

3 Oxfordshire's Future Housing & Employment Trajectory to 2040

Oxfordshire's Future Change Trajectory to 2040 at a Glance

This chapter provides an indication of the key policy changes that have occurred since OxIS-17, including the adoption of District Local Plans and Neighbourhood Plans alongside the emerging Oxfordshire Plan 2050.

Through use of up-to-date information provided by Oxfordshire District Councils, the chapter summarises future housing and employment allocations, and how this might impact on possible population by 2040. To reflect the uncertainty of the period after the Local Plan horizons, this considers:

- **Core Local Plan Period:** 2020 – 2031 / 2035 / 2036 (depending on Local Plan)
- **Horizon Planning Period:** 2031 / 2035 / 2036 – 2040

The population estimates to 2031 and 2040 are necessary to inform the county's future infrastructure needs both during the Core Planning Period and the Horizon Planning Period to 2040. This is applicable to infrastructure types that are predominantly demand driven such as Education, Potable Water, Waste and Health and Adult Social Care.

Any potential emerging housing and employment allocations to 2050 will be covered in the forthcoming OxIS Stage 2 Report.

3.1 Oxfordshire's Planning Policy Context

3.1.1 Planning Policy Framework

The UK Government controls and regulates England's planning system through key legislation, including:

- Town and County Planning Act 1990
- The Planning and Compulsory Purchase Act 2004
- Localism Act 2011

National planning policy is contained within both NPPF (MHCLG, 2019) and Planning Practice Guidance produced by the Ministry of Housing, Communities & Local Government (MHCLG) (see Section 1.4.2).

Each of Oxfordshire's five District Councils, in their capacity as Local Planning Authorities, are required to produce a Local Plan, setting out the intentions for spatial allocations of housing and employment sites across their area. Alongside Local Plans, there are various Neighbourhood Plans produced by Parish and Town Councils throughout Oxfordshire which develop a shared vision for future development within local areas.

Potential Future Planning Process Changes

There are likely to be substantial changes to the planning process in England implemented by 2024 that the upcoming round of Oxfordshire Local Plans may be required to take cognisance of. The precise changes are not yet known, but MHCLG's initial concepts have been initially identified within the Planning for the Future White Paper. Some of the key potential changes, such as the establishment of a Community Infrastructure Levy, are likely to impact on how infrastructure in Oxfordshire is delivered in future.

All Local Plans in Oxfordshire are underpinned by IDPs. Recent legislative changes now obligate Local Planning Authorities to prepare an Infrastructure Funding Statement annually to identify schemes intended to be funded through the planning process.

Infrastructure Funding Statements

The Community Infrastructure Levy (Amendment) (England) Regulations 2019 obligates Local Planning Authorities to prepare Infrastructure Funding Statements annually.

There is an opportunity for these regular Infrastructure Funding Statements to provide a greater level of transparency and clarity over Oxfordshire's emerging infrastructure needs to support delivery of housing and employment sites allocated in District Local Plans and Neighbourhood Plans.

3.1.2 Oxfordshire Planning Policy Changes Since 2017

3.1.2.1 Emerging Oxford-Cambridge Arc Spatial Framework

The Oxford-Cambridge Arc is a cross-government initiative that supports spatial land use planning for the future of the five contained counties of Oxfordshire, Bedfordshire, Buckinghamshire, Cambridgeshire, and Northamptonshire up until 2050.

The Oxford-Cambridge Arc is a highly successful, prosperous and productive network of places. These internationally renowned cities, together with their neighbouring towns and rural communities, are home to vital innovation hubs that attract knowledge-led industries and people. Because of this there has been a boost in funding to enhance aspects such as how the environment is protected and enhanced, how land is used and where future housing and employment development could occur. Such projects being funded include East West Rail which aims to link Oxford to Milton Keynes and Cambridge (see Section 4.3.2 for further detail).

Emerging Oxford-Cambridge Spatial Framework

In 2020, the UK Government committed to developing a strategic Spatial Framework for the Oxford-Cambridge Arc, with the intention of embedding an integrated approach to ensure that the region is equipped to tackle key issues like the climate crisis whilst also ensuring it can continue to prosper.

This Strategic Plan intends to shape future decisions on:

- How land is used
- How the environment is protected and enhanced, including addressing climate change
- Where and when future housing and employment development happens
- What infrastructure is provided

The Spatial Framework will be assigned the same status as national planning and transport policy, like NPPF, and therefore there will be a requirement for emerging Local Plans in Oxfordshire to account for it.

The Spatial Framework is currently in preparation by MHCLG, with further consultation planned in 2022 and an expected completion date in 2023. There is an opportunity for OxIS Stage 2 to influence and take account of the emerging outcomes.

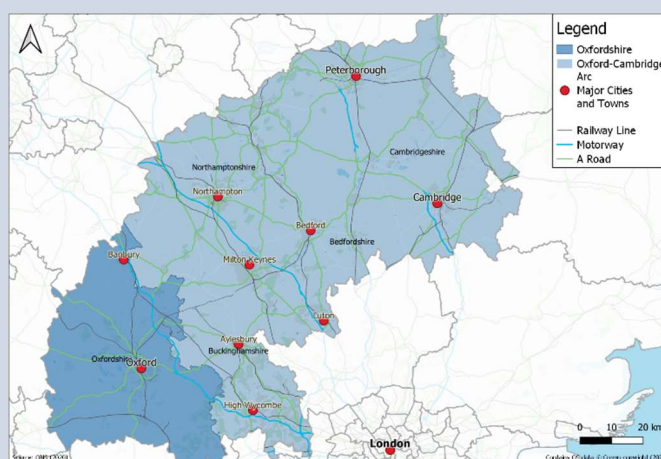


Figure 3-1: Oxford-Cambridge Arc

3.1.2.2 Oxfordshire Housing and Growth Deal

This deal was signed in 2018 (since OxIS-17) which commits Oxfordshire's local authorities to deliver 100,000 homes, allocated in the various District Local Plans, in the 20-year period between 2011 and 2031.

