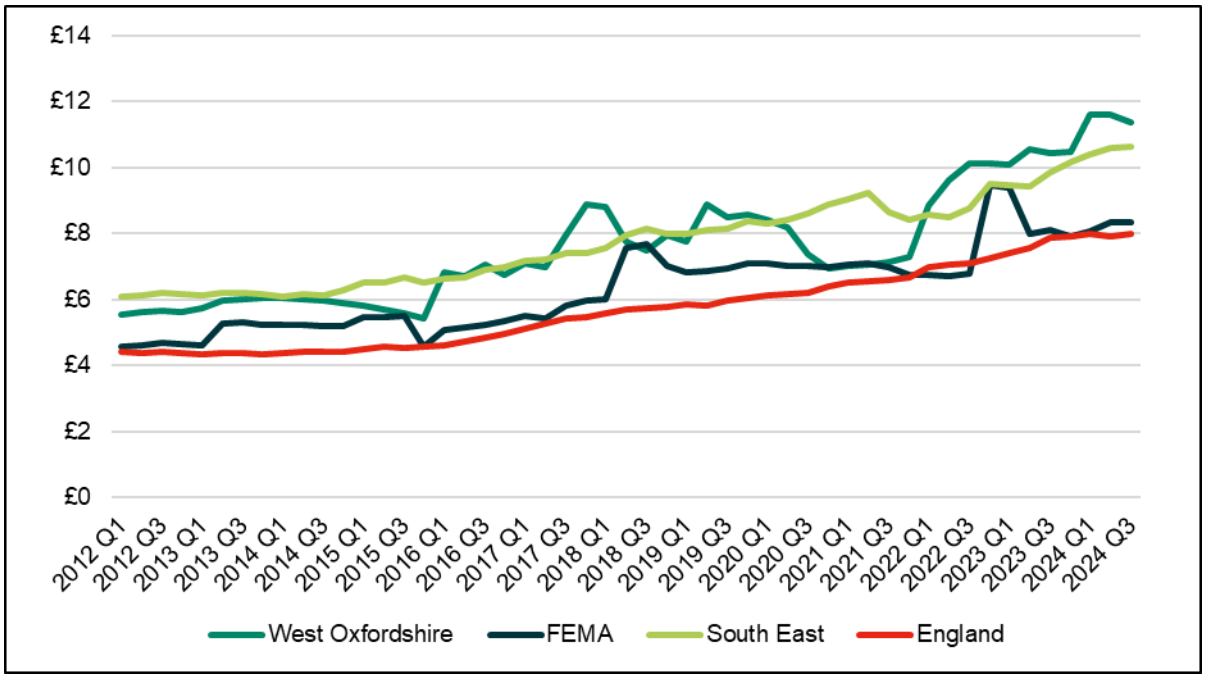
Table 7.9 Average rental values for General Industrial floorspace (£/m²/yr) in Q3 2024

Geography	Average value (£/m²/yr)
West Oxfordshire	£123
FEMA	£90
South East	£114
England	£86
Burford Charlbury sub-area	£95 – £117
Carterton sub-area	£83 - £101
Chipping Norton sub-area	£93 - £98
Eynsham Woodstock sub-area	£84 - £101
Witney sub-area	£85 - £103

Source: CoStar (2024).

7.4.6. Figure 7.8 presents the change in achieved rental values for general industrial space in West Oxfordshire, the FEMA, SE and England between Q1 2012 and Q3 2024. The average rent per m² in West Oxfordshire experienced an increase of 105.2% between Q1 2012 and Q3 2024. This is significantly higher than the increase in the FEMA (+82.7%), SE (+74.8%) and England (+81.0%).

Figure 7.8 Average rental values for industrial floorspace (£/m²/yr) between Q1 2012 and Q3 2024



Source: CoStar (2024).

Vacancy, availability and absorption rates

7.4.7. Table 7.10 shows the vacancy rate and availability rate for the industrial market in West Oxfordshire, the wider FEMA, sub-areas, SE and England. In Q3 2024, the vacancy rate in West Oxfordshire was 1.8%, which was higher than the FEMA (0.7%) but lower than the average for the SE (2.5%) and England (2.2%).

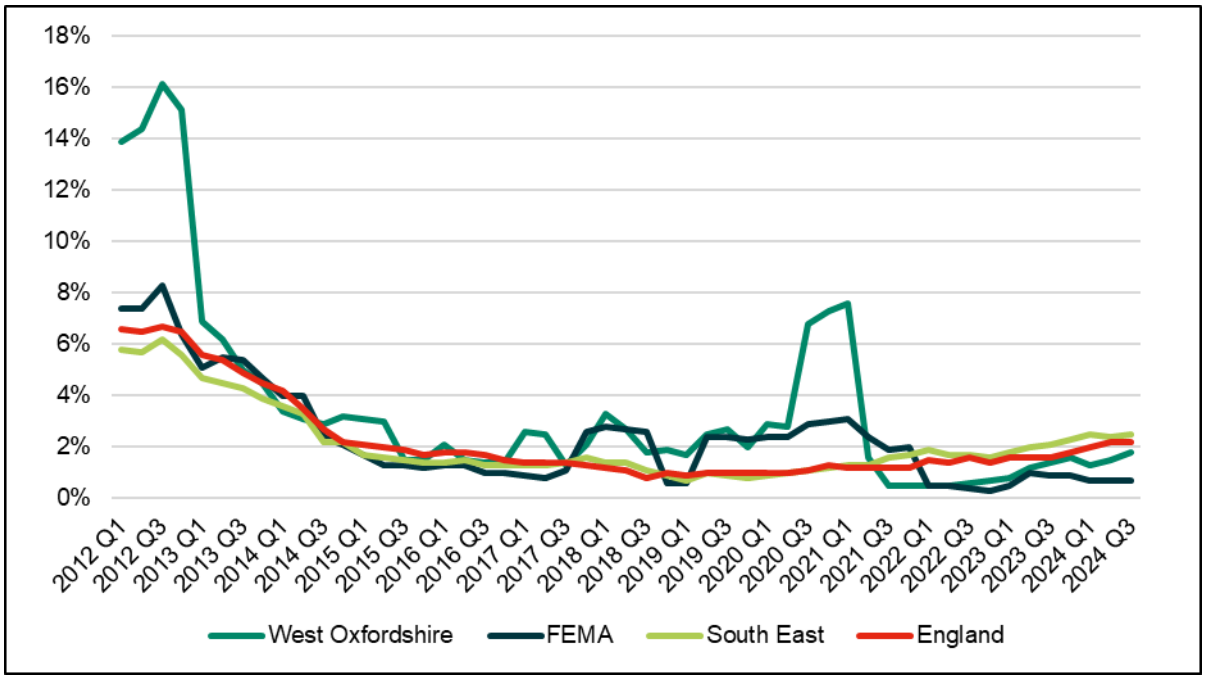
Table 7.10 Vacancy and availability rates of general industrial floorspace

Geography	Vacant floorspace (m^2)	Vacancy rate (%)	Availability rate (%)
West Oxfordshire	1,886	1.8%	1.6%
FEMA	7,792	0.7%	0.7%
South East	167,683	2.5%	2.8%
England	1,611,374	2.2%	2.4%
Burford Charlbury sub-area	0	0.0%	0.0%
Carterton sub-area	312	2.9%	2.9%
Chipping Norton sub-area	1,370	7.2%	2.6%
Eynsham Woodstock sub-area	204	0.4%	0.7%
Witney sub-area	0	0.0%	0.0%

Source: CoStar (2024).

7.4.8. Figure 7.9 shows the change in general industrial floorspace vacancy rates between Q1 2012 and Q3 2024 for West Oxfordshire, the FEMA, SE and England. Over the period since 2013 vacancy rates for general industrial floorspace, as for light industrial floorspace, have remained very low (mostly below 4%) reflecting low vacancy amongst this use class across all geographies considered. As of Q3 2024 there is no vacant general industrial floorspace in the district, which is likely to persist. High demand for limited space has the effect of driving higher market rental values when compared to regional and national averages.

Figure 7.9 Vacancy of industrial floorspace between Q1 2012 and Q3 2024

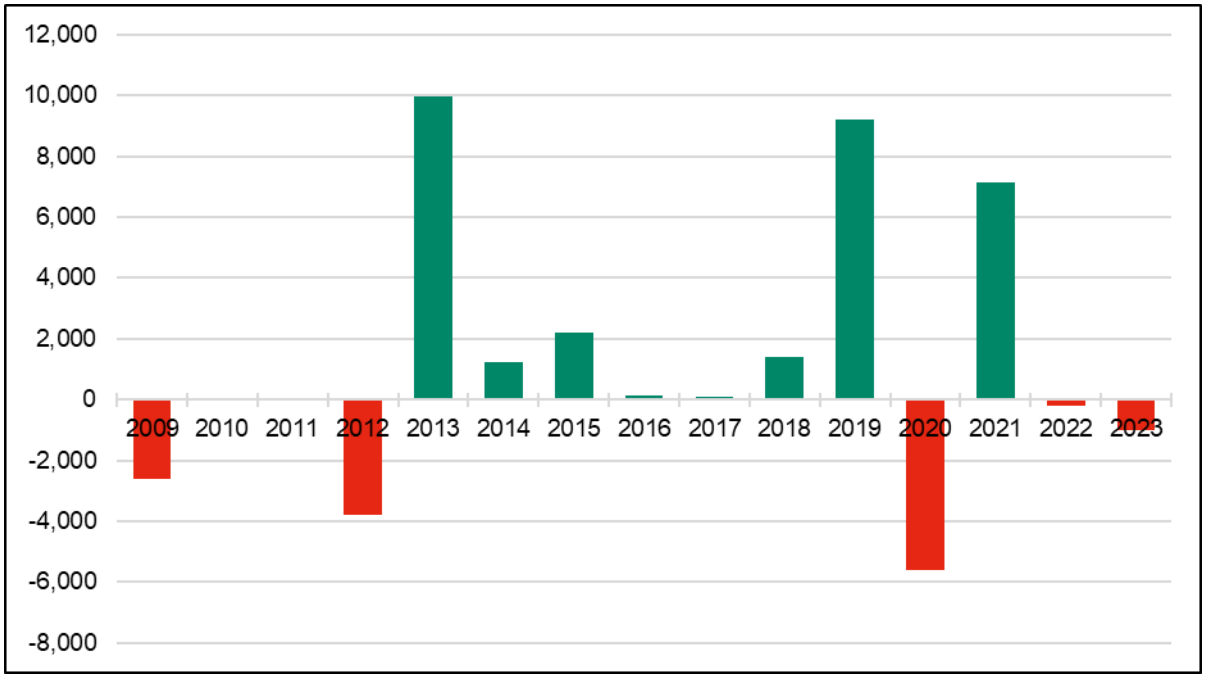


Source: CoStar (2024).

7.4.9. Similarly, availability rates in West Oxfordshire have fluctuated mostly below 4% since 2013, peaking in Q1 2021 (9.0%), and standing at 1.5% at the time of writing.

7.4.10. In respect of net absorption, Figure 7.10 presents rates for general industrial floorspace in West Oxfordshire between 2009 and 2023 (the last year for which complete data is available). Net absorption has been largely positive over this period suggesting demand has been persistent over this period.

Figure 7.10 Net absorption rate of general industrial floorspace between 2009 and 2023



Source: CoStar (2024).

