Local Investment Plan
Colchester

Evidence Base

February 2011

Colchester

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1. EXECUTIVE SUMMARY

1.1 Location and general character (See Section 2)

Colchester is very well located. Being 62 miles North East of London it is a key gateway location between the UK and Europe with access to Europe via the nearby ports of Harwich and Felixstowe to the east and Stansted Airport to the west.

1.2 Population (see Section 3)

Mid year population estimates for 2009 estimated Colchester's population at 177,100 people. Colchester has seen very rapid population growth since mid 2001. Mid year estimates show a percentage growth of 13.5% in mid 2009. As the largest district in Essex, Colchester accounts for 12.7% of the County population. Colchester is predicted to grow faster than Essex, the East and England rates at an increase of 21.9% from 2009 to 2021.

Young people
There are a similar proportion of young people (aged less than 20 years) at 23.4% of the population to Essex (23.7%), East (23.9%) and England (23.9%).

Older people
In relation to older people (60+ for women and 65+ for men), at 18.2%, Colchester had a significantly lower proportion than Essex (24.6%) and the East (23.6%) and slightly lower than England (19.3%).

Minority ethnic groups
There has been an increase in minority ethnic groups since Census day 2001, from 3.82% to 7.9% of the Colchester population. This is higher than the Essex proportion of 6.5%. [1]

1.3 Employment (see Section 4)

Employment/unemployment
Colchester had a higher employment rate in 2008 than Essex or the East at 76.4% of the working age population. The Jobseekers allowance rate had climbed from 1.8% in January 2008 to 2.9% in February 2009. This was lower than the Essex (3.5%), East (3.6%) and Great Britain (4.3%) averages.

Jobs
In relation to jobs sought and vacancies advertised through Job Centre Plus in May and June 2010, for the top ten occupations sought all but one (care assistants and home carers) had a greater number of jobseekers to actual vacancies. For the most sought after job, sales and retail assistants there were 463 people seeking this type of job, with only 44 vacancies.

[1] Mid-2007 Experimental Ethnicity Estimates, Population Estimates Unit, ONS © Crown Copyright 2010

Not in Employment, Education or Training (NEET)
In March 2010 5.7% of Colchester's 16 to 19 year old population were classed as NEET. This was lower than the Essex average of 6.9%, and placed Colchester sixth out of the twelve Essex districts.

Wage levels
Colchester's wage levels, according to the Annual Survey of Household Earnings 2009, were, at £20,858, well below the overall Essex median of £23,201 (ninth out of the 11 Essex districts surveyed).

1.4 Skills (see Section 5)

No qualifications
Between January and December 2008, the Annual Population Survey estimated that 11.1% of Colchester's working age population had no qualifications. This was lower than the figure of 14.1% for Essex, the East (11.8%) and the 12.3% for England.

NVQ level 4
Colchester had 26% of population with NVQ level 4. This was higher than the Essex average of 23.6% and equivalent to the figure for the East of 26.1% but lower than the average for the whole of England (28.7%).

However although Colchester has higher than Essex and the East proportions for NVQ level 4 and only slightly lower proportions than England and lower proportions of working age people with no qualifications performance on this indicator lags behind buoyant city economies like Cambridge, Reading and Milton Keynes.

Students
Of those University of Essex graduates who responded to the Destination of Leavers from Higher Education survey the percentage in work in general had declined from 66.7% in 2005 to 63.5%. However, the proportion who had gained work in the Colchester area (CO1-CO8), the 'graduate retention rate' had increased two percentage points from 8.8% in 2005 to 10.8% in 2009. There had also been an increase in graduates staying at Essex to study from 7.2% in 2005 to 10% in 2009.

Occupations
Colchester had a higher level of the workforce employed in higher level occupations (SOC level 1: Managers and senior officials) at 24.9% of all occupations, than Essex at 20.1% and the East of England at 17.6%.

Skills score
Colchester is ranked 151 out of 407 districts for skills and qualifications[2]. This indicates a resident workforce that performs in the top 40% of districts by national standards.

[2] Local Futures Group's: Composite measure for skills. This measure is based on NVQs (with greater weighting attached to the higher levels) and GCSEs (see Section 11.4-11.6 for a breakdown of GCSE levels for Colchester and by school.

Inequalities
There are inequalities between small areas in relation to skills and training. For instance, in relation to the Indices of Deprivation 2007, St Anne's had the highest score for this type of deprivation in Colchester, ranking in the highest 2% in the country.

Skills gaps
The 2008 Colchester Business Survey identified that around one fifth of businesses had skills gaps they were finding it difficult to bridge. These ranged from customer care, sales skills through to ICT and specific work skills.

The Essex Employer and Business survey 2010 identified that Colchester businesses are the most reluctant in Essex to offer work placements (66% as opposed to 50% average in Essex).

Data and intelligence
According to the EEDA's Regional Skills Priority Statement there is a lack of labour market intelligence products available at a sub regional level to analyse skills needs accurately.

1.5 Enterprise (see Section 6)

According to the Annual Business Inquiry 2008 there were 7,399 businesses in Colchester employing 71,596 people.

Business size and employees
Micro businesses (1-10 people) amounted to 84.9% of the total businesses in the borough. This is slightly below the proportions for England (85.4%), East (86.3%) and Essex (86.9%).

Small businesses (11 to 49 employees) accounted for the highest proportion of employment jobs at 28.4% of all employee jobs in the borough. Medium sized businesses (50-199 employees) accounted for 25.7% of employees. Although micro businesses accounted for the majority of businesses, they employed less of the proportion of employees at 23.6% than small or medium sized businesses. Large businesses accounted for the smallest proportion of employee jobs at 22.3%.

Business characteristics
Public administration, education and health accounted for the highest proportion of business types according to the Standard Industrial Classification (SIC) in 2008 at 31.1%. Distribution, hotels and restaurants accounted for the second largest group of businesses at 25.7%. Both of these SIC categories accounted for the top two classifications between 1998 and 2008 in Colchester, Essex and the East.

In terms of business clusters, in 2008, Colchester had the highest number of creative industry businesses (400+) in Essex with one in six of Colchester jobs in this sector. This amounts to 1 in 14 jobs.

For 1998 to 2008 the number of knowledge based industries[3] grew by 64.8% with the increase in employees growing by 124.2% (from 6,990 to 15,673 employees).

Public sector
Colchester has a significantly more dominant public sector in 2008 at 31.1%, than Essex (26.4%) and the East of England (25.1%), amounting for nearly one in three people employed in industry according to this measure. Growth in the public sector has occurred in all areas since 1998. This makes Colchester particularly vulnerable to public sector job cuts (probably more so than the wider Haven Gateway sub region as a whole). Local Futures estimate Colchester to lose 1,877 public sector jobs by 2016, ranking it 89 out of 408 districts nationally. This represents 2.6% of the employment base, placing it 119 out of 408 districts nationally.[4]

The wider effects of public sector job losses could also be felt widely in terms of a reduction or cessation of public sector contracts and the loss in demand for local goods and services.

'Buoyant' economy
Work by 'Centre for Cities' identified Colchester as a 'buoyant' economy due particularly to the large population growth and the increase in private sector jobs. However, they also highlighted the relatively low wage rate in relation to other buoyant cities and suggested that the type of economic activity that could be taking place could be 'less high value' than in those other areas.

Retail
The retail sector employs 9,291 people with 806 employers. In the UK CACI Survey for Colchester shows that Colchester has slipped from 36th in the UK in 2006 to 46th in 2009. Annual retail expenditure in the town centre is £540m – this figure has fallen by £10m since 2008.[5]

1.6 Economic development and growth (see Section 7)

Colchester's core strategy's target for jobs is 14,200 jobs between 2001 and 2021. Currently the borough is on track to achieve this target.

Floorspace
Industrial land supply has continued to rise in Colchester to around 450,000 square feet in 2008 while demand (take up) has risen to 275,000 square feet. Colchester has seen a decline in industrial floorspace from 1999 to 2008 of 12%[6]. Retail floorspace has grown by 4.3% in the period 1999 to 2008 compared to the national figure of 3.16%.

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[3] defined by the Office for Economic Co-operation and Development as 'telecommunications, R&D, finance and business services, recreational and cultural services in which graduates make up at least 25% of the workforce'.
[4] Local Futures Group, 2010.These estimated job losses are based on local share of the national public sector employment base. The 610,000 job cuts forecast by the OBR were distributed across the country according to each local authority district's share of national employment in public services.
[5] CACI Retail Footprint © CACI Limited 2010
[6] CRE Collins Estates Gazette February 21st, 2010.

The amount of total business floorspace developed within the borough decreased between 2008 and 2009 for the second year in a row. However, the net loss of employment land was less than in the previous year (2008/09). The net increase of retail, office and leisure space within the Borough was 9,208 square metres, however the net increase of retail, office and leisure space within the town centre was –1,200 square metres.

In order to fulfil Core strategy 2021 targets, the Borough will need to provide a further 48,259 sqm of retail floorspace in the town centre; this figure will be slightly surpassed with the development by 2015 of the Vineyard Gate shopping complex which will deliver 50,000 sqm.

1.7 Heritage, tourism and culture (see Section 8)

Heritage and arts are celebrated and are showcased in the many museums and galleries, parks and open spaces, theatres, historic monuments and buildings in and around the town. Many have won awards and continue to develop their network of influential contacts nationally and internationally.

Value of tourism
Tourism was worth £216.8m to the economy of Colchester Borough in 2009. The value of tourism to Colchester has risen by 243% from £63.1m in 1993. Tourism supports more than 6000 jobs in the Borough. Colchester has remained resilient in tourism terms over the past 15 years.

Colchester attracted 4.5m visitor trips in 2009. This is a 61% rise on the 1993 figure of 2.8m visitor trips. There were 59,000 staying trips taken by overseas staying visitors and 224,000 staying trips taken by domestic staying visitors. There were also 4.2m day trippers.

Visitor's views
The ‘Destination benchmarking’ survey indicated that a high proportion of children were amongst the visitors to Colchester (26%) indicating that the visitor group are likely to be families. A second influential group includes visitors 45 years and over who account for 41% of all respondents. Nearly half of all respondents are in full time employment (48%), with a further 32% having a retired chief income earner.

For 2009 the overwhelming response was positive however there were several key issues which have occurred for respondents’ year on year which are being addressed by a package of initiatives. These include the cost of car parking, cleanliness of streets and the cleanliness of public toilets. Other trends which show a decline in satisfaction include an initial dip in satisfaction between 2001 and 2008 in relation to visitor’s ratings of Colchester’s shopping environment however this seems to be improving. Visitors would, however, like to see a better range of shops in Colchester. In addition, the proportion of visitors who said they would be likely or very likely to recommend Colchester declined between 2001 and 2008, however this also seems to be improving.

Hotel demand and supply
Humbert's hotel study suggested that there has been a positive growth in hotel demand between 2006 and 2007 with a slight decline in occupancy in 2008 and 2009. However, they suggest that the market is relatively healthy despite the current economic conditions and that opportunities exist within the budget hotel sector and for a small upmarket boutique hotel and opportunities for large branded three and four full service hotels in the medium to long term.

1.8 Deprivation (see Section 9)

According to the Indices of Deprivation 2007 Colchester is a relatively affluent borough but has pockets of deprivation. The borough deprivation score at 14.59 was below the England average of 18.88. However, three small areas[7] in Colchester are within the 20% most deprived in England: St. Anne's in St Anne's ward was the most deprived small area in Colchester followed by Magnolia in St Andrew's ward and Barnhall in Harbour. In addition, St Anne's small area in St Anne's ward was in the highest 10% of small areas in England for income deprivation and child poverty.

1.9 Health (see Section 10)

According to the Association of Public Health Observatories (APHO) Health Profile 2010 for Colchester, the health of people in Colchester is generally good. Life expectancy is higher than the England average and deprivation overall is low (see above). However, health inequalities exist within the borough. For example, life expectancy for men living in the least deprived areas is seven years higher than that for men living in the most deprived areas.[8]

Housing and health
Poor quality housing can contribute to poor health. Fuel poverty data can be used as a proxy indicator for exposure to cold and poor quality housing. Homefield Road in Shrub End has the highest overall percentage of fuel poor households in Colchester at 7.74% of all households. Three of the six small areas in Shrub end ward fall into the top fifteen for fuel poverty in the borough and all three of the small areas in Christ Church ward appear in the top fifteen (out of 104 small areas in Colchester). All six of the small areas which make up New Town ward are in the top fifteen most fuel poor areas in Colchester. Both Christ Church and New Town are wards are areas with high proportions of private rented accommodation.

[7] There are 104 'small areas' also known as Lower Layer Super Output Areas (L-SOAs) in the borough and 32,482 in England. Small areas have an average population of 1500 people and 'fit' into the existing ward boundaries. Each of our wards has between one and small areas.
[8] Association of Public Health Observatories (APHO) Health Profile 2010 for Colchester, Department of Health, Crown Copyright ©2010.

1.10 Crime (see section 11)

Colchester has been consistently safe from any significant crime levels over the last 10 years with year on year falls in ‘all crime’ since 2003 which makes it one of the safest towns in the UK. There are some occasional spikes in crime such as house burglary, anti-social behaviour, domestic abuse, criminal damage or theft of or from a car and some offenders use the A12 to drive into Colchester from London and surrounding areas to commit crime. There has not been a persistent on-going crime type that has caused concern to the Safer Colchester Partnership which partner agencies working together have not been able to combat and reduce.

Business crime

Colchester Business Against Crime (COLBAC) run and exclusion scheme for people who offend (steal) in members’ business premises. The scheme excludes people from all COLBAC members’ businesses after an initial warning. This has become very effective with the percentage of people receiving a 1st warning that then actually go on to re-offend and be excluded being in single figures.

1.11 Communities (see Section 12)

Resident satisfaction

According to the Place Survey 2008, Colchester ranked seven out of 12 districts for resident’s satisfaction with their local area as a place to live, 84.7% of people surveyed saying they were satisfied. There was a higher proportion of people than nationally who felt they could influence local decisions with a score of 29.8% compared to the national median of 27.8%.

The top five answers in descending order that people felt made somewhere a good place to live were: the level of crime, clean streets, health services, public transport and shopping facilities.

The top five answers in descending order people felt were most in need of improvement were: traffic congestion, road and pavement repairs, activities for teenagers, clean streets and public transport.

For older people the level of crime, clean streets, public transport, health services and road and pavement repairs were felt to be in most need of improvement.

Young people felt more strongly than the all respondents that they could influence decisions affecting their local area (43% of young people as opposed to only 32% in the total sample). In addition, more young people felt they were treated with respect by local public services all or most of the time 82%, than all those sampled (77%). However, young people had a lower satisfaction with their local area at 76% as opposed to 84% for all respondents and less felt they belonged to their neighbourhood than the total sample.

Rural community facilities

Rural community facilities vary from village to village and in standard. They tend to be village shops, public houses and village/church halls which by their nature are multi functional and can provide a meeting place for a variety of groups and classes throughout the day. Colchester is fortunate that some villages are able to provide a wide range of convenience and comparison shopping facilities as well as various public houses, village halls or other meeting places.

The larger villages such as Dedham, Layer-de-la-Haye and West Bergholt provide sufficient opportunities for residents (and visitors) to meet their daily needs within the village. Alongside the range of facilities these villages also provide medical facilities in the form of Doctor Surgery. A minority of the villages across the Borough have limited services and facilities; these tend to be those smaller villages such as Mount Bures and Salcott, which is to be expected. Villages such as Easthorpe and Little Horkesley have limited facilities within their parish boundaries.

The closure of rural public houses and shops is an issue nationally and Colchester borough is unfortunately no different. In recent years the Council has received numerous applications for the conversion of various establishments which have been considered against a range of Planning Policies which seek to protect and retain community facilities and this type of policy is being carried forward in to the Local Development Framework.

1.12 Educational attainment (see Section 13)

Primary school: Key stage 2

Colchester levels for Key stage 2, level 4[9] in 2009 were, at 87%, the same as the levels for Essex and only slightly below the levels for the East and England (both 88%). These differences, however, may be due to yearly fluctuations. Twelve schools in Colchester had levels above the Essex and England averages for combined Key Stage 2 English and Maths scores.

GCSE levels (5 A* to C grades)

Between 2005 and 2009 Colchester saw an increase in the percentage of pupils gaining five or more A* to C grades, although we had lower levels in 2009 at 66% of pupils than Essex (68.2%), East (69%) or England (70%). However, in a different set of DCSF data all of the mainstream schools apart from two achieved above the England average, with two schools in particular, the County High School for Girls and The Royal Grammar school achieving 100% of passes at A* to C. In addition, eight schools were at or above the average GCSE point score for England in 2009.

1.13 Schools provision (Essex Schools Organisation Plan 2009 to 2014) (see Section 14)

On the whole Essex has seen a decrease in school places by almost 3% in all schools, with primary school places falling by 4% and secondary totals by 2%. However, for Colchester primary school pupil places have *increased* by 0.8%

[9] The Government expects that children who do not have special educational needs to attain level 4 in the Key stage 2 test taken when they are 11.

and there has been a greater fall in the numbers of secondary school places at 3%.

In 2009, 11.3% of Colchester school pupils were from minority ethnic groups, this is the fourth highest proportion out of the 12 Essex school areas.

Only five Colchester schools have sixth forms, largely due to further education being undertaken in the further education colleges. In 2008/09 Colchester had a very high number of pupils attending Colchester Institute and the Sixth Form College (6,552). This accounts to over a third of the Essex total for those attending further education colleges. In addition Colchester is the only one of the eight districts with this type of college that has more than one establishment.

Primary school number forecasts
Colchester's forecasts of 15.1% with anticipated housing development (7.7% without) are well above the next highest forecast in Uttlesford and second only to Harlow's forecasts for primary school pupils. However, the housing numbers used in this forecast are from pre-recession housing data fro April 2007 to March 2008. This means that the anticipated increase in housing provision is unlikely to be as high as this.

There will be considerable housing development over 2009 to 2014 and beyond. Areas under development include additional housing on the Garrison site, the Hythe and the north of Colchester. In some of these locations there are schools with unfilled places that will be needed, in addition to new schools, to meet the demand for places from the new housing. Contributions are being sought from housing developers towards the cost of providing additional places.

1.14 Housing delivery (see Section 15)

On 1st April 2009 there were approximately 73,571 dwellings within the borough of which 62,740 were privately owned. A total of 1,041 homes were built between 1 April 2008 and 31 March 2009 but development in the borough has been reducing due to the down turn in the housing market nationally. Only 518 new homes were completed in 2009/2010 which is a reduction of 50% in just one year. A number of sites have stalled due to viability concerns and this will have an impact on the local economy.

1.15 The housing market and affordability (see Section 16)

The Strategic Housing Market Assessment 2008 shows that approximately 77% of households are owned, well above the 79% national average. In relation to the length of residence, there is a relative stability in the owner occupied sector but dynamism in the private rented sector where nearly 40% of their households were in their current home for a year or less.

Affordability and home ownership
The restriction of credit since the recession has meant that to buy a high deposit is necessary. Data on household income suggests that many

households in the borough are unlikely to be able to save enough to afford the deposit necessary to purchase if they are not currently homeowners without external assistance.

Private rented sector
Rent levels have remained broadly stable over the last two years. In relation to affordability, only those rents in the lower quartile are below the levels set by the Local Housing Allowance (LHA). The SHMA update 2009 suggests that rent levels advertised are in excess of LHA meaning benefit tenants will always need to make a top up to their rent levels.

There was a 40% increase in the number of Housing Benefit claims made by tenants in the private rented sector between April 2008 and April 2010. There is however a suggested dislocation between demand from those needing to claim housing benefit and supply, as landlords are sometimes reluctant to rent to claimants. According to the Eastern England Landlords Association this could be as a result of the cost of the insurance landlords take out which require a credit check that housing benefit claimants are very unlikely to pass.

Migration: England, Wales and the East of England
ONS estimates suggest that net migration into Colchester is approximately 1600 individuals from across the country[10]. The numbers suggest that more families with children and older people are moving into the borough. The only age group with a net outflow is the 45 to 64 age group. Most of the migration experienced occurs within the region (75%). The original SHMA (2008) also assessed that 22% of all movers were from London. Nearly a half of those individuals moving into the borough from London were children suggesting that families are a significant part of migration. This may in part explain why larger family homes have remained fairly stable in price with demand remaining high.

Support needs
On average around a third of affordable rented tenants have some form of disability or impairment. This group of households are likely to experience increased barriers in securing market housing suitable for them and their families.

Homelessness and temporary accommodation
Between 2009 and 2010, 415 people made a homelessness application to the Council. This was a reduction on the previous year's figures of 550 people. In relation to acceptances in 2008/09 Colchester had a significantly higher rate of homeless acceptances per thousand households than the England average. At the end of March 2009, there were 235 households in temporary accommodation. This means that the Council has missed the NI 156 end of year target of 206 households in temporary accommodation

Affordable housing need: Housing Needs Register
Colchester has 4,555 households on its housing register. The data shows that the majority of homes needed in the affordable rented sector are for one and two bedroom homes, including sheltered housing (more than half). The overall

[10] International migration is not included, nor is migration from Scotland, and Northern Ireland.

difference between vacancies and need shows a broad split across all sizes of property.

Although in terms of numbers there is less demand for three and four bedroom homes these are often the most difficult group to re-house due to many fewer vacancies and consequently larger families experience much longer waiting times.

1.16 Transport (see Section 17)

Road
The urban road network a heavily utilised and dense network of roads serving major residential, employment, retail, health education and leisure areas. It is heavily congested at peak times, at certain times and locations[11].
The interurban movements are catered for by the A12 and A120 Trunk Road networks and the Great Eastern Railway Mainline. These are busy interurban routes serving a major freight and passenger arteries, operating at capacity in peak times and suffer from poor reliability of service. There are currently four main junctions around the urban area of Colchester. There are some sub standard limited access junctions serving the rural areas of North Colchester.

Rail
The Great Eastern Mainline connects Colchester to the City of London (55 minutes away) with employment opportunities there and in Docklands. There are regular and frequent services along the line, but capacity is severely restricted due to the high demand along the line and the mix of trains including freight from the Haven ports.

Movement
According the 2001 Census, there was high level of "local labour market self-containment" – 72% people living and working locally. Excepting the large movement from Tendring the borough is not overly reliant on other towns/cities for its employment.

Congestion
Locally there is a real concern that traffic congestion is affecting growth, causing avoidable environmental impact and limiting the operation of bus services and the promotion of alternative modes of travel. Household Travel Diary surveys undertaken the urban area in July 2007 (recording approximately 54,000 trips) show that there is a significant proportion of short trips undertaken by car; some 45% of car trips are less than 1 mile in length. Congested locations exist in the town centre and approaches from the east and west; at junctions along the A133 Cymbeline Ave/Cowdray Avenue/St Andrews Avenue between Spring Lane and Greenstead Roundabouts; at Ipswich Road Severalls Lane junction and at junctions around the North Station area. In addition there is a problem with the A12 maintaining reliable operation along a heavily trafficked route.

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[11] Local Transport Plan 2, Essex County Council; Transport Monitoring Report 2008, Essex County Council.

Forecasts
As the population of the Borough grows there will be growth in the in demand to travel. From the Government's TEMPRO trip end forecast for the Colchester it predicts an increase in morning peak hour the demand of 29% between 2007 and 2023. However, only 9% of this growth is linked to LDF housing growth. The remaining growth of 20% accounts for the growth in trips from the existing population and from growth in trips such as proposals for increased employment.

1.17 Environment and sustainability (see Section 18)

Electricity
EDF, the Borough's electricity supplier, has advised that growth will overload the Severalls and Braiswick primary substations and there is insufficient capacity to support new Town Centre development. EDF has a number of proposals to ensure that new development within the Borough is supplied with electricity, these include a new town centre primary substation and a new north west substation, new cable and grid routes and transferral of voltage to Severalls substation.

Water
The Water Cycle Study reported that Anglian Water Services can supply demand for water in Colchester borough up to at least 2035. However, there are potential supply deficits against dry year averages or critical peak period forecasts.

Air quality
Short term exposure to air pollutants can affect peoples breathing, while long term exposure can permanently damage lungs. Air pollution has been linked to the worsening of asthma, chronic bronchitis, heart and circulatory disease and cancer.

There are two Air Quality Management Areas (AQMAs) in Colchester. These are located on Mersea Road and Brook Street. Like most districts in the region which do not have large industrial processes, the main source of local air pollution is from motor vehicles. There are thirteen monitoring sites outside the declared AQMAS that exceeded the annual mean objectives for Nitrogen dioxide (N02). A detailed assessment of the two centre monitoring sites which exceeded the hourly objectives for NO2 is being undertaken. Depending upon the findings in this report it may become necessary to declare the Town Centre an AQMA. Work with the regeneration team is currently considering options to restrict vehicles though the town Centre.

Greenspace
The ward with the lowest percentage of greenspace was Prettygate, with only 18.3% of the total ward area, which was less than half of the 41% of greenspace available in Castle ward which accommodates the town centre. The wards with the second and third lowest percentage of greenspace were also in the town wards, St Andrews with 27.1% greenspace, followed by New Town (29.2%).

2. LOCATION AND GENERAL CHARACTER

2.1 The borough of Colchester is located in the county of Essex in the East of England, covering an area of approximately 329 square kilometres and situated 62 miles north east of London. The borough lies in a key gateway location between the UK and Europe with access to Europe via the nearby ports of Harwich (22 miles) and Felixstowe (29 miles) to the east and Stansted Airport (32 miles) to the west.

2.2 Colchester is centrally located within the Haven Gateway sub-region and is identified as a "key centre for development and change". Colchester shares its vision with the Haven Gateway partnership vision to have "a high quality environment for its residents, workers and visitors by capitalising on its location as a key gateway, realising its potential for significant sustainable growth, addressing its needs for economic regeneration, creating an additional focus for growth of hi-tech, knowledge based employment and protecting and enhancing its high quality, attractive and natural assets". [12]

Figure 1: Colchester location

[12] Haven Gateway Partnership 'Smarter Solutions for Growth 2008-2011'

3. POPULATION

3.1 Population mid 2009

Data from the 2001 Census put the borough population at approximately 158,900 people. However, mid-year estimates from the Office for National Statistics (ONS) indicate that Colchester's population has seen a growth of 13.5% since mid-2001 to 177,100 in mid-2009. As the largest district in Essex, Colchester accounts for 12.7% of the County population.

3.2 Population growth

Table 1: Percentage increase in population

Date	England	Essex	East	Colchester
2008-2011	2.37	2.93	3.06	6.50
2011-2016	3.8	4.7	4.9	9.2
2016-2021	3.7	4.5	4.7	7.7
2021-2026	3.4	4.1	4.3	6.6
2026-2031	3.0	3.6	3.7	5.5
2008-2031	17.4	21.5	22.4	40.8

Source: 2006-based Subnational Population Projections, Office for National Statistics (ONS).

Colchester's population is predicted to continue to grow faster than the county, the region and England rates. It is estimated to grow to approximately 215,900 people in 2021, an increase of 21.9% (38,800 people) over a 12 year period. This is the largest population growth in Essex county by 6.5% (Tendring having the next highest growth at 15.4%). See also item 6.7 in relation to rapid population growth and Colchester as a 'buoyant city' in terms of economic growth.

3.3 Population density

Based on the mid-2009 figures the average population density of Colchester was 538 people per square kilometre. This is an increase of 13.5% from 2001 when there were 474 people per sq km.