Oxfordshire Housing and Growth Deal

The deal was signed by all of Oxfordshire Local Authorities, OxLEP and HM Government in February 2018 (MHCLG, 2018). It commits OCC and the Oxfordshire District Councils to work together to deliver 100,000 homes in the 20-year period between 2011 and 2031. Funding of £215 million has been provided by the UK Government as part of the deal; of which £150 million is assigned for investment in infrastructure.

3.1.2.3 Emerging Oxfordshire Plan 2050

Oxfordshire Plan 2050

This is a forthcoming Joint Statutory Spatial Plan which is currently in preparation with its current anticipated completion and adoption by all of Oxfordshire's Local Authorities in 2023. Prioritising the need to maximise social and environmental outcomes (including the need to address climate change) as a core consideration, the Plan will identify potential areas where sustainable housing and employment development could occur. It will be used as the strategic planning framework for Oxfordshire, underpinning the preparation of future District Local Plans.

The OxIS Stage 2 Report, will align with Regulation 19 of the Oxfordshire Plan 2050 consultation process and consider what infrastructure is required to support the county's aspirations to maximise social and environmental outcomes in delivering potential future housing and employment to 2050.

3.1.2.4 District Local Plan Adoptions

Each of Oxfordshire District Councils now have an adopted Local Plan in place, which provides greater certainty over the future housing and employment trajectories since OxIS-17. There are currently seven adopted Local Plans across Oxfordshire (see Table 3-1).

District Local Plan	Adoption Date	Timeframe	Key Changes Since OxIS-17
Cherwell Local Plan (Part 1) 2011 – 2031 (2015)	July 2015 (Readopted December 2016)	2011 to 2031	n/a
Cherwell Local Plan (Part 1) 2011 – 2031 Partial Review (2020)	September 2020	2011 to 2031	<ul style="list-style-type: none"> Formal adoption Additional housing allocations apportioned
Oxford Local Plan 2016 – 2036 (2020)	June 2020	2016 to 2036	<ul style="list-style-type: none"> Formal adoption
South Oxfordshire Local Plan 2035 (2020)	December 2020	2011 to 2035	<ul style="list-style-type: none"> Formal adoption Key changes in strategic site allocations Additional housing allocations apportioned
Vale of White Horse Local Plan 2031 (Part 1) (2016)	December 2016	2011 to 2031	n/a
Vale of White Horse Local Plan 2031 (Part 2) (2019)	October 2019	2011 to 2031	<ul style="list-style-type: none"> Formal adoption Additional housing allocations apportioned
West Oxfordshire Local Plan 2031 (2018)	September 2018	2011 to 2031	<ul style="list-style-type: none"> Formal adoption

Table 3-1: Summary of adopted District Local Plans in Oxfordshire and key changes since OxIS-17

The current tranche of Local Plans has slightly different end dates, however, work is progressing through the Oxfordshire Plan 2050 to align the next set as closely as possible. The currently adopted end-dates of Local Plans is as follows:

- **2031:** Cherwell, West Oxfordshire and Vale of White Horse Local Plans
- **2035:** South Oxfordshire Local Plan
- **2036:** Oxford Local Plan

Next Round of District Local Plans

All five Oxfordshire District Councils have committed to consider a future consistent end date in the next round of their Local Plans. These Local Plans are currently in the early stages of preparation across the county and therefore are not yet ready to inform the OxIS Stage 1 Process. This next round of Local Plans will also include a joint Local Plan which combines South Oxfordshire and the Vale of White Horse.

There is an opportunity for future iterations of OxIS to consider the updated impact of these emerging Local Plans on the associated infrastructure requirements when these become available.

3.1.2.5 Neighbourhood Plans

There have been a series of Neighbourhood Plans produced since OxIS-17 which set out the local vision for future housing and employment. Once plans are ‘made’ via a local referendum and approved by the local planning authority, these form part of the relevant Local Plan. As of October 2021, there are 16 ‘made’ Neighbourhood Plans (see Table 3-2), with more in preparation.

Local Planning Authority	‘Made’ Neighbourhood Plans
Cherwell	<ul style="list-style-type: none"> • Adderbury (Referendum Held 2018) • Bloxham (Referendum Held 2016) • Hook Norton (Referendum Date 2015) • Mid-Cherwell (Referendum Held 2019) • Weston-on-the-Green (Referendum Held 2021)
Oxford City	<ul style="list-style-type: none"> • Headington (Referendum Held 2017)
South Oxfordshire	<ul style="list-style-type: none"> • Crowmarsh (Referendum Held 2021)
Vale of White Horse	<ul style="list-style-type: none"> • West Hanney (Referendum Held 2021) • Appleton with Eaton (Referendum Held 2021) • Chilton (Referendum Held 2021)
West Oxfordshire	<ul style="list-style-type: none"> • Chipping Norton (Referendum Held 2016) • Eynsham (Referendum Held 2020) • Hailey (Referendum Held 2019) • Shilton (Referendum Held 2018) • South Leigh (Referendum Held 2018) • Charlbury (Referendum Held 2021)

Table 3-2: Summary of ‘Made’ Neighbourhood Plans in Oxfordshire

3.2 Spatial Portrait of Oxfordshire’s Housing to 2040

OxIS-17 identified the period from 2016 to 2031 to be the core planning period, reflecting the duration of the adopted Local Plans, with the period post 2031 to 2040 having less clarity and weight attached to it as it forecasts beyond the planning horizon of local authorities and infrastructure planning partners.

OxIS Stage 1 Future Planning Time Horizons

OxIS Stage 1 retains the same end date of 2040 considered within OxIS-17. However, this differs by District (Table 3-3).

Local Authority	Core Local Plan Period (Primarily 2020 to 2031)	Horizon Planning Period (Primarily 2031 to 2040)
Cherwell	2020 to 2031	2032 to 2040
Oxford City	2020 to 2036	2037 to 2040
South Oxfordshire	2020 to 2035	2036 to 2040
Vale of White Horse	2020 to 2031	2032 to 2040
West Oxfordshire	2020 to 2031	2032 to 2040

Table 3-3: OxIS Stage 1 future planning time horizons by District

3.2.1 District Local Plan Housing Allocations in Core Planning Period

The current Local Plans allocate approximately 107,000 homes. The broad spatial strategy within each adopted Local Plan is summarised in Table 3-4.