7.5. Storage and distribution market [B8]

7.5.1. This section presents findings relating to the storage and distribution [B2 use class] in West Oxfordshire, along with comparison to both the wider FEMA, sub-areas in West Oxfordshire, SE and England.

Premises and floorspace

7.5.2. CoStar data indicates that the storage and distribution market in West Oxfordshire is comprised of 99 properties, with approximately 295,630 m^2 net internal area (NIA) floorspace, including existing space, and space under renovation.

7.5.3. Table 7.11 shows the number of storage and distribution properties and the corresponding floorspace (in m^2) for West Oxfordshire, the FEMA, sub-areas, SE and England overall. West Oxfordshire accommodates around 16.3% of the storage and distribution properties within the FEMA, and accounts for 12.3% of the FEMA's total storage and distribution floorspace. It is also shown that that the average property size in West Oxfordshire (2,986 m^2) is smaller than the average in the FEMA (3,955 m^2), SE (3,034 m^2) and England (3,670 m^2)

7.5.4. Across the sub-areas, properties are mostly concentrated in Witney, with a supply of premises in Eynsham Woodstock, with the three other areas each containing less than three properties. The largest average premises sizes are located in the Witney (3,720 m^2) and Carterton (2,065 m^2) sub-areas.

Table 7.11 Storage and distribution properties [B8 use] – buildings and floorspace

Geography	Amount of floorspace (m^2)	Number of premises	Average premises size (m^2)
West Oxfordshire	295,630	99	2,986
FEMA	2,404,551	608	3,955
South East	23,808,977	7,848	3,034
England	192,183,642	53,372	3,670
Burford Charlbury sub-area	2,394	3	798
Carterton sub-area	14,458	7	2,065
Chipping Norton sub-area	7,975	5	1,595
Eynsham Woodstock sub-area	43,859	23	1,906
Witney sub-area	226,944	61	3,720

Source: CoStar (2024).

Rental values

7.5.5. Table 7.12 presents the average achieved rental values in Q3 2024 for storage and distribution floorspace in West Oxfordshire, the FEMA, sub-areas, SE and England.[77] It shows that West Oxfordshire has an average rental value for this type of floorspace (£85/m^2/yr) is notably lower than the FEMA (£96/m^2/yr), SE (£121/m^2/yr) and England (£98/m^2/yr). Agents noted that the lack of strategic roads, and prevalence of congestion on the A40, meant that the area is, for the most part, less attractive to B8 occupiers and even with planned road improvements this is unlikely to change. Rental values are lower than elsewhere for this reason.

Table 7.12 Average rental values for storage and distribution floorspace (£/m^2/yr) in Q3 2024

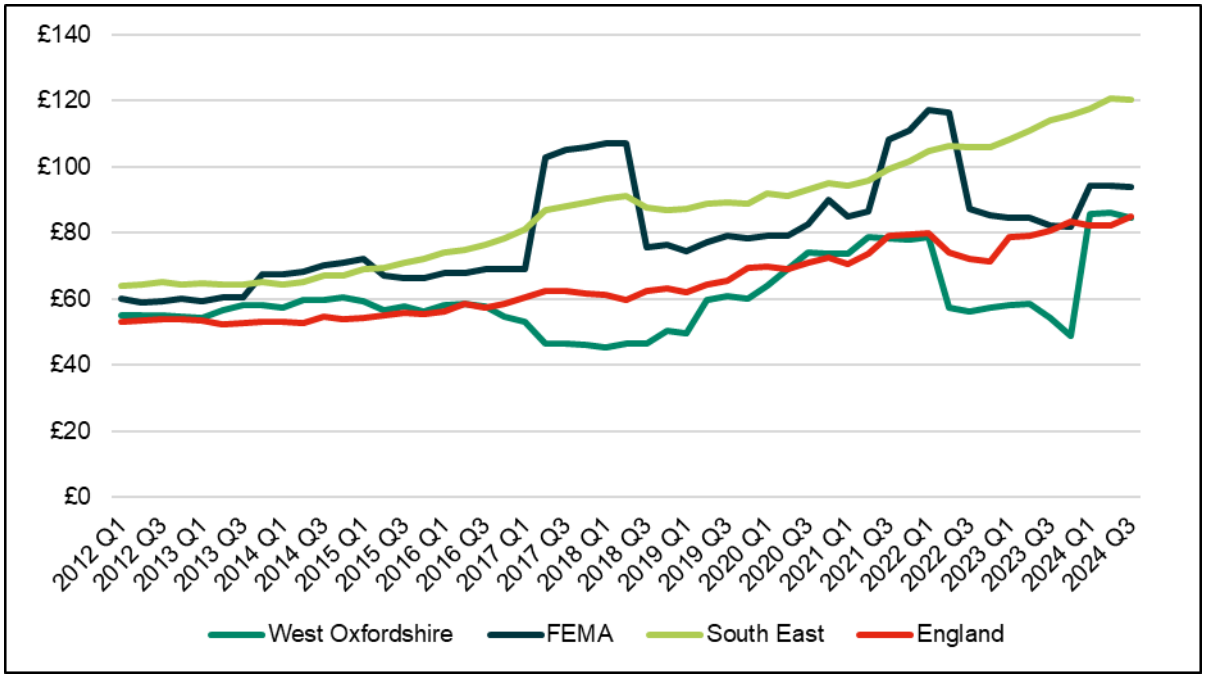
Geography	Average rental value (£/m^2/yr)
West Oxfordshire	£85
FEMA	£94
South East	£120
England	£98
Burford Charlbury sub-area	£56 - £68
Carterton sub-area	£66 - £78
Chipping Norton sub-area	£65 - £80
Eynsham Woodstock sub-area	£66 - £80
Witney sub-area	£74 - £88

Source: CoStar (2024).

7.5.6. Figure 6-13 presents the trend in rental values for storage and distribution floorspace in West Oxfordshire, the FEMA, SE and England between Q1 2012 and Q3 2024. The average rent per m^2 in West Oxfordshire was significantly lower than for the FEMA and SE between 2016 and 2019 and between 2022 and 2023. In 2024, storage and distribution premises achieve a similar rental value to the rate for England and the FEMA, albeit much lower than achieved across the SE region.

[77] Please note that for the sub-areas, building level rental values have been averaged which are estimates. Therefore there are slight discrepancies compared to the wider area rental values.

Figure 7.11 Average rent per m² for storage and distribution floorspace between Q1 2012 and Q3 2024



Source: CoStar (2024).

Vacancy, availability and absorption rates

7.5.7. Table 7.13 shows the vacancy rate and availability rate for floorspace in the storage and distribution market in West Oxfordshire, the FEMA, sub-areas, SE and England in Q3 2024. The vacancy rate in West Oxfordshire is lower (3.8%) than the FEMA (7.5%), SE (5.7%) and England (5.7%). Similarly, the availability rate in West Oxfordshire is significantly lower (3.2%) than the FEMA (6.1%), SE (5.8%) and England (5.8%). The only sub-areas with vacant premises at the time of writing were in Witney, where the majority of total premises stock is found, and in Carterton.

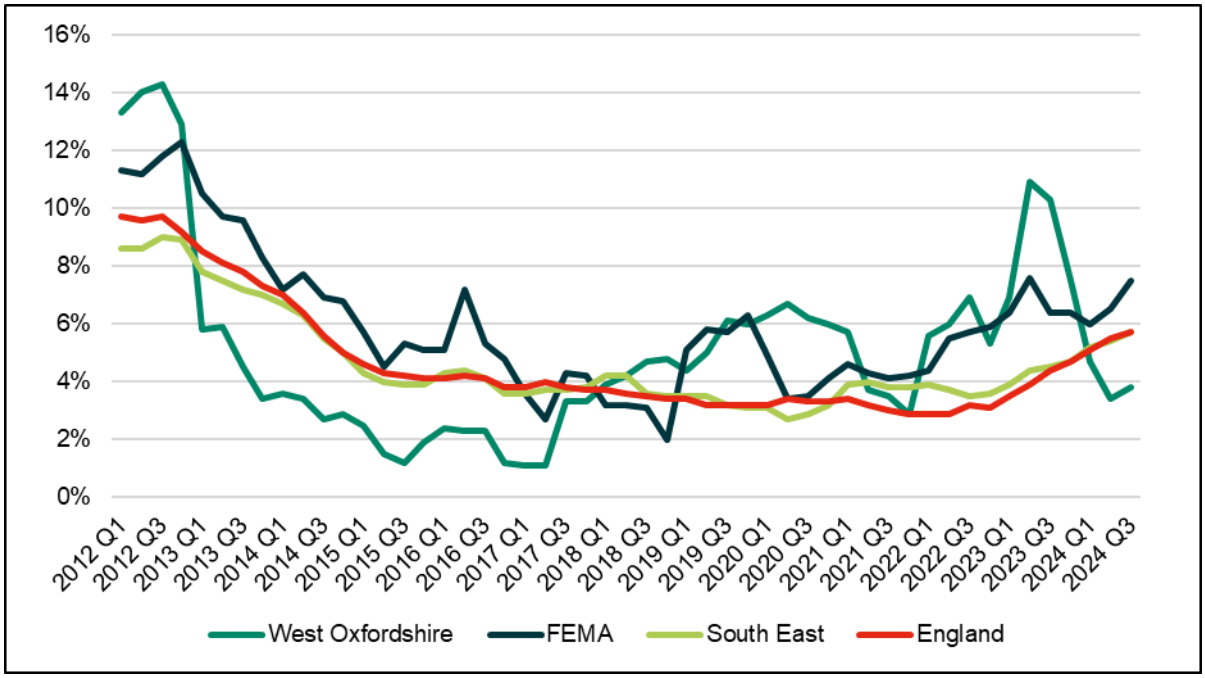
Table 7.13 Vacancy and availability rates of storage and distribution floorspace

Geography	Vacant floorspace (m²)	Vacancy rate (%)	Availability rate (%)
West Oxfordshire	11,191	3.8%	3.8%
FEMA	180,272	7.5%	8.1%
South East	1,355,703	5.7%	6.8%
England	10,951,869	5.7%	6.7%

Source: CoStar (2024).

7.5.8. Figure 7.12 shows the change in storage and distribution floorspace vacancy rates between Q1 2012 and Q2 2024 in West Oxfordshire, the FEMA, SE and England. In West Oxfordshire, vacancy rates have fluctuated, generally falling between 2012 and 2015, increasing until peaking in 2023, and have been decreasing since Q3 2023. The vacancy rates are currently positioned below the rest of the analysed geographies. The rate for West Oxfordshire and FEMA has fluctuated more than the rates in SE and England, which is likely to be a reflection that it accounts for less stock and changes in occupancy have a greater skewing effect than they do at aggregated geographical levels. The availability rate has followed a similar trend.