3.4 Young people

41,400 young people were estimated to be living in the borough in 2009 aged less than 20 years which accounts for 23.4% of the total population. This is almost equivalent to the figures for Essex (23.7%), East (23.9%) and England (23.9%). There has been significant growth in younger age groups since 2001, especially people in their twenties. However, the proportion of young people, aged 0 to 15 years is predicted to see a small increase of 24.1% between 2009 and 2021. [13]

[13] 'Mid-2009 Population Estimates, Population Estimates Unit, ONS © Crown Copyright 2010' and '2008-based Subnational Population Projections, ONS © Crown Copyright 2010'

3.5 Older people

An estimated 32,200 people in Colchester were of retirement age (60+ for women, 65+ for men) in 2009 accounting for 18.2% of the population in 2009. This was considerably lower than the proportion of people of retirement age Essex (24.6%) and East (23.6%) and slightly lower than the figure for the rest of England (19.3%).11,600 of these people were men aged 65 or more and a further 20,600 women aged 60 or more.

3.6 Ethnic minority groups

There has been an increase in ethnic minority groups since Census day 2001, from 3.82% to 7.9% of the Colchester population. This is higher than the Essex proportion of 6.5%. [14]

[14] Mid-2007 Experimental Ethnicity Estimates, Population Estimates Unit, ONS © Crown Copyright 2010

4. EMPLOYMENT

4.1 Employment and unemployment

Table 2: Employment, unemployment and economic activity (July 2008-June 2009)

All people	Colchester (numbers)	Colchester (%)	East (%)	Great Britain (%)
Economically active†	96,200	81.2	81.8	78.9
In employment†	90,800	76.4	77.0	73.3
Employees†	80,600	67.7	66.4	63.9
Self employed†	10,200	8.7	10.2	9.1
Unemployed (model-based)§	5,400	5.6	5.8	6.9

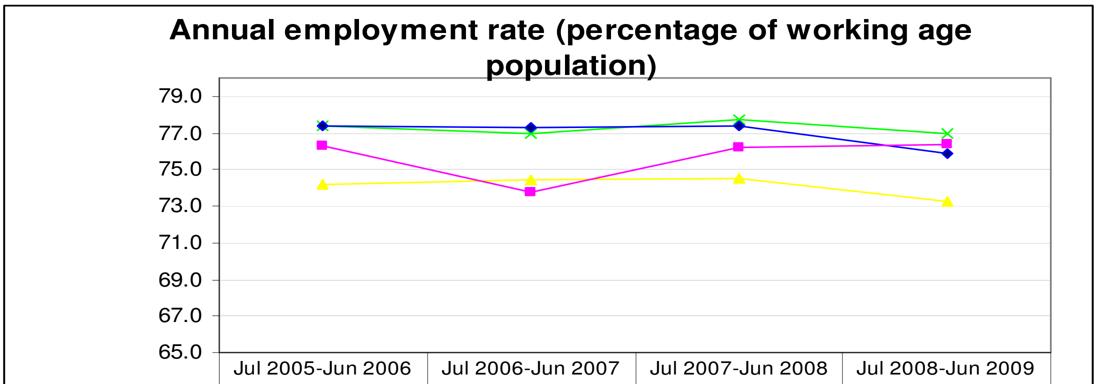
Sample size too small for reliable estimate (see definitions)
† numbers are for those aged 16 and over, % are for those of working age (16-59/64)
§ numbers and % are for those aged 16 and over. % is a proportion of economically active

Source: ONS Annual Population Survey July 2008-June 2009, downloaded from Nomis, May 2010.

According to the Annual Population Survey, the employment rate in Colchester as measured by the percentage of people of working age in the population who are economically active was 81.2% between July 2008 and June 2009. This figure is slightly lower than the regional figure of 81.8% but higher than the Great Britain of 78.9%. The Colchester numbers were 96,200 of which 90,800 are in employment, 80,600 are employees, 10,200 are self employed and 5,400 are unemployed. The latter figure (5.6% of the working age population) is slightly lower than the East (5.8%) and national (6.9%) averages.

4.2 Employment rate time series

Figure 2:



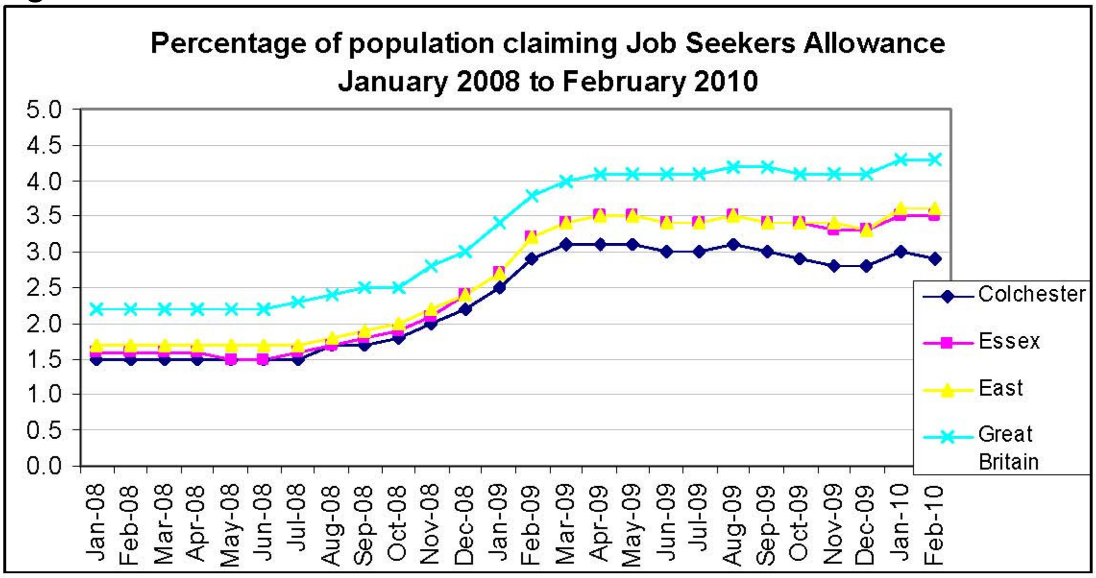
	Jul 2005-Jun 2006	Jul 2006-Jun 2007	Jul 2007-Jun 2008	Jul 2008-Jun 2009
Great Britain	74.2	74.4	74.5	73.3
East	77.4	77.0	77.7	77.0
Essex	77.4	77.3	77.4	75.9
Colchester	76.3	73.8	76.2	76.4

As figure 2 illustrates, Colchester's employment rate in June 2009 was nearly equivalent to that of the year to June 2006. However, for the year July 2006 to June 2007 the rate dropped below the Great Britain average for the first time in the four years measured, recovering the following year (July 2007 to June 2008).

4.3 Jobseekers allowance

The percentage of Job Seeker Allowance (JSA) claimants in Colchester in February 2009 was 2.9%, lower than Essex (3.5%), East of England (3.6%) and national (4.3%) averages. The largest increase in JSA claimants has been in the 16 to 24 year old age group which accounts for 30% of all JSA claimants, followed by 25 to 34 year olds at 23%, meaning that the majority of JSA claimants (53%) are aged 34 and under.

Figure 3:

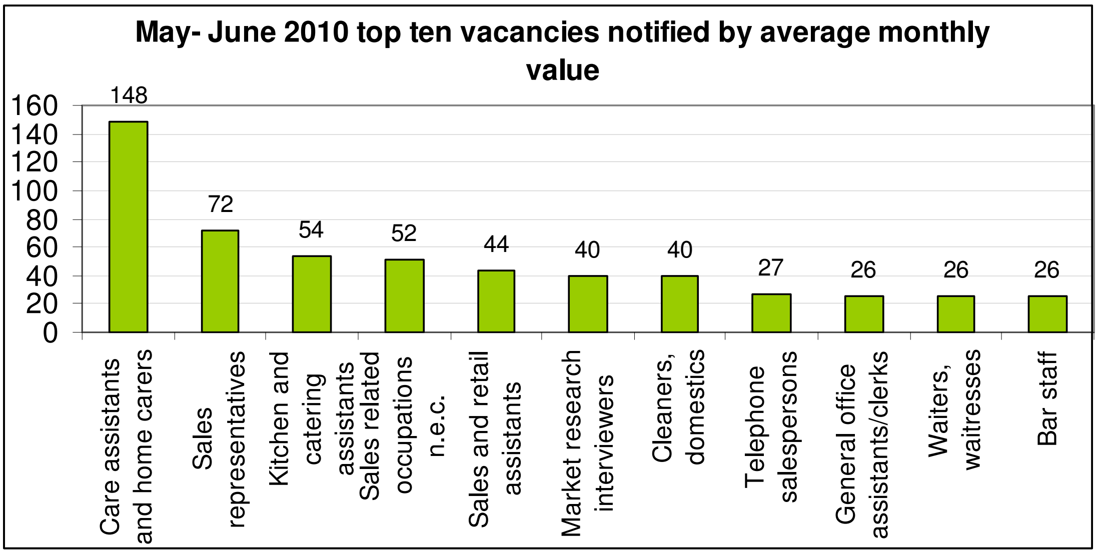


Source: ONS claimant count as a percentage of the working age population © crown copyright, 2010 downloaded from Nomis May 2010.

Where Colchester had very similar percentages of JSA claimants to Essex and the East in January 2008 (between 1.5 and 1.8), Colchester's claimant rate, although increasing throughout the recession, has increased at a lower level than Essex and the East of England since December 2008, with highest values of 3.1% compared to 3.6% for Essex and the East.

4.4 Jobseekers and vacancies

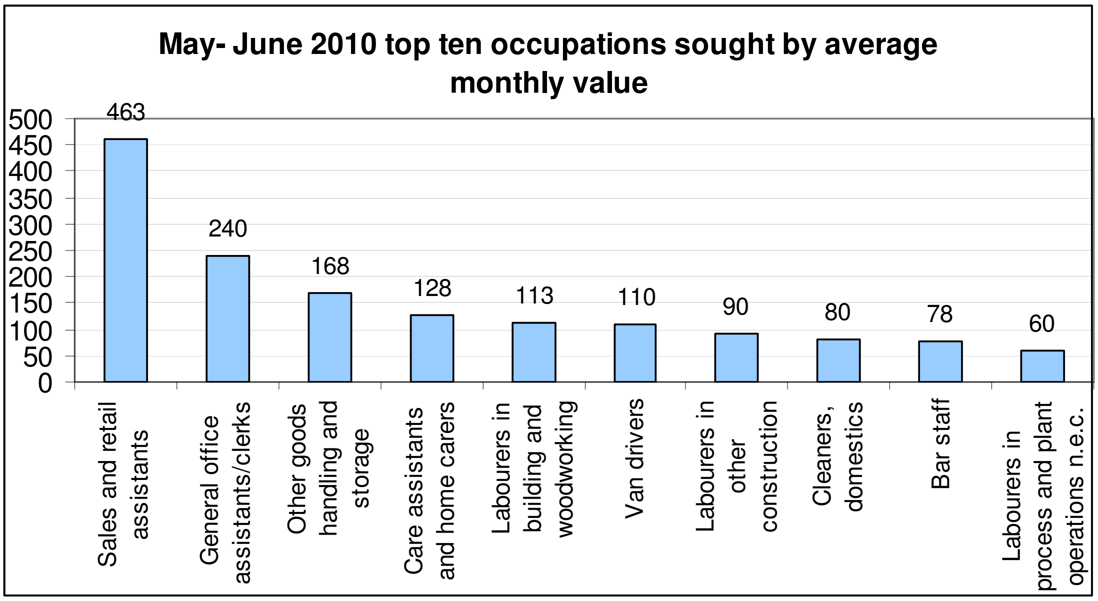
Figure 4:



Source: Job Centre Plus, Colchester branch site level vacancies, August 2010

With an average of 148 vacancies registered between May and June 2010, care assistants and home carers had the top number of vacancies, followed by sales representatives with an average of 72 vacancies a month.

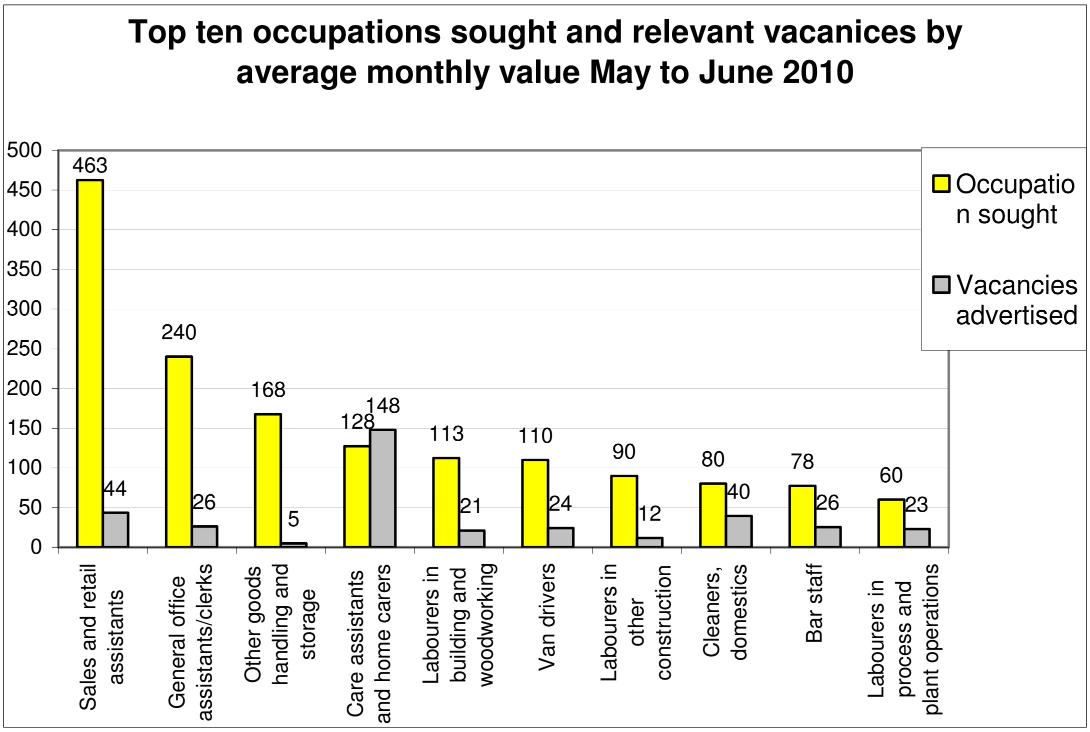
Figure 5:



Source: Job Centre Plus, Colchester branch site level vacancies, August 2010

As shown in figure 5, between November 2009 and February 2010, an average of 463 people a month were searching for sales and retail assistant jobs through the Job Centre Plus. An average of 240 people a month were seeking general office assistant/ clerk work, and 168 on average were looking for other good handling and storage work.

Figure 6:



Source: Job Centre Plus, Colchester branch site level vacancies, August 2010; Colchester branch site level vacancies, August 2010

Figure 6 illustrates the top ten occupations sought in relation to the actual vacancies. This shows that for the top ten occupations sought all but one (care assistants and home carers) had a greater number of jobseekers to actual vacancies. For the occupation sought by the highest number of jobseekers, there were 463 jobs for only 44 vacancies.

4.5 Jobseekers to jobs (all jobs)

Table 3: Numbers of vacancies to jobs sought

Job Centre Plus	February 2010 percentage	June 2010 vacancies	June 2010 occupancy sought	June 2010 percentage (vacancies to occupancy)
Basildon	9.9	926	4915	18.8
Braintree	23.7	1071	2665	40.2
Brentwood	36.4	428	960	44.6
Canvey Island	5.6	107	1105	9.7
Chelmsford	29.0	1301	3315	39.2
Clacton	21.0	428	2250	19.0
Colchester	**21.2**	**1192**	**3215**	**37.1**
Grays	10.9	1236	3675	33.6
Harlow	19.6	724	2975	24.3
Harwich	10.5	63	560	11.3
Loughton	18.1	286	1545	18.5
Rayleigh	13.7	347	1185	29.3
Southend	11.5	843	4950	17.0
Witham	21.3	201	775	25.9

Source: Job Centre Plus, Colchester branch site level vacancies, April 2010

Table 3 shows, the value of vacancies advertised through the Job Centre Plus was 37.1% of the number of job seekers in Colchester. Of the areas shown, Colchester had the fourth highest value of jobs to job seekers.

Although this data shows the percentage of jobs to job seekers, these figures will not necessarily translate into employment, as the difference in the types of occupations sought and vacancies advertised shows.

4.6 16-19 year olds Not in Employment, Education or Training (NEET)

Table 4: March 2009 to March 2010 (NEET)

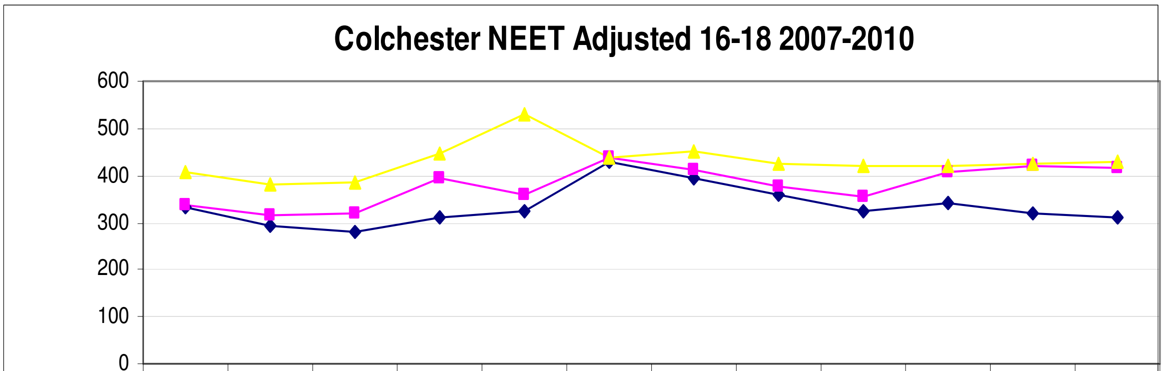
Area	Mar-09	Mar-10	Diff Mar 09 - Mar 10	Mar-10
Basildon	11.00%	13.40%	**2.40%**	539
Braintree	10.90%	11.10%	**0.20%**	276
Brentwood	4.20%	4.70%	**0.50%**	88
Castle Point	7.10%	4.50%	**-2.60%**	179
Chelmsford	3.90%	3.50%	**-0.40%**	223
Colchester	5.60%	5.70%	**0.10%**	428
Epping Forest	2.20%	2.90%	**0.70%**	91
Harlow	4.30%	4.20%	**-0.10%**	113
Maldon	9.20%	10.60%	**1.40%**	90
Rochford	6.20%	9.40%	**3.20%**	113
Tendring	12.80%	13.60%	**0.80%**	455
Uttlesford	3.90%	3.50%	**-0.40%**	50
Essex	**7.00%**	**6.90%**	**-0.10%**	**2656**

Source: Colchester 14 to 19 Area Planning Group (APG) NEET data set, provided by NE Area Integrated Youth Services, © Essex County Council (March 2010)

As table 4 indicates, in March 2010 5.7% of Colchester's 16 to 19 year old population were classed as NEET. This was lower than the Essex average of 6.9%, and placed Colchester sixth out of the twelve Essex districts.

In terms of numbers of NEET 16 to 19 year olds, Colchester had the third highest number of the twelve districts, at 428.

Figure 7: Time series NEET 2007 to 2010



	April	May	June	July	August	Septemb er	October	Novemb er	Decemb er	January	February	March
2007-8	331	295	281	309	323	431	396	357	324	342	318	310
2008-9	337	315	320	394	357	436	412	376	353	406	419	414
2009-10	406	379	386	448	530	437	453	424	422	420	425	428

Source: Colchester 14 to 19 Area Planning Group (APG) NEET data set, provided by NE Area Integrated Youth Services, © Essex County Council (March 2010)

For all three annual periods, the adjusted NEET figure is shown on a monthly basis in figure 7. Across the three years, the lowest adjusted NEET figures were given for the period of April 2007 to March 2008, where the highest NEET figure given was 431 in September 2007 and the lowest NEET figure was 281 in June 2007.

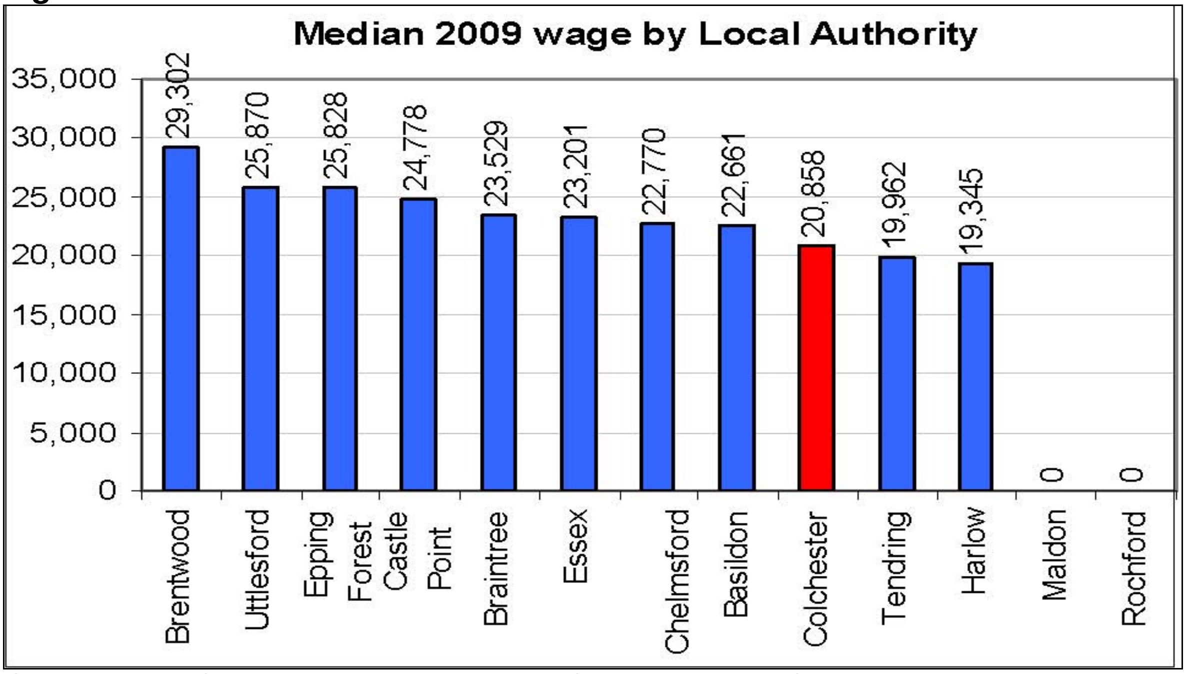
The period of April 2009 to March 2010 had the highest adjusted NEET figures, with the highest figure of 530 in August 2009, and the lowest figure of 379 in May 2009.

4.7 Jobs density

The jobs density in Colchester as measured by the total number of jobs (including employees, self employed, government supported trainees and HM forces) as a ratio to the working population is 0.75. This figure is lower than the regional and national figures and other districts such as Chelmsford (0.84) and Ipswich (0.98).

4.8 Earnings

Figure 8:



Source: Annual Survey of Hours and Earnings, Office for National Statistics.

The Annual Survey of Household Earnings 2009 shows that the median average was estimated to be £20,858 per year in Colchester. This placed Colchester ninth out of the 11 Essex districts and well below the overall Essex median of £23,201. This difference may partially be due to the proximity to London of most other Essex authorities. However Centre for Cities suggest that it may be due to the type of economic activity being 'less high value than in other buoyant economies' (see item 6.7).

The gross weekly pay for full-time workers in Colchester is £469.5. For males this figure is £520.8 and for females £375.0. The median hourly pay for fulltime workers is £11.76. For males this is £12.89 and for females £10.12. These figures place Colchester in the middle 20% of districts nationally.

Between the estimated median wage in 2008 and 2009, there was an increase of 1.6% in wage values in Colchester.

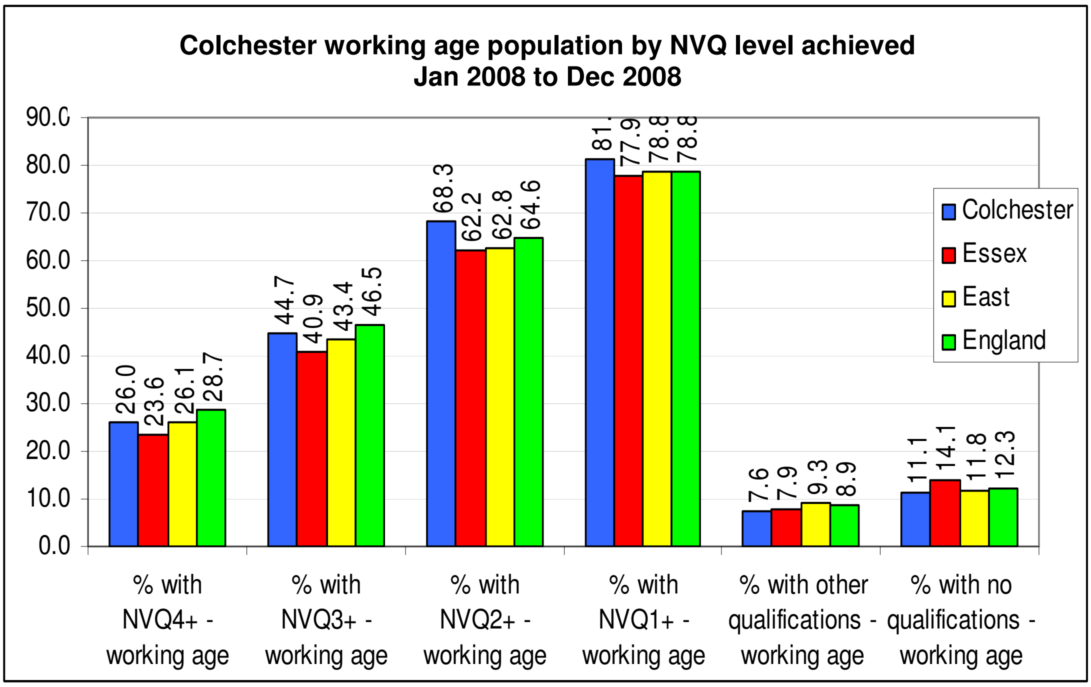
Of the 10 Essex authorities for which this data was available, four saw a percentage decrease in the annual wage of the resident population (Braintree, Brentwood, Chelmsford and Harlow) and the other six saw an increase.

Colchester had the fourth largest change in median wage of the ten authorities. Epping Forest saw the largest increase, at 6% change, and the largest decrease in median wage was in Chelmsford, at -3.3%.

5. SKILLS

5.1 National Vocational Qualifications (NVQs) (including no qualifications)

Figure 9:



Source: Annual Population Survey, ONS crown copyright (From Nomis 20th April 2010)

Between January and December 2008, the Annual Population Survey (figure 9) estimated that 11.1% of Colchester's working age population had no qualifications. This was lower than the predicted 14.1% for Essex, 11.8% for the East and 12.3% for England.

For all levels of NVQ qualifications, Colchester had a higher percentage of the population than Essex and the East. For NVQ level three and above and NVQ level four and above the England value was higher than that for Colchester. For NVQ level four and above, 28.7% of the working age population of England was estimated to have this, compared to only 26% in Colchester. For NVQ level three and above, 46.5% of the working age population of England was estimated to have this, compared to only 44.7% in Colchester.