Adopted Local Plan	Total Allocated Homes (2011 – 2031)	Spatial Allocation Summary
Cherwell Local Plan 2011- 2031 Part 1 (2015)	27,240	<ul style="list-style-type: none"> • Prioritises housing allocations in established towns and villages • Limits housing allocations rural areas • Focus of proposed housing allocations in and around Bicester and Banbury
Cherwell Local Plan 2011- 2031 Part 1 Partial Review (2020)		<ul style="list-style-type: none"> • Prioritises apportioned housing allocations in locations well connected to Oxford along the A44 and A4260 corridors in the south Cherwell area north from Oxford.
Oxford Local Plan 2036 (Oxford City Council, 2020)	10,884 ¹	<ul style="list-style-type: none"> • Focuses on housing allocations with no new employment site allocations. • Focuses on intensifying development on previously developed land • Supports the role and function of Oxford's city centre, district centres and transport nodes as the most sustainable locations for new development
South Oxfordshire Local Plan 2035 (2020)	30,056 ²	<ul style="list-style-type: none"> • Allocation of a strong network of vibrant settlements building upon the existing settlement hierarchy. • Strategy focuses development in Didcot Garden Town as well as settlements at Culham, Chalgrove and Berinsfield Garden Village. • Apportioned allocations predominantly at the Oxford City boundary including at Northfield, Bayswater Brook and south of Grenoble Road
Vale of White Horse Local Plan 2031 Part 1 (2016)	22,760	<ul style="list-style-type: none"> • Reinforces service centre roles of the main settlements whilst promoting thriving villages and rural communities. • Majority of strategic future housing allocated at the periphery of Wantage, west of Didcot and north of Abingdon-on-Thames • Future housing also allocated within villages along the A420 corridor including at Faringdon, Kingston Bagpuize and Shrivenham.
Vale of White Horse Local Plan 2031 Part 2 (2019)		<ul style="list-style-type: none"> • Allocates apportioned future housing in Abingdon-on-Thames and Oxford Fringe Sub-Area (e.g. at Dalton Barracks and Shippon alongside the larger villages of East Hanney and Marcham)
West Oxfordshire Local Plan 2031 (2018)	15,950	<ul style="list-style-type: none"> • The strategy steers a significant proportion of future development into the Witney, Carterton and Chipping Norton Sub-Areas, with a particular focus on these three main service centres. • A strategic urban extension of Eynsham (e.g. a garden village alongside additional housing in Woodstock).
Notes: ¹ Covers the core planning period between 2016 - 2036 ² Covers the core planning period between 2011 – 2035 ³ In addition to allocated homes, the Local Plans have separate policies covering accommodation for travelling communities and boat dwellers.		

Table 3-4: District Council Local Plans Broad Housing Allocation Strategy

3.2.2 Forecast Future Changes in Core Local Plan Period

The five local planning authorities (District Councils) have each supplied a site-specific dataset which provides an up-to-date position of housing to be delivered from 2020 to the end of the Core Planning Period. For each of these sites, housing supply trajectories have been updated to reflect the picture as of 31/03/2020 to indicate anticipated housing delivery, however the actual delivery could differ significantly depending on several factors, including changing economic conditions as a result of COVID-19, development viability and infrastructure delivery.

Table 3-5, which provides a summary of allocated future housing across the five District Councils, indicates that a total of approximately 75,600 homes are planned to be completed during the Core Local Plan Period.

Local Authority	Time Period	Approximate Remaining Housing to be Delivered from Local Plans ¹
Cherwell	2020 – 2031	18,908
Oxford City	2020 – 2036	8,900
South Oxfordshire	2020 – 2035	22,860
Vale of White Horse	2020 – 2031	13,660
West Oxfordshire	2020 - 2031	11,550
OXFORDSHIRE		75,878

Notes:

¹ Calculated by subtracting the historical housing completions (2011/12 - 2019/20) from the total allocations in the various Local Plans. For Oxford, historical completions (2016/17 - 2019/20) have been used to reflect the different start point of their Local Plan

Table 3-5: Allocated Future Housing Summary by District 2020 to 2031, 2035 and 2036 [Calculations based on data by District Councils based on 2020 Annual Monitoring Reports and 2020 Local Plan Adoptions]

Figure 3-2 illustrates the spatial distribution of future allocated housing on a site-by-site basis during the Core Local Plan Period (2020 – 2036).