Figure 7.12 Vacancy of storage and distribution floorspace in between Q1 2012 and Q3 2024

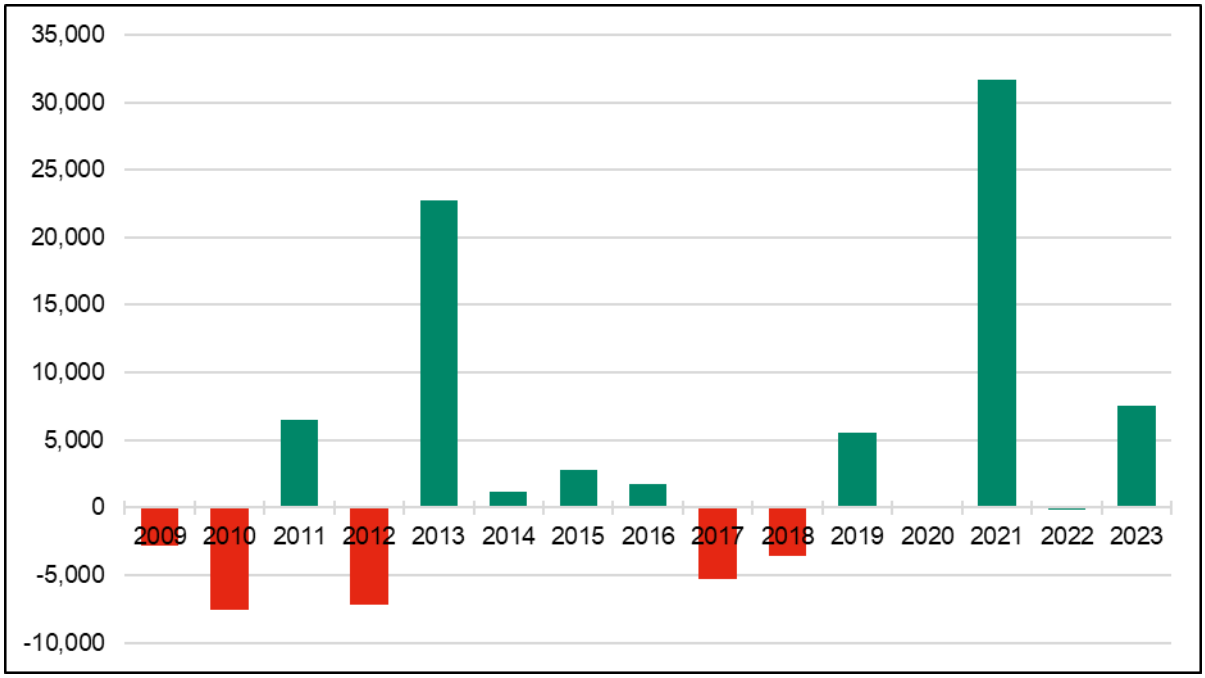


Source: CoStar (2024).

7.5.9. Similarly to the vacancy rate, the availability rate has followed a similar pattern but peaked in Q2 2020, decreased in 2021, increased in 2022 and is now decreasing. Here as well, the rate for West Oxfordshire and FEMA has fluctuated more than the rates in SE and England.

7.5.10. In respect of net absorption, Figure 7.13 presents the net absorption for warehousing floorspace in West Oxfordshire. Between 2009 and 2023 (the last year for which complete data is available), net absorption was positive overall in West Oxfordshire, with pockets of negative absorption rates only in 2017 and 2018. Positive absorption rates since 2023 indicate that take-up of space when available is strong.

Figure 7.13 Net absorption rate of storage and distribution floorspace between 2009 and 2023 (m^2)



Source: CoStar (2024).

7.6. Summary

7.6.1. The **office** market in West Oxfordshire is comprised of 235 properties and accommodates approximately 120,899 m^2 of floorspace. West Oxfordshire accommodates 13.4% of office properties within the FEMA, but only accounts for 7.4% of the FEMA's total office floorspace. This demonstrates that the supply of office floorspace in West Oxfordshire is centred around small and medium sized premises dominated by SME occupiers whose typical requirements are shaped by affordability. The principal office areas in West Oxfordshire are located around the main settlements of Witney, Eynsham and Chipping Norton. Whilst there is a strong focus on the industrial market in the district, there are a number of recent high-quality office development schemes and business centres evident in these settlements.

7.6.2. The analysis indicates that, whilst demand for **office** floorspace in the district has fluctuated over the last 13 years, the small size of the offer means that this is at an enduringly low base. West Oxfordshire has a higher vacancy rate than the FEMA but for both areas this is lower than optimal market levels of 8-10% and lower compared to SE and England. The demand for office space in West Oxfordshire is also reflected in its average rental values, which are significantly lower than the FEMA, SE and England averages. There have been mainly negative net absorption rates from 2020 likely due at least in some part to changes in working practices but skewed by there being few transactions in what is and, has historically always been, a small market. The positive net absorption rates recorded in Q1 and Q2 2024 indicate a pattern of market activity which points to favourable market conditions being present that convey stability, if not growth. In general, office developments across the district offer flexible terms which means they enable small businesses to enter the property market.

7.6.3. The **light industrial** market in West Oxfordshire is small, comprised of 34 properties, accommodating approximately 37,697 m^2 of floorspace. West Oxfordshire accommodates 19.3% of properties within the FEMA and accounts for 17.5% of the FEMA's total light industrial floorspace. The average property size in

West Oxfordshire is slightly smaller than the average in the FEMA, SE and England as a whole. At the time of writing there is no vacancy, rental values are lower than the FEMA, SE and England and have been decreasing since peaking in 2022. This indicates that the demand for light industrial premises is positive. However, this will at least in some part be due to the small size of the market dictating low levels of activity such that trend analysis is inherently less conclusive.

7.6.4. The **general industrial** market in West Oxfordshire is comprised of 101 properties and accommodates approximately 105,961 m^2 of floorspace. West Oxfordshire accommodates 16.0% of properties within the FEMA, but only accounts for 9.7% of the FEMA's total office floorspace. General industrial premises in West Oxfordshire are more likely to accommodate local, smaller businesses due to lack of strategic road access. Smaller businesses typically need less space and so the average property size in West Oxfordshire is significantly smaller than recorded in the FEMA and elsewhere. Meanwhile, the average rental value in West Oxfordshire has experienced a significant increase and currently stands above all comparator geographies. Regarding net absorption rates, since 2020 these have been mainly negative. This would suggest that demand for such premises is generally muted across West Oxfordshire, which is corroborated by agents perceptions and an expression of traditional sectors such as manufacturing having been in slow decline over time.

7.6.5. The **storage and distribution** market in West Oxfordshire is comprised of 99 properties and accommodates approximately 296,630 m^2 of floorspace. This represents around 16.3% of properties within the FEMA, and accounts for 12.3% of the FEMA's total storage and distribution floorspace. Properties are concentrated in Witney due to access to the A40, with an additional reservoir of supply concentrated in the Eynsham Woodstock sub-area. Trends in demand over the last 13 years indicate vacancy and availability rates locally have fluctuated, generally falling between 2012 and 2015, increasing until peaking in 2023 and falling again since Q3 2023.

7.6.6. Comparatively, vacancy rates are lower than recorded for both the FEMA and SE and sit below optimal frictional levels. Rents across West Oxfordshire have generally diverged from those reported for the FEMA, SE and England in recent years which is likely to be due to the lack of strategic roads in the district which storage and distribution occupiers rely on, this characteristic having become more critical with the expansion of e-commerce activities that have driven growth in the sector. However, West Oxfordshire experienced a sharp increase in rents in Q3 2024. Positive absorption rates indicate that the conditions within the sector locally are generally favourable within what is, in comparison to the other industrial types, a larger market albeit one unlikely to grow considerably due to an inherent lack of strategic road infrastructure throughout much of it, even accounting for planned improvements.

8. Future demand assessment

8.1. Introduction

8.1.1. The approach to assessing future employment floorspace and land requirements below is in line with Planning Practice Guidance on Economic Needs Assessments. The analysis in this section considers four possible employment growth scenarios:

- Scenario 1 – Labour demand scenario: based on the floorspace and land needed to accommodate expected employment growth in West Oxfordshire, as per the latest employment forecasts derived from Oxford Economics data.
- Scenario 2 – Labour supply scenario: based on the latest population and housing growth projections, as derived from Office for National Statistics data and a Local Housing Needs Assessment.
- Scenario 3 – Past take-up scenario: trend-based scenario based on the continuation of historical take-up rates, sourced from CoStar. This analyses take-up rates by use class over the last 15 years and extrapolates these trends over the assessment period.
- Scenario 3 – Past take-up scenario: trend-based scenario based on the continuation of historical take-up rates, sourced from CoStar. This analyses take-up rates by use class over the last 15 years and extrapolates these trends over the assessment period.
- Scenario 4 – Policy-driven scenario: based on employment levels that could be possible with an economic development strategy reflecting priority sectors as set out for Oxfordshire and/or the district in available plans and strategies.

8.1.2. The assessment of future need has also been informed by analysis of market signals, engagement with commercial agents, and discussions with officers from the Council.

8.1.3. Employment sectors have been aligned with the current core B and E(g) use classes:

- Office uses (former B1a, former B1b):
  - E(g)(i) Offices; and
  - E(g)(ii) Research and development.
- Industrial uses (former B1c, B2, B8):
  - E(g)(iii) Light industrial;
  - B2 General industrial; and
  - B8 Storage and distribution.

8.1.4. Job numbers for each use class have been calculated and converted to floorspace requirements by applying appropriate employment density assumptions. To calculate land requirements for industrial uses, plot ratios have been applied in order to convert floorspace into land (hectares). The employment densities and plot ratios used draw on a combination of available guidance such as Homes and Communities Agency (HCA) Employment Densities Guide 3rd Edition (2015) and recent reports on occupancy rates. These are summarised in Table 8.1 below.

Table 8.1 Employment density and plot ratio assumptions

Use class	Employment Density Source	Employment density assumption uses (m^2 per full time equivalent (FTE) job)	Plot ratio (% of site area)
E(g)(i)	British Council for Offices[78]	10	100%
E(g)(ii)	Oxford to Cambridge: Science, Innovation, and Technology Business Premises Study (2025) [79]	30	40%
E(g)(iii)		30	40%
B2	HCA Employment Densities Guide 3rd Edition	36	40%
B8		70	45%

8.1.5. It should be noted that employment density ratios can vary significantly depending on location and the exact type of use. At present there are no studies or guidance which examine this in sufficient detail to draw firm conclusions from. For example, whilst desk space per employee may have declined, the requirement for collaborative and meeting space may have increased; flexible workspaces which inherently change in arrangement and occupation over time problematise this further. With regards to R&D and light industrial employment density, based on the availability of more localised information specific to the science-based nature of Oxfordshire's economy and assessment of planning applications within the Oxford to Cambridge: Science, Innovation, and Technology Business Premises Study (2025) [80], an employment density of 30m^2 per FTE job has been adopted for this assessment. For storage and distribution employment density, the lower band of the suggested HCA range (i.e. higher density employment) has been adopted in order to reflect that most storage and distribution use space serves a local or sub-regional market rather than being of a larger scale serving as regional or national hubs (which are generally of lower employment density per m^2 of space).

8.1.6. Like employment densities, plot ratios achieved through development will vary from site to site. The chosen ratios are derived from AECOM's experience in preparing studies recently in Oxfordshire, and elsewhere in the South East, and informed by consideration of local circumstances. For office (E(g)(i)) use, a 100% ratio has been used which is a catch-ratio representative of expected development in the area to follow a similar pattern to existing development, thus comprising a mix of town centre (typically 200% plot ratio) and campus locations (assumed to be more similar to R&D plot ratio at 40%). For storage and distribution uses the chosen ratio (45%) is a reflection of types of site locally, as explained above, likely serving a local or sub-regional market where sites are typically smaller than they would be in more strategic locations, where typical ratios might be lower (e.g. 40%).