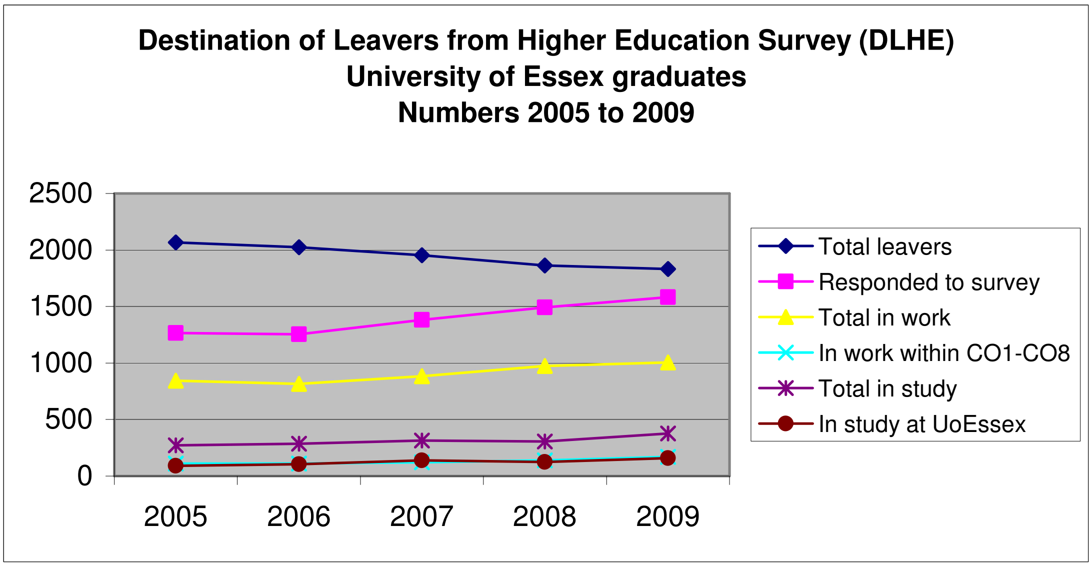
The largest percentage of Colchester's population had achieved NVQ level one or above, at 81.3%. This is expected as those who are marked as achieving higher levels are also counted for the lower levels they achieve, as many of the educational qualifications are progressive.

Colchester had 26% of population with NVQ level 4. This was higher than the Essex average of 23.6% and equivalent to the figure for the East of 26.1% but lower than the average for the whole of England (28.7%).

However, although as is shown above, Colchester has only slightly lower proportions than England in relation to NVQ level 4 and lower than average for the working age population with no qualifications, as item 6.7 shows performance on this indicator lags behind buoyant city economies like Cambridge, Reading and Milton Keynes.

5.2 Students: Destination of Leavers from Higher Education, University of Essex, Colchester

Figure 10:



Source: Destination of Leavers from Higher Education Survey, University of Essex, 2005-2009.

Figure 10 above and Table 5 below show the data for University of Essex leavers only from the Destination of Leavers from Higher Education Survey (DLHE). The data is for all UK/EU undergraduates and postgraduates. The survey is carried out 6 months after the students have completed their course and had a response rate of between 69% of all graduates in 2005 to 77% of all graduates in 2009. For the purposes of this survey 'work' includes full-time work part-time work, self-employmeny and voluntary work.

Table 5: Percentage of graduates in work and study

Year	% UoE graduates in work	% UoE graduates in work Colchester (CO1-CO8) (graduate retention rate)	% UoE graduates in study	% UoE graduates in study at UoE
2005	66.7	8.8	21.5	7.2
2006	64.9	8.8	22.8	8.4
2007	63.8	8.9	22.6	10.0
2008	65.2	9.3	20.4	8.4
2009	63.5	10.8	23.8	10.0

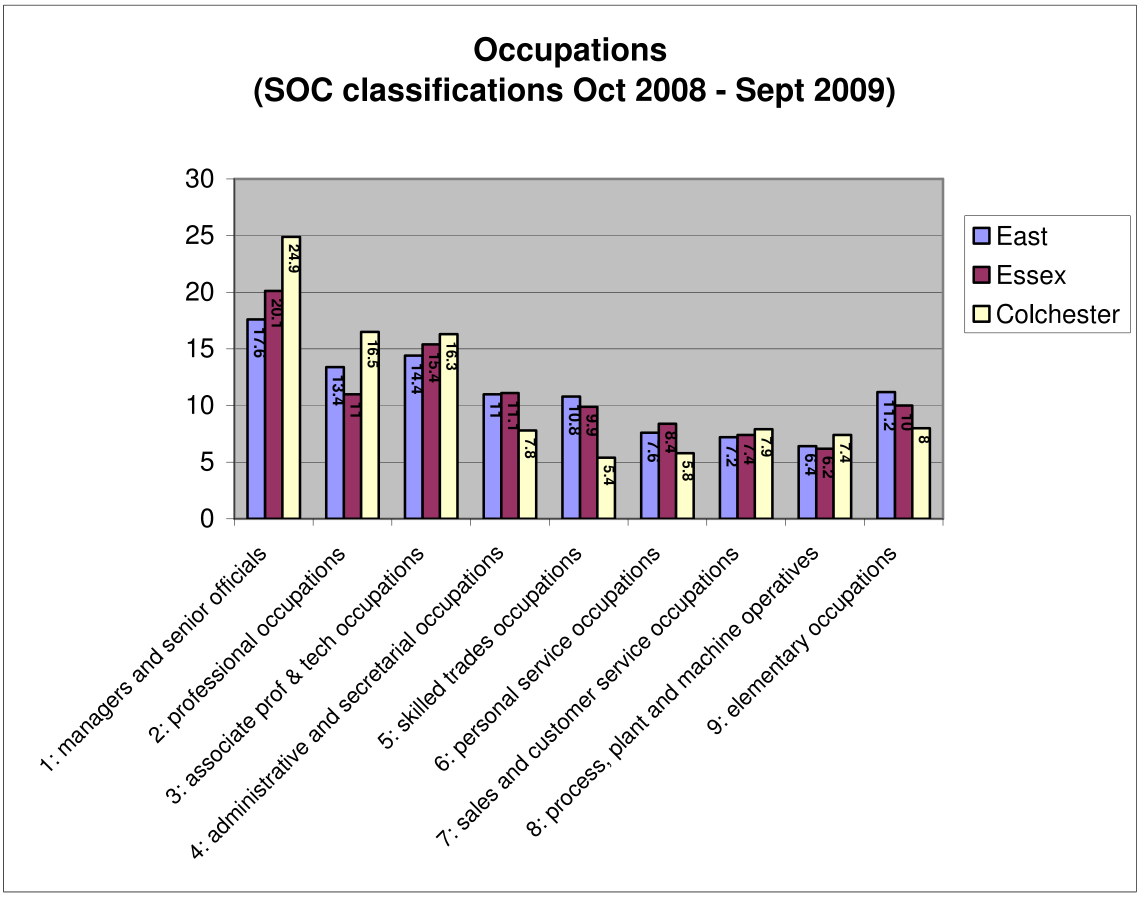
Source: Destination of Leavers from Higher Education Survey, University of Essex, 2005-2009.

Of those University of Essex graduates who responded to the survey the percentage in work in all areas had declined from 66.7% in 2005 to 63.5%. However, the proportion who had gained work in the Colchester area (CO1-

CO8), the 'graduate retention rate' had increased two percentage points from 8.8% in 2005 to 10.8% in 2009. There had also been an increase in graduates staying at Essex University to study from 7.2% in 2005 to 10% in 2009.

5.3 Occupational levels

Figure 11:



Source: Annual Population Survey, ONS crown copyright (From Nomis 20th April 2010)

In Colchester, as figure 11 illustrates, the largest percentage of those in employment were employed at Standard Occupational Classification (SOC) level 1 (Managers and senior officials). Although this pattern was the same for all geographies, Colchester had a higher level of the workforce employed as managers and senior officials, with 24.9% of all occupations, compared to only 20.1% in Essex and 17.6% in the East. As a proportion of the population, the three top skilled occupations (SOC 1 – 3) contained higher percentages of the workforce than either Essex or the East of England.

The second largest percent of the population were employed at SOC level 2, professional occupations in Colchester at 16.5%.which differed from Essex and the East, where the second largest SOC employment levels were in level 3 (associate professional and technical occupations) with 15.4% and 14.4% respectively.

Colchester had a lower level of the workforce employed in SOC level 9 (Elementary occupations) SOC level 6 (personal service occupations) SOC level 5 (skilled trades occupations) and SOC level 4 (administrative and secretarial occupations) than Essex or the East of England.

5.4 Local Futures Group skills score

According to Local Futures Group's composite measure for skills[15] Colchester is ranked 151 out of 407 districts for skills and qualifications. This indicates a resident workforce that performs in the top 40% of districts by national standards. Colchester has a skills and qualifications score of 103.57 against the national median (100).

5.5 Indices of deprivation 2007 (ID07): Education, skills and training domain

Table 6: Small areas[16] within highest 10% in England for Education, skills and training deprivation, ID07

Education, skills and training deprivation %	Ward name	Small area name	Rank
	St. Anne's	St Anne's Estate	553
	St. Andrew's	Magnolia	929
	St. Andrew's	Forest	1,675
1-10%	St. Andrew's	Salary Brook South	1,938
	Shrub End	Iceni Square	2,888
	St. Andrew's	Sycamore	3,056
	Harbour	Barnhall	3,153
	Berechurch	Monkwick	3,225

Looking at small areas within Colchester can highlight inequalities that exist within the borough in education, skills and training. Table 6 illustrates the small areas in Colchester, the ward they are located in and their rank against all 32,482 small areas in England.

According to this measure several small areas were within the highest 10% of small areas in England. The small area with the highest education, skills and training deprivation, St Anne's small area within St Anne's ward, was within the highest 2% in the country ranking 553rd out of all 32,482 small areas in England, indicating extreme disadvantage. It was also the fourth highest small area in Essex for this type of disadvantage (out of 863 small areas).

Magnolia in St Andrew's the area with the next highest levels of this type of disadvantage was also within the top 5% in the country for this measure and was ranked 10th out of all small areas in Essex[17].

[15] This measure is based on NVQs (with greater weighting attached to the higher levels) and GCSEs (see Section 11.4-11.6 for a breakdown of GCSE levels for Colchester and by school.
[16] There are 104 'small areas' also known as Lower Layer Super Output Areas (L-SOAs) in the borough and 32,482 in England. Small areas have an average population of 1500 people and 'fit' into the existing ward boundaries. Each of our wards has between one and small areas.
[17] The Education, Skills and Training Deprivation domain consists of two sub-domains: one relating to education deprivation for children/young people and another relating to lack of skills and qualifications in the working age population. These sub-domains are designed to represent the 'flow' and 'stock' of educational disadvantage within an area respectively. 'Flow' relates to deprivation in children and young people attaining qualifications, and 'stock' relates to deprivation of skills in the resident working age adult population.

For further information about educational attainment, including GCSE levels and schools provision see Section 13: Educational Attainment.

5.6 Skills gaps

The Colchester Annual Business Survey 2008 (sample size 400) identified that around one fifth of Colchester businesses had skills gaps that they were finding difficult to bridge. These skills gaps ranged from customer care, sales skills, ICT through to specific work skills such as electrical engineering. Local manufacturing companies have skilled engineers with a median age of 56. This is currently only partially being addressed by apprenticeships and other skill initiatives.

The East of England Development Agency's draft Skills Priority Statement (see 5.6 below) outlines that in terms of generic skills, the most frequently reported deficiencies for the whole of the East of England are customer handling, team working and oral communication skills. A recent survey by the CBI/EDI Education and Skills Survey 2010[18] reinforces this observation (employability skills of young people in particular) and notes the concerns that employers have around the literacy, numeracy and IT skills of their lower skilled workforces

In addition, trade apprenticeships in Colchester are significantly lower in Colchester with an estimated level of 2.3% compared to 4.2.

The Essex Employer and Business Survey 2010 have identified that Colchester businesses are the most reluctant in Essex to offer work placements (66% would not consider offering work placements against an average of 50% in Essex).

5.7 Training opportunities

EEDAs draft Skills Priority Statement contains analysis of the regions issues in relation to skills. The draft is still in consultation. The following points extracted from the report are relevant to Colchester in terms of the provision of training:

- *Regional small firms are particularly prone to a lack of training with almost half of firms with less than five employees providing no training at all.*

- *Training participation by individuals is influenced by a range of characteristics. Generally, those who already have higher level qualifications are more likely to receive more training. Only about one in forty of those with no qualifications will have undertaken any training recently.*

[18] http://www.cbi.org.uk/ndbs/content.nsf/802737AED3E3420580256706005390AE/C4393B860D00478E802576C6003B0679 [Accessed June 2010

- *Younger people in the East of England, aged under 25, seem to miss out on training opportunities relative to their counterparts elsewhere in the country.*

- *The recession has had an impact on action to address skills issues and some firms have cut back their training budgets, but many more have responded by demanding more bespoke support focusing on mandatory training, up-skilling key individuals and bite-sized learning customised to the current and future needs of the business. However, even before the recession, surveys of individuals and employers within the East of England consistently and repeatedly show training levels below England and UK levels. Proportions of those receiving training are lowest in the East of England and Yorkshire and Humber (UKCES 2010 pg. 77)*

(Draft Regional Skills Priority Statement (subject to consultation) June 2010, EEDA)

As shown in item 6.2 below Colchester (typical of the region) is a town of micro and small businesses. This factor could make those employed in smaller businesses vulnerable to the possibility of poor training provision offered by small businesses and particularly as outlined above businesses with five employees and under. This could have a negative of impact in terms of skills development in the borough. However, more research is needed to determine the level and extent of these skills gaps (see below).

EEDA's report highlights that the lack of labour market intelligence products available at a sub regional level to analyse skills needs accurately, as most are generated from extrapolation of data at a national, regional or sectoral level. The robust intelligence that is needed for decision making does not exist at a sub regional level. As EEDA suggests this is 'the Achilles heel of the market in skill-related supply at a sub regional level'. EEDA states that:

> *Informed choice by learners and employer is key in order that the providers are challenged to deliver the economic valuable skills needed by the current and future economy. Strengthened all-age IAG provision backed up with up-to-date labour market information is vital to ensure that learner choice is informed and high-quality skills diagnostic and brokerage provision through Business Link and Sector Skills Councils to ensure that employers are able to identify and source the skills development provision that is effective and meets the needs of their business .(Draft Skills Priority Statement, June 2010, EEDA)*

For Essex County Council Skills Priority Statement see Appendix A.

6. ENTERPRISE

6.1 Major employers in Colchester

Table 7: Key Employers in Colchester

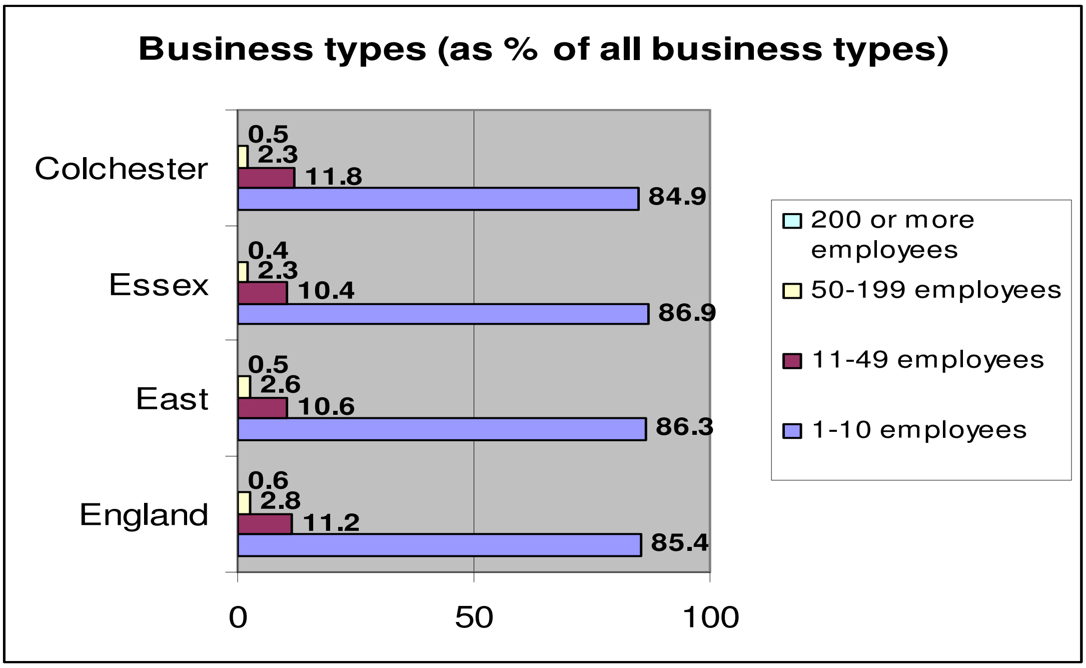
Employer	Numbers of employees	Activity
COLCHESTER DISTRICT GENERAL HOSPITAL	3000	Hospital Activities
UNIVERSITY OF ESSEX	2000	Higher Education
COLCHESTER BOROUGH COUNCIL	1500	Local Authority
COLCHESTER INSTITUTE	900	Adult And Other Education
MONTHIND CLEAN	800	Industrial Cleaning
SEVERALLS HOSPITAL	800	Hospital Activities
MONTGOMERY INTERIOR FABRICS	750	Retail Sale
SAINSBURY'S SUPERMARKETS LTD	515	Retail Sale
TESCO STORES LTD	500	Retail Sale
CAPITA	500	Legal Activities
FLAKT WOODS LTD	420	Manufacture Of Non-Domestic Cooling And Ventilation Equipment
BETTS UK LTD	400	Manufacture Of Corrugated Paper And Paperboard
POLESTAR UK PRINT - COLCHESTER	400	Composition and Plate-making
ESSEX MUSIC SERVICES	400	Adult And Other Education
COLCHESTER LEISURE WORLD	400	Operation Of Sports Arenas And Stadiums
ASDA STORES LTD	360	Retail Sale
WILKIN & SONS LTD	350	Manufacture Of Other Food Products
RECOGNITION EXPRESS	349	Manufacture Of Other Wearing Apparel And Accessories
EIMCO WATER TECHNOLOGIES	349	Manufacture Of Other General Purpose Machinery
COLCHESTER ZOO	320	Zoological Garden

Table 7 shows the major employers in Colchester, the numbers of employees and their area of activity. The five largest employers (in terms of numbers of employees) are all in the public sector (see item 6.6 for an analysis of the public sector).

6.2 Number and types of businesses

According to the Annual Business Inquiry 2008 there were 7,399 businesses in Colchester employing 71,596 people.

Figure 12:



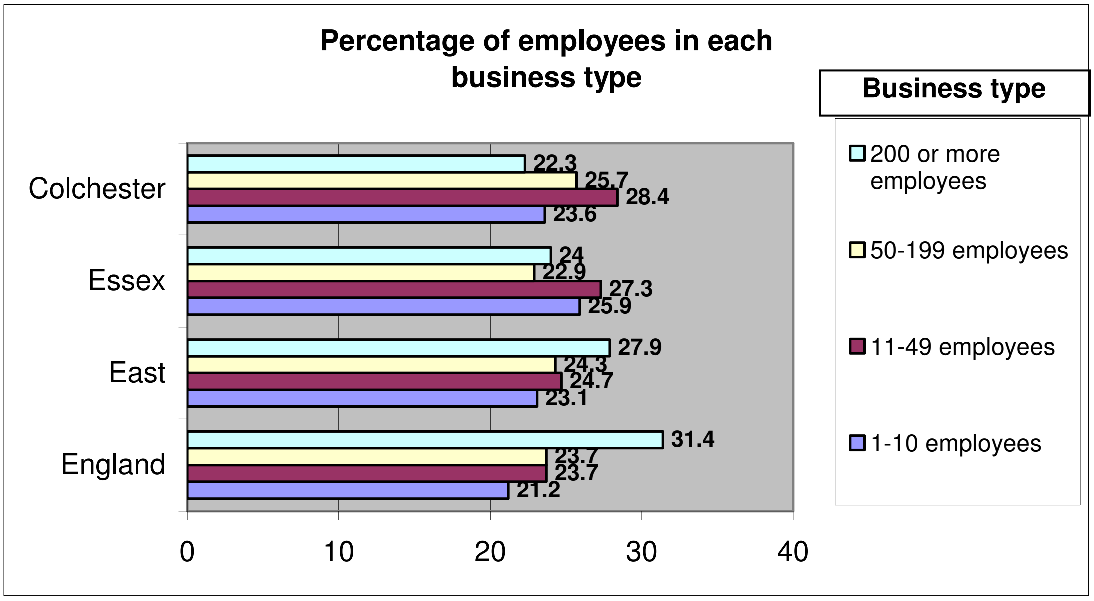
Source: Annual Business Inquiry ©Crown Copyright ONS 2008.

As Figure 12 illustrates, in terms of the size and class of businesses, in 2008, micro businesses (employing 1-10 people) accounted for 84.9% of businesses in the borough. Small businesses (11-49) accounted for 11.8%, medium sized businesses (50 -199) for 2.8% and large businesses (200+) for 0.5%. Colchester has a smaller share of micro-enterprises than Essex, the East of England or England but had a marginally higher share of small and medium sized enterprises. However, see item 6.3 below for the number of employees in each business type.

The average annual growth of micro businesses in Colchester at 2.9% is higher than Essex and the East of England. For small businesses it is almost double that in the East of England. Significantly Colchester is also ahead of both Essex and the East in the growth-rate of medium sized businesses. The converse is true of large businesses where growth is a negative -0.3% against positive growth in excess of 2% in Essex and the East. Some of this is due to the decline (downsizing/outsourcing) of some large businesses in Colchester.

6.3 Numbers of employees in each business type

Figure 13:



Source: Annual Business Inquiry ©Crown Copyright ONS 2008.

As figure 13 shows micro businesses (employing 1-10 employees) accounted for 23.6% of employee jobs in Colchester. This was lower than the figure for Essex of 25.9% but higher than the East (23.1%) and England 21.2%).

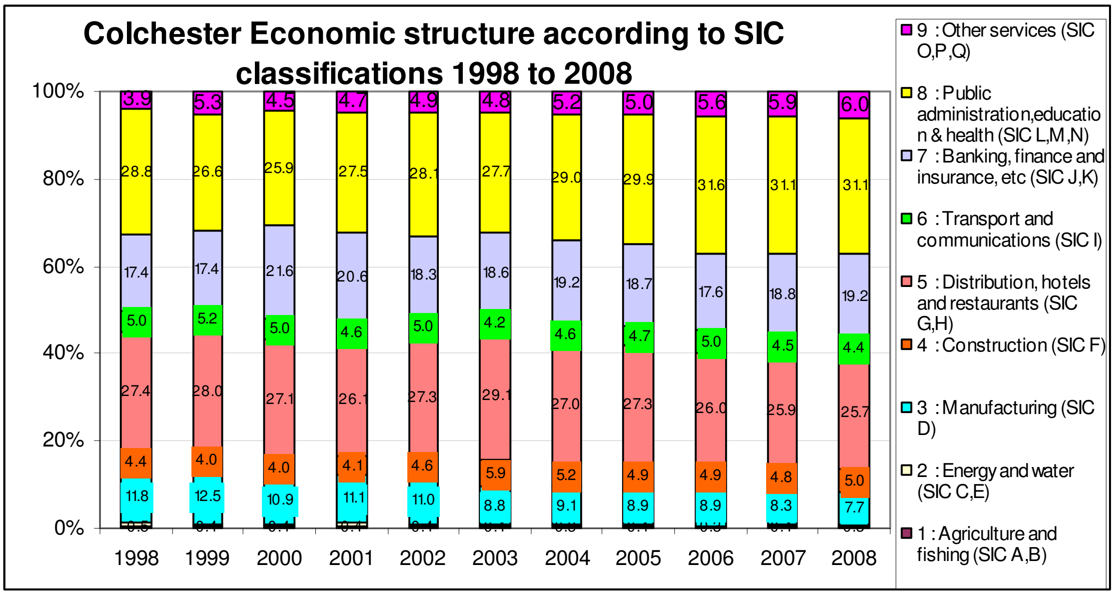
Small businesses (employing 11-49 people) employed 28.4% of all employee jobs in Colchester. This was slightly higher than the proportion for Essex of 27.3%, and higher than the figure for the East (24.7%) and England (23.7%).

Medium sized businesses (employing 50-199 employees) accounted for a very small 2.3% of businesses in Colchester (see figure 11 above), but this translated into a quarter (25.7%) of all employees, which was higher than total for employees in micro businesses (23.6%).This proportion of 25.7% was also higher than the other geographies: Essex (22.9%), East (24.3%) and England 23.7%.

Large businesses (200 or more employees) in Colchester made up only 0.5% of businesses overall. However, they accounted for 22.3% of employee jobs, but this was lower than the Essex figure of 24%, the East with 27.9% and England with 31.4%.

6.4 Industrial sectors

Figure 14:



Source: Annual Business Inquiry ©Crown Copyright ONS data is shown for 1998 to 2008. Figures shown in this charts are averages across all business sizes.

As figure14 reveals, in 2008, 86.1% of employee jobs were in the service sector. This breaks down into Public administration, education and health (31.1%), distribution, hotels and restaurants (25.7%), finance, IT and other business activities (21.4%),tourism (9%), other services (5.9%), transport and communications (4.4.%). Manufacturing accounts for 7.6% of employee jobs, construction 5%; the balance is made up of energy, water, fishing and agriculture.

Public administration, education and health and distribution, hotels and restaurants account for the top two classifications of businesses between 1998 and 2008 in Colchester, Essex and the East of England. .

Colchester had a consistently lower percentage of level 7: banking, finance and insurance than Essex or the East of England from 1998 to 2008. However, this did increase from 17.4% in 1998 to 19.2% of businesses in the borough in 2008. Colchester also had a consistently lower percentage of businesses in level 6 transport and communications (4.4% in 2008 down from 5% in 1998) and SIC level 4, construction (5% in 2008, 6.2% in Essex and 5.6% in the East). Colchester also had a much lower level of manufacturing businesses than Essex and the East, with 7.7% in 2008, compared to 10.5% in Essex, and 10.3% in the East of England.

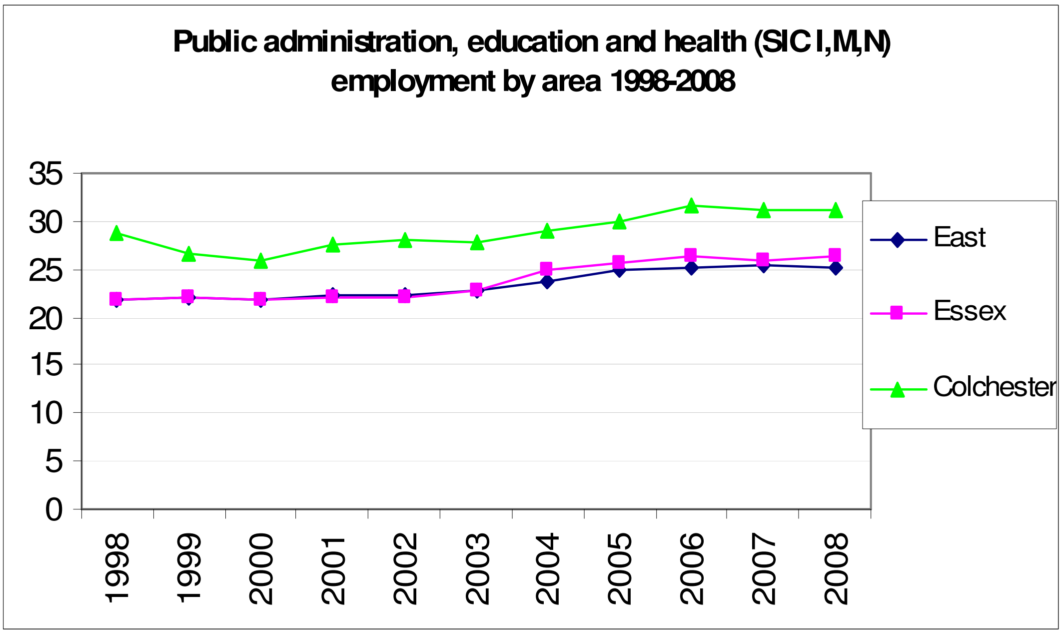
6.5 Creative industries

In terms of business clusters, in 2008, Colchester had the highest number of creative industry businesses (400+) in Essex with one in six of Colchester jobs in this sector. This amounts to 1 in 14 jobs. Colchester has the second highest number of financial services businesses in Essex after Southend with 185 local units accounting for 2,905 employees. Colchester also had the second highest number of Advanced Electronic and ICT companies in Essex after Chelmsford.