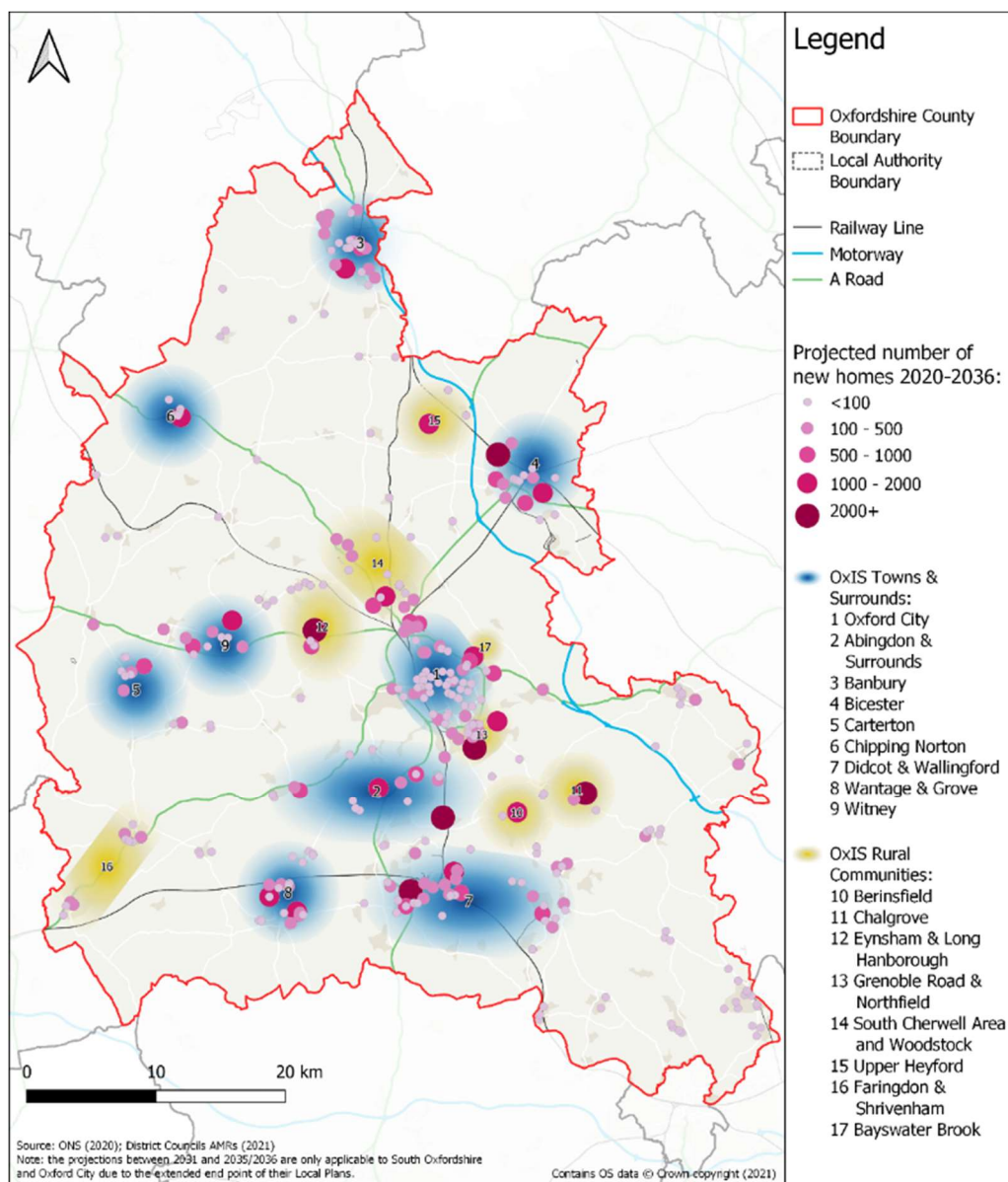


Figure 3-2: Total Projected Future Housing During Core Local Plan Period (2020/21 – 2035/36)

This data has been broken down by five-year segments of future housing allocations (see Figure 3-3) covering:

- **Short Term** 2020/21 – 2025/26
- **Medium Term** 2026/27 – 2031/32
- **Long Term** 2032/33 – 2035/36

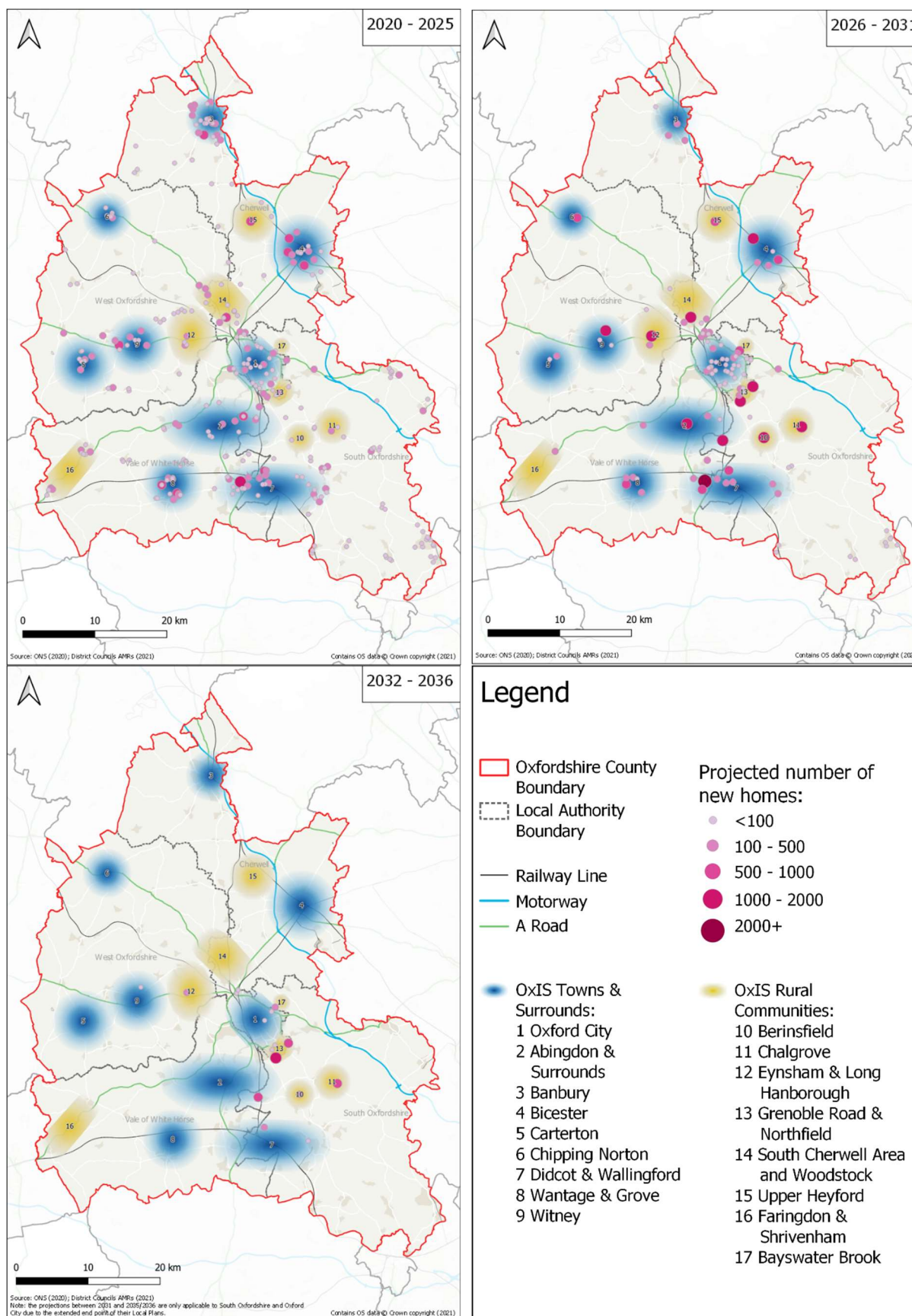


Figure 3-3: Projected New Homes During Core Plan Periods (Top Left: Short Term (2020-2025), Top Right: Medium Term (2026-2031), Bottom Left: Long Term (2032-2036) [Applicable to Oxford City and South Oxfordshire only])