8.1.7. The employment land requirement forecast delineates growth into major sectors which, in turn, are aggregated into land use types. Space requirements in terms of floorspace use type of each of the considered sectors have been assigned. This approach provides a land and floorspace requirement for office [E(g)(i), E(g)(ii)] and industrial [E(g)(iii), B2, B8] activity. Whilst this approach aligns with the guidance

[78] British Council of Offices (2023) BCO announces new recommendations for greener and healthier offices http://www.bco.org.uk/News/News59242.aspx
[79] Oxford to Cambridge Pan-regional Partnership / Iceni Projects, Carter Jonas, HDR, (2025); Science, Innovation and Technology Business Premises Study (2025)
[80] Oxford to Cambridge Pan-regional Partnership / Iceni Projects, Carter Jonas, HDR, (2025); Science, Innovation and Technology Business Premises Study (2025)

provided by the NPPF and PPG and provides a robust basis for planning purposes, it should be recognised that future delivery may not be as neatly categorised.

8.1.8. The scenarios discussed in this chapter should be treated as broadly indicative. Predicting future economic trends and corresponding employment land requirements is not an exact science. The assessment needs to be based on a series of assumptions, including the future performance of individual business sectors, the proportion of employment in each sector that corresponds to each of the B and E(g) use classes, and the future employment densities and plot ratios for each use class. Furthermore, the future economic performance of West Oxfordshire's economy is subject to external factors that are hard to predict in the context of this study, such as political and economic changes at the national and international levels.

8.1.9. Moreover, the nature of work is subject to change over the study period. This could relate, as discussed, to alternative models of hybrid and remote working. Co-working, flexible and 'open' style workplaces may become more prominent. Data suggests that part-time work is becoming increasingly common in the UK[81]. The adoption of novel technologies could have disruptive implications on sectors and the workforce. These trends, if found in reality, may imply different space requirements to present requirements.

8.1.10. With the above caveats in place, the scenarios presented in this chapter provide an indication of future economic trends and are a useful tool for informing employment land policy. It should also be noted that all figures presented in this chapter have been rounded and therefore may not sum exactly.

8.2. Labour demand scenario

8.2.1. The 'labour demand' scenario is based on Oxford Economics' economic forecasts for West Oxfordshire. Oxford Economics' Local Authority District (LAD) model represents a comprehensive dataset which enables the analysis of the local economy in detail. The model is shaped by three elements:

- International, national and regional outlook projections which capture global events impacting on the performance of UK economies, along with monetary policy effects on consumer spending and Government spending;
- Historical trends pertaining to the local area, including competitiveness in particular activities; and
- Fundamental economic relationships including indicators relating to changes in employment and assumptions about migration, commuting and economic activity rates.

8.2.2. According to Oxford Economics' August 2024 employment forecasts, employment across all sectors in West Oxfordshire is forecast to increase from 61,406 in 2024 to 68,031, as shown in Table 8.2.

8.2.3. In absolute terms, the largest growth in employment is anticipated in the 'professional, scientific and technical activities', as well as 'construction', 'administrative and support services' and 'human health and social work activities'. Conversely, in absolute terms, the largest reduction in employment is forecast in the 'manufacturing' sector.

[81] Office for National Statistics, (1993;2023); Labour Force Survey.

Table 8.2 Forecast change in employment by sector (2024 – 2041)

Employment sector	Employment change (2024 – 2041)
M : Professional, scientific and technical activities	1,244
F : Construction	1,084
N : Administrative and support service activities	1,043
Q : Human health and social work activities	1,031
P : Education	785
R : Arts, entertainment and recreation	742
G : Wholesale and retail trade; repair of motor vehicles and motorcycles	723
I : Accommodation and food service activities	482
J : Information and communication	473
H : Transportation and storage	273
S : Other service activities	266
K : Financial and insurance activities	94
L : Real estate activities	64
O : Public administration and defence; compulsory social security	7
D : Electricity, gas, steam and air conditioning supply	0
E : Water supply; sewerage, waste management and remediation activities	-18
B : Mining and quarrying	-40
A : Agriculture, forestry and fishing	-62
C : Manufacturing	-1,567
Total	**+6,625**

Source: Oxford Economics, (2024) / AECOM analysis.

8.2.4. Oxford Economics data for 2024 is based on a projection. In order to provide a forecast of future employment based on observed data, the year-on-year employment growth rate derived from the Oxford Economics dataset has been applied to the observed Business Register and Employment Survey baseline data for 2023, and projected forwards.

8.2.5. Following this, the BRES adjusted employment forecasts by sector are matched to the most relevant planning use class. As shown in Table 8.3, this indicates that the greatest increase in absolute terms in forecast to take place in E(g)(i) office use class jobs (+1,446 jobs), followed by B8 storage and distribution jobs (+572 jobs). Employment in E(g)(ii) research and development is also forecast to increase (+252 jobs), however employment in E(g)(iii) light industrial and B2 general industrial sectors is forecast to decrease (by -423 and -470 jobs respectively).

8.2.6. It is noted that employment in use class E(g)(ii) research and development is forecast to increase by 252 jobs, however there are currently limited premises in West Oxfordshire in this use (based on CoStar data). However, it is known that research and development activities are taking place, although these are not captured by the primary and secondary use types defined by CoStar, potentially because they are not the predominant use of these buildings.

Table 8.3 Labour demand scenario – employment forecasts by use class (2024 – 2041)

Use Class	2024	2041	Change 2024-2041
E(g)(i)	9,242	10,688	1,446
E(g)(ii)	1,848	2,100	252
Total office jobs	**11,090**	**12,788**	**1,698**
E(g)(iii)	3,174	2,751	-423
B2	3,057	2,587	-470
B8	7,576	8,148	572
Total industrial jobs	**13,808**	**13,487**	**-321**
Total office and industrial jobs	**24,897**	**26,274**	**1,377**

Source: Oxford Economics, (2024) / AECOM analysis.

8.2.7. Based on the above employment forecasts and the employment density assumptions summarised in Table 8.1, floorspace requirements in West Oxfordshire generated by the labour demand scenario over the period between 2024 and 2041 are presented in Table 8.4 below.

8.2.8. Overall, based on the Oxford Economics derived labour demand scenario, West Oxfordshire is projected to experience a modest change in office floorspace requirements over the period between 2024 and 2041, reflecting an additional 22,018 m^2 comprised of 14,462 m^2 of office (E(g)(i)) use and 7,556 m^2 of research and development (E(g)(ii)) use floorspace.

8.2.9. With regard to industrial floorspace, West Oxfordshire is forecast to register an overall increase in industrial floorspace requirements of 10,431 m^2 over the 2024-41 period, driven by storage and distribution floorspace requirements, which are projected to increase by 40,035 m^2. However, a decline of -12,682 m^2 in light industrial (E(g)(iii)) needs and 16,922 m^2 general industrial (B2) needs is projected over the Plan period.

Table 8.4 Labour demand scenario – additional floorspace need (m^2, 2024 – 2041)

Use class	Change (2024 – 2041)	% change (2024 – 2041)
E(g)(i)	14,462	15.6%
E(g)(ii)	7,556	13.6%
Office floorspace need	**22,018**	**14.9%**
E(g)(iii)	-12,682	-13.3%
B2	-16,922	-15.4%
B8	40,035	7.5%
Industrial floorspace need	**10,431**	**1.4%**
Total office and industrial floorspace need	**32,449**	**3.7%**

8.2.1. Finally, applying relevant plot ratios, floorspace requirements can be converted into land requirements (presented in hectares). As set out in Table 8.5, Scenario 1

suggests a 5.2ha increase in the quantum of employment land over the period 2024-2041.

Table 8.5 Additional Employment Land (ha) – Labour Demand scenario

Use Class	Land (ha)
E(g)(i)	1.5
E(g)(ii)	1.9
E(g)(iii)	-3.2
B2	-4.2
B8	9.2
Total E(g)/B use land	**5.2**

8.3. Labour supply scenario

8.3.1. The labour supply scenario is based on the latest population and housing growth projections, utilising the employment forecast underpinning Scenario 1 in respect of sector trends in employment. This provides an indication of the amount of employment land required to maintain a balance between population and economic growth.

8.3.2. Informing this scenario is a separate Local Housing Needs Assessment (LHNA) commissioned by the Council and prepared by ORS. The scenario considers the potential local employment requirements arising from an initial assessment of growth driven the demographic information underpinning the LHNA, calculating predicted population change to 2041. This has in turn been used to forecast an increase in employment / local labour supply and, in turn, employment forecasts by use class.

8.3.3. The preferred housing need scenario, as determined by the LHNA, considered there to be housing need for 905 dwellings per annum to 2041. This was developed using 5-year population trends derived from Mid-Year Estimates (MYE) provided by the Office for National Statistics. The resulting population change derived from the preferred housing need scenario between 2024 and 2041 is shown in Table 8.6.

Table 8.6 Local Housing Needs Assessment population change projection linked to preferred housing need scenario

Age range	Population in 2024	Population in 2041	Change in population (no.)	Change in population (%)
Under 16	20,690	23,080	2,389	+11.5%
16 – 64	72,445	82,241	9,797	+13.5%
65 and over	27,059	40,828	13,769	+50.9%
Total	120,194	146,149	25,955	+21.6%

Source: West Oxfordshire District Council/ORS, (2024); West Oxfordshire Local Housing Needs Assessment.

8.3.4. For the purposes of developing the labour supply scenario, this study is concerned with the projection of the working age population. The following assumptions have been applied to generate employment growth projections arising from expected population growth in West Oxfordshire between 2024 and 2041:

- Total working age population change between 2024 and 2041 reflects the preferred housing need scenario derived population projection;

- Proportion of the working age population that is economically active is 87.0% as per the rate for September 2024 (latest available data)[82]. This is assumed to remain constant over the study period given there are no published projections of this to factor change in robustly; and
- Labour force ratio of 81.1%, as per Census data. This is also assumed to remain constant over the study period again given there are no projections of this to factor change in robustly. The ratio is calculated by totalling the number of residents of West Oxfordshire who also work there (including working from home, no fixed place of work, working outside the UK and working in offshore installations) with the workers who commute to West Oxfordshire to work, against the total number of employed people who live in West Oxfordshire.

8.3.5. Applying the above, the total employment is expected to increase by a total of 6,912 between 2024 and 2041. This conversion is presented in Table 8.7.

Table 8.7 Conversion of population projection to local labour supply

	2024	2041	Change	Change (%)
Working age population	72,445	82,241	9,797	13.5%
Economically active population	63,027	71,550	8,523	13.5%
Total employment	51,115	58,027	6,912	13.5%

8.3.6. The increased annual local labour supply has been mapped proportionally to each sector. This was achieved by considering the overall change in number of jobs as derived from Oxford Economics forecasts. The proportion of this change represented by each sector was then applied to the annual employment change calculated above. The amount of change in employment therefore reflects forecasted sectoral trends transposed on to annual labour supply derived from the trajectory-led population forecast.

8.3.7. The labour supply scenario therefore projects an increase of 2,419 office jobs and a decrease of -153 industrial jobs over the period between 2024 and 2041, totalling a net increase of 2,266 jobs. This is shown in Table 8.8.

Table 8.8 Labour supply scenario - employment forecasts by use class (2024 – 2041)

Use class	Total jobs 2024	Total jobs 2041	Change (2024 – 2041)
E(g)(i)	9,080	11,113	2,033
E(g)(ii)	1,820	2,205	386
Total office jobs	**10,900**	**13,319**	**2,419**
E(g)(iii)	3,171	2,837	-334
B2	3,054	2,659	-395
B8	7,578	8,154	576
Total industrial jobs	**13,803**	**13,650**	**-153**
Total office and industrial jobs	**24,703**	**26,969**	**2,266**

8.3.8. The same assumptions regarding floorspace use type requirements of sectors as the labour demand scenario were then applied in order to derive floorspace requirements.