In addition, Colchester stands out as being the district most likely to consider IT/ICT as a priority (37% against the Essex average of 27%). A private sector backed next generation broadband scheme utilising the Council CCTV network is currently under consideration.

6.6 The public sector

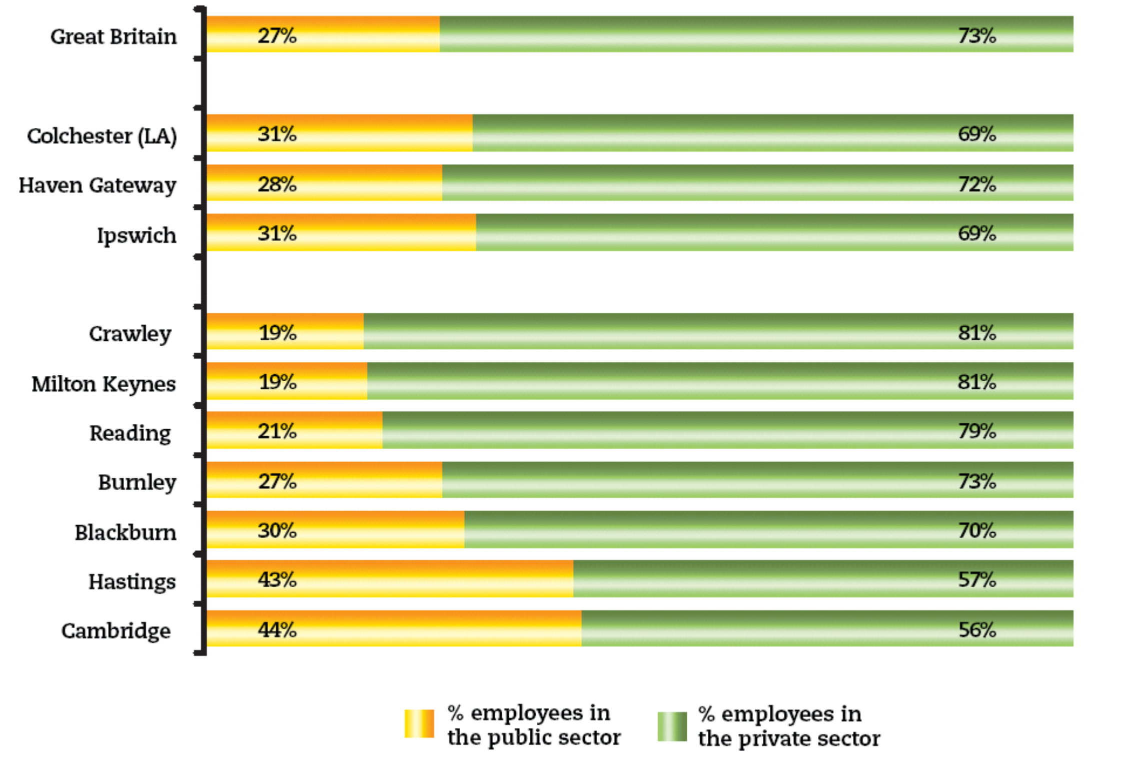
Figure 15:



Source: Annual Business Inquiry ©Crown Copyright ONS data is shown for 1998 to 2008. Figures shown in this charts are averages across all business sizes.

Colchester has a significantly more dominant public sector in 2008 at 31.1%, than Essex (26.4) and the East of England (25.1%), amounting for nearly one in three people employed in industry according to this measure. Growth in the public sector has occurred in all areas since 1998.

Figure 16: Ratio of public to private sector jobs, 2008



Source: *Annual Business Inquiry*

Figure 16 shows how the ratio of public to private sector jobs in Colchester and the Haven Gateway[19] area compares to a selection of other cities in England. Figure 16 and the extract below were taken from the Centre for Cities report referred to below in item 6.6:

Colchester's share of private sector jobs is 69 percent and the Haven Gateway's is 73 percent. The national average is also 73 percent. Based on this simple comparison, it would seem that Colchester is probably more vulnerable to public sector job cuts than the wider Haven Gateway sub region. Indeed, Colchester's share of public sector jobs is equal to that in Ipswich, which the Centre for Cities identified as one of the most vulnerable cities in the country when it conducted research on public sector job cuts in summer 2009[20] More work would be needed to understand whether Colchester is equally as vulnerable as its neighbour.[21]

This factor will create greater exposure to the effect of any future public spending reductions from the perspective of employment, spend and local supply chains. At the end of June 2010 the Government announced spending cuts in most departments and suggested budgets are reduced by over a quarter over the next four years, which amounts to 610,000 job losses nationally[22].

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[19] The Haven Gateway sub-region is defined as Colchester, Tendring, Ipswich, Babergh, Suffolk Coastal and Mid Suffolk districts.
[20] Larkin K (2009*) Public Sector Cities: trouble ahead.* London: Centre for Cities.
[21] Webber, C (July, 2010) *Colchester, Ipswich and the Haven Gateway sub region: comparative analysis, London:* Centre for Cities.

[22] Local Futures (2010) *Barometer: the geography of public sector cuts* © The local futures group.

Local Futures estimate Colchester to lose 1,877 public sector jobs by 2016, ranking it 89 out of 408 districts nationally. This represents 2.6% of the employment base, placing it 119 out of 408 districts nationally.[23]

However, in addition, Local Futures point out that the wider economic affects of public sector job losses will be felt locally in terms of a reduction or cessation in public sector contracts and the demand for local goods and services 'both from the public sector itself and public sector workers via consumption economies'[24]. The impact of public spend in the borough given that it employs one third of the working population (one fifth in the UK) is clearly significant with local spend supporting in particular retail, leisure, hospitality and personal services. It is estimated that for every £1 spent on public services £1.64 is returned to the local economy[25]. Colchester has targeted interventions such as promoting 'Buy Local' to further increase the multiplier effect of local procurement and purchasing as an effective means of keeping more money in the local economy.

According to research by Oxford Economics due to the factors listed above, at least 2.3m private sector jobs will be at risk nationally as a result of the cuts.

Research undertaken by Centre for Cities has shown that a robust private sector could go some way in compensating for this contraction in the public sector[26]. See item 6.7 below.

6.7 Colchester as a 'buoyant city': Private sector growth

In July 2010 the Haven Gateway Partnership commissioned 'Centre for Cities'[27] to undertake some research about how the economic performance of Colchester, Ipswich and the local authorities comprising the Haven Gateway sub-region rank in comparison to English cities. The analysis uses a typology of economic performance developed in a recent report, *Private Sector Cities: a new geography of opportunity*[28]. The typology categorises the economies of England's cities as 'buoyant', 'stable' or 'struggling'. Below are extracts from the research[29]:

---

[23] Local Futures Group, 2010.These estimated job losses are based on local share of the national public sector employment base. The 610,000 job cuts forecast by the OBR were distributed across the country according to each local authority district's share of national employment in public services.
[24] Oxford Economics, 2010.
[25] CLES (2008) Creating resilient local economies: exploring the economic footprint of public services
[26] Webber, C and Swinney, P (2010) *Private sector cities: a new geography of opportunity © Centre for Cities.*
[27] Centre for Cities describe themselves as an 'Independent, non partisan research and policy institute committed to improving the performance of UK cities' www.centreforcities.org
[28] Webber, C (July, 2010) *Colchester, Ipswich and the Haven Gateway sub region: comparative analysis, London:* Centre for Cities.
[29] Centre for Cities typology uses a range of indicators to measure the performance and trajectory of England's cities. It ranks their performance on each of these indicators and gives each city a total score that determines its position in the typology.

- *If Colchester was included in England's list of 56 cities, it would rank as one of the country's most buoyant economies.*

- *Between 1998 and 2008, the number of private sector jobs in Colchester grew by 11.5 percent (which would have been the ninth highest percentage growth of any city in England). For the Haven Gateway as a whole the figure was 8.0 percent (the 16th highest).*

- *Judging by the increase in JSA claimants between February 2008 and June 2010, both Colchester and the Haven Gateway area have performed relatively well during the recession. Ipswich has been the worst hit area in the sub-region, but has still performed relatively well compared to many other UK cities.*

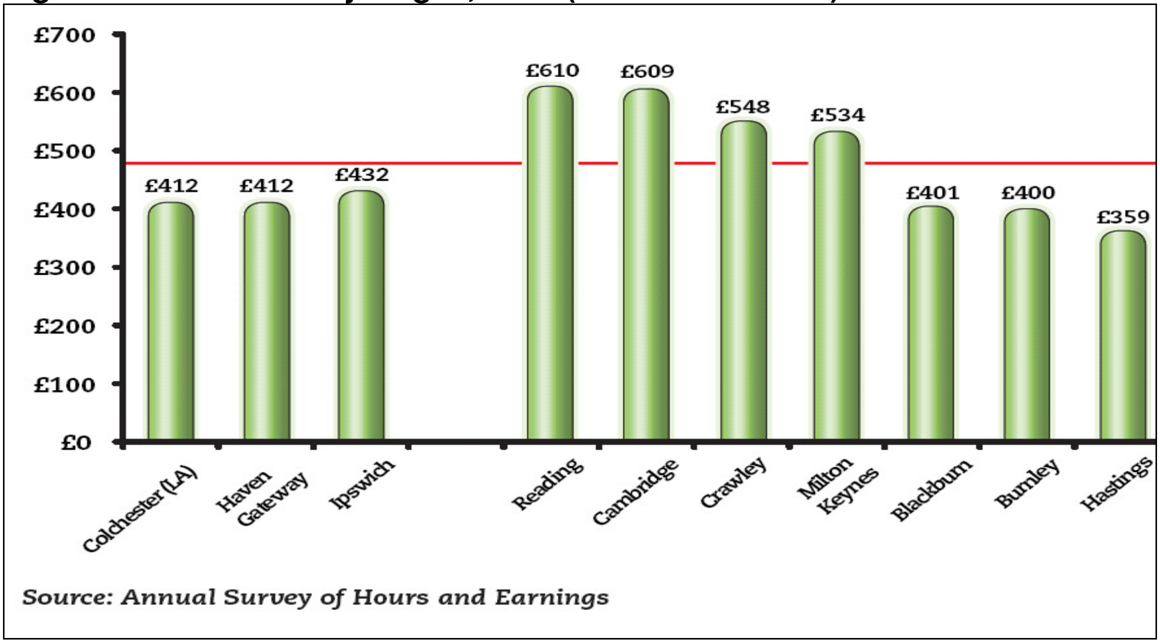
Table 8 lists England's buoyant cities and shows that Colchester would fit comfortably into this category, alongside places like Cambridge, Reading and Bristol.

Table 8: Colchester as a buoyant city

City/area	Average annual population change (1998-2008)	Real GVA Growth (1998-2007)	Private Sector Jobs Growth (1998-2008)	Wages £ (2008)	House Prices £ (2008)	Average IB and JSA Claimant rate (1998-2008)
London	0.7% (11)	4.5% (4)	9.4% (15)	653.7 (1)	355,696 (1)	4.5% (20)
Milton Keynes	1.4% (2)	4.6% (3)	23.7% (2)	534.3 (6)	192,611 (15)	3.4% (7)
Cambridge	1.2% (4)	4.1% (10)	-4.0% (42)	608.6 (3)	287,493 (3)	2.6% (4)
Reading	0.4% (22)	4.7% (2)	10.3% (10)	610.3 (2)	256,879 (7)	2.4% (2)
Crawley	0.7% (14)	4.2% (6)	9.5% (14)	548.3 (5)	270,876 (4)	2.5% (3)
Oxford	1.3% (3)	4.1% (7)	-9.8% (52)	484.3 (10)	333,253 (2)	2.7% (5)
Colchester	**1.7% (1)**	**3.8% (18)**	**11.5% (9)**	**411.7 (40)**	**194,674 (13)**	**3.1% (6)**
Aldershot	0.2% (40)	2.6% (41)	9.9% (13)	599.6 (4)	260,940 (5)	2.1% (1)
Bristol	0.8% (9)	4.1% (8)	15.4% (5)	476.6 (12)	200,467 (11)	3.8% (13)
Brighton	0.4% (26)	3.8% (16)	24.8% (1)	423.6 (31)	256,987 (6)	4.9% (27)

Centre for Cities point out that there are two figures that stand out in this table for Colchester. The first is Colchester's very strong population growth, which according to Centre for Cities *'would give it the highest population growth of any city in England if it was included in our standard list of cities'* (out of 56 cities - see also Section 2 Population). The second is Colchester's relatively low wage rate, which as Centre for Cities point out 'is significantly below the wage rates seen in other buoyant cities'. This is also highlighted in item 4.8 in relation to other districts in Essex.

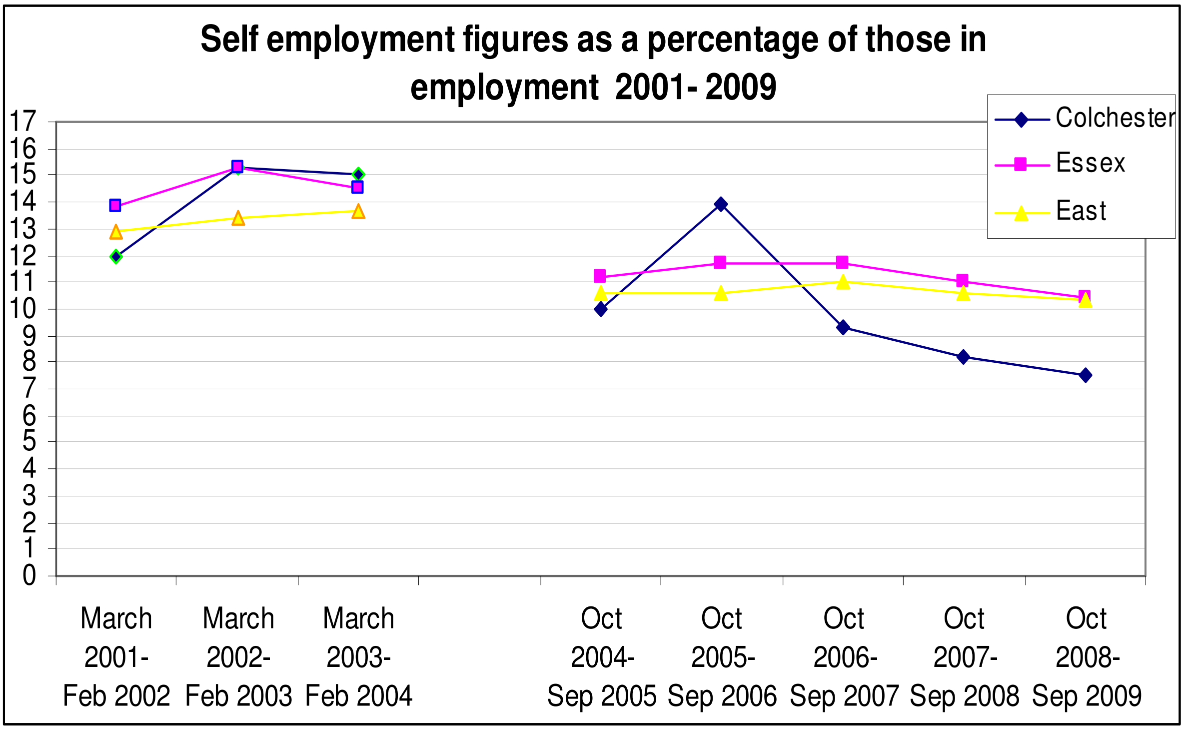
Figure 17: Mean weekly wages, 2008 (see also item 4.8)



According to the Centre for Cities report the low wage rates for Colchester could mean the type of economic activity taking place is 'less high value than in other buoyant economies' (see also item 4.8 Earnings).

6.8 Self employment

Figure 18:



Source: Annual population survey data ONS © Crown Copyright (October 2004 onwards) has been reweighted in line with the ONS population estimates.
Labour Force Survey data ONS © Crown Copyright (2001 to February 2004)

The rate of self employment in Colchester averaged 10.1% of the economically active population between March 2001 and September 2009.

This rate is higher than the national rate (9.1%) but slightly lower than the regional rate (10.5%). The rate has fluctuated between a high at 14.6% in 2005/06 to the current low of 7.5% (see figure 17 above).

6.9 New business formation

The new business formation rate (VAT registered) in Colchester is low with the area ranking in the bottom 40% of districts nationally. In 2008, 9.4% of new businesses (505) were VAT registered below the Essex (10.43%) and national (10.55%) figures. However, the 24 month business survival rate is very high by national standards with 83.6% of businesses registered in 2005 still trading in 2007.

6.10 The retail sector

The retail sector employs 9,291 people with 806 employers. In the UK CACI Survey for Colchester shows that Colchester has slipped from 36th in the UK in 2006 to 46th in 2009. Annual retail expenditure in the town centre is £540m – this figure has fallen by £10m since 2008.[30]

The North Essex Retail Study (2009) identified that there is significant spending leakage for comparison goods shopping for which Colchester has a relatively low market share of 34%. Colchester has a strong independent retail presence and has 26 out of 28 of the key retail attractors. Arresting the relative decline in the town centre performance is a key regeneration priority for Colchester as is working in partnership with the retail sector to deliver coordinated project delivery.

6.11 Knowledge based industries

Knowledge based industries are defined as being 'telecommunications, computing, R&D, finance and business services, recreational and cultural services in which graduates make up at least 25% of their workforce'[31]. From 1998 to 2008 the number of knowledge based industries in Colchester grew from 933 to 1,538 an increase of 64.8%. Over the same period the number of employees grew from 6,990 to 15,673 an increase of 124.2%. Within these very positive overall figures the point made in item 5.6 above in relation the downsizing of some large companies in finance, manufacturing, insurance and telecommunications applies here.

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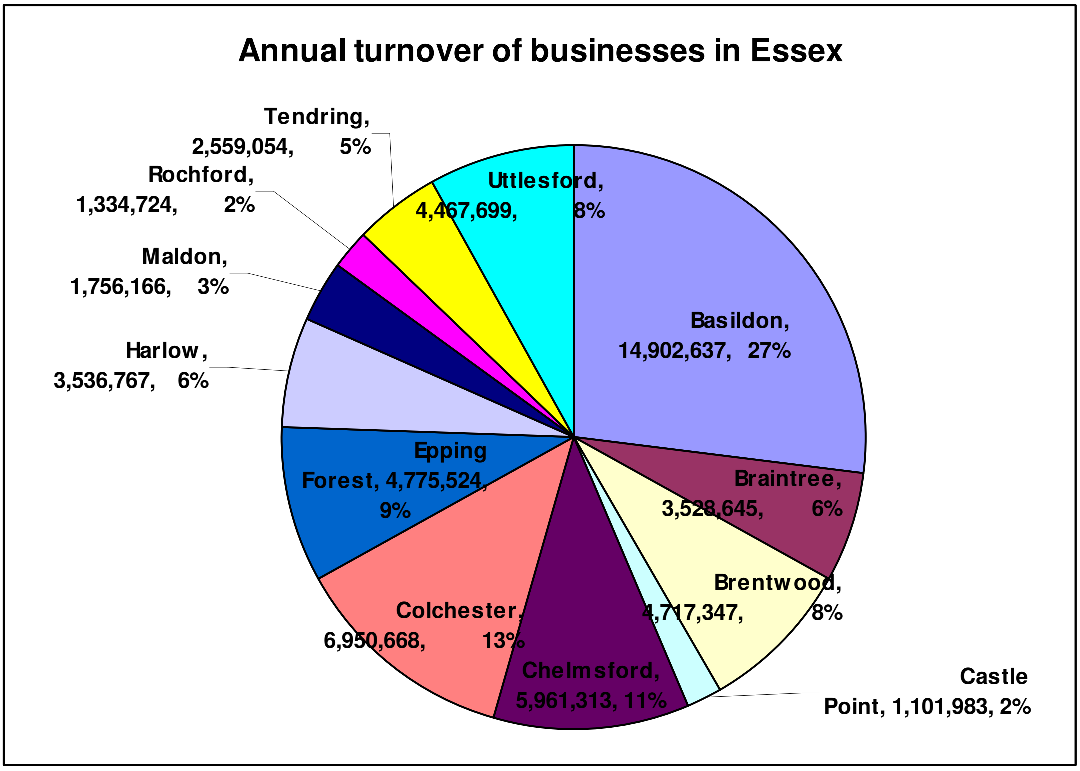
[30] CACI Retail Footprint © CACI Limited 2010

[31] Office for Economic Cooperation and Development OECD definition

6.12 Annual turnover of businesses

Figure 19:



Source: Inter-departmental Business Register to March 2009, ONS © Crown copyright reserved

As figure 19 illustrates, the annual turnover of Colchester businesses is estimated to be nearing £7 billion. At 13% of the Essex total, this is the second highest in the county after Basildon at 27% of the total.

6.13 Economic productivity

In terms of economic productivity Colchester was ranked 194 out of 408 districts on the Local Futures economic productivity score. This places it in the middle 20% of districts nationally. The size of the economy with a score of 109.88 was above the national median of 100.0 but below the Essex score of 124.9.

Huggins (2010) provides information on 380 authorities. There GVA per capita reports Colchester as £17,957 in 2006 (rank of 139) and £18,833 in 2007 (rank of 140).

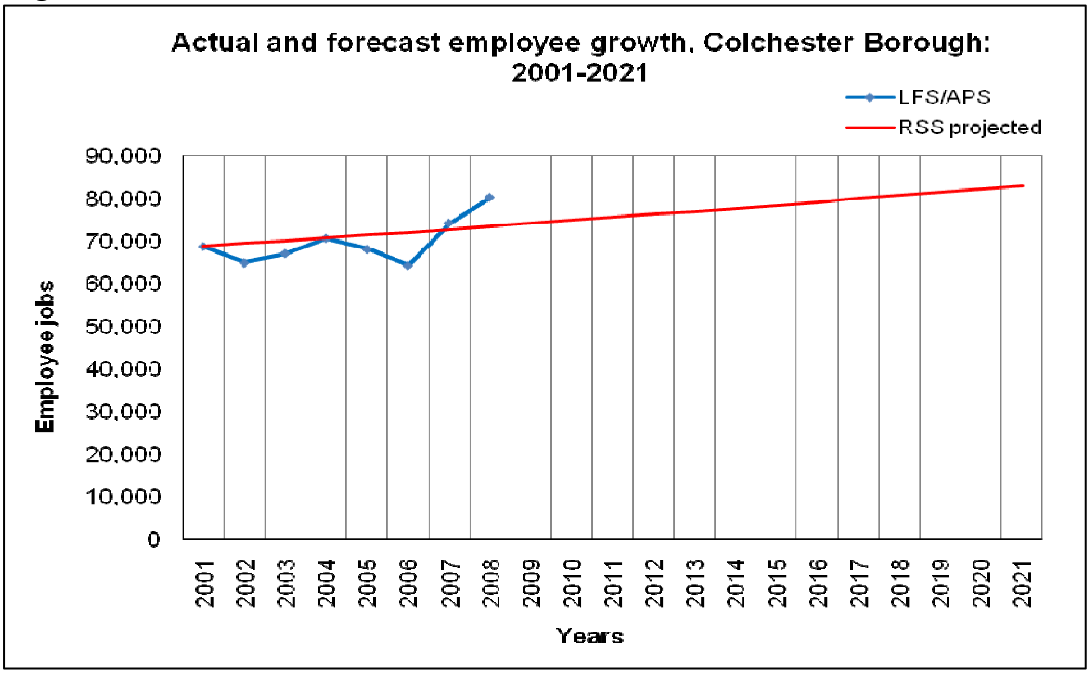
7. ECONOMIC DEVELOPMENT AND GROWTH

7.1 Core strategy floor target 2021

Providing jobs for Colchester's growing community is a central objective of Colchester's Core Strategy. The floor target set in 2001 for 2021 is approximately 14,200 jobs. The Council cannot deliver the additional employment directly, but it can help to protect existing employment, stimulate new employment developments and accommodate new developments at the most suitable locations.

Currently the borough is on track to achieve the job target total; the chart below illustrates Annual Population Survey (APS) job growth to date (2008 is the most recent figure) against the projected target. The previous Labour Force Survey (LFS) has now been replaced with this data set. Major employment-generating projects in the Regeneration areas see section 6.3 below) and Employment Zones will boost progress towards the target as they come on stream over the next few years.

Figure 20:



Source: Core strategy Colchester (RSS)

7.2 Economic development: land and buildings

Industrial land supply has continued to rise in Colchester to around 450,000 square feet in 2008 while demand (take up) has risen to 275,000 square feet. Colchester has seen a decline in industrial floorspace from 1999 to 2008 of 12%[32].

Office floorspace supply and demand has fluctuated in the period 2005 to 2008. The most recent figures show that 65,000 square feet is available. In May 2010 the annual rent per square foot ranged from £4-6 for

[32] CRE Collins Estates Gazette February 21st, 2010.

Warehousing/Distribution to £12-15 per square foot for Business Park accommodation. Colchester has seen a growth in office floorspace of 14.7% in the period 1999 to 2008 against a national increase of 22.1%.

Retail floorspace has grown by 4.3% in the period 1999 to 2008 compared to the national figure of 3.16%.

Colchester is ranked 324 out of 375 districts for commercial floorspace indicating a level of growth in the bottom 20% of districts nationally. The quantity and overall quality of commercial floorspace is a real concern for the Borough.

The amount of total business floorspace developed within the borough decreased between 2008 and 2009 for the second year in a row. However, the net loss of employment land was less than in the previous year (2008/09). The net increase of retail, office and leisure space within the Borough was 9,208 square metres, however the net increase of retail, office and leisure space within the town centre was –1,200 square metres.

The Council's Local Development Framework Core Strategy (adopted in 2008) provides the strategic policy to support the allocation of land to deliver employment-generating developments The Council commissioned studies for the Core Strategy for projected growth in retail, business and employment, and used this evidence to plan and facilitate future economic development and employment delivery in Colchester. Over the 2006 to 2021 period, the borough will need to accommodate the following development:

- 67,000sqm (net) of retail floorspace, predominantly in the Town Centre (Retail Study, Feb. 2007)
- 106,000sqm (gross) of office floorspace (Use Class B1a & B1b), predominantly in the Town Centre and at the University Research Park. (Employment Land Review, May 2007)
- 45,000sqm (gross) of business floorspace (excluding offices), predominantly in Strategic Employment Zones (Employment Land Review, May 2007)

In order to fulfil Core strategy 2021 targets, the Borough will need to provide a further 48,259 sqm of retail floorspace in the town centre; this figure will be slightly surpassed with the development by 2015 of the Vineyard Gate shopping complex which will deliver 50,000 sqm .