Approximate Future Housing Allocations by OxIS Town & Surround in Core Local Plan Period

1. Oxford City



8,900 Homes
(2020 – 2036)

2. Abingdon & Surrounds



4,600 Homes

3. Banbury



5,000 Homes

4. Bicester



6,900 Homes

7. Didcot & Wallingford



15,000 Homes
(2020 – 2035)

5. Carterton



1,700 Homes

6. Chipping Norton



1,300 Homes

8. Wantage & Grove



4,300 Homes

9. Witney



3,100 Homes

Approximate Future Housing Allocations by OxIS Rural Community in Core Local Plan Period

10. Berinsfield



1,800 Homes
(2020 – 2035)

11. Chalgrove



2,400 Homes
(2020 – 2035)

12. Eynsham & Long Hanborough



3,700 Homes

13. Grenoble Road & Northfield



4,300 Homes
(2020 – 2035)

14. South Cherwell Area & Woodstock



5,000 Homes

15. Upper Heyford



1,600 Homes

16. Faringdon & Shrivenham



1,300 Homes

17. Bayswater Brook



1,100 Homes
(2020 – 2035)

3.2.3 Future Housing in Horizon Planning Period to 2040

There is greater uncertainty in relation to forecasting the future housing in the Horizon Planning Period between the end of the Core Local Plan Period and 2040 due to the ongoing Oxfordshire Plan 2050 process. This will be captured in the forthcoming OxIS Stage 2 Report, as the future situation becomes clearer.

For the purposes of this OxIS Stage 1 Report, a consistent roll-forward considering both the historical and projected housing completions covering the period between 2011 and 2031 has been used to inform the potential future housing during the Horizon Planning Period to 2040. This roll-forward equates to a projected average completion rate of approximately 4,800 homes per year across Oxfordshire.

3.3 Spatial Portrait of Oxfordshire's Employment Allocations to 2040

3.3.1 District Local Plan Strategic Employment Allocations in Core Planning Period

As shown in Figure 3-4, over 500 hectares of strategic employment space is allocated within the various District Local Plans. As indicated in Table 3-6, most of the space is split across Cherwell and the Vale of White Horse. The increase in employment space in the Vale of White Horse is associated with several key strategic sites in the Science Vale including Harwell Campus, Milton Park and the former Didcot Power Station. Notable employment sites are also allocated around Bicester and in several mixed-use communities, including the Salt Cross Garden Village in Eynsham.

Adopted Local Plan	New Strategic Employment Sites Total Allocation	Spatial Allocation Summary
Cherwell Local Plan 2011- 2031 Part 1 (2015) 1	212 hectares in addition to high value employment areas	<ul style="list-style-type: none"> Allocation of large employment sites in Bicester (138.5 hectares), Banbury (61 hectares) and Former RAF Upper Heyford (12 hectares) High Value Employment Areas at Langford Lane / Oxford Technology Park / London-Oxford Airport and at Begbroke Science Park
Oxford Local Plan 2036 (Oxford City Council, 2020)	66 hectares (Previous Allocation of Oxford Core Strategy 2026)	<ul style="list-style-type: none"> No new strategic employment sites are identified in the Local Plan Provision for nine hectares of employment land at Northern Gateway and five hectares in West End Total of 52 hectares from sites and allocated housing sites Protection of 174 hectares of existing employment sites²
South Oxfordshire Local Plan 2035 (2020)	31 hectares	<ul style="list-style-type: none"> Intensification of key sites including Culham Science Centre (7 hectares) and Oxford Science Park extension at Grenoble Road (10 hectares) Key strategic sites at Berinsfield (5 hectares) and Chalgrove (5 hectares) as part of mixed-use sites as well as sites at Southmead (3 hectares) and in Wallingford (1 hectare)
Vale of White Horse Local Plan 2031 Part 1 (2016) 1	194 hectares	<ul style="list-style-type: none"> Key strategic sites include Harwell Campus (128 hectares), Milton Park (28 hectares), Didcot A Power Station (29 hectares), Monks Farm (9 hectares) and Faringdon (3 hectares)³
West Oxfordshire Local Plan 2031 (2018)	69 hectares	<ul style="list-style-type: none"> Key mixed-use sites where employment has been allocated includes a 'campus-style' science park at Salt Cross Garden Village (40 hectares) alongside allocations at Witney (18 hectares), Carterton (6 hectares) and Chipping Norton (5 hectares)
Notes: ¹ No additional strategic employment allocations are included in the Cherwell Local Plan Partial Review or Vale of White Horse Local Plan Part 2 ² Data informed by Oxford City Annual Monitoring Report 2019 – 2020 ³ 3 hectares have been allocated in Faringdon in the Local Plan 2031 Part 1 for a mixed-use site. All allocations shown do not include saved allocations previously identified in the 2011 Local Plan.		