[82] Office for National Statistics, (2024); Annual Population Survey – September 2024.

8.3.9. Based on the above employment forecasts and the employment density and plot ratio assumptions, floorspace requirements in West Oxfordshire generated by the labour supply scenario over the period between 2024 and 2041 are presented in Table 8.9.

8.3.10. Overall, this scenario estimates an additional need between 2024 and 2041 for circa. 20,334 m^2 of office (E(g)(i)), and 11,568 m^2 of research and development (E(g)(ii)) floorspace, resulting in a combined increase in need for office/R&D space of 31,903 m^2.

8.3.11. In terms of industrial floorspace, this scenario estimates a reduction in need between 2024 and 2041 of -10,015 m^2 of light industrial (E(g)(iii)) floorspace and -14,225m^2 of general industrial (B2) floorspace, and an increase of 40,330 m^2 of storage and distribution (B8) floorspace, resulting in a combined increase in need of 16,091 m^2.

Table 8.9 Labour supply scenario - additional floorspace need (m^2, 2024 – 2041)

Use class	Change (2024 – 2041)	% change (2024 – 2041)
E(g)(i)	20,334	22.4%
E(g)(ii)	11,568	21.2%
Office floorspace need	**31,903**	**21.9%**
E(g)(iii)	-10,015	-10.5%
B2	-14,225	-12.9%
B8	40,330	7.6%
Industrial floorspace need	**16,091**	**2.2%**
Total office and industrial floorspace	**47,993**	**5.4%**

8.3.12. Finally, applying relevant plot ratios, floorspace requirements can be converted into land requirements (presented in hectares). As set out in Table 8.10, Scenario 2 suggests an 8.2 ha increase in the quantum of employment land over the period 2024-2041.

Table 8.10 Additional Employment Land (ha) – Labour Supply scenario

Use Class	Land (ha)
E(g)(i)	2.1
E(g)(ii)	2.9
E(g)(iii)	-2.5
B2	-3.6
B8	9.2
Total B use land	**8.2**

8.4. Past take-up rate scenario

8.4.1. To determine the needs arising from a scenario of change based on ‘past take-up’, AECOM has used data derived from CoStar on net absorption of employment floorspace by planning use class. Data for West Oxfordshire over the period between 2009 and 2023 has been considered.

8.4.2. The historical net absorption (annual average) by planning use class indicated the quantum of net floorspace occupied over a period of time (i.e. move-ins minus move-outs). The 'move-in' component includes new space to the market once it is occupied. Net absorption is a proxy for demand as it shows, if positive, additional occupation of space in one year to the next. If negative, less floorspace is occupied in one year to the next. Persistent positive net absorption is therefore broadly indicative that more space is being occupied overall over time and the property market is in a condition of strong demand and generally good health. For the purposes of developing a projection, net absorption is a representative basis of how the property market is responding in practice to wider trends, as well as indicating how demand is influencing take up of space.

8.4.3. Recorded net absorption in West Oxfordshire can be projected forwards to inform the future demand for employment floorspace. As part of this exercise, several historical periods were considered (past 5 years, past 10 years, past 15 years). It was considered that the past 15-year average was the most robust, as it was not overly impacted by the 2008 financial crisis and is a long enough period to suppress, to a good degree, the impact of the COVID-19 pandemic (unlike the past 5-year average). As shown by the variation in take-up depending on the time frame under consideration, past trends in take-up are representative of their respective economic conditions. In this way, the analysis conducted within this scenario should be viewed as reflective of the projected future condition of the market based on a point in time extrapolation and is subject to limitation in its ability to appreciate potential for future events, influences or interventions to affect future employment needs; a limitation particularly acute in a location with constrained supply such as West Oxfordshire.

8.4.4. Table 8.11 provides a summary of the average net absorption of employment floorspace planning use class over the past 5, 10 and 15 years.

Table 8.11 Average annual net absorption of floorspace (m^2, 2009 – 2024)

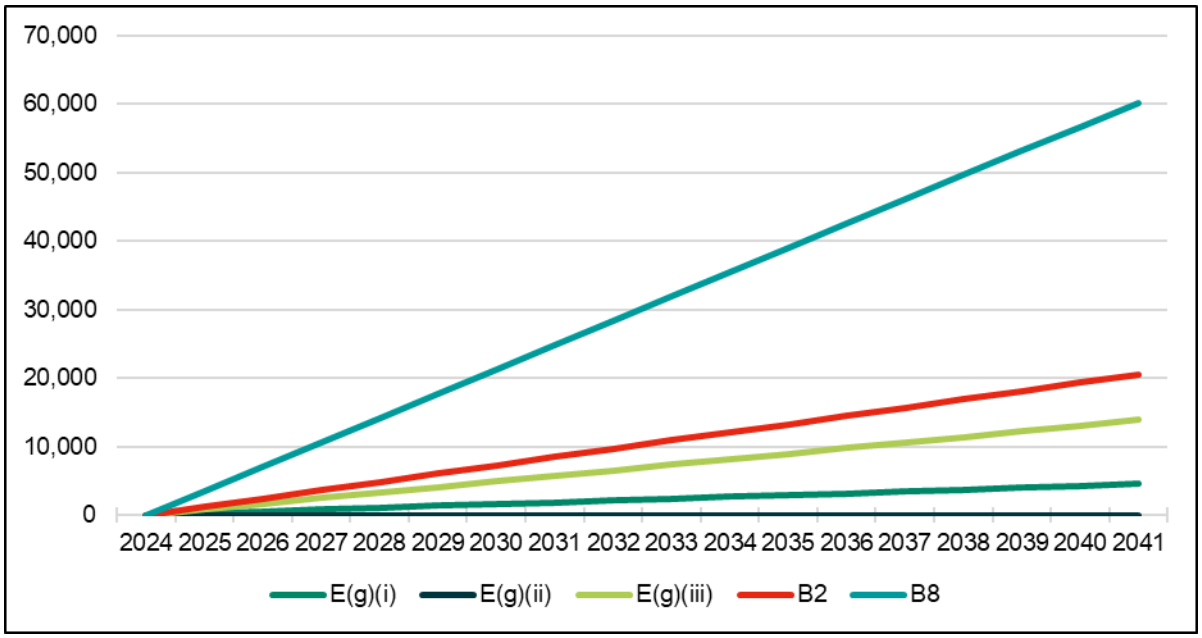
Use class	5-year	10-year	15-year
Office [E(g)(i)]	-207	487	265
R&D [E(g)(ii)]	0	0	0
Light industrial [E(g)(iii)]	-186	-75	816
General industrial [B2]	1,911	1,458	1,208
Storage and distribution	8,937	4,153	3,543

Source: CoStar data

8.4.5. The average historical annual absorption of employment floorspace was projected forward to 2041 from the 2024 baseline position. Overall, based on the continuation of the average annual trend over the 15-year period preceding 2024, by 2041 there is a projected requirement for circa. 4,503 m^2 of office [E(g)(i)] floorspace, 13,864 m^2 of light industrial [E(g)(ii)] floorspace, 20,529 m^2 of general industrial (B2) and 60,231 m^2 of storage and distribution floorspace.

8.4.6. Figure 8.1 shows this projected evolution of the floorspace requirements in West Oxfordshire to 2041.

Figure 8.1 Past take-up scenario - floorspace requirement (m², 2024 – 2041)



Source: CoStar (2025); AECOM analysis

8.4.7. Finally, applying relevant plot ratios, floorspace requirements can be converted into land requirements (presented in hectares) for industrial uses.

8.4.8. As set out in Table 8.12, the evolution of land requirements for West Oxfordshire indicates a requirement for an additional 22.4ha of employment land by 2041.

Table 8.12 Additional Employment Land (ha) – Past Trends Scenario

Use Class	Land (ha)
E(g)(i)	0.5
E(g)(ii)	0.0
E(g)(iii)	3.5
B2	5.1
B8	13.4
Total Employment Land	**22.4**

8.5. Policy-driven scenario

8.5.1. The policy-driven scenario is based on employment levels that could be possible with an ambitious economic development strategy reflecting priority sectors as set out for Oxfordshire and/or the district in available plans and strategies.

8.5.2. For each sector, a weighting was assigned in the form of a suggested % adjustment to the demand-based levels of growth anticipated by the Oxford Economics forecasts. The value of the adjustment was derived entirely from professional judgement and experience from other studies, there being no guidance on which to base such an analysis. It took into account the sectors absolute employment levels and level of growth anticipated by the scenario 1 (Labour demand) forecast. Critically it also took account of the reality that given the role of market conditions and wider policies in influencing performance business behaviour is considerable and cannot easily be isolated to an administrative boundary, local policies in themselves will not likely have a considerable influence on a forecast. As such, no adjustments to sector forecasts of greater than 10% were assigned in this scenario.

8.5.3. Based on this analysis, the following sectoral growth projections, above the demand-based levels of growth anticipated by the Oxford Economics forecasts, for the period 2024-2041 have been projected to be potentially achievable, with resulting forecasts shown in Table 8.13:

- **Transportation and storage:** 10%. To reflect the strong industrial market of recent years and expected continued increase in warehouse use since COVID-19 and increase in online retail further growth is expected in storage which could be capitalised on by an interventionist employment strategy in the district to support higher than forecast uptake of local storage space.
- **Information and communication:** 10%. Should the ambitions of Oxfordshire-wide growth strategies be realised, this will increase the attractiveness of the area for businesses engaged in relevant sectors, particularly those focused on science, innovation and technology. This is attributed a moderate potential to grow jobs in information and communication in the district over the plan period.
- **Professional, scientific and technical activities:** 10%. As above for information and communication.
- **Administrative and support service activities:** 5%. As above, a general increase in the attractiveness of the district supported by an interventionist economic development strategy could support associated growth in administrative and support services sectors.
- **Construction:** 7.5%. As above, a general increase in the attractiveness of the district could spur development, particularly in the sectors highlighted above, which can justify attributing a modest increase in construction sector activity to support this.

Table 8.13 Policy-driven scenario – employment forecasts by use class (2024-2041)

Use class	Total Jobs 2024	Total Jobs 2041	Change (2024-2041)	
E(g)(i)	9,242	11,261	2,020	22%
E(g)(ii)	1,848	2,240	393	21%
Total office jobs	**11,090**	**13,502**	**2,412**	**22%**
E(g)(iii)	3,174	2,812	-362	-11%
B2	3,057	2,624	-433	-14%
B8	7,576	8,338	762	10%
Total industrial jobs	**13,808**	**13,755**	**-33**	**0%**
Total office and industrial jobs	**24,897**	**27,277**	**2,379**	**10%**

Source: AECOM. 2025

8.5.4. The same assumptions regarding floorspace use type requirements of sectors as the labour demand scenario were then applied in order to derive floorspace requirements.

8.5.5. Based on the above employment forecasts and the employment density and plot ratio assumptions, floorspace requirements in West Oxfordshire generated by the policy-driven scenario over the period between 2024 and 2041 are presented in Table 8.14.

8.5.6. Overall, this scenario estimates an additional need between 2024 and 2041 for approximately 20,196 m^2 of office (E(g)(i)), and 11,783 m^2 of research and

development (E(g)(ii)) floorspace, resulting in a combined increase in need for office/R&D space of 31,979 m^2.