The Site Allocations document (currently awaiting the Inspector's report) identified 47 sites across the Borough of which 3 are Strategic Employment Zones (totalling 152.9 hectares) and 44 Local Employment Zones covering both urban and rural locations, totalling 128.4 hectares. Together with 4 mixed use sites totalling 19.4 hectares, almost 300 hectares of employment land is available across the Borough.

7.3 Regeneration

The borough council has a regeneration programme with over 39 key projects either under construction, at feasibility stage or ready for delivery once funding is secured. Many of the projects have traditionally been the responsibility of the private sector to deliver e.g. Vineyard Gate shopping centre, however public sector intervention (although not necessarily grant funding) is now required to move forward development. Funding is generally secured from a number of sources for each project and these sources historically have included EEDA, GAF, S106, European funding and from the sale of Council owned land where appropriate.

***Funding*:** Increasingly, in a difficult financial environment, funding has become scarcer and the Council is seeking more innovative ways to continue to deliver projects alongside the more traditional sources such as European bids. This includes entering into partnership agreements with the private and public sector, looking at emerging initiatives such as TIF and CIL and using its own assets more effectively. However significant resources are still required to deliver key projects within the Council's existing programme such as the Town Centre transport improvements (this is a joint project with ECC), Phase 2 of the Cultural Quarter and Breakers Park in East Colchester.

Council role/leadership: Projects fall broadly within three main areas: East and North Colchester and the Town Centre. Within the three main areas, East Colchester is the most traditional in terms of regeneration. With the closure of the Haven Port in 2000, land on either side of the river requires redevelopment and is mainly in third party ownership. Due to the historical port uses, most sites have significant contamination. The purpose of regeneration in this area is to create a new community along the river with a range of infrastructure and community facilities which is linked to existing communities both physically and socially. Due to the high contamination costs and reduction in land values due to the recession, over the last two years the Council has provided leadership and secured funding to bring about key pieces of infrastructure e.g. Hythe Station redevelopment. This leadership will continue and the Council is now looking at forming partnerships with private sector landowners to bring about further delivery with a particular focus on community infrastructure.

North Colchester: North Colchester development programme is taking place in an area of mainly Greenfield which over the years has become established as a key area for the Borough's economic growth. Due to the significant site area owned by the Council, it is leading a range of development initiatives with a jobs focus e.g. North Colchester Business Incubator.

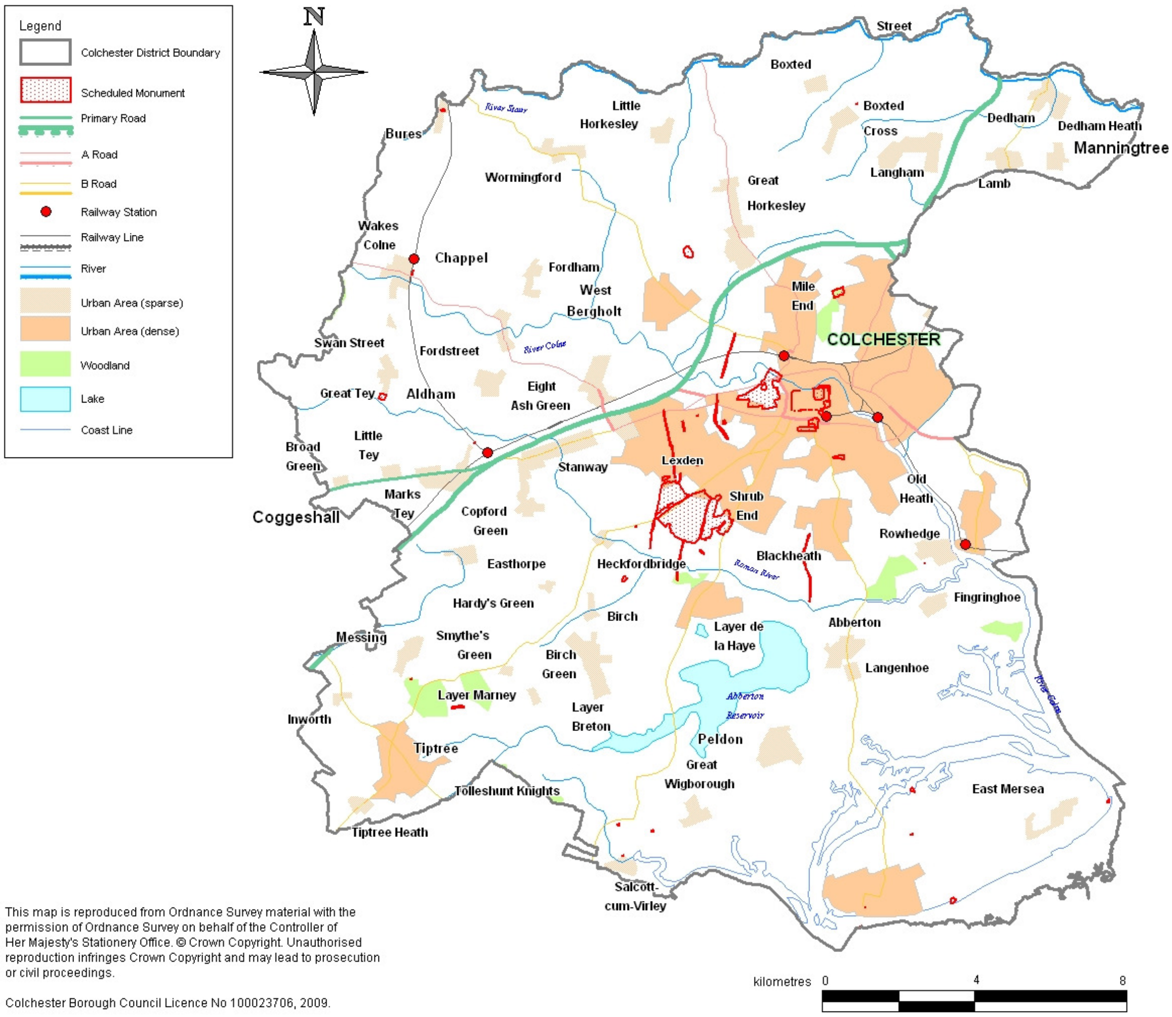
Town Centre: Regeneration in the town Centre initially was focused on the secondary St Botolphs area and in 2005 the Council adopted a Masterplan for the area which was anchored by the creation of a new Visual Arts Facility. This landmark building is now onsite and has proven to be the catalyst for the adjacent Cultural Quarter development scheme. However as work in St Botolphs has continued it has become increasingly obvious that many issues in this particular area have an impact on the wider town centre e.g. transport and closure of the bus station. Therefore a programme of improvements 'Better Town Centre' has now been established and is managed by the Council and Essex County Council working in partnership and project delivery is being achieved on a town wide basis. The improvements programme is accompanied by an engagement strategy to ensure where possible collaboration is achieved with other partners (in particular the private sector) to bring about change. Evidence of this has been highlighted recently where a group of key business leaders within the town have worked together to bring about a co-ordinated programme for Christmas (an area traditionally seen as a Council responsibility)

Future regeneration*:* It is anticipated that delivery of key projects will continue in accordance with the Regeneration Programme and other new areas are emerging which will in due course be added to the programme e.g. North Station. However as previously mentioned it is anticipated that delivery will become even more difficult over the next few years and it is particularly important that the Council continues to provide leadership in order to facilitate new partnerships and creative ways of achieving development.

8. HERITAGE, TOURISM AND CULTURE

8.1 Colchester's monuments and physical features 2009

Figure 21: Map of Colchester (monuments and features)



There are 22 conservation areas, and some 1,555 listed buildings in Colchester borough. There are also 52 Scheduled Ancient Monuments (SAM). There are 4 parks within Colchester on the National Register of Special Historic Interest including Colchester Castle Park, Severalls Hospital, Layer Marney Tower gardens and Wivenhoe Park. As scheduled ancient monuments Gosbecks Archaeological Park is a major asset to the area containing Roman remains. However, the primary archaeological monument is an Iron Age Dyke System around Colchester. Such remains are also uncovered on a regular basis during development particularly in the town centre. Many of the town's buildings are listed and date from 15th century. There are also many listed barns and agricultural buildings in the outlying villages.

8.2 Heritage, tourism and culture in context

Colchester is an ambitious visitor destination. As well as being Britain's oldest recorded town Colchester has a vibrant contemporary arts scene and is looking forward to new attractions, new hotels and an anticipated additional 500,000 visitor trips annually to add to the 4.4m visitor trips already taken here.

Over the past 15 years, Colchester and the surrounding area has emerged as a preferred destination for visitors and investment in tourism businesses to ensure a quality visitor experience to attract repeat and referred visits.

Tourism, driven by the town's unique cultural assets, makes a significant contribution to improving the image and perception of the Colchester area in the region, nationally and internationally. It also enhances the quality of life of local people by offering a wide choice of things to do and places to visit as well as bringing new jobs to the area and sustaining those already here.

Colchester and the surrounding area are fortunate to have a wide range of visitor offerings appealing to many different visitor markets. However, two particular strands make a particular contribution to the visitor economy: heritage and the arts.

Colchester is Britain's oldest recorded town, with a colourful history dating back over two thousand years. From here, King Cunobelin (Shakespeare's 'Cymbeline') ruled over much of southern Britain from his fortified settlement known as Camulodunum.

Some of the most important events in British history have taken place here including:

- The establishment of a Roman town here after the invasion of AD43. This town became the first Capital of Roman Britain
- The British Queen Boudica and her warriors burnt the Roman town to the ground in AD60.
- One thousand years later the Normans built a massive castle keep at Colchester, the largest in Europe
- A thriving medieval town grew up based around the cloth trade.
- The town survived the devastation of the Black Death and a major siege during the English Civil War in 1648.

By the Victorian period Colchester's growth had taken a different turn and the town became known for its military garrison and engineering industries. In recent years Colchester has changed again with new developments such as the University of Essex and major regeneration plans for the town and its outskirts.

This rich history provides a strong base for tourism. In addition, the classic English lowland landscape around Colchester has inspired the artists such as John Constable, Gainsborough, Nash and Munnings and continues to inspire, artists and creative people to live in, work in and visit this area, particularly the Dedham Vale Area of Outstanding Natural Beauty.

Heritage and arts are celebrated and are showcased in the many museums and galleries, parks and open spaces, theatres, historic monuments and buildings in and around the town. Many have won awards and continue to develop their network of influential contacts nationally and internationally.

As well as showcasing Colchester's rich archaeological collections, some of which have been nationally Designated, key recent Museum exhibitions have included:

- Colchester Castle around the theme of 17th century witchcraft;
- Guardians to the King exhibition of 2000 year old terracotta figures from Jiangsu Province in China

Future plans include: the 'Treasures of China' exhibition in 2012, planned as part of the Cultural Olympiad, which will include gold and jade suits from Jiangsu Province.

Further, the University of Essex collection of Latin America Art is in progress to become nationally designated. The collection marks commercial links in cloth and oil that town had historically with Latin America as well international links forged in the 1960s and 70s centring on human rights.

The town centre is home to a number of visual and performing arts organisations which contribute over £23million to the economy each year, supports over 400 jobs, and are vital to ensuring a vibrant choice of leisure activity.

The award-winning Mercury Theatre is a producing theatre that has forged links with theatres in London, New York and Europe bringing internationally renowned plays to the town for local and regional audiences to enjoy. The Mercury attracts over 130,000 visitors and participants each year and is currently the largest cultural attraction in the town centre.

It is projected that firstsite will top this at 150,000 visitors each year bringing a huge boost in terms of cultural, leisure and tourism activity. Firstsite will offer a programme of contemporary visual arts, education, conferencing and seminars as well as retail and hospitality.

Further, Colchester Arts Centre, while a smaller venue, regularly draws audiences from London which is thought to be a near impossible feat for any cultural attraction outside of the capital. These examples show the importance and impact of heritage and the arts on jobs, economy and the town's profile.

It is also important to note the role that arts and heritage play on community development. Culture that is rooted in the community can bring diverse cultures together, engage communities and encourage active citizenship. For example, the partnerships forged in recent years between the arts and Tendring and Colchester Minority Ethnic Partnership and Black history Month.

The landscape and coastline also have a strong influence over the variety and quality of food and drink that is produced here. So not only is the area inspirational to artists, the Colchester area is also rich with food and drink producers. From fresh seafood, including some of the country's best oysters (originally introduced by the Romans), tasty fruit and vegetables, and a plethora of successful brewers, vineyards and juice producers, the landscape and countryside, together with a favourable climate has a positive influence on what is produced in this relatively small area and is highly popular with visitors and local people alike.

8.3 Value of tourism to the economy

Table 9: Key economic indicators of tourism in Colchester

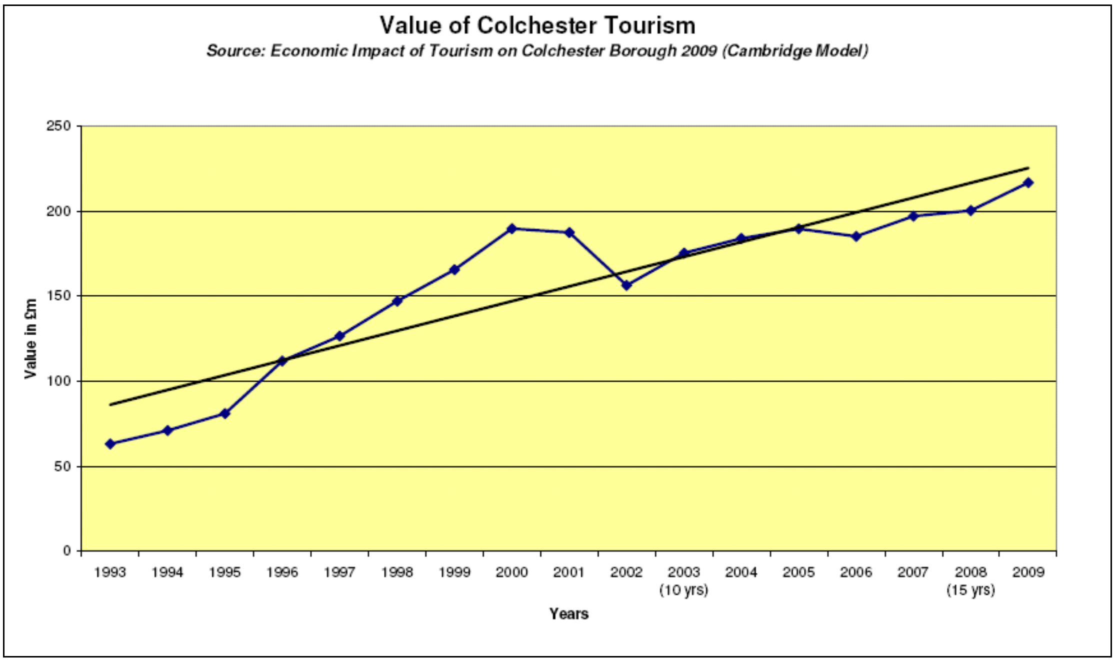
Value of Tourism to the Borough	**Tourism was worth £216.8m** to the economy of Colchester Borough in 2009 * **The value of tourism to Colchester has risen by 243%** from £63.1m in 1993 (*2009 is the latest year for which figures are available).
Number of trips taken to Colchester	• **Colchester attracted 4.5m visitor trips in 2009** • **A 61% rise on the 1993 figure of 2.8m visitor trips**. • **This includes:** • 59,000 staying trips taken by overseas staying visitors • 224,000 staying trips taken by domestic staying visitors • 4.2m day trippers

Source: Economic Impact of Tourism to the Borough of Colchester (Cambridge Model) 2009

The trends for volume and value of tourism are outlined in table 9 above and figures 22 and 23 below. It is worth noting that tourism is an industry easily affected by the weather, currency exchange rates, national/global disease (Foot & Mouth / SARS) and terrorism as well as reducing leisure spend in recession. However, despite all these factors Colchester and the surrounding area has remained resilient in tourism terms over the past 15 years. New tourism and leisure businesses have opened and existing businesses have continued to invest in improving the visitor experience.

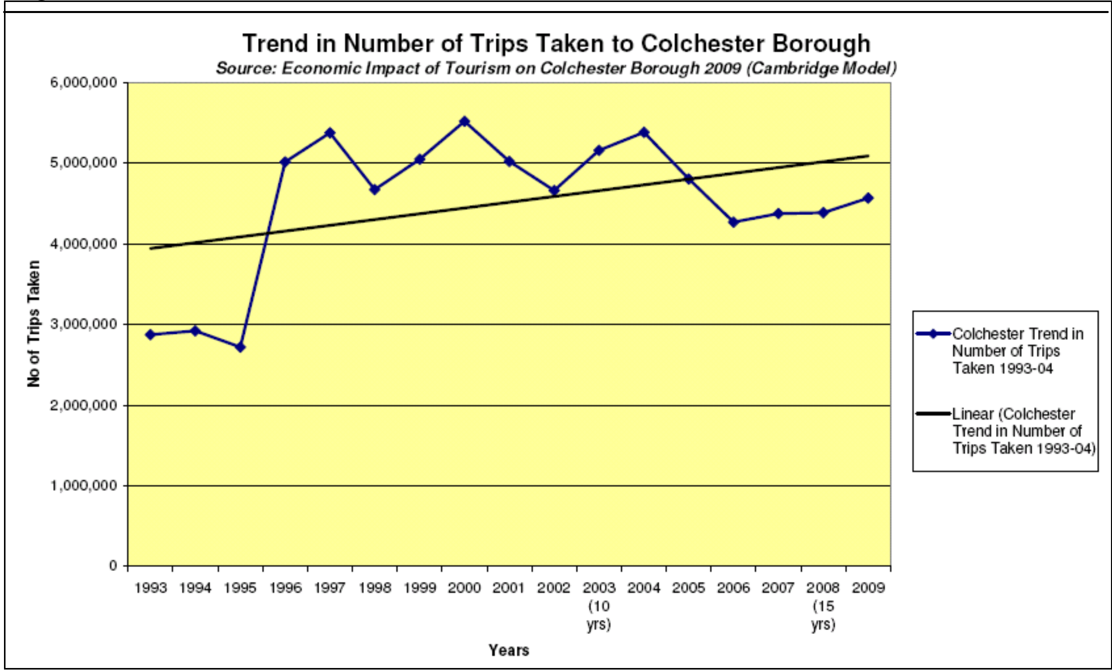
In addition, according to the latest figures (2009) tourism supports more than 6000 jobs in the borough, a rise of 75% since 1993[33].

Figure 22:



[33] NOMIS, the official Office of National Statistics **labour market statistics** website https://www.nomisweb.co.uk/Default.asp accessed February 2009.

Figure 23:



In addition, Colchester has much future potential to realise. Colchester is looking forward to new attractions, new hotels (see item 8.5) and projected additional 500,000 visitor trips annually to add to the 4.4m visitor trips already taken here. Planned new visitor experiences and infrastructure include:

- A new park and ride facility
- A new bus and coach park
- Improved interpretation of Colchester's history and stories
- A new junction from the A12 trunk road
- 4 new hotels
- A new cultural quarter including a new multi-million visual art gallery with new parkland with views of the Roman wall, new film screening facilities, café and 200 seat theatre
- Development of a Cultural Quarter including a wide range of creative business and entertainment opportunities
- A new Roman Circus attraction (remains of the Country's only Roman Circus was discovered in 2005)
- Continuing improvements to existing attractions and accommodation (for instance, Colchester Castle Museum will undergo a complete redisplay in 2013)
- Colchester has also been selected as a host destination for the 2012 Olympics as an official training camp. Colchester has excellent facilities in the form of the Human Performance Unit at the University of Essex and the Garrison also has sports training facilities and is building a new Rehabilitation Centre. In addition Colchester has some excellent facilities for specific sports including basketball and para-basketball and swimming.

In recent years, the Council and partners have made significant investment into creative infrastructure for Colchester, particularly centred on the development of a Cultural Quarter. This has levered £50million of private sector investment into the renewal of our town centre helping to show that arts and culture can drive economic vitality and attract investment.

The characteristic nature of Colchester makes it ripe for a flourishing culture and creative economy offer and as we emerge from the recession it has become even clearer that the downturn served to hasten trend towards a skilled, knowledge economy. This means that sectors with the potential for high-growth, such as the creative industries, are even more important.

8.4 Visitor Services

Visitor Services in Colchester is a unique concept. The idea is that services for visitors should be more than information and so Colchester's Visitor Services team takes on a wider remit taking in the welcome and first impression of the place in car parks and pedestrian signage around the town centre.

Visitor Services in particular is central to developing and supplying 'virtual' tourism information electronically via an IT Destination Management System which provides the platform for our official tourism website: www.visitcolchester.com as well as providing information via face-to-face contact at the VisitColchester Information Centre (VIC) in Queen Street .

The VisitColchester Information Centre team helped over 82,651 visitors, took 11, 964 phone calls, had 706,805 emails, kiosk and web users and sent and received a total of 136 letters. This amounts to a grand total of 801, 556 contacts.

Annual VisitColchester website usage has risen dramatically between 2004 and 2010 from only 109,511 contacts in 2004 to 914,456 in 2010.

8.5 Visiting and tourism: Benchmarking

Benchmarking research forms an important foundation for the management and development of Colchester's Tourism and Visitor Services. The 'Destination Benchmarking' survey assesses visitors' opinion of their visit to Colchester and then compares Colchester's performance with that of other destinations also participating in the same research programme.

Interviewing was carried out on weekdays and weekends in 2009 at a variety of locations popular with visitors in the town centre only. However, it is acknowledged that there are significant visitor attractions in the surrounding area including: Constable Country, Chappel Viaduct and the East Anglian Railway Museum, Mersea Island and oysters as well as the Wilkins 'Tiptree' Visitor Centre in Tiptree.

The survey indicated that a high proportion of children were amongst the visitors to Colchester (26%) indicating that the visitor group are likely to be families. A second influential group includes visitors 45 years and over who account for 41% of all respondents. Nearly half of all respondents are in full time employment (48%), with a further 32% having a retired chief income earner.

For 2009 the overwhelming response was positive however there were several key issues which have occurred for respondents' year on year which are being addressed by a package of initiatives. These are:

- Cost of car parking (being addressed through a targeted package of discount to various groups – 2009)
- Cleanliness of streets (investment in new cleaning equipment 2007/8)
- Cleanliness of public toilets (investment in total refurbishment programme and Creative conveniences project 2008/9).

In addition there are a number of other trends which show a decline in visitor satisfaction over the years:

- Visitors would like a better range of shops in Colchester.
- The proportion of visitors rating Colchester's shopping environment as good or very good has declined between 2001 and 2008, however after an initial dip between 2001 and 2005 this appears to be improving.
- The proportion of visitors saying that they would be likely or very likely to recommend Colchester as a place to visit has declined between 2001 and 2008, however, as with above this is also improving.

8.6 Humbert's hotel study

A hotel study was undertaken by Humbert's in 2006 with an update in 2009 to assess the levels of hotel demand and supply in Colchester, project future growth and make recommendations for future development based on this assessment. They forecast future roomnights by projecting rommnights (occupancy) from a base year (2008) and taking this forward using various growth rates and assumptions. A number of hotel development opportunities in the short, medium and long term (up to 2026) were identified.

Whilst the 2009 update suggest that the success and delivery of regeneration and development initiatives[34] may be affected by the current economic climate, it acknowledges that developers still appear to be keen to invest in the area.

Overall, hotel performance trends in the last few years have reflected that of the overall provincial UK hotel market, experiencing an increase in rooms yield up to and including 2007 - following a number of years of strong economic growth.

For the majority of hotels, 2007 was considered to be a peak year. The UK hotel market has, however, come under pressure as a result of worsening economic conditions – which Colchester has not been immune to. As a result, occupancy slightly declined in 2008, with a further decline expected in 2009, as well as a softening in room rates.

[34] These include the new Visual Arts Facility to be opened in 2011, the first phase of the Cultural Quarter (20011/12), a new Centre at the University (2011/12), new retail development and Vineyard Gate (2014/15) the second phase of the Cultural Quarter and development of strategic employment zones in east, north and west Colchester.

A number of the full service hotels in Colchester have experienced marginal declines in occupancy in 2008 and, for some, a softening in room rates. The budget hotels appear to be performing very strongly, indicating the overall shortage of branded budget hotels currently serving Colchester.

The Colchester hotel market has achieved positive growth in hotel demand following a number of years of impressive economic growth in the UK and the South East specifically – falling much in line with the trends experienced across the wider provincial UK hotel market. Similarly, however, Colchester has not been immune to the current economic conditions prevailing in the UK – with some hotels having experienced a decline in occupancy and a softening in room rates in 2008 and 2009YTD.

Whilst the Colchester hotel market does fall slightly below the overall provincial UK hotel market in terms of both occupancy and room rates, the market does, however, appear to be relatively healthy. Hotels in the budget sector, those with a brand, and those that have invested appear to be the strongest performers. Currently, however, the mid-market remains competitive – which is expected to be increasingly competitive as a result of worsening economic conditions.

The immediate opportunities for development lie within the budget hotel sector and for a small upmarket boutique hotel(s). There are also opportunities for large branded three and four star full service hotels in the medium to longer term. The findings of the study are summarised in table 10 below.