Table 3-6: Summary of Strategic Employment Allocations in District Local Plans

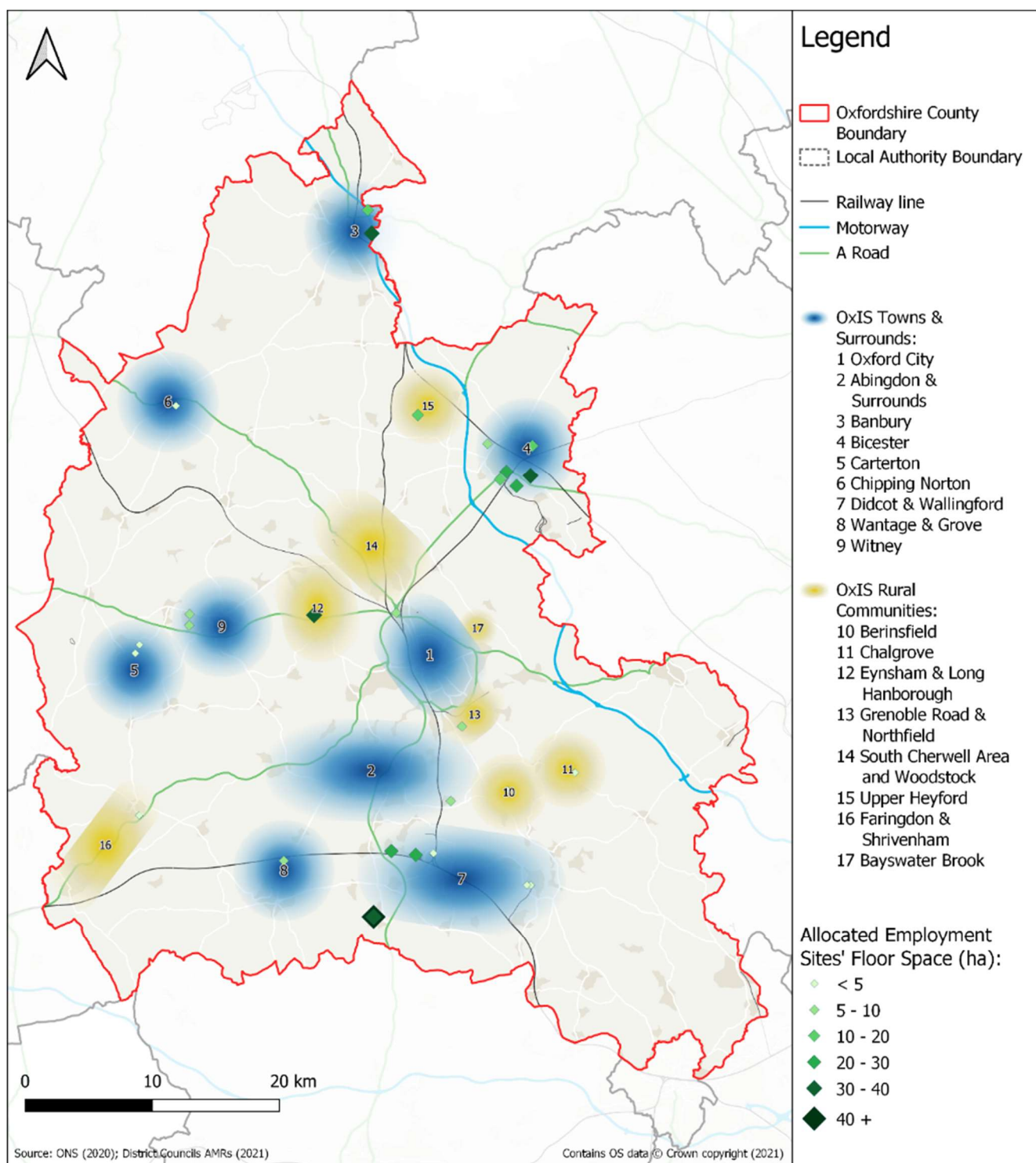


Figure 3-4: Allocated Employment Sites in Core Local Plan Period [Note this represents allocations from Local Plans – some of this has already been delivered since these were Adopted]

3.3.2 Future Employment Trajectory

Due to the ongoing Oxfordshire Plan 2050 process and the continued uncertainty because of economic impacts caused by COVID-19, the projection of future employment during the Core Local Plan Period remains challenging.

Uncertainty of COVID-19 on Future Employment

The ongoing COVID-19 crisis presents a series of unprecedented challenges to forecasting future employment trajectories.

Moreover, there is uncertainty in relation to what the long-term impacts that the transition to remote working in service sectors of Oxfordshire's economy will be; particularly how it impacts the relationship between the quantum of proposed employment floorspace, and the number of jobs created.


















Whilst the OxLEP Economic Recovery Plan (OxLEP, 2021) forecasts that Oxfordshire could have around 6,000 fewer jobs by 2031 (relative to a pre-COVID-19 trajectory), it identifies that there is likely to be continued strong demand for the Research & Development floorspace property market.

3.3.2.1 Future Strategic Employment Sites

Based on information from the various Annual Monitoring Reports across the county, most of the allocated strategic employment sites in the District Local Plans are still to be delivered during the Core Local Plan Period (see Table 3-6). The exception to this is where allocated employment sites have already been delivered.

Whilst the impacts of COVID-19 on the delivery of these sites remains unknown, a summary of allocated floorspace yet to be delivered by OxIS Towns & Surrounds and OxIS Rural Communities is provided below. This indicates that most future jobs in Oxfordshire are likely to be created in the OxIS Towns & Surrounds (e.g. Didcot, Banbury and Bicester).

Remaining Approximate Allocated Strategic Employment Floorspace still to be delivered during Core Local Plan Period (N.B. this includes sites with planning consent granted but not yet built out)

OxIS Towns & Surrounds			OxIS Rural Communities	
1. Oxford City	2. Abingdon & Surrounds	3. Banbury	10. Berinsfield	11. Chalgrove
				
66 Hectares	7 Hectares	29 Hectares	5 Hectares	5 Hectares
4. Bicester	5. Carterton	6. Chipping Norton	12. Eynsham & Long Hanborough	13. Grenoble Road & Northfield
				
128 Hectares	6 Hectares	5 Hectares	40 Hectares	10 Hectares
7. Didcot & Wallingford	8. Wantage & Grove	9. Witney	14. South Cherwell Area & Woodstock	15. Upper Heyford
				
190 Hectares	6 Hectares	18 Hectares	8 Hectares	13 Hectares
			16. Faringdon & Shrivenham	17. Bayswater Brook
				
			3 Hectares	No Strategic Allocations

All remaining employment allocation data is factual and correct as of March 2020; sourced from 2020 District Annual Monitoring Reports and confirmed through subsequent dialogue with District Councils

3.4 Oxfordshire's Future Population Forecasts to 2040

3.4.1 Purpose & Background

Understanding what the future demographic changes will be across Oxfordshire is crucial to informing the county's future infrastructure needs both during the Core Planning Period and the Horizon Planning Period to 2040 (see Chapter 5), with the period to 2050 covered in the forthcoming OxIS Stage 2 Report. This is particularly relevant for infrastructure types that are predominantly demand driven including:

- Energy (IF1)
- Community & Cultural (IF8)
- Waste & Recycling (IF11)
- Education (IF4)
- Health & Adult Social Care (IF10)
- Potable Water Supply & Wastewater (IF12)

All the Adopted District Local Plans' already plan for county-wide population changes originally identified in the Oxfordshire Strategic Housing Market Assessment (2014) to 2031.