8.5.7. In terms of industrial floorspace, this scenario estimates a reduction in need between 2024 and 2041 of -10,859 m^2 of light industrial (E(g)(iii)) floorspace and -15,591 m^2 of general industrial (B2) floorspace, and an increase of 53,346 m^2 of storage and distribution (B8) floorspace, resulting in a combined increase in industrial need of 26,896 m^2.

Table 8.14 Policy-driven scenario – additional office floorspace need (m^2, 2024 – 2041)

Use class	Change (2024-2041)	Change (2024-2041)
E(g)(i)	20,196	21.9%
E(g)(ii)	11,783	21.3%
Office floorspace need	**31,979**	**21.6%**
E(g)(iii)	-10,859	-11.4%
B2	-15,591	-14.2%
B8	53,346	10.1%
Industrial floorspace need	**26,896**	**3.7%**
Total office and industrial floorspace	**58,875**	**6.7%**

Source: AECOM, 2025

8.5.8. Finally, applying relevant plot ratios, floorspace requirements can be converted into land requirements (presented in hectares). As set out in Table 8.15, this scenario (policy-driven) suggests a 10.5 ha increase in the quantum of employment land over the period 2024-2041.

Table 8.15: Policy-driven scenario – additional industrial floorspace need (ha, 2024-2041)

Use class	Land (ha)
E(g)(i)	2.1
E(g)(ii)	2.9
E(g)(iii)	-2.7
B2	-3.9
B8	12.1
Total B use land	**10.5**

Source: AECOM, 2025

8.5.9. This scenario provides a useful insight to potential growth in the sectors earmarked within local economic development strategies, considering local factors and investments which will likely not have been considered by the Oxford Economics employment growth projections due to their recency. However, the robustness of this scenario depends on the accuracy of the percentage uplifts applied to the sectors identified for accelerated growth, for which it is challenging to be precise.

8.6. Replacement of losses

8.6.1. The forecasting exercise has also taken into account replacement of losses. Evidently some redevelopment will take place on existing employment sites. However there can be losses of employment floorspace and land to other uses.

8.6.2. In order to estimate the replacement rate of losses of floorspace required each year, assumptions have been applied to the annual average loss based on CoStar data on demolitions from 2018 to 2023 as follows:

- 25% of office floorspace [E(g)(i), E(g)(ii) uses) losses will be replaced each year; and
- 50% of industrial floorspace [E(g)(iii), B2, B8 uses] losses will be replaced each year.

8.6.3. This is set out in Table 8.16 below:

Table 8.16 Allowance for Replacement of Losses 2024-41 (m^2)

Type of Space/Use Class	Average Annual Demolitions (m^2)	Allowance for Losses 2024-41 (m^2)
E(g)(i) / E(g)(ii)	354	1,506
E(g)(iii) / B2 / B8	549	4,666
Total	**903**	**6,172**

8.6.4. The data and assumptions set out above have been applied to the labour demand, labour supply and policy-driven scenario. A replacement for losses adjustment has not been applied to the past take-up rates scenario as market conditions are already inherently taken into account, given this scenario is a reflection of net leasing position and how the property market is restructuring over time.

8.7. Net Requirement for Floorspace and Land

Net Requirement for Office Floorspace and Land

8.7.1. The forecast net requirement for office space (E(g)(i) and E(g)(ii) uses) and land equivalent under all scenarios is set out in Table 8.17. The table identifies all the parameters which are used to inform the supply / demand balance. The existing supply position is informed by CoStar data on supply of office floorspace (in m^2) and vacancy of floorspace (% of total stock available).

8.7.2. The current supply of available floorspace is factored into the assessment after it is netted off against the optimum frictional vacancy rate (assumed to be 10% for office floorspace). This is because vacant, available employment floorspace could help to meet some of the identified needs.

Table 8.17 Net Requirement for Office Floorspace and Land by Scenario 2024 to 2041

Parameters	Scenario 1 (Labour Demand)	Scenario 2 (Labour Supply)	Scenario 3 (Past Trends)	Scenario 4 (Policy-driven)
	Floorspace (m^2)			
A. Supply of occupied office floorspace	113,664	113,664	113,664	113,664
B. Current vacant office floorspace	7,235	7,235	7,235	7,235
C. Total stock of office floorspace [A+B]	120,899	120,899	120,899	120,899
Forecast				
D. Gross Floorspace demand to 2041	23,524	33,409	4,503	33,485
E. Optimum frictional vacancy at 2041 (10% of A+D)[83]	13,719	14,707	11,817	14,715
F. Surplus/deficit of vacant floorspace in 2041 [E-B]	6,484	7,472	4,582	7,480
G. Gross requirement for office floorspace 2024-2041 [C+D+F]	150,907	161,780	129,983	161,864
H. Net requirement for office floorspace 2024-2041 [G-C]	30,008	40,881	9,084	40,965
Land Requirement (ha)	4.5	6.3	0.9	6.4

8.7.3. This shows that up to 2041 there is a projected (net) requirement for between approximately 9,084 m^2 and 40,965 m^2 office floorspace in West Oxfordshire. This would translate to a land requirement for office uses of between 0.9 ha and 6.4 ha.

Net Requirement for Industrial Floorspace and Land

8.7.4. The forecast net requirement for industrial floorspace and land under all scenarios is set out below in Table 8.18. The table identifies all the parameters which are used to inform the supply/demand balance. The existing supply position is informed by CoStar data. The current supply of available floorspace is factored into the assessment after it is netted off against the optimum frictional vacancy rate. This is because vacant, available employment floorspace could help to meet some of the identified needs.

[83] An allowance for frictional floorspace has been included in our assessment. To operate efficiently a property market requires a small proportion of total floorspace to be readily available for take-up to allow businesses expanding or contracting to more to suitable premises. This available space is called frictional floorspace, the optimal rate of which we assume to be currently around 10% for office uses and 5% for industrial uses.

Table 8.18 Net Requirement for Industrial Floorspace and Land by Scenario 2024 to 2041

Parameters	Scenario 1 (Labour Demand)	Scenario 2 (Labour Supply	Scenario 3 (Past Trends)	Scenario 4 (Policy-driven)
		Floorspace (m^2)		
A. Supply of occupied industrial floorspace	426,211	426,211	426,211	426,211
B. Current vacant industrial floorspace	13,077	13,077	13,077	13,077
C. Total stock of industrial floorspace [A+B]	439,288	439,288	439,288	439,288
Forecast				
D. Gross Floorspace demand to 2041	15,097	20,757	94,624	31,562
E. Optimum frictional vacancy at 2041 (5% of A+D)	22,065	22,348	26,042	22,889
F. Surplus/deficit of vacant floorspace in 2041 [E-B]	8,988	9,271	12,965	9,812
G. Gross requirement for industrial floorspace 2024-2041 [C+D+F]	463,374	469,316	546,876	480,661
H. Net requirement for industrial floorspace 2024-2041 [G-C]	24,086	30,028	107,588	41,373
Land Requirement (ha)	3.5	5.4	25.0	8.1

8.7.5. Up to 2041, the analysis predicts a net requirement for between 24,086 m^2 and 107,588 m^2 of industrial floorspace. This would translate to a land requirement for industrial uses of between 3.5 ha and 25.0 ha.

8.8. Preferred scenario

8.8.1. The scenarios set out within this section forecast varying changes in floorspace in West Oxfordshire across the Local Plan period; with varying growth outlooks forecast under Scenario 1 (Labour Demand), Scenario 2 (Labour Supply), Scenario 3 (Past Trends), and Scenario 4 (Policy-driven).

8.8.2. For the office use classes, the floorspace requirements forecasted through Scenario 1 (Labour Demand) indicate that there will be growth requirement of 30,008 m^2 to 2041, equivalent to 24.8% of the current supply of office floorspace in the district. Historically there has always been a small office market in West Oxfordshire with the market being concentrated in smaller premises than across the FEMA. However, office space is anticipated to grow due to the anticipated growth in the science, innovation and technology sector across the region. As such, growth of this order to 2041 is considered to be a feasible projection in light of local market intelligence and development prospects, before pipeline supply is accounted for – see Section 8.

8.8.3. For industrial use classes, the floorspace requirements forecasted through Scenario 1 (Labour Demand) and 2 (Labour Supply) indicate that there will be a slight growth in the supply of industrial floorspace of 24,086 m^2 or 30,028m^2 up to 2041. However, property market intelligence highlights a robust, competitive performance

in market rents over the past decade and vacancy rates below regional and national comparators. Furthermore, considering the past 5 years, which have been impacted by the Covid-19 pandemic, a positive performance is evident in terms of market activity.

8.8.4. As such, a slight increase in floorspace to 2041 would represent a divergence from recent activity. The Past Take Up scenario, forecasting an increase of 107,588 m^2 of industrial floorspace over the Plan period, is therefore deemed a justified representation of past performance, local market intelligence and development prospects and is taken forward for industrial uses.

8.8.5. The policy-driven scenario overlays local economic policy priorities on the Oxford Economics forecasts in order to understand the level of growth that could be possible (and associated office and industrial floorspace requirements) should local policies and investments realise growth in the district above and beyond demand-based projections. This is considered an aspirational scenario to demonstrate the potential for growth, recognising that there is opportunity for this set out within strategies. The policy-based scenario methodology identifies broad industrial priorities as understood from the breadth of literature reviewed. The scenario does not assess statistical or specific targets, nor translate those for the purpose of this exercise in estimating demand. The policy-based scenario interprets the priorities and, based on professional judgement and previous experience of similar context alone, apply a reasonable assessment of growth in employment in favoured sectors.

8.8.6. The preferred scenario proposed to be taken forward is therefore a hybrid of Scenario 1 (Labour Demand) for office uses and Scenario 3 (Past Take Up) for industrial uses. This hybrid scenario forecasts growth of 30,008 m^2 for office space (E(g)(i) and E(g)(ii) uses) and 107,588 m^2 of industrial space (E(g)(iii), B2 and B8 uses).

9. Comparison between supply and demand

9.1. Introduction

9.1.1. This section compares the projected future demand for office and industrial floorspace and land between 2024 and 2041, as earlier described in Section 7, with the existing supply conditions in the district, as earlier described in Section 5. It factors in the presence of vacant land, or land with potential for intensification/redevelopment as identified in the supply assessment, as well as considering the pipeline for development of office and industrial land, to inform a position of how supply may change over the planning period, and how that influences the overall supply and demand balance.

9.1.2. Broadly, supply in excess of demand suggests a demand constrained position; and where demand is in excess of supply, a supply constrained position with the requirement to identify additional floorspace/land for employment use activities and ensure growth is adequately supported.

9.1.3. Further consideration of the balance of supply and demand in terms of quantitative and quality requirements is given in the conclusions and recommendations section.

9.2. Available Supply

9.2.1. As set out in the supply assessment, a number of existing employment sites across the district represent potential pipeline for future development. This includes a number of vacant sites, and sites currently in low density use that could be suitable for future intensification. In addition West Oxfordshire District Council records of consented planning permissions for employment use that have not yet been built out indicate additional potential pipeline supply.

Vacant land allocated for development

9.2.2. The employment clusters identified as having land allocated for development within Local Plan policy where all or a portion of which has yet to be developed for active employment use are:

- Oxfordshire Cotswold Garden Village Strategic Location for Growth (SLG) in which 40 ha land is allocated for office and light industrial space.
- East Chipping Norton Strategic Development Area (SDA) in which 5 ha land is allocated for office use.