Table 10: Future hotel development opportunities

Future hotel development opportunities Colchester			
Type of hotel	**No of rooms**	**Development time frame**	**Recommended site locations**
Boutique/lifestyle hotel (upper 3star/4star)	20 to 40+	Immediate opportunity (post 2009)	Town centre/Cultural quarter
Budget/ Limited service hotel	120	2009-2011	Town centre
	180	2009-2015	Near to main arterial route and within relative close proximity to town centre/other key business
	220	2009-2020	
	290	2009-2026	
Full service (large branded 3/4 star hotel)	0	2009-2011	Out of town (near/on A12)
	80	2009-2015	
	150	2009-2020	
	240	2009-2026	

9. DEPRIVATION

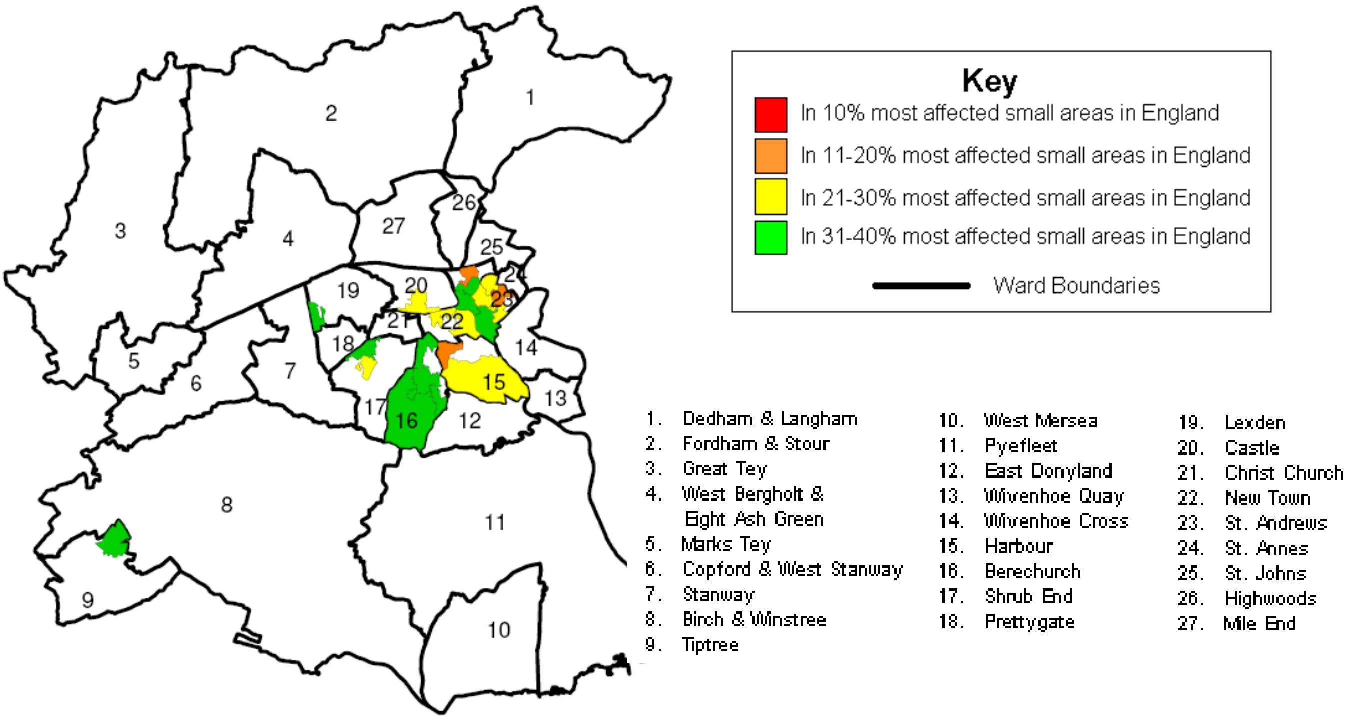
9.1 Deprivation: borough summaries

According to the Indices of Deprivation 2007, Colchester is a relatively affluent borough. The deprivation score at 14.59 was below the England average of 18.88. However, out of the 12 districts in Essex, Colchester was amongst the four most deprived districts in Essex in terms of average score according to the Indices of deprivation 2007 and it had the third highest local concentration score of all 12 districts in Essex, suggesting that where deprivation does exist in Colchester it is relatively intense. This is evidenced in the small area deprivation statistics. It is interesting to note that most of the small areas in Colchester which are considered deprived are in the East of the borough.

9.2 Deprivation in small areas[35]

Figure 24: Deprived small areas in Colchester wards (Indices of deprivation 2007)

(40% most deprived small areas in England)



Three small areas in Colchester were within the highest 20% in England for deprivation in the 2007 Indices of deprivation. St Anne's in St Anne's ward

[35] There are 104 'small areas' also known as Lower Layer Super Output Areas (L-SOAs) in the borough and 32,482 in England. Small areas have an average population of 1500 people and 'fit' into the existing ward boundaries. Each of our wards has between one and small areas.

was the most deprived small area in Colchester followed by Magnolia in St Andrew's ward and Barnhall in Harbour.

9.3 Child poverty and Income deprivation

In the small area of St Anne's within St Anne's ward Income deprivation in this area was tenth highest of all small areas in Essex, affected 35% of the population and ranked 2,937 of all 32,482 small areas in England (in the top 10%). In relation to child poverty[36] two small areas: St Anne's in St Anne's ward and the Paxmans area of New Town ranked within the highest 10% of small areas in England. Out of the 865 small areas in Essex these two small areas were ranked 12th and 13th respectively – within the top 2% in Essex.

[36] This measure relates to the Income Deprivation Affecting Children sub index of the Indices of Deprivation 2007.

10. HEALTH

10.1 General health and inequality

According to the Association of Public Health Observatories (APHO) Health Profile 2010 for Colchester, the health of people in Colchester is generally good. Life expectancy is higher than the England average and deprivation overall is low (see Section 9 also). However, health inequalities exist within the borough. For example, life expectancy for men living in the least deprived areas is seven years higher than that for men living in the most deprived areas.[37]

10.2 Key health indicators (APHO)

Table 11: Colchester scores (significantly *better/ worse)* than the England average

Significantly better	Significantly worse
• Physically active children (% of year 1-13 pupils who spend at least 3 hours per week on hig quality PE and school sport 2008/09) • Tooth decay in children (Weighted mean number of teeth per 5 yr old child sampled that were actively decayed, missing or filled 2007/08) • Teenage pregnancy (Under-18 conception rate per 1,000 females aged 15-17 (crude rate) 2006-2008 (provisional)) • Binge drinking adults (% adults, modelled estimate using Health Survey for England 2007-2008) • Physically active adults (% aged16+ 2008/09) • Hospital stays for alcohol related harm (Directly age and sex standardised rate per 100,000 population 2008/09 (rounded)) • People diagnosed with diabetes (% of people on GP registers with a recorded diagnosis of diabetes 2008/09) • New cases of tuberculosis (Crude rate per 100,000population 2006-2008) • Life expectancy (male and female, at birth 2006-2008) • Deaths from smoking (Per 100,000 population age 35+, directly age standardised rate 2006-2008) • Early deaths form heart disease, stroke or cancer (Directly age standardised rate per 100,000 under 75, 2006-2008)	• Smoking in pregnancy (% of mothers smoking in pregnancy where status is known 2008/09) • Incidence of malignant melanoma (small numbers) (%adults, modelled estimate using Health Survey for England 2006-2008) • Road injuries and deaths (Rate per 100,000 population 2006-2008) • Homelessness (crude rate per 1000 households)

[37] Association of Public Health Observatories (APHO) Health Profile 2010 for Colchester, Department of Health, Crown Copyright ©2010.

10.3 Contextual excerpt from APHO report:

Below is an excerpt from the 2010 APHO report for Colchester:

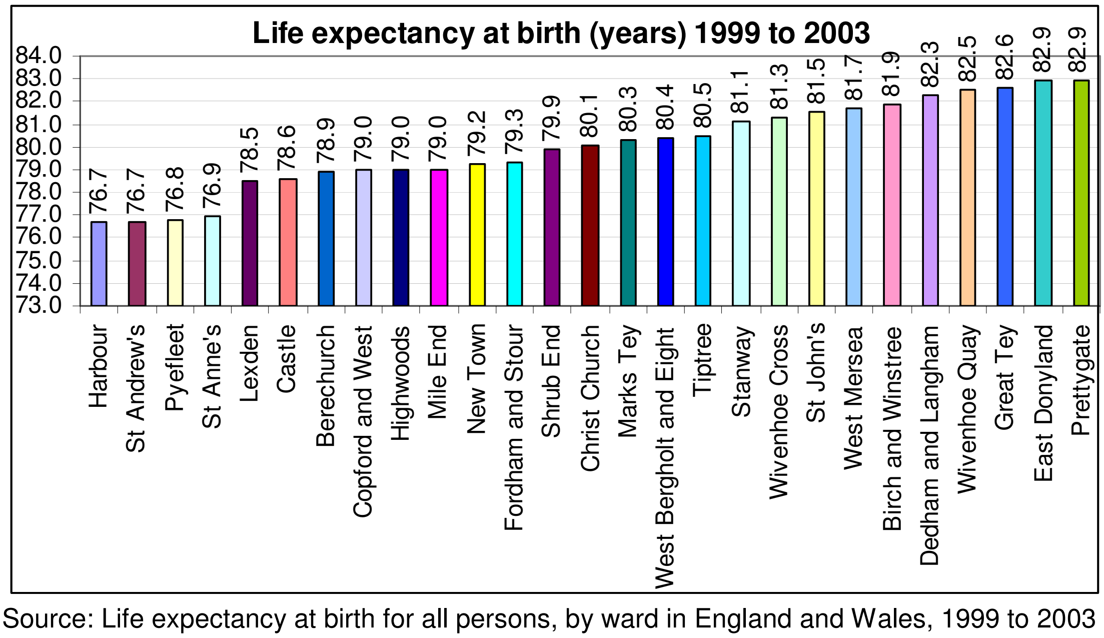
- *Road injuries and road death rates worse than average*
- *Smoking in pregnancy rates worse than average (about 1 in 5) 19.9% compared to 16.1% England average (2007/08)*
- *Health inequalities: men for most deprived fifth of areas have 4.3 years shorter life expectance than those in least deprived fifth (see also item 8.4 below)*
- *All cause mortality rates better than national average. Early death rates for heart disease, cancer & stroke below England rates*
- *Smoking rates better than average but about 1 in 4 still smokes*

Over the past ten years, the rates of death from all causes and rates of early death from cancer and from heart disease and stroke have all improved. They are lower than the England average. There is a higher level of smoking in pregnancy than average. The proportion of children in Reception year and the rate of physical activity at school is higher. Estimated binge drinking in adults in Colchester is lower than the England average, and there are fewer hospital admissions for alcohol related harm. Adults are also more physically active than the England average.

At a local level, continuing work with primary care partners is aiding the detection and early treatment of conditions such as hypertension, diabetes and lung diseases to improve quality of life and life expectancy. There are more details about the health of this area in the Joint Strategic Needs Assessment, available from www.northeastessexpct.nhs.uk (See 'About Us').[38]

10.4 Life expectancy at birth: difference between wards

Figure 25:



Source: Life expectancy at birth for all persons, by ward in England and Wales, 1999 to 2003 (experimental statistics) Crown Copyright, ONS, 2006.

[38] Association of Public Health Observatories (APHO) Health Profile 2010 for Colchester, Department of Health, Crown Copyright ©2010.

As figure 25 illustrates the wards with the lowest life expectancy were Harbour (76.7), St Andrew's (76.7), Pyefleet (76.8) and St. Anne's (76.9). The wards with the highest life expectancy were Prettygate (82.9), East Donyland (82.9) and Great Tey (82.6)

10.5 Housing and health

In 1998 the Acheson Report, the independent inquiry into health inequalities, explicitly linked poor quality housing with poor health.

Vulnerable groups such as older people, people with health problems, and people on low incomes, benefits or unemployed are most likely to live in poor housing and also tend to spend large amounts of their time in their homes exposed to potentially hazardous environments. For indications of levels and geographical locations of unemployed people and people on low incomes see Sections 4 and 9.

Table 12: The impact of housing on health and social care: overview of the evidence[39]

HOUSING CONDITION	POTENTIAL CONSEQUENCE
Physical Health	
Overcrowding	Increased risk of infectious/respiratory disease. Reduced stature.
Damp and Mould	Respiratory problems. Asthma, rhinitis, alveoli is. Eczema.
Indoor pollutants and infestations	Asthma.
Cold	Diminished resistance to respiratory infection. Hypothermia. Bronchospasm. Ischemic heart disease, myocardial infarction and strokes.
Homelessness (rooflessness)	Problems resulting from facing the elements without protection. Risk of assault.
Homelessness (temporary accommodation)	Problems resulting from overcrowding, noise, inadequate cooking and washing facilities.
Mental Health	
Relatively poor quality housing in each tenure	Residents mental well-being reduced.
'Difficult to let' housing	Poorer emotional well-being than people in 'better' areas.
Damp	Depression in women
Overcrowding	Emotional problems, bed wetting, developmental delay, poorer educational attainment and mental adjustment in children. Social tension, irritability, impairment of social relations.
Flatted accommodation	Increased GP consultation by women for emotional symptoms. Social isolation and psychiatric disturbance among women.

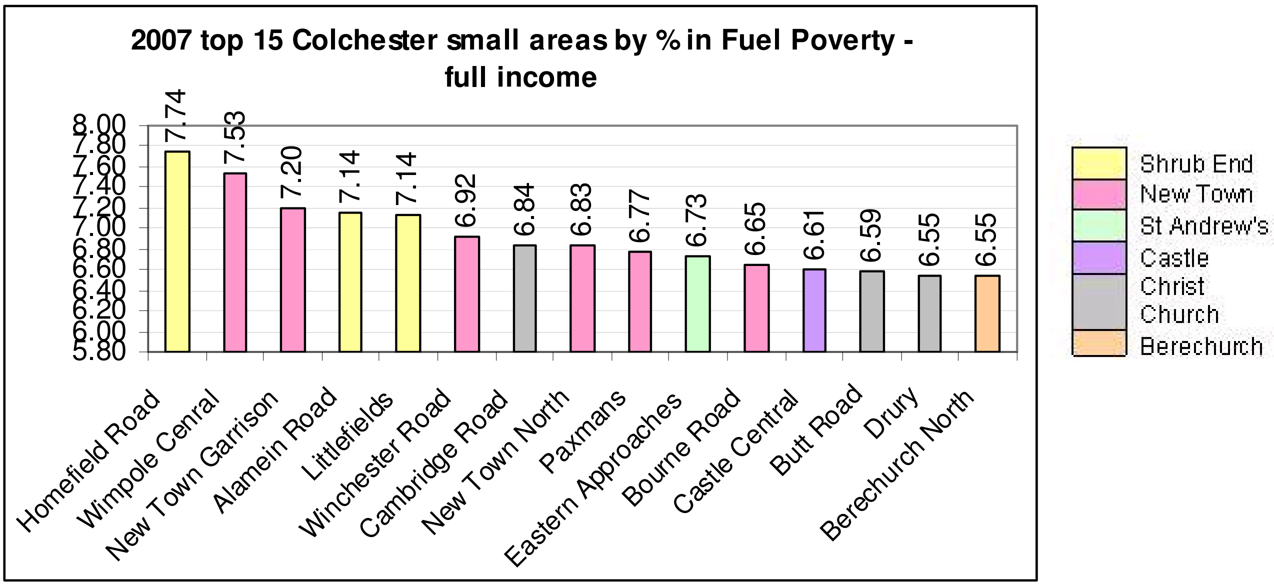
Source: Adapted from Marsh, A; Gordon, D; Pantazis, C. and Heslop,P Home Sweet Home:The impact of poor housing on health, The Policy Press, Bristol,1999)

[39] Taken from a presentation 'Better Homes, Better Health' by Professor Tim Blackman, Wolfson Research Institute, Durham University, www.durham.ac.uk/wolfson.institute in York, 9 July 2008.

Table 12 above shows the specific conditions which link homelessness and poor housing with health. In relation to homelessess, in 2008/09 we had a significantly worse rate of homelessness per 1000 households than the average for England (see also item 16.14), which will have an impact on health.

Whilst we do not have indicators for poor quality housing in Colchester, fuel poverty data can be used as a proxy indicator for exposure to cold and poor quality housing. Although only indicative, it can highlight areas where housing related health problems might occur. The chart below shows the top small areas in Colchester where Fuel poverty is more likely to occur:

Figure 26:



Source: Top 15 small areas by % fuel poor- Fuel Poverty Index, Centre for Sustainable Energy, University of Bristol, 2007

Homefield Road in Shrub End has the highest overall percentage of fuel poor households in Colchester at 7.74% of all households. Three of the six small areas which make up Shrub end ward fall into the top fifteen for fuel poverty in the borough.

All three of the small areas in Christ Church ward appear in the top fifteen (out of 104 small areas in Colchester) for the highest percentage of people living in fuel poor households. All six of the small areas which make up New Town ward are located in the top fifteen (out of 104) most fuel poor areas in Colchester. Both of these wards are areas with high proportions of private rented accommodation.

For the impact of poor air quality on health see item 18.5 Air quality.

11. CRIME

11.1 Incidences of crime

Table 13: Crime in Essex and Colchester: Incidences per 1,000 population (year up to May 2010)

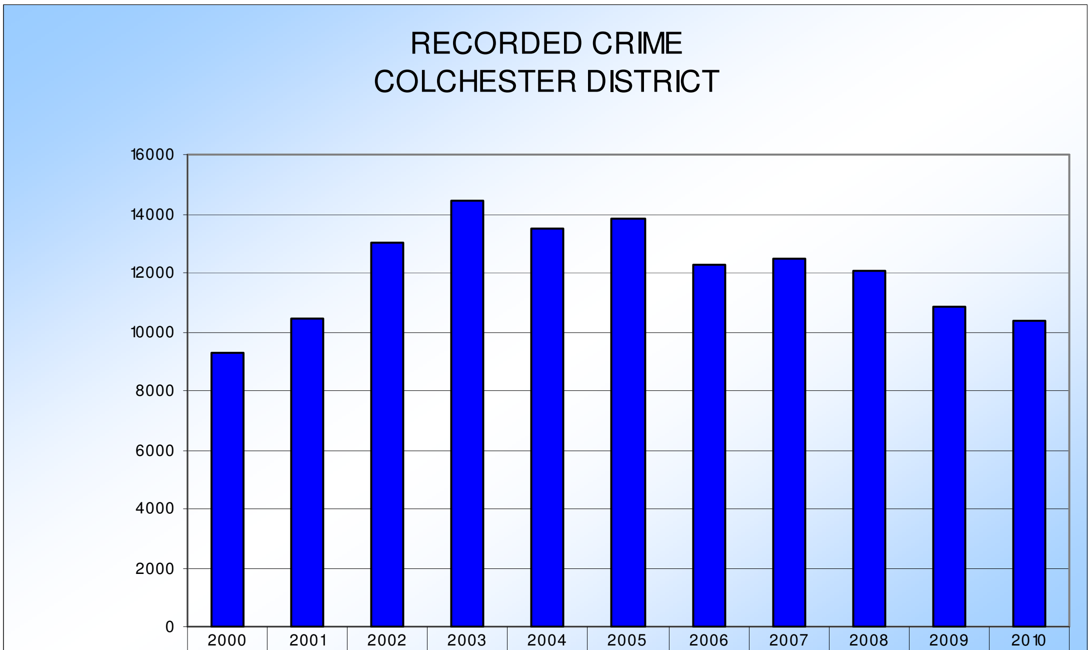
Area	All crime	Burglary	Robbery	Vehicle crime	Violence	Anti social behaviour
Essex	5.4	0.6	0.1	0.6	1.2	3.8
Colchester	5.2	0.4	0	0.5	1.3	3.8

Source: CrimeMapper, National Policing Improvement Agency[*http://essex.crimemapper.co.uk/*](http://essex.crimemapper.co.uk/)
Figure is number of incidences per 1,000 population.

As table 13 illustrates crime in Colchester is very similar for all major crime categories to average for the whole of Essex. For 2010, the average number of crimes in this area has decreased from 962.7 to 924 (by 4%) compared to the same three month period in 2009 (March, April, May), see http://essex.crimemapper.co.uk .

11.2 Colchester crime: time series

Figure 27:



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
RECORDED CRIME	9275	10409	13003	14432	13490	13808	12305	12491	12035	10843	10361

Colchester has been consistently safe from any significant crime levels over the last eight years with year on year falls in 'all crime' since 2003 which makes Colchester one of the safest towns in the UK. There are some occasional spikes in crime such as house burglary, anti-social behaviour, domestic abuse, criminal damage or theft of or from a car and some offenders use the A12 to drive into Colchester from London and surrounding areas to commit crime. There has not been a persistent on-going crime type that has caused concern to the Safer Colchester Partnership which partner agencies working together have not been able to combat and reduce.

11.3 Business crime

Colchester Borough Council and The Safer Colchester Partnership has developed strong links to with local businesses as reducing business crime remains a key priority for all our partner agencies in Colchester. Our borough economic vibrancy, inward investment and future prosperity depends on retaining and developing new business opportunities where crime is a low risk factor and always taken seriously. The Safer Colchester Partnership was instrumental in developing Colchester Business Against Crime (COLBAC) to ensure that business can combat business crime and trade in confidence and with safety. COLBAC has increased its membership from 78 businesses to135 local business members in the last two years.

Table 14: Number of incidences of crime against business

April 2010	34
May 2010	31
June 2010	32
July 2010	35
August 2010	31

Source: COLBAC September 2010

As table 14 illustrates since the figures were collected in April the levels of crime against COLBAC members have remained steady.

Table 15: Warnings and exclusions

Month	Total 1st Warning letters	Exclusions
April 2010	33	5
May 2010	2	
June 2010	22	
July 2010	11	1
August 2010	21	1
Sept to date	13	

Source: COLBAC, September 2010

COLBAC run and exclusion scheme for people who offend (steal) in member’s business premises. The scheme excludes people from all member’s businesses after an initial warning. As table 15 above shows this has become very effective with the percentage of people receiving a 1st warning that then actually go on to re-offend and be excluded being in single figures.

11.4 Public confidence

According to the Local Confidence Survey undertaken by the Police, 56% of people surveyed in Colchester agree that the police and local council are dealing with anti-social behavior and crime issues that matter in this area (2009/2010). Although a different survey, the British Crime Survey notes that

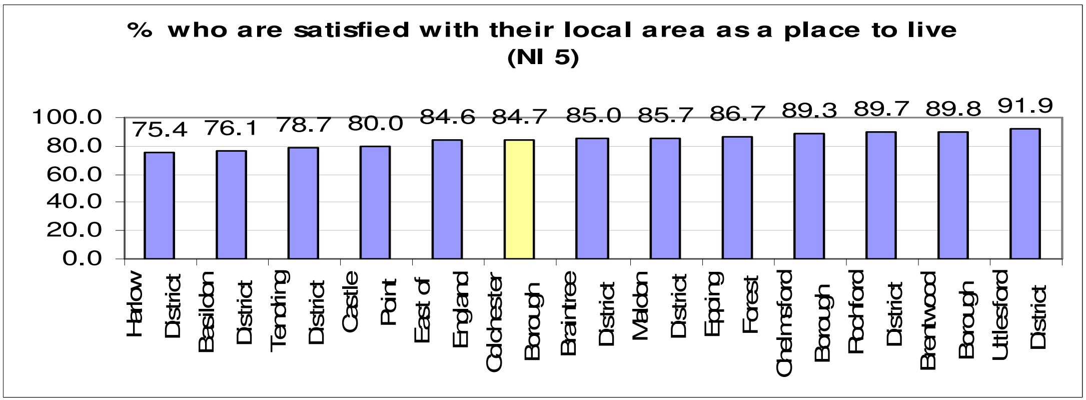
57.9% of those interviewed in Essex expressed confidence in the policing of crime and anti-social behaviour[40].

[40] Care should be taken in making comparisons in local indicators that have used different survey techniques.

12. COMMUNITIES

12.1 Satisfaction with local area

Figure 28:



Source: Place Survey, 2008

Figure 28 shows that according to our Place Survey 2008, Colchester's score ranked seventh out of all 12 districts in Essex for resident's satisfaction with their local area. All districts in Essex scored highly on this measure and Colchester was similar to the East of England average of 84.7% at 84.6%.

12.2 Overall indicators from Colchester's Place Survey, 2008

Figure 29: Place survey 2008: Colchester in relation to the UK

This chart uses 2008 Place Survey data for all district councils.
Green markers show Colchester's score for each National Indicator in relation to the national average.

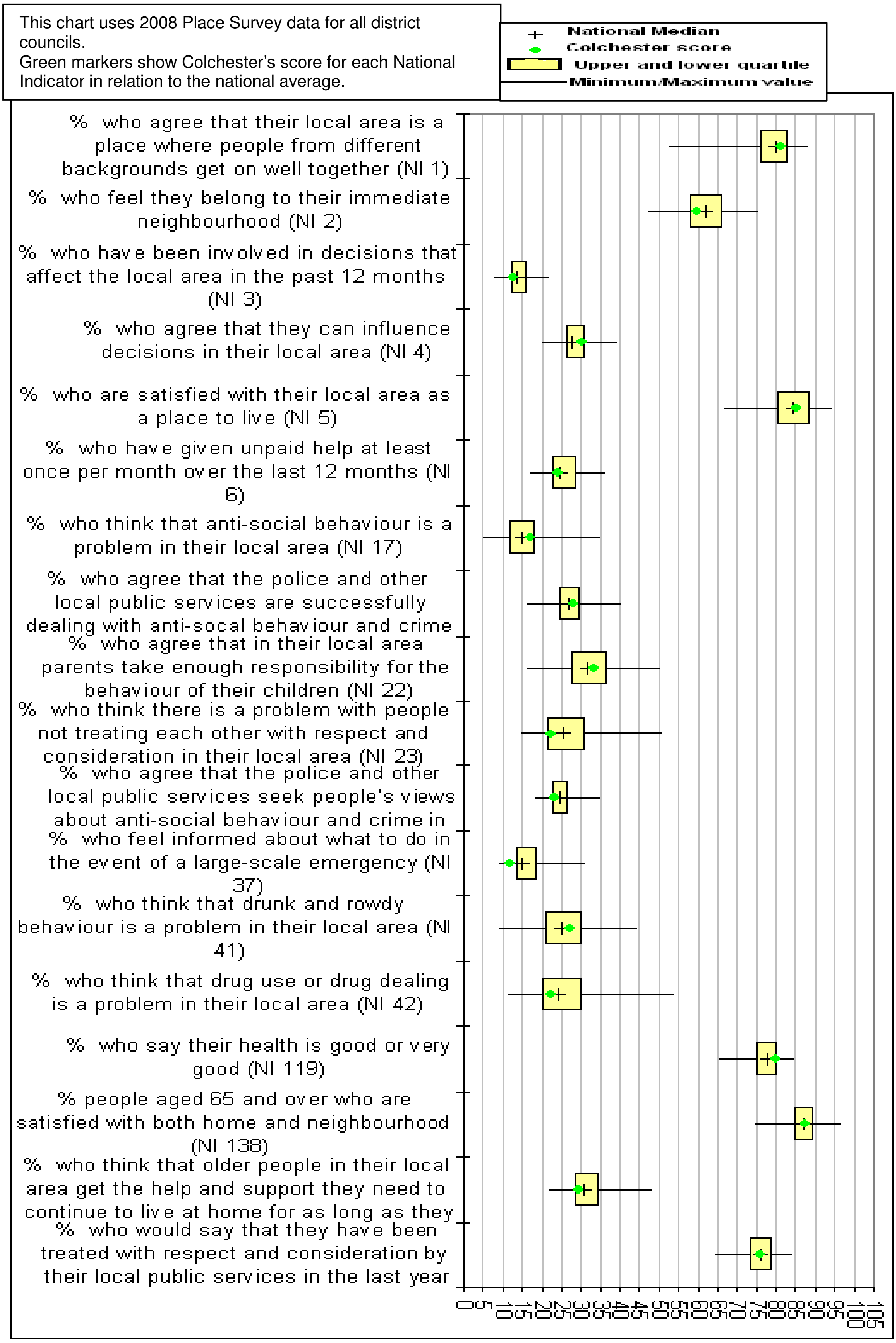


Figure 29 contains a set of key indicators from the borough's 2008 Place Survey in comparison to the national scores. It shows the upper and lower quartile and the minimum and maximum values in local authorities nationally for each Place Survey question.

Most scores are relatively similar to the national scores for the above measures with a couple of exceptions listed below:

- For the question whether respondents felt informed about what to do in a large scale emergency, Colchester received a percentage lower than the average (11.6%)

- The indicator where Colchester scored the highest above the national median was for the percentage of people who feel they can influence local decisions, scoring 29.8%, compared to the median of 27.8%

- Colchester had the largest percentage difference from the national median for the percentage of people who think there is a problem with people not treating each other with respect and consideration in their local area) which is a positive result, as the borough only had 22.1% who agreed with this statement.

12.3 Priorities for residents: Place Survey 2008

Below are the top five factors that respondents of the Place Survey felt made Colchester a good place to live and those that were most in need of improvement.

They represent the top five answers by the percentage of residents which selected them. Residents could select more than one factor.