The emerging Oxfordshire Plan 2050 process will establish further certainty on population forecasts to inform housing need; which will be considered in the forthcoming OxIS Stage 2 Report.

3.4.2 Approach to Projections

In advance of the ongoing Oxfordshire Plan 2050 process, new OxIS specific housing-led projections have been modelled in partnership with the OCC Oxfordshire Insight team. These form the basis for calculating future infrastructure need, such as education and healthcare, in Chapter 5 of this report.

OCC Oxfordshire Insight Housing-Led Population Forecasts

It is important to note that the rate of housebuilding identified in the various District Local Plans and Annual Monitoring Reports is an input to OCC's population model and the outputs reflect the expected population assuming the fulfilment of the projected housing completions. **The forecasts are not indicative of housing need and should not be used or interpreted as such. Forecasts informing housing need will be reflected in the ongoing Oxfordshire Plan 2050 process.**

For county-wide consistency to reflect the differing level of certainty, projections consider the following timescales:

- **Core Local Plan Period Population Projections (aligned with District Local Plan data):** 2020 – 2031
- **Horizon Planning Period Population Projections:** 2032 – 2040

The horizon planning period (2032 to 2040) utilises a theoretical roll-forward of District Local Plan future housing forecasts (see Section 3.2.3).

3.4.3 Housing-Led Population Projections (2020 – 2040)

How many people might live in Oxfordshire by 2031 and 2040?

Based on the OCC housing-led forecast model (which utilises District Local Plan forecast completions), it is predicted that approximately 850,000 people may live in Oxfordshire by 2031. This represents an **increase of around 21%** compared to 2020.

As indicated in Table 3-7, Cherwell, South Oxfordshire and Vale of White Horse are forecast to undergo increases of between 24% and 28%. Oxford City is forecast to have the lowest population increase of around 10%. The largest increases are forecast to be amongst the older populations (see Figure 3-5).

Local Authority	Potential Population 2031 ¹	% Change (2020 – 2031)
Cherwell	195,000	+28%
Oxford City	175,000	+10%
South Oxfordshire	180,000	+24%
Vale of White Horse	175,000	+25%
West Oxfordshire	130,000	+19%
OXFORDSHIRE	850,000	+21%

Notes:

¹ Figures are approximate and rounded to the nearest 5,000 people

Table 3-7: Forecast Core Local Plan Housing-Led Population Change by Oxfordshire District (2020 – 2031) (Based on OCC Insight Team Projections)

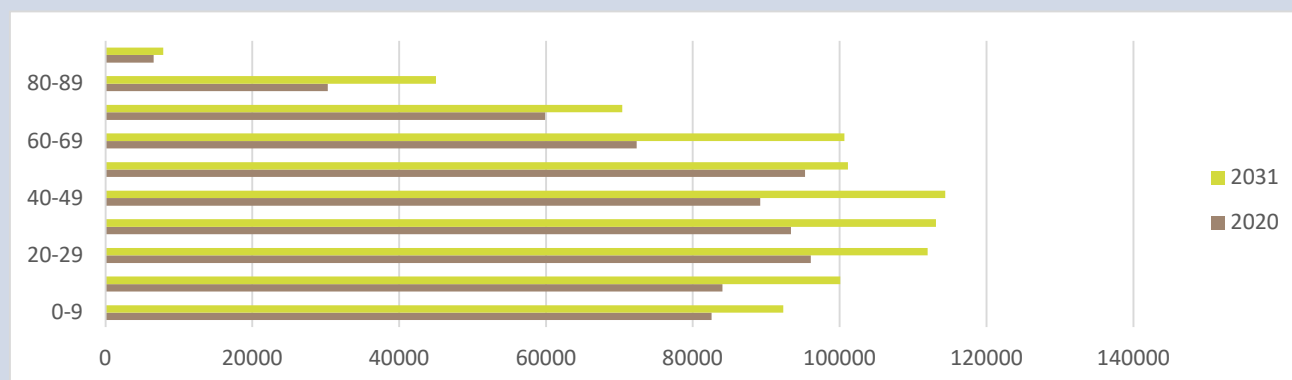


Figure 3-5: Change in Age Groups across Oxfordshire during Core Local Plan Period (Based on OCC Insight Team Projections)

There is a much higher level of uncertainty in relation to forecasting housing-led population projections to 2040 given the application of theoretical house completion data and the ongoing Oxfordshire Plan 2050 process which will provide the framework for the next round of Local Plans.

Based on the information currently available, the OCC housing-led forecast model predicts that approximately 950,000 people may live in Oxfordshire by 2040. This represents an **increase of around 35%**.

Local Authority	Potential Population 2040 ¹	% Change (2020 – 2040)
Cherwell	220,000	+44%
Oxford City	180,000	+13%
South Oxfordshire	210,000	+45%
Vale of White Horse	200,000	+42%
West Oxfordshire	145,000	+31%
OXFORDSHIRE	950,000	+35%

Notes:

¹ Figures are approximate and rounded to the nearest 5,000 people

Table 3-8: Forecast Horizon Planning Period Housing-Led Population Change (2020 – 2040) (Based on OCC Insight Team Projections)

3.5 Cross-County Boundary Changes in Housing & Employment

Future changes in housing and employment outside Oxfordshire remains important as it will have knock-on impacts within the county and a bearing on cross-county infrastructure.

All relevant Local Plans from the nine surrounding local planning authorities neighbouring Oxfordshire have been reviewed and key housing and employment sites are identified in Table 3-9.