Planning pipeline

9.2.3. If all approved planning applications concerning office floorspace in West Oxfordshire were to come forward for development, 1,490m^2 of floorspace would be delivered when both gains and losses are considered. Key applications driving this change are a development at Downs Road, Witney (application 21/02364/FUL) which is under construction, and Land South of Station Road (application number 22/02951/FUL).

9.2.4. If all approved planning applications concerning industrial floorspace in West Oxfordshire were to come forward for development, supply of industrial floorspace across the district would increase by 36,865m^2, again once gains and losses are

considered. Key applications driving this change are the development at Downs Road, Witney (application 21/02364/FUL) which is under construction, and a development at Lakeside Industrial Park (application 23/00301/FUL). Table 9.1 provides the breakdown of floorspace and land delivered across office and industrial uses.

Table 9.1 Planning Pipeline – Office and Industrial Floorspace

	Under construction		Pre-construction		Total	
Use	Planning Pipeline f'space (m^2)	Planning Pipeline land (ha)	Planning Pipeline f'space (m^2)	Planning Pipeline land (ha)	Planning Pipeline f'space (m^2)	Planning Pipeline land (ha)
Office (E(g)(i) / E(g)(ii)	1,393	0.1	97	0.01	1,490	0.1
Industrial (E(g)(iii) / B2 / B8	14,000	1.4	21,865	2.2	35,865	3.6
Total	**15,393**	**1.5**	**21,962**	**2.2**	**37,355**	**3.7**

9.2.5. If implemented, these permissions may serve to reduce overall land requirements. However, there is a possibility that some developments may not come forward at all or be developed in different quantities by use class than has been consented, for example if amendments to the planning applications are made and as such these have not directly been deducted from the stated net requirements.

9.3. Conclusions

9.3.1. The outcome of the comparison between employment land demand and available supply, based on the current portfolio of sites / allocations across the district, is set out in Table 9.2. This indicates that, taking into account pipeline sites, there is sufficient supply available to meet projected demand in West Oxfordshire over the Plan period.

Table 9.2 Summary of Demand vs Supply based on Preferred Scenario of Needs

	Preferred Scenario
Demand	
A) Net Office Land	4.5
B) Net Industrial Land	25.0
C) Total Demand [A+B]	***29.5***
Supply	
D) Vacant sites	45.0
E) Pipeline (ha)	3.7
F) Total Supply [D+E]	***48.7***
G) Total Supply – Total Demand [F-C]	**19.2**

10. Conclusions

10.1. Introduction

10.1.1. This section concludes our assessment by reviewing the balance of projected demand and existing supply and, drawing on the findings from preceding sections, provides options for the policy direction regarding employment land in West Oxfordshire.

10.2. Conclusions

Office space (E(g)(i), E(g)(ii) and Sui Generis Office Use Classes)

10.2.1. The latest published CoStar data shows there is approximately 120,899 m^2 of office space across West Oxfordshire, accounting for 7.4% of total office floorspace across the FEMA.

10.2.2. Office floorspace is predominantly located in Witney, Eynsham and Chipping Norton. Office stock is generally smaller compared with the FEMA, SE, and England as a whole, and is centred around small and medium size premises dominated by SME occupiers whose typical requirements are shaped by affordability. There are however a number of high-quality recent office developments and business centres such as West Oxfordshire Business Park, Thorney Leys Industrial Park and Oasis Business Park.

10.2.3. Most office floorspace is currently occupied however vacancy rates are currently exhibiting a relatively high level compared to the FEMA, SE and England. Demand for office space in West Oxfordshire is also relatively low which is reflected in its average rental values which are significantly lower than the FEMA, SE and England averages.

10.2.4. The projected demand for office floorspace up to 2041 is for an estimated net additional 30,008 m^2 of floorspace (under the preferred scenario). This requirement is due to expected growth in sectors that require office space, which is likely to be driven by a range of social, demographic and wider economic factors.

Industrial space (E(g)(iii), B2 and B8 and Sui Generis Industrial Use Classes)

10.2.5. The latest published CoStar data shows there is approximately 439,288 m^2 of industrial floorspace across West Oxfordshire. Key locations include Station Lane Industrial Estate, Bromag Industrial Estate, Oakfield Industrial Estate and Tungsten Park. The majority of floorspace is generated by storage and distribution (67.3%), followed by general industrial (24.1%); and light industrial (8.6%).

10.2.6. Analysis highlights limited spare capacity within the industrial use classes, with no vacancy in the light industrial sector, 1.8% vacancy in the general industrial sector and 3.8% in the storage and distribution sector. Although there have been fluctuations over time, current rates are generally lower than across the FEMA, SE and England as a whole.

10.2.7. Rental values are varied across the industrial use classes. Whilst they are significantly higher than the FEMA, SE and England for general industrial space, they are lower for light industrial and storage and distribution space. This is unlikely

to change in the future, particularly for storage and distribution due to the inherent lack of strategic road infrastructure throughout much of the district even with planned improvements.

10.2.8. The projected demand for industrial floorspace up to 2041 is for an estimated net additional 107,588 m^2 of floorspace (under the preferred scenario).

10.3. Policy direction

10.3.1. The needs analysis forecasts increased demand for office and industrial floorspace within the district over the Local Plan period to 2041. Given the quantum of land available at designated sites, additional vacant sites and employment sites in the planning pipeline, this demand is not considered to require the allocation of additional sites in West Oxfordshire up to 2041 beyond those identified, comprised of two key sites: Oxfordshire Cotswold Garden Village SLG (40 ha) and East Chipping Norton (5 ha) which are considered to be justified and deliverable based on the evidence considered.

10.3.2. The safeguarding of existing sites to ensure there is a ready supply of premises and that the vacant land and intensification opportunities can potentially be realised is considered important across the district. However, while it is important to protect employment land, there is also evidence of competition for space other than non-employment uses such as housing; employment land policies will therefore need to accommodate the Council's ambitions and objectives in these areas. This will require a flexible approach that considers the merits of each individual site, and which use it is best suited for.

10.3.3. In practice, the selective protection of employment land and premises is recommended to ensure that the sites that are unlikely to come forward for employment use during the Local Plan period are not left vacant. This approach would ensure that the over protection of sites, which could result in the inefficient use of assets and blight and deter investment, does not occur. Similarly, the under protection of sites, whereby the market intervenes prematurely to short-term demand indicators and adversely impacts the long-term provision of employment land, also does not occur.

10.3.4. When forming employment land policies, the Council should follow a balanced approach such that the employment activities of all business sizes, from start-ups to large headquarters, are supported and encouraged. The Council should also recognise that demand will vary by type of space and will therefore be geographically varied.

10.3.5. The Council should monitor changes of employment land through planning permissions to ensure that sufficient land is available for economic growth over the plan period to 2041. A routinely updated Employment Land Trajectory (or similar) would be beneficial. This is whilst being dynamic enough to allow planning applications to be determined with the best available information to hand. This includes ensuring that Class E changes of use do not have an outsized impact on the integrity of employment areas through facilitating the introduction of non-employment uses.

10.3.6. This is one of several evidence base documents the Council will be considering that will feed into and inform its Local Plan evidence base. These are AECOM's independent conclusions based on the evidence, and the Council will subsequently consider these in drafting its own Local Plan policies.

Appendix A Commuter flow data

The behaviours of commuters in terms of where their place of residence is in relation to workplace location is important for policymakers to understand for the purposes of planning for sustainable communities to ensure appropriate amounts of employment opportunities are available where needed. Commuter flow data is utilised for this purpose.

Commuter flow information is derived from Census data, the most recent of which was conducted during the COVID-19 pandemic at a time where restrictions and other measures such as 'furloughing' encouraged people to stay at or work from home. This is a recognised concern in terms of the robustness of commuter flow data, i.e. the extent to which observed trends are reflective of normal behaviours versus temporary measures. The Office for National Statistics who produce Census data have noted that caution should be taken when applying commuter flow data derived from the 2021 Census for the purposes of policy development[84].

In order to consider the difference in observed trends between 2011 Census data and 2021 Census data, the following discussion compares commuter flow data from each year. In order to allow comparison, those working at or from home have been excluded from the 2011 data presented given working at or from home information was not collected for the 2021 dataset. This analysis therefore purely considers how *commuters* behave, given it is those with a workplace which is not at home who create demand for employment space[85]. Also, this analysis reflects how the adjacent influence of homeworking might have affected the spatiality of commuting. As discussed in Section 4, the Office for National Statistics threshold definition of self-containment has been adopted to define a travel to work area. That is, for an area with a workforce in excess of 25,000 such as West Oxfordshire, a travel to work area is evident when 66.7% or more of the workforce are retained within the area in which they live. Inflow self-containment refers to the flow of commuters whose place of work is in West Oxfordshire. Outflow self-containment refers to the flow of commuters whose place of residence is in West Oxfordshire. Figure A.1 shows inflow and outflow self-containment for West Oxfordshire in 2011 and 2021.

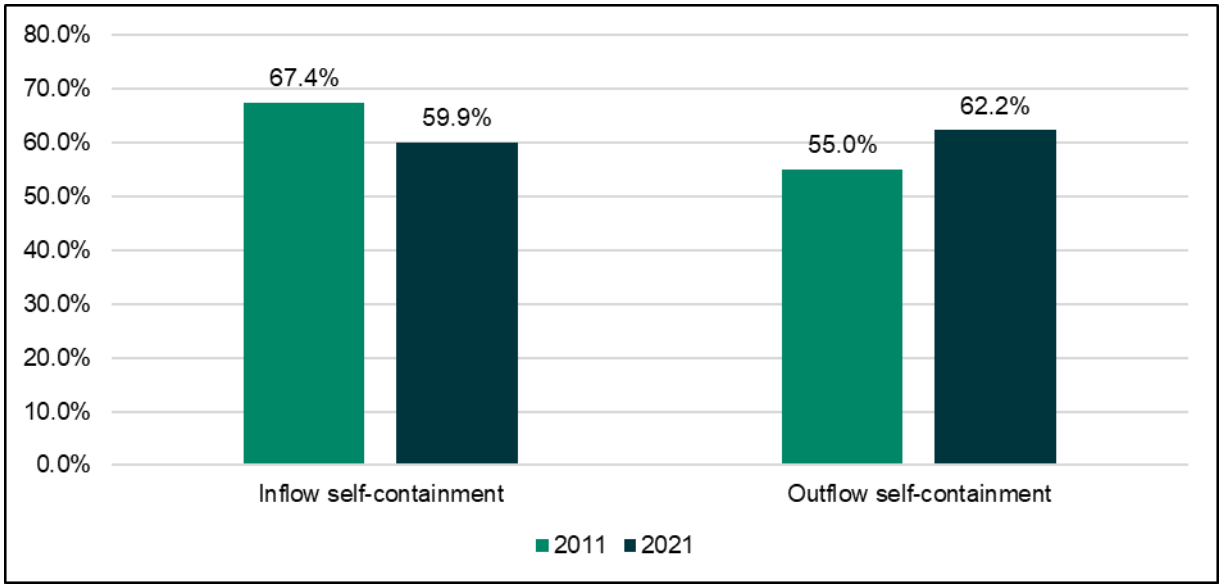
From an inflow perspective, West Oxfordshire would be considered to be a self-contained travel to work area in 2011, i.e. of those travelling to a workplace in West Oxfordshire a sufficiently high proportion originated in West Oxfordshire to define a succinct economic area. In 2021, a larger proportion of those travelling to a workplace in West Oxfordshire originated outside of the local authority area.