***Most important for making somewhere a good place to live*:**

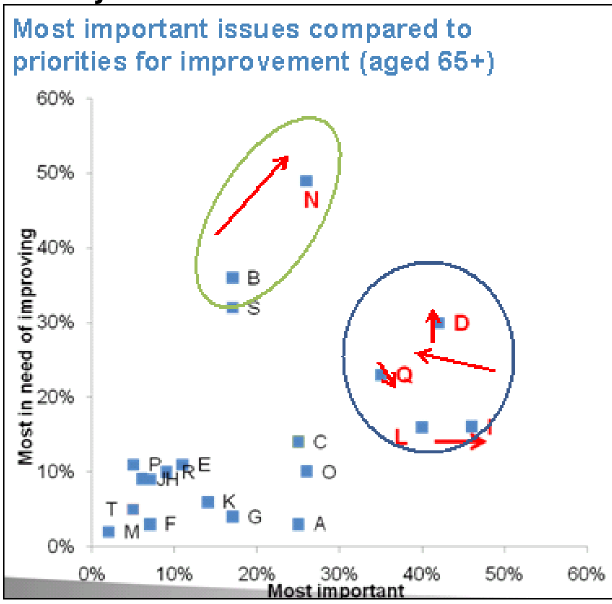
- The level of crime- 49%
- Clean streets- 39%
- Health services- 38%
- Public transport- 34%
- Shopping facilities- 27%

Most in need of improvement in Colchester:

Traffic congestion- 40%
Road and pavement repairs- 38%
Activities for teenagers- 38%
Clean streets- 26%
Public transport- 22%

12.4 Specific groups: younger and older people’s opinions in the Place Survey 2008

Figure 30: Older people’s most important issues and priorities: Place Survey 2008



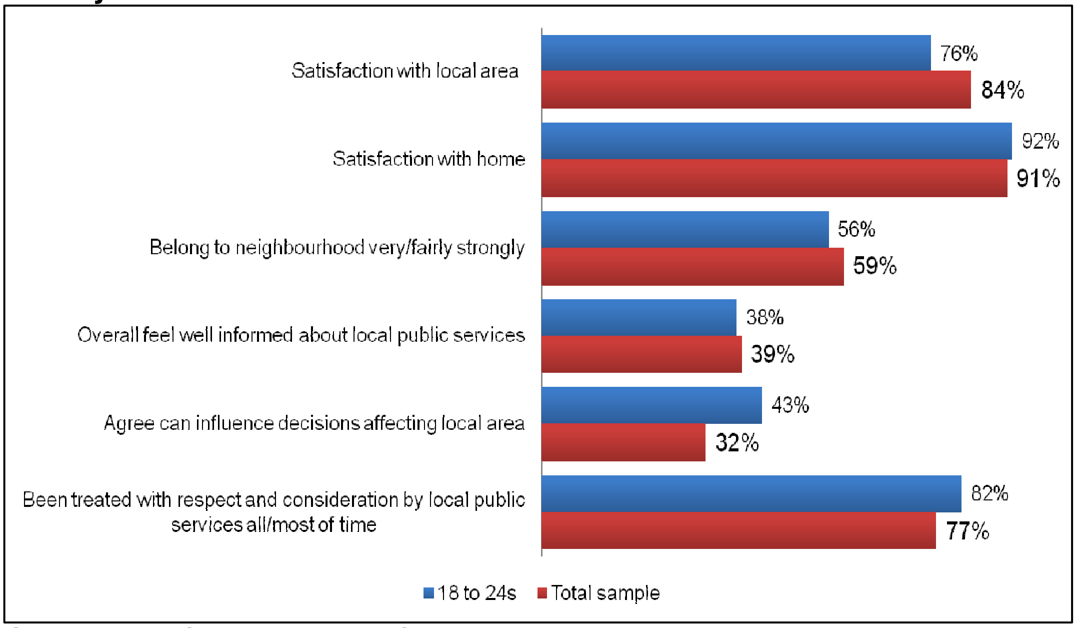
Access to nature	A	Parks and open spaces	K
Activities for teenagers	B	Public transport	L
Affordable decent housing	C	Race relations	M
Clean streets	D	Road and pavement repairs	N
Community activities	E	Shopping facilities	O
Cultural facilities (e.g. libraries, museums)	F	Sports and leisure facilities	P
Education provision	G	The level of crime	Q
Facilities for young children	H	The level of pollution	R
Health services	I	The level of traffic congestion	S
Job prospects	J	Wage levels and local cost of living	T

Source: Place Survey, 2008 (BMG graph)

Figure 30 shows the issues older people felt most in need of improvement set against those that were most important. The highest scores for being both important issues and in need of improvement were:

- The level of crime
- Clean streets
- Public transport
- Health services
- Road and pavement repairs

Figure 31: Young people's opinions compared to all opinions: Place Survey 2008



Source: Place Survey, 2008 (BMG graph)

Figure 31 shows younger people's opinions against those of the total number sampled in the Place Survey 2008. Younger people were slightly more satisfied with their home than the total sample. They also felt more strongly than the total sample of people that they could influence decisions affecting their local area with 43% of young people saying this was the case as opposed to 32% of the total sample. Interestingly, whilst the vast majority of all respondents felt they were treated with respect and consideration by local public services all/most of the time (77%), for young people this was even higher with 82% of the young people surveyed feeling that this was the case.

Although all respondents had a high level of satisfaction with their local area (84%) for young people this was slightly lower at 76%. The level of young people who felt they belonged to their neighbourhood very or fairly strongly was also lower than the total sample with 59% of all respondents feeling this as opposed to 56% of young people sampled. Young people also felt slightly less well informed about public services.

12.5 Rural Community Facilities

In 2005 the Council commissioned the Rural Community Council of Essex to carry out a consultation on Colchester village services and facilities to inform Core Strategy preparation. The consultation included the compilation of a list of the level of village facilities, including village halls, post offices, shops, pubs, doctor's surgeries, primary schools and play areas. The list was circulated to Parish Councils for updating in February 2009 and the table below reflects the findings which were published as part of the Council's Settlement Boundary Review published in July 2009.

Table 16: Community Facilities in Colchester Villages

Parish	Village Hall	Post Office	Grocery/Farm Shop	Pub	Doctor	School	Play Area
Abberton	1	1	1	1	0	1	1
Aldham	1	0	0	2	0	0	1
Birch	1	1	1	2	1	1	0
Boxted	1	0	1	0	0	1	1
Chappel	1	1	1	1	0	1	1
Copford	1	0	0	1	0	1	2
Dedham	2	1	3	4	1	1	1
East Mersea	1	1	1	1	0	0	0
Easthorpe	1	0	0	0	0	0	0
Fingringhoe	1	1	1	1	0	1	1
Fordham	1	1		1	0	1	1
Great Horkesley	1	1		3	0	1	0
Great Tey	1	1	1	1	1	1	1
Inworth	0	0	0	1	0	0	0
Langham	1	1		1	0	1	1
Layer Breton	0	0	0	1	0	0	1
Layer de la Haye	1	0	2	2	1	1	1
Little Horkesley	0	0	0	1	0	0	1
Marks Tey	1	1	1	0	0	1	1
Messing	1	0	0	1	0	1	1
Mount Bures	1	0	1	1	0	0	0
Peldon	1	0	0	2	0	0	1
Rowhedge	2	1	2	3	1	1	1
Salcott	1	0	0	0	0	0	1
West Bergholt	1	1	1	1	1	1	1
Wormingford	1	1		1	0	1	1

The level of community facilities reflects local situations as well as national trends and policies. Two farm shops have opened in Colchester villages and this is considered to be a small indicator of the changing profile of convenience services in villages which includes on the one hand the growth of locally produced fresh food outlets and, as the State of the Countryside report notes, increases in cash machines and in the number of supermarkets serving rural areas, and on the other hand the closure of village shops.

In Colchester, the round of post office closures at national level resulted in four post offices in the urban area of Colchester closing rather than the closure of rural post offices. In Langham, post offices services are now being delivered as an outreach service two mornings a week in the community shop, which reflects the national trend for new forms of service delivery.

Multi-purpose facilities are increasingly perceived as a way of improving rural services, blurring the distinction between categories. Other examples include after-hours use of school facilities; mobile vans providing a range of public sector services as well as library services, and the use of village halls for farmers markets and doctor's surgeries. The provision of community services, therefore, is as much about innovative and co-ordinated delivery as it is about increasing the amount of bricks and mortar needed to house them.

In July 2010 the Council started to update the information relating to Community Facilities specifically in the rural areas of the Borough. This study focused on the community facilities along with primary education opportunities as well as considering the capacity in each school after taking into account information supplied by Essex County Council's School Organisation Plan. The updating work built on the information gathered previously as part of the village facility audit and looked at wider services and facilities such as public transport and how residents can connect to other parts of the Borough from their home village.

Many of the villages across the Borough have a variety of services and facilities to meet the needs of the local residents and the surrounding parishes. Not all villages have the same facilities so in practice neighbouring villages may serve different needs but this is normal within the rural hinterland.

Across the Borough the Council considers the range of community services and facilities to be a valuable asset to ensuring that the residents of the borough have access to facilities which are in convenient locations, accessible and reduces the need to travel for recreation/entertainment/learning as well as raising the quality of life for them through creating community cohesion, reducing isolation, reducing fear or crime and creating opportunities for information sharing and participation in community activity. In September 2009 the Council published the Community Facilities Supplementary Planning Document (SPD) which highlights the importance of community facilities as a mechanism for building community cohesion as well as ensuring adequate provision of community facilities to satisfy the needs of local communities.

Most of the villages across the Borough have a range of community facilities and services to meet local needs, however the facilities vary from village to village and along with that the standard will also. Facilities and services in Colchester tend to be village shops, public houses and village/church halls which by their nature are multi functional and can provide a meeting place for a variety of groups and classes throughout the day which increases the offer they provide.

Colchester is fortunate that some villages are able to provide a wide range of convenience and comparison shopping facilities as well as various public houses, village halls or other meeting places. The larger villages such as Dedham, Layer-de-la-Haye and West Bergholt provide sufficient opportunities for residents (and visitors) to meet their daily needs within the village and therefore reducing the need to travel and providing support for the local economy. Alongside the range of facilities these villages also provide medical facilities in the form of Doctor Surgery which increase the attractiveness of a particular village and to some people makes it a more desirable place to reside as well as acting as a focus for the surrounding rural villages and hamlets which perhaps do not have the same services and facilities within their parish boundary.

A minority of the villages across the Borough have limited services and facilities; these tend to be those smaller villages such as Mount Bures and Salcott. It is to be expected that the smaller villages generally have a limited range of services and facilities on offer but it is important for the Council to ensure that new facilities are encouraged in areas such as these to supplement the current provision. Villages such as Easthorpe and Little Horkesley have limited facilities within their parish boundaries but should not be overlooked.

The closure of rural public houses and shops is an issue nationally and Colchester Borough is no unfortunately no different. In recent years the Council has received numerous applications for the conversion of various establishments which have been considered against a range of Planning Policies which seek to protect and retain community facilities and this type of policy is being carried forward in to the Local Development Framework.

The updating work in 2010 has considered primary school provision across the Borough and the forecasted surplus or deficit in each school. The information for each village looks at the primary school closest to that village and is useful to be aware of the capacity at the schools across the Borough. Although the information published by Essex County Council in their School Organisation Plan only looks ahead to 2013 is it helpful when considering which villages could be candidates for future housing provision and which would be unlikely to be able to absorb future residential development. In the main the rural primary schools have an estimated capacity although a small number are expected to be operating at or over capacity in 2013 and this may have implications on the supporting infrastructure should future housing developments come forward in these areas. Capacity issues in some villages may also have a direct impact on the level of S.106 contribution required by Essex County Council as education authority at the planning application stage.

It is important for the Council to update the information held about each village regularly to ensure that the correct type of development is permitted in the appropriate locations to complement the existing services and facilities that are on offer throughout the Borough. The Council will also work closely with town/parish council's through their Village Design Statements/Parish Plans to assist the encouragement and delivery of more community facilities and services across the Borough. Ensuring that the information is current will be important in assisting the rural areas to evolve over time and cater for the needs of the rural population.

13. EDUCATIONAL ATTAINMENT

The Department for Children, Schools and Families are responsible for monitoring results of pupil's assessments in primary, secondary and post 16 educational state educational establishments. There are five key stages in a pupil's education at the end of which their attainment is measured. Arguably the most important are at Key Stage 2 where pupils' are aged 11 and their GCSE achievement. These will be examined below.

13.1 Key Stage 2, English, Maths and Science at Level 4

The government expects that pupils who do not have special educational needs to attain level 4 in the Key Stage 2 test taken when they are aged 11.

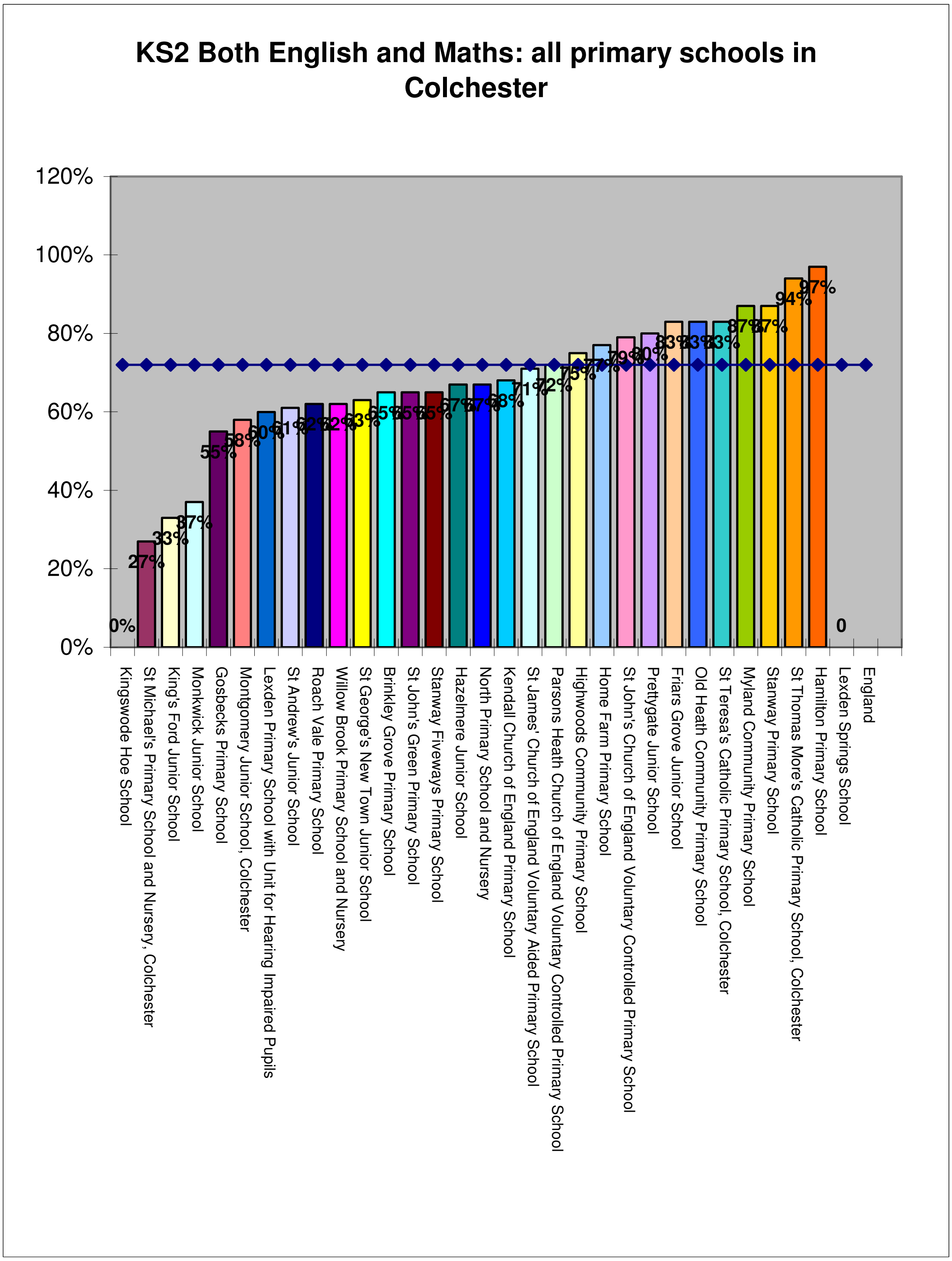
Table 17: Key Stage 2 attainment (Percentages)

	English		Maths		Science	
Area	**2005**	**2009**	**2005**	**2009**	**2005**	**2009**
Colchester	82	80	76	76	88	87
Essex	80	76	76	74	87	87
East of England	80	80	75	78	87	88
England	79	80	75	79	87	88

As shown in table 17, between 2005 and 2009 the average for all schools in Colchester had decreased by two percentage points overall. However this may be down to yearly fluctuations. The Colchester levels in 2009 at 80% of all pupil's achieving level 4 and above in English was above the average for Essex of 76% and the same as the percentage for the East of England and England. For Maths there was no change in the percentage between 2005 and 2009 (76%) which in 2009 were above the level for Essex but below the levels of the East of England and England at 78% and 79% respectively.

13.2 English and Maths: Primary schools in Colchester

Figure 32: Both English and Maths KS2 Primary schools in Colchester



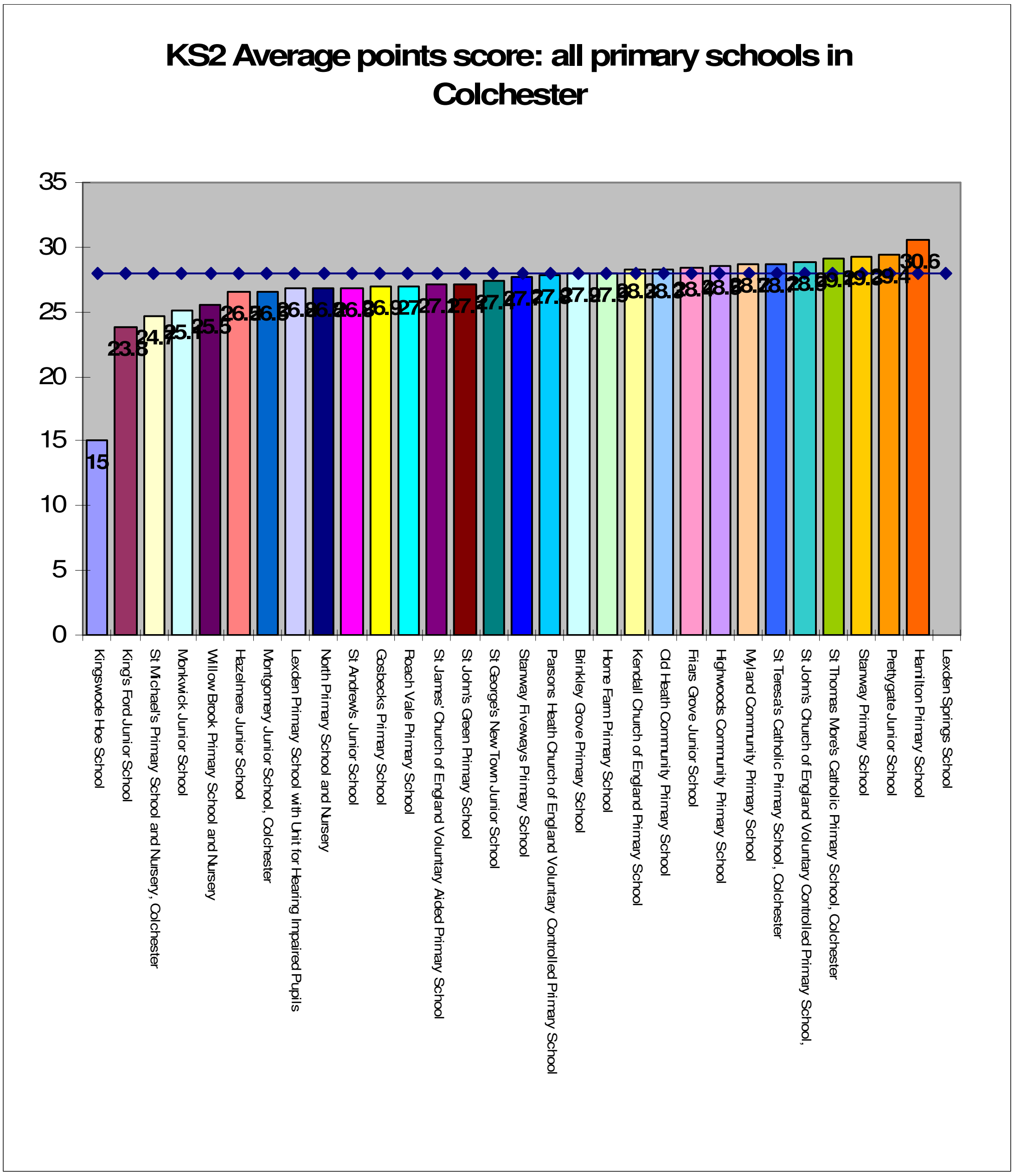
Source: DCSF, 2009.

Figure 32 illustrates the combined Key Stage Two attainment scores for English and Maths for all primary schools in Colchester schools and the average for Essex and England shown by the blue line. Twelve primary schools score above the Essex and England average of 72% with two schools

St Thomas Moore's Catholic Primary School and Hamilton Primary school scoring above 90% at 94% and 97% respectively.

13.3 Average points score Key Stage 2: Primary schools in Colchester

Figure 33: Key stage 2 average points score



Source: DCSF, 2009.

Figure 33 shows the average point scores for all primary schools in the borough. Again 12 schools show above the England average score of 27.9, with the top five being led by Hamilton primary with 30.6, followed by Prettygate (29.4), Stanway (29.3), St Thomas Moore's Catholic primary (29.1) and St John's (28.9).

13.4 GCSE levels

Table 18: GCSE 5 A* to C grades, 2009

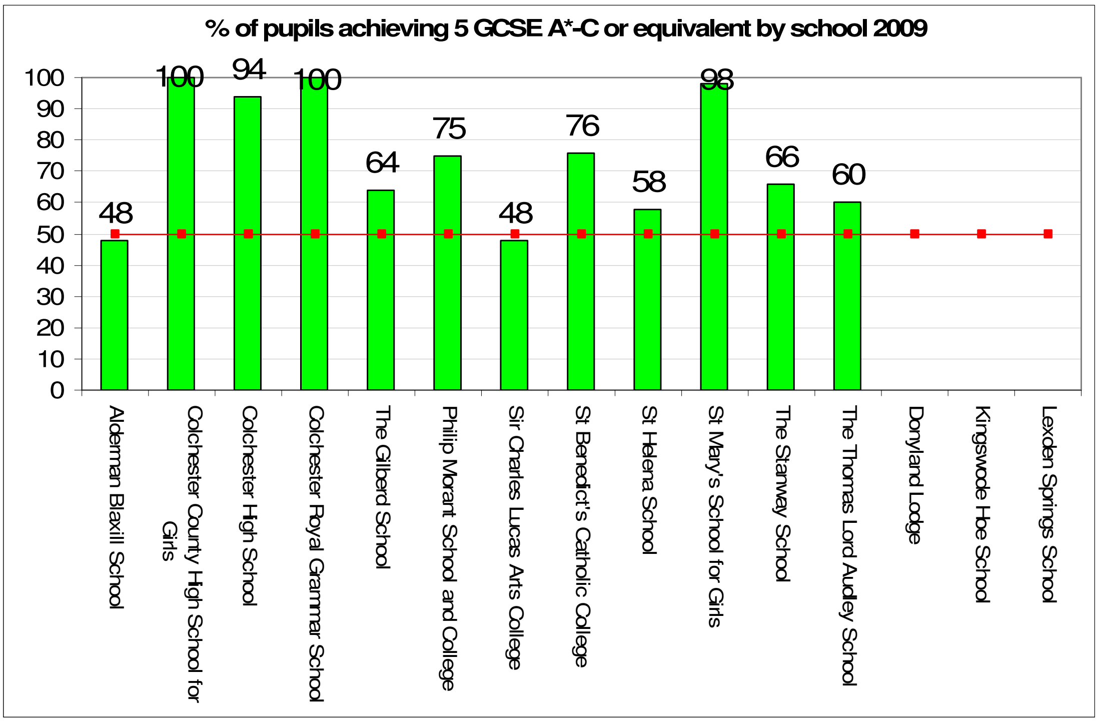
Area	2005	2006	2007	2008	2009
Colchester District	57.3	60.1	61.1	64	66
Essex LA	56.4	59	60.8	63.3	68.2
East of England Region	56.6	59.3	61.2	64.7	69
England	56.3	59.2	62	65.3	70

Source: DCSF, 2009.

As table 18 shows Colchester, along with the other comparators, has seen an increase in the percentage of pupils gaining five or more A* to C grades at GCSE.

13.5 Pupil's achieving 5 GCSE A* to C grades in Colchester schools[41]

Figure 34:



Source: DCSF, 2009.

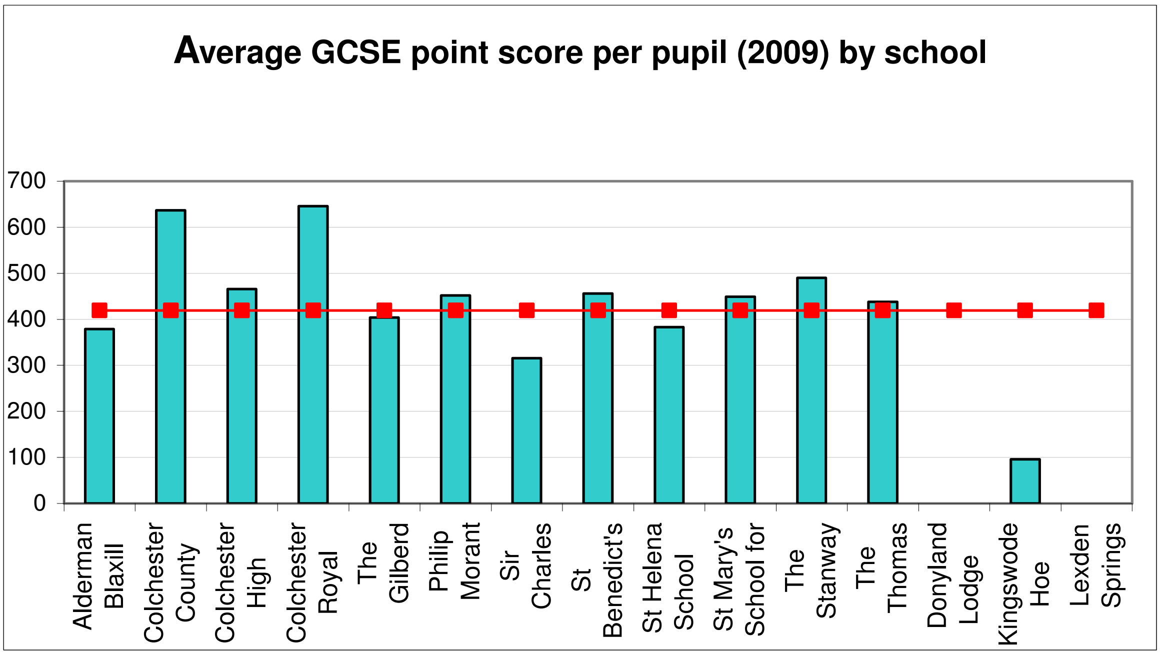
All of the mainstream state schools[42] in Colchester apart from two (Alderman Blaxill and Sir Charles Lucas Arts college) achieved above the England

[41] NB the calculations for the data in figures 52 and 53 employ different methodologies, hence a different percentage figure for 5A* to C grades for Colchester.
[42] Kingwode Hoe and Lexden Springs are 'special schools' (ECC) and Donyland Lodge is a residential provision for young people aged 11 to 18 who are placed by referring Social Services, Local Education Authorities and Health Trusts.

average for GCSE A* to C grades in 2009. Two schools, the Colchester County High School for Girls and the Royal Grammar school achieved 100% of passes at A* to C. These are both selective schools.