As indicated in Figure 3-6, there are several key sites which are likely to impact upon Oxfordshire's future infrastructure need:

- **New Eastern Villages, Swindon:** The New Eastern Villages in Swindon of 8,000 homes is likely to impact upon local infrastructure: including the A420 and local infrastructure in villages such as Shrivenham and Faringdon in the West Vale Environs.
- **East of Thame:** Cumulative strategic development to the east of South Oxfordshire associated with the Aylesbury Garden Town, Princes Risborough and Haddenham is likely to impact towns such as Thame and its surrounding transport connections.
- **Reading and Wokingham:** The cumulative impact of future housing in Reading and in Wokingham, including the potential for a Garden Town at Grazeley, may impact upon key transport corridors across the River Thames in South Oxfordshire.

The implications of these sites have resulted in the consideration of several cross-boundary infrastructure schemes, such as a cycle route between Thame and Haddenham. All relevant cross-boundary infrastructure schemes are identified in Chapter 6.

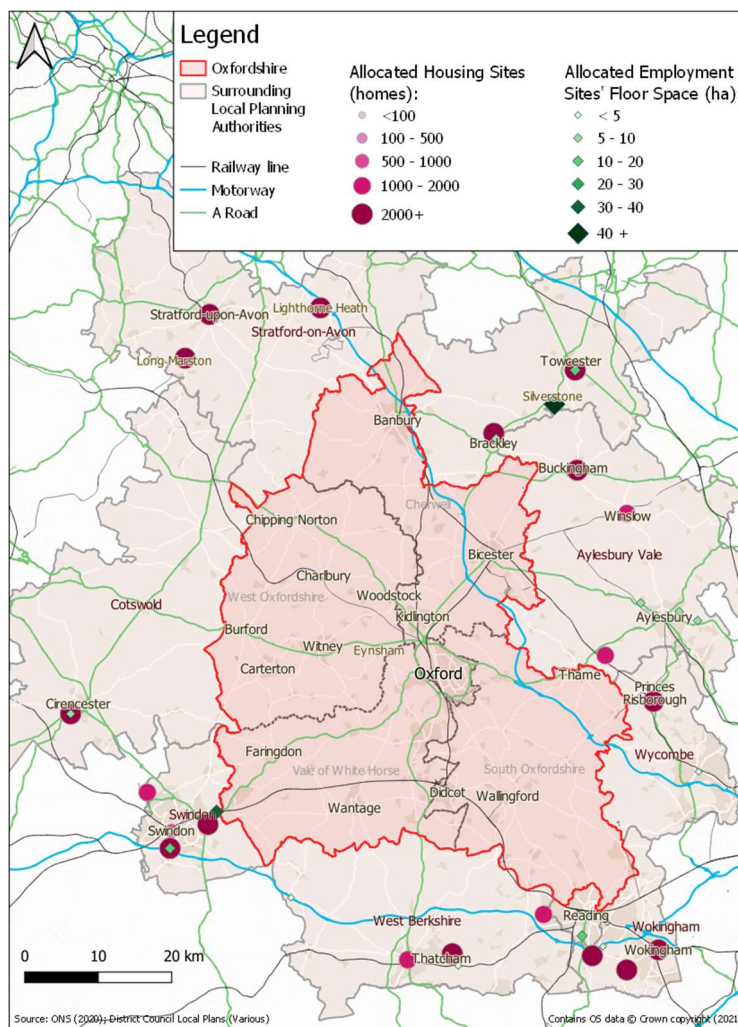


Figure 3-6: Strategic Future Housing & Employment Allocations outside of Oxfordshire

Neighbouring Local Planning Authority	Adopted Local Plan	Major Site	Homes	Floorspace (hectares)
Aylesbury Vale District Council	Vale of Aylesbury Local Plan 2013 – 2033 [Not Yet Adopted]	Aylesbury Garden Town	16,400	-
		Haddenham New Settlement	1,100	-
		Winslow New Settlement	1,200	-
		Buckingham	2,400	-
		Kingsbrook	-	10
		Berryfields	-	9
		Woodlands, College Road	-	10
Cotswold District Council	Cotswold District Local Plan 2011 - 2031	Land South of Chesterton, Cirencester	2,350	9
Reading Borough Council	Reading Borough Local Plan (Adopted 2019)	Central Reading Area	6,300	7
		West Reading and Tilehurst	1,900	-
		Island Road, South Reading		15
South Northamptonshire District Council	South Northamptonshire Local Plan (Parts 1 & 2)	Towcester South Urban Extension	2,650	16
		Silverstone Circuit	-	90
		Brackley North Urban Extension	2,160	9
Stratford-on-Avon District Council	Stratford-on-Avon District Core Strategy 2011 - 2031	Lighthorne Heath New Settlement	2,300	-
		Long Marston Airfield New Settlement	2,100	-
		Stratford-upon-Avon	3,500	-
		Jaguar Land Rover & Aston Martin Expansion (Gaydon/ Lighthorne Heath)	-	105
Swindon Borough Council	Swindon Local Plan 2026	New Eastern Villages	8,000 ²	40
		Wichelstowe	4,000	13
		Land near Lotmead Farm	2,600	-
		Swindon Central Area	1,000	9
		Tadpole Farm	1,700	-
Wycombe District Council	Wycombe District Local Plan	Princes Risborough	2,100	-
		High Wycombe (Wycombe Air Park)	-	3
		High Wycombe Area	6,500	-
Wokingham Borough Council	Wokingham Local Plan 2036 (Draft)	Grazeley Garden Town ¹	15,000	
		Arborfield Garrison	3,300	
		South of the M4	2,300	
		North & South Wokingham	3,500	
		Thames Valley Science & Innovation Park Expansion	2	
West Berkshire Council	West Berkshire Local Plan Review 2020 – 2037 (Draft)	Sandleford Park, Newbury	1,500	
		North East Thatcham	2,500	
		Land East of Colthrop Industrial Estate	2	
		Land West of Ramsbury Road	3	

Notes:

¹Due to a recent objection from the Ministry of Defence, Wokingham Borough Council are currently exploring alternative options for this site.

²The originally adopted Swindon Borough Local Plan allocated 6,000 homes only, however, 8,000 homes are now proposed.

Table 3-9: Key major housing and employment Sites outside of Oxfordshire