From an outflow perspective West Oxfordshire would not be considered to be a self-contained travel to work area in either 2011 or 2021, i.e. of those residents of West Oxfordshire, workplace destinations outside of West Oxfordshire represented a sufficiently high proportion of destinations such that it would not be defined as a succinct economic area.

[84] Office for National Statistics, (2023); Origin-destination data, England and Wales: Census 2021. Available at: https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/bulletins/origindestinationdataenglandandwales/census2021

[85] Working from home has other implications from a planning perspective such as provision of goods and services local to households, as well as requirement for strong digital/broadband connectivity capabilities in residential areas.

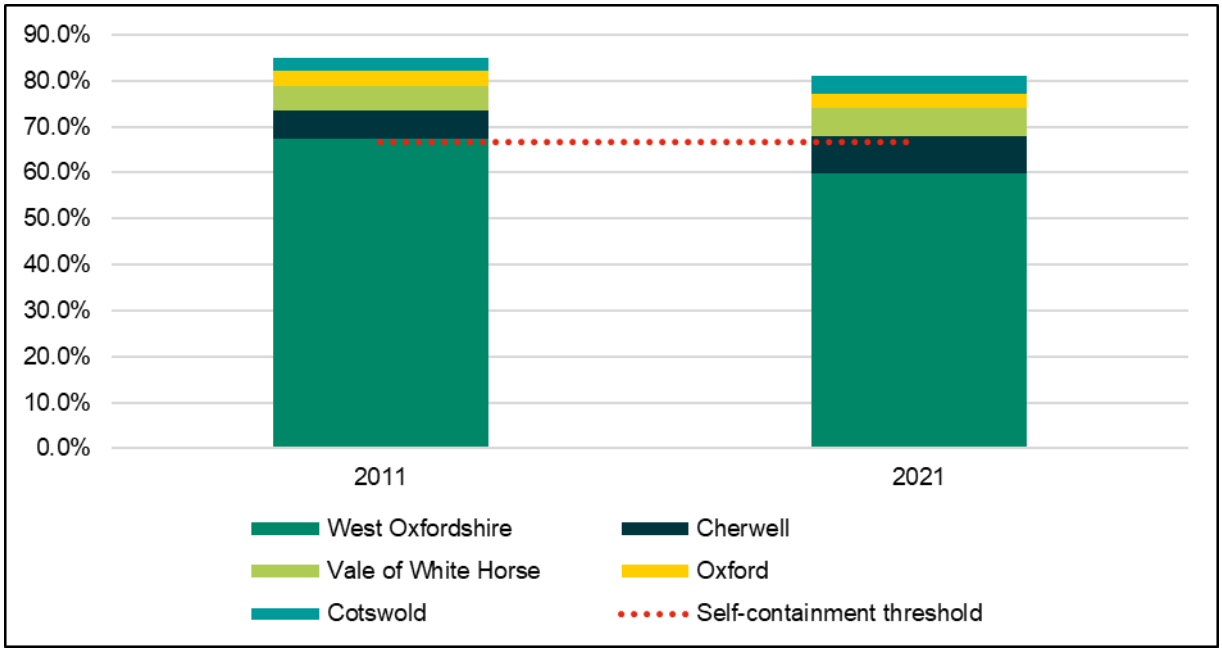
Figure A.1 Comparison of inflow and outflow self-containment for West Oxfordshire between 2011 and 2021



Source: Office for National Statistics, (2012); Census 2011. Office for National Statistics, (2022); Census 2021.

Comparing commuter inflow between 2011 and 2021, a smaller proportion of those commuters with a workplace in West Oxfordshire were also resident there. In 2021, Cherwell would also be considered as part of the travel to work area in order to reach the threshold definition of self-containment. This is shown in Figure A.2.

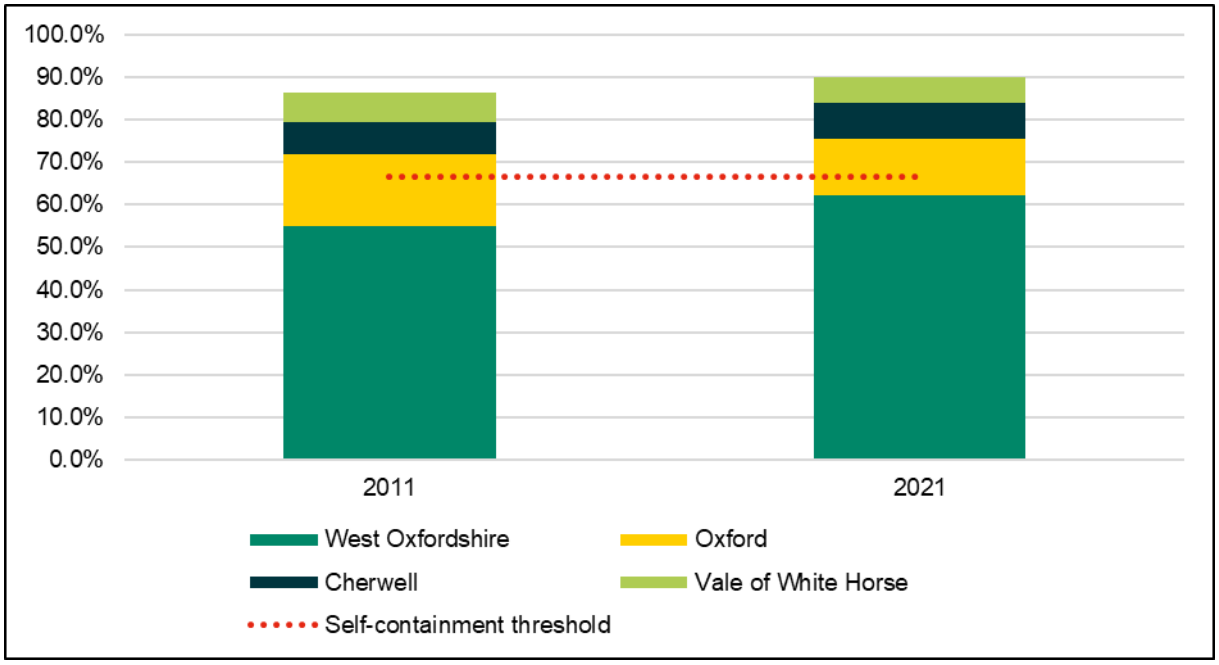
Figure A.2 Comparison of inflow self-containment origins by local authority area for West Oxfordshire workplace locations between 2011 and 2021



Source: Office for National Statistics, (2012); Census 2011. Office for National Statistics, (2022); Census 2021.

Comparing commuter outflow between 2011 and 2021, the condition whereby the principal workplace destination for those whose place of residence is in West Oxfordshire comprised the local authority itself as well as Oxford in order to sufficiently meet the self-containment threshold remained consistent.

Figure A.3 Comparison of outflow self-containment destinations by local authority area from West Oxfordshire places of residence between 2011 and 2021



Source: Office for National Statistics, (2012); Census 2011. Office for National Statistics, (2022); Census 2021.

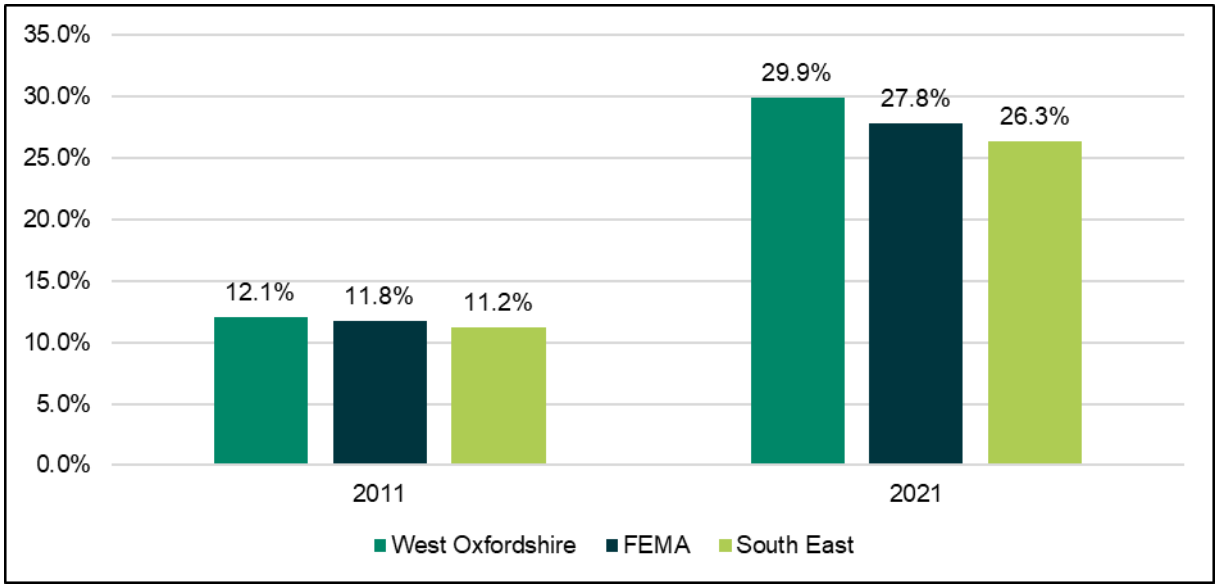
Is 2021 commuter flow data reliable?

To determine whether 2021 commuter flow data is reliable for the purposes of defining a travel to work area in West Oxfordshire, the previous discussion has considered how the data differs from that presented in 2011. From an outflow self-containment perspective, the data shows the same relationship between West Oxfordshire and Oxford. The adjacent influence of homeworking has therefore not significantly affected the spatiality of commuter outflows, i.e. the relative importance/relationship with Oxford. From an inflow self-containment perspective, West Oxfordshire would be considered less self-contained between 2011 and 2021, with influence of workforce from Cherwell important to define a succinct area. Overall, the spatiality of commuter flows has not significantly changed with respect to the important origins and destinations of commuters and a similar relationship between West Oxfordshire, Oxford and Cherwell remains evident. On balance, it is therefore considered appropriate to consider commuter flows as derived from the latest available data on the basis that there is not sufficient perturbation in the data to cause doubt and that more up-to-date data are likely more reflective of the current behaviours of the workforce.

Homeworking

As discussed, commuter flow data in 2021 did not include those working at or from home. However, homeworking as discussed has the potential to affect the spatiality of commuter flows. During the COVID-19 pandemic, the amount of homeworking increased dramatically. Indicatively, Figure A.4 shows how the proportion of those aged 16 to 64 in employment who worked mainly at or from home at the time of Census data collection in 2011 and 2021.

Figure A.4 Comparison of the proportion of those in employment who work mainly at or home between 2011 and 2021



Source: Office for National Statistics, (2012); Census 2011. Office for National Statistics, (2022); Census 2021.

Although the proportion of the workforce primarily homeworking increased during the COVID-19 pandemic, evidence suggests that although a degree of purely homeworking persists, hybrid working whereby some proportion of work is conducted at a workplace and at home is considered to be more prevalent[86] [87]. On this basis, it is unlikely that commuter behaviours reflect conditions of 2011 and 2021 commuter data is, although imbued with some influence of pandemic restrictions, more closely reflective of modern working patterns and the current nature of work.

[86] Office for National Statistics, (2023); Characteristics of homeworkers, Great Britain: September 2022 to January 2023. Available at: https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/characteristicsofhomeworkersgreatbritain/september2022tojanuary2023

[87] Office for National Statistics, (2022); Is hybrid working here to stay? Available at: https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/ishybridworkingheretostay/2022-05-23