13.6 Average point scores GCSE (schools in Colchester 2009)

Figure 35:



Source: DCSF, 2009.

As figure 35 illustrates, eight schools were at or above the average GCSE point score for England in 2009. The schools with the highest scores were also those with the highest proportion of GCSE grade A* - C grades: Colchester Royal Grammar schools and Colchester County High School for girls (both selective).

14. SCHOOLS PROVISION

The Essex schools organisation plan 2009 to 2014 contains data on numbers of school places and forecasts of likely school places needed within each local authority area. The data in this section is taken from that plan. Further calculations appropriate to Colchester have been undertaken where appropriate.

14.1 Number of pupils in schools 2005 to 2009

Figure 36:

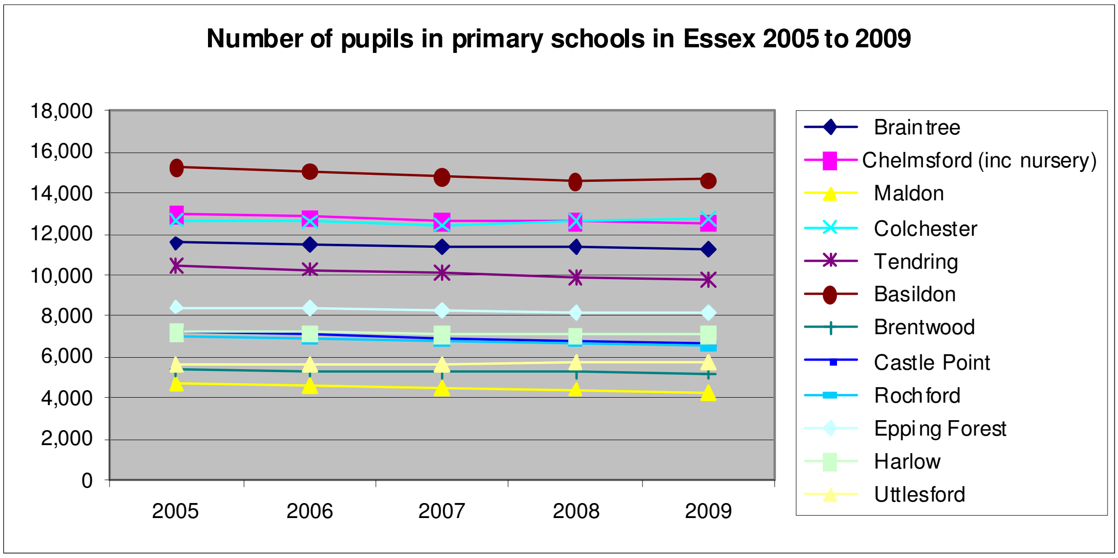
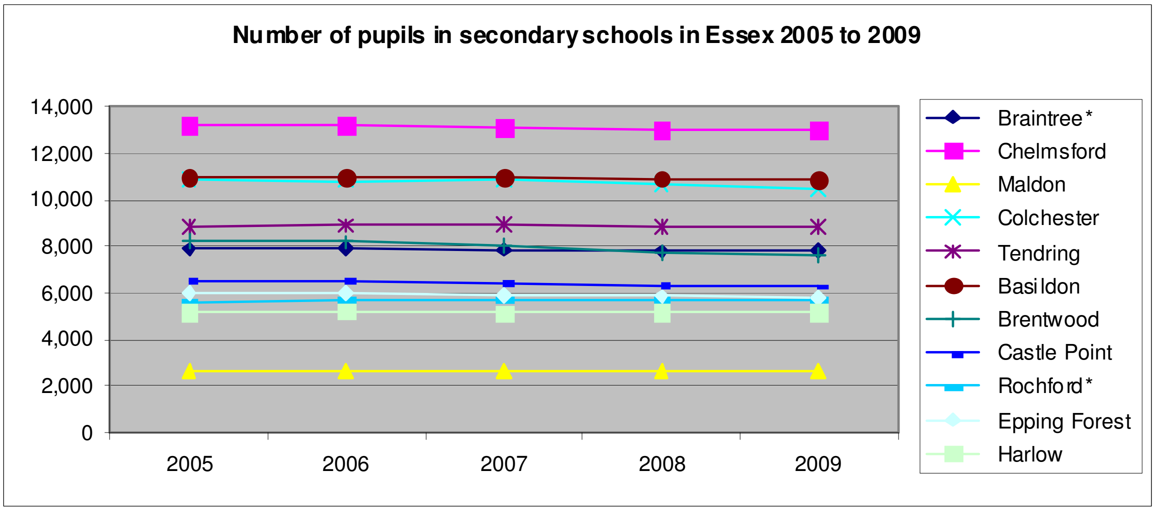


Figure 37:



Source: DCSF School Census, January 2009 – all pupils including pupils in sixth forms, part time pupils and pupils in designated nursery classes.

According to the Essex school organisation plan, Essex on the whole has seen a decrease in school places by almost 3% in all schools between 2005 and 2009. Primary totals have fallen by almost 4% while secondary totals by only 2%. However, for Colchester as the above graphs illustrate, primary school pupils have *increased* between those years by a marginal 0.8%. Conversely Colchester has seen a higher fall in the numbers of secondary school pupils than the Essex average (almost 3%).

14.2 Ethnic groups in schools

Table 19: Ethnic groups: schools in Essex

District	Ethic minority groups (EMG)	EMG %	White British	White British %	Number on roll
Braintree	1,315	6.9	17,412	91.3	19,072
Chelmsford	2,745	10.7	22,118	86.5	25,573
Maldon	358	5.2	6,311	91.2	6,923
Colchester	**2,612**	**11.3**	**19725**	**85.6**	**23,040**
Tendring	1,337	7.2	17041	91.2	18,676
Basildon	2,785	11.1	22048	87.7	25,149
Brentwood	1,797	13.9	10188	78.8	12,922
Castle Point	674	5.2	11895	92	12,936
Rochford	728	6	11142	92.4	12,056
Epping Forest	2,337	16.9	11287	81.4	13,863
Harlow	1,883	15.8	9354	78.4	11,934
Uttlesford	701	6.6	9263	87.7	10,566
Essex total	**19,272**	**10**	**167,784**	**87.1**	**192,710**

Table 19 provides aggregate ethnicity data for children of reception year group and above in all Essex schools as at January 2009[43]. 11.3% of Colchester's pupils are from minority ethnic groups, this is the fourth highest out of all 12 Essex school areas.

14.3 School sixth forms

According to the Schools Census January 2009, only five Colchester schools had sixth forms (with a total of 896 pupils). Although this was the fifth highest in Essex it was less than half the number of pupils in Chelmsford school sixth forms which had the highest number in Essex at 2,403. However this is largely down to a high proportion of pupils in further education colleges as discussed in item 14.4.

[43] Since parents have the right to refuse to provide information on their children's ethnicity or may not return the information to the school, the ethnic minority and white pupil percentages may not total 100 percent.

14.4 Numbers and projections: 16-18 year old students

Table 20: Actual numbers of 16-18 year old students, 2008/09 and projected numbers to 2013/14

College	District	Number of 16 – 18 year old students 2008/09	Projected numbers of 16 – 18 year old students 2013/14
Braintree College	*Braintree District*	1,046	1,075
Chelmsford College	*Chelmsford Borough*	2,014	2,577
Colchester Institute	***Colchester Borough***	**3,605**	**3,758**
The Sixth Form College, Colchester	***Colchester Borough***	**2,947**	**3,025**
SEEVIC, Benfleet	*Castle Point District*	2,718	3,350
Thurrock & Basildon College	*Basildon District **	2,062	2,400
Epping Forest College,	*Epping Forest District*	1,831	2,286
Harlow College,	*Harlow District*	2,539	2,958
Essex total		**18,762**	**21,429**

Note: Numbers on roll are LSC funded learners aged 16-18 and were obtained from the Learning and Skills Council. Projected numbers on roll where available were obtained directly from the colleges concerned.
Source: Essex School Organisation Plan, 2009 to 2014

Colchester had a very high number of pupils attending our two further education colleges (Colchester Institute and the Sixth Form College). A combined total of 6,552 pupils attended these colleges in 2008/09. This amounts to over a third of the Essex total for further education provision. No other district in Essex has more than one further education colleges and only eight out of the twelve districts that have a further education college within their boundaries.

14.5 Pupil number forecasts for 2014

Birth rates in Colchester rose steadily between 2000 and 2008. Births along with the number of children moving into the county through new housing developments are factors in dictating the number of school places that Essex County Council needs to provide. Our housing trajectory figures can be found in item 15.3. According to the Essex Schools Organisation Plan *"pupil number forecasts make use of information about historic births, current GP registrations, historic admissions, current numbers on roll and new housing in geographically defined areas of Essex"* (Essex Schools Organisation Plan, 2009 to 2014: p31).

Table 21: Pupil number forecasts

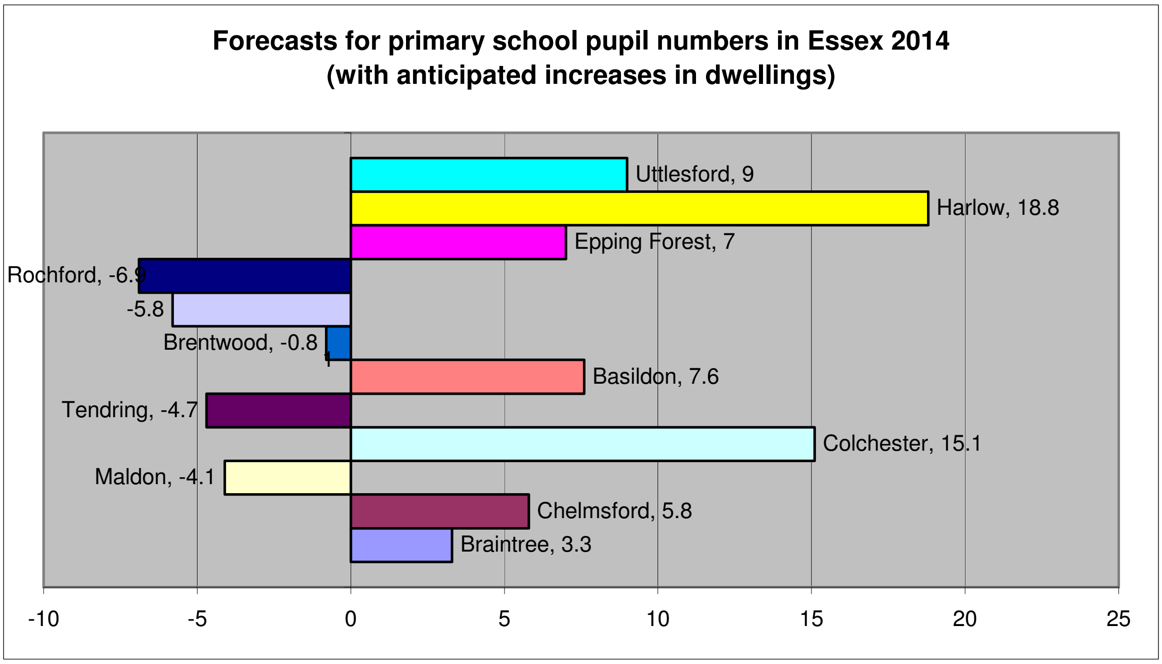
District / Area	Pupils 2009	Pupils 2014	Pupils 2014 with housing	% difference	
				without housing	with housing
Braintree	11,051	11,192	11,416	1.3	3.3
Chelmsford	12,162	12,409	12,872	2	5.8
Maldon	4,248	4,053	4,073	-4.6	-4.1
Colchester	12,398	13,358	14,264	7.7	15.1
Tendring	9,607	8,937	9,156	-7	-4.7
Basildon	14,028	14,663	15,088	4.5	7.6
Brentwood	5,285	5,157	5,243	-2.4	-0.8
Castle Point	6,447	6,035	6,071	-6.4	-5.8
Rochford	6,386	5,896	5,948	-7.7	-6.9
Epping Forest	7,935	8,300	8,494	4.6	7
Harlow	6,689	7,291	7,949	9	18.8
Uttlesford	5,704	5,735	6,215	0.5	9
Essex Total	**101,940**	**103,026**	**106,789**	**1.1**	**4.8**

Source: Essex School Organisation Plan 2009 to 2014.

Table 21 above and figure 38 below illustrate the forecasts for primary school pupils with and without the anticipated increases in housing as set out in Colchester's core strategy (see item 15.3). However, the housing numbers used in this forecast are from pre-recession housing data for April 2007 to March 2008. This means that the anticipated increase in housing provision is unlikely to be as high as those forecast in table 20.

Overall, the plan states that Essex primary school numbers are likely to increase by 2014. However it acknowledges that some areas are likely to see much higher increases (Colchester and Harlow) and five of the districts are forecast to experience a decrease in primary school pupil numbers.

Figure 38:



Source: Essex School Organisation Plan 2009 to 2014.

Both Table 20 and Figure 37 illustrate that Colchester's forecasts of 15.1% with anticipated housing development (7.7% without) are well above the next highest forecast in Uttlesford and second only to Harlow's forecasts for primary school pupils (however see previous paragraph in relation to the effects of the recession on these forecasts).

14.6 Local Delivery Groups (LDGs): Colchester

The information below is taken from the Essex Schools Organisation Plan 2009 to 2014 and information from Essex County Council in September 2010 which updates the document.

Primary schools

Colchester East North

Forecasts, when adjusted for the impact of housing, indicate that there will be a significant deficit of school places in this group. Significant housing development in the area of Myland, North, Highwoods and Brinkley Grove Schools has resulted in pupil growth across the areas and the need for additional primary provision.

Queen Boudica Primary School which opened in September 2009, was planned as a 210 place primary school, with the potential for phased growth to 330 places in the medium to longer term. Phase 2 of the building works are underway and the capacity will rise to 315 school places

A site for a further primary school has been secured on the Severalls development. Schools in this group that have been identified as having surplus places in the short term will retain their accommodation to ease the pressure for places in the medium and longer term. Discussions will also be held with schools in this group to work collaboratively towards easing the pressure for spaces in the area. All of these measures will address the forecast deficit in places.

Friars Grove Infant School and Friars Grove Junior School amalgamated in September 2010 to become a 420 place primary school.

Colchester East South

A preliminary review of this group indicates a significant degree of surplus spaces, particularly when adjusted for housing forecasts. Some of the schools with surplus capacity within the overall LDG group are located near to the Colchester Garrison site, where there is a substantial amount of new housing (1,500 dwellings) planned over the next few years and any agreed redesignation of unused permanent accommodation would therefore be on a short to medium term basis. Discussions are taking place with schools where high levels of surplus capacity are forecast with no housing development being undertaken, to consider how best to reduce the level of surplus places. The Published Admission Number at Cherry Tree Primary School will be reduced to 25 from 2011/12.

Colchester West

Consideration is being given as to how to provide the school places required to accommodate additional pupils resulting from housing developments in the Stanway area. Overall, particularly in the rural schools, there is a significant amount of surplus places in this group, even when adjustment for housing has been taken into consideration. Officers will continue to monitor those schools with more than 25 percent of their accommodation unfilled and further discussion will take place to identify ways of reducing their capacity.

Colchester East South/ Colchester West

A strategic review of primary provision in the area of the Garrison and the Hythe is being carried out in order to ensure there is sufficient primary provision in the medium term to meet the potential demand from new housing development and supply and demand for pupil places is balanced. In some locations there are schools with unfilled places that will be needed in addition to a potential increase in primary provision to meet the demand for places from new housing.

Colchester primary notes: across LDGs

There will be considerable housing development over the period of the Plan and beyond. Areas under development include additional housing on the Garrison site, the Hythe and the north of Colchester. In some of these locations there are schools with unfilled places that will be needed, in addition to new schools, to meet the demand for places from the new housing. Contributions are being sought from housing developers towards the cost of providing additional places.

Forecasts for Colchester Group 8, which is comprised of the following oversubscribed schools, Kendall, Old Heath, St George's, St James, St John's Green, and St Thomas, indicate a deficit of places. Some of the surrounding schools which have surplus capacity are a less popular choice with parents and would increase the journey for children travelling to and from school. Consequently, a strategic review of this particular area commenced in September 2009 and is ongoing at this stage.

Secondary

Sir Charles Lucas Arts College closed on the 31 August 2010 and a replacement Academy opened on 1 September 2010. The decision to close The Thomas Lord Audley School and Alderman Blaxill School has been put on hold.

15. HOUSING DELIVERY

15.1 Households

At 1st April 2009 there were approximately 73,571 dwellings within the Borough of which 62,740 were privately owned. The average household size was 2.37 people per household in 2001 but it is estimated that this may have decreased in recent years in line with recent trends.

15.2 Housing completions

A total of 1,041 homes were built between 1 April 2008 and 31 March 2009 but development in the borough has been reducing due to the down turn in the housing market nationally. Only 518 new homes were completed in 2009/2010 which is a reduction of 50% in just one year. A number of sites have stalled due to viability concerns and this will have an impact on the local economy (for stalled sites see item 16.19 and for affordable housing completions see item 16.18).

15.3 Housing delivery (including housing trajectory)

Colchester needs to allocate and build a minimum provision of 17,100 homes between 2001 and 2021 in accordance with the Core Strategy. Under current policies, 830 dwellings are expected to be built in the Borough each year up to March 2021 and 855 per year for 3 years after March 2021 up to 2023/24 (however, see 15.2 above).

The majority of this housing is already accounted for by previous Local Plan allocations, housing completions and planning permissions. Colchester has already delivered 8,169 new homes between 2001/02 and 2008/09 at an average rate of 1,021 dwellings per year. In 2008/09 there were outstanding permissions for over 6,327 (gross) additional homes.

The Colchester Strategic Housing Land Availability Assessment also identified additional capacity within developed areas to accommodate all most of the required housing and shows a 15 year supply of housing land. New housing development in Colchester Borough will seek to reduce the need to travel, support regeneration and protect Greenfield land. The Core Strategy focuses this development in the following key areas:

- Town Centre
- North Growth Area
- East Growth Area
- South Growth Area
- Stanway Growth Area

Colchester will seek to provide over 80% of housing on previously developed land (PDL) during this plan period and will also ensure that a sufficient supply of developable land is available to deliver over 830 new homes each year.

15.4 Gypsy and traveller issues

In January 2009, a total of 15 gypsy and traveller caravans were present in Colchester. This accounts for just 1.4% of the Essex total (a reduction from 2.2% in January 2008). It is estimated that 14 of these caravans were privately owned and on authorised sites with planning permission. One other caravan was recorded as on 'unauthorised gypsy owned land without planning permission and not tolerated.'

Colchester is well advanced with it's Local Development Framework, having an adopted Core Strategy, Site Allocations and Development Policies DPDs. The Site Allocations Inspector's Report was received in September 2010 and found that the DPD was sound and that it makes adequate provision for sites for Gypsies and Travellers in policy H2.

The policy allocates sites to provide 30 pitches for Gypsy and Traveller accommodation within the borough including a new site at Severalls Lane, Colchester. Planning permission has been granted for twelve new pitches at Severalls Lane which will be delivered by Essex County Council. The Essex Gypsy and Traveller Accommodation Assessment (GTAA) provides important evidence to inform any future review of site allocations and the evidence shows that the need for additional gypsy and traveller sites in Colchester is low. It identifies a need for a total of 16 pitches in the Borough by 2021. It is therefore anticipated that the allocation of 30 pitches in the current document will meet both the 2011 target for pitches as identified in the evidence behind the RSS and the longer term need for pitches as identified in the Essex GTAA.

When the Site Allocations DPD is reviewed it will assess the need to provide further Gypsy and Traveller Accommodation taking account of any new government guidance as well as local evidence in the Essex GTAA.

16. THE HOUSING MARKET AND AFFORDABILITY

16.1 Household tenure

Table 22: Number of households in each tenure group (Colchester)

Tenure	Total number of households	% of households	Number of returns	% of returns
Owner-occupied (no mortgage)	23,100	33.6%	1,190	37.2%
Owner-occupied (with mortgage)	29,500	42.9%	1,336	41.8%
Social rented	9,200	13.4%	415	13.0%
Private rented	5,900	8.6%	218	6.8%
Other rented	1,100	1.6%	41	1.3%
TOTAL	68,800	100.0%	3,200	100.0%

Source: Colchester SHMA, Fordham Research 2008

Colchester's Strategic Housing Market Assessment (SHMA) 2008, which sampled 3,200 Colchester residents, shows that about 77% of all households are owners, well above the 70% national average (Table 22). The social rented and particularly the private rented sectors are proportionately below their national averages.

16.2 Length of residence by tenure

Table 23: Length of residence in household by tenure (Colchester)

Tenure	Length of residence				Total
	Less than 1 year	1 to 2 years	3 to 5 years	Over 5 years	
Owner-occupied (no mortgage)	3.0%	4.5%	9.9%	82.5%	100.0%
Owner-occupied (with mortgage)	12.4%	11.1%	22.9%	53.6%	100.0%
Social rented	13.1%	9.7%	19.8%	57.5%	100.0%
Private rented	37.8%	24.3%	22.1%	15.7%	100.0%
Total	11.9%	10.1%	18.0%	60.0%	100.0%

Source: Colchester SHMA, Fordham Research 2008

Table 23 above indicates the relative stability of the owner occupied and social rented sectors and the dynamism of the private rented sector, where nearly 40% of households have been in their current home for a year or less. This is a typical pattern for the UK housing market, but Colchester's is the most extreme in this housing market area (consisting of Braintree, Chelmsford and Colchester).

16.3 The housing market: Owner occupation

Figure 39[44]:

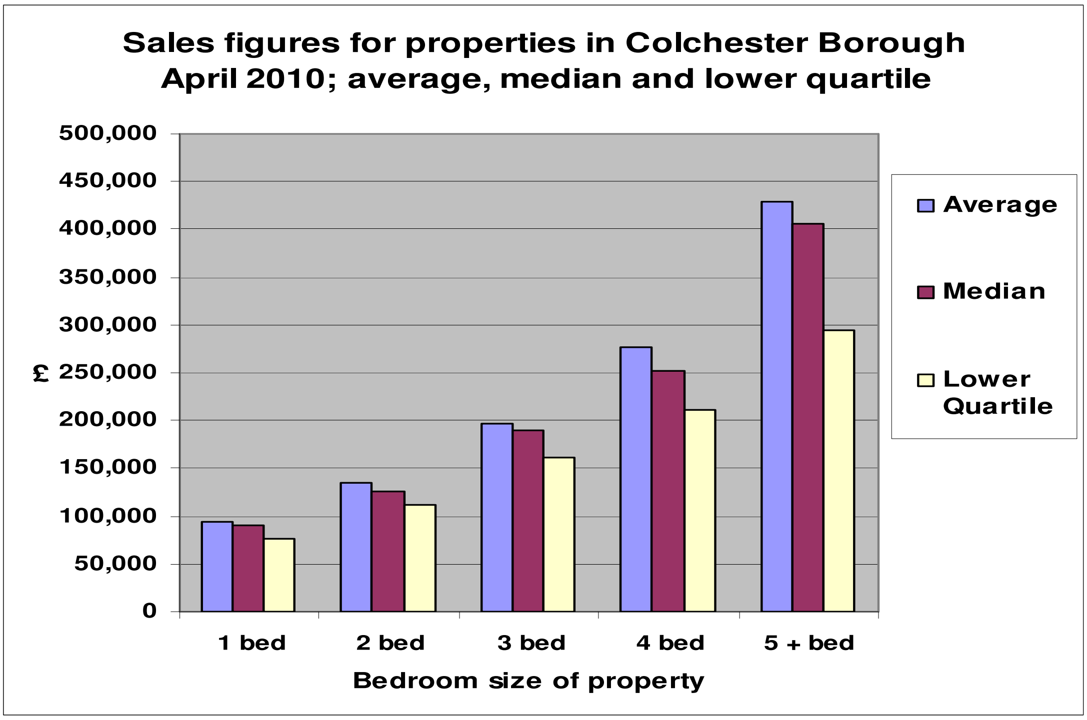


Figure 38 shows the average house prices in Colchester, the median and the lower quartile in relation to 1 to 5 bedroom properties.

The price of three and four bedroom properties increased between the original SHMA (2007/08) and 2010. Three bedroom properties increased by 17.5% from a median figure of £161,000 to £189,295; whilst four bedroom properties by 8.74% from £232,000 in 2007/08 to £252,275 in 2010. However, this is based on a very small number of transactions mostly purchases made by households with small or no mortgages

The average prices of one and two bedroom properties have decreased over the past two years but are not more affordable as the access to mortgage finance is restricted by the need for a large deposit. Deposits needed by first time buyers are generally equivalent to a year's household income needed to make the mortgage affordable.

[44] Figure 39 is captured from the Rightmove website of all properties available for sale www.rightmove.co.uk in May 2010. Data was then been filtered using the following criteria:

- Using Colchester plus 3 miles for searching and excluding properties outside of the Borough
- Selecting the number of bedrooms excluding retirement properties and newly built properties as these usually have a premium price and distort the figures.
- Sorting data and calculate average, median and lower quartile prices.
- Applying sales to asking price from Hometrack to the asking price results to arrive at a robust estimate of sales price by bedroom size.

The ratio of sales to asking price has recovered from a low of 86% in October 2008 to just over 95% at the end of 2009. This suggests that there is more demand for homes being marketed however it is based on a much smaller number of transactions.

16.4 Affordability and home ownership

Table 24: Household income

	SHMA data	% up rate ASHE 2008	Gross Household Income 2009	% up rate ASHE 2009	Gross Household Income 2010
Average Household Income	£31,396	-2.0%	£30,768	+0.9%	£31,045
Median Household Income	£23,874	+4.1%	£24,853	+1.6%	£25,251

Household income is the most accurate way to measure the affordability of a home. The SHMA published in 2008 detailed the average and median household incomes for the Borough. These were up-rated using the average change in incomes from the Annual Survey of Hours and Earnings (ASHE)[45].

The data shows that there has been a marginal increase in median incomes since the publication however average incomes have decreased despite a small recovery in the past year. We may however not be comparing like for like since this could represent a different range of jobs depending on the churn in the local labour market.

These figures show that incomes are broadly similar to levels reported in 2008. This suggests that changes to income will have very little impact on the number of households who are able to afford suitable homes in the local housing market. Other factors such as mortgage credit availability are likely to have a bigger impact. However the data suggests that many households in the borough are unlikely to be able to save enough to afford the deposit necessary to purchase if they are not currently homeowners without external assistance.

Data available from the Council of Mortgage Lenders (CML) suggests that the percentage of loan to value of property percentage has decreased since the time our SHMA was conducted and the amount of deposit needed to purchase a home for a first time buyer has increased significantly:

[45] This survey is based on a small sample and while it is a reasonably accurate indicator of the direction in which wages are going it cannot be seen as a totally accurate representation of incomes in the Borough.

Table 25: First-time buyers, lending and affordability

	Number of loans	Value of loans £m	Average loan to value	Average income multiple	Proportion of income spent on interest payments
March 2010	17,300	2,000	76%	3.22	13.4%
Change from February 2010	+27%	+25%	76%	3.21	13.4%
Change from March 2009	+42%	+54%	75%	3.00	15.1%

The number and value of loans nationally have increased from the very low base one year ago. This however is a fraction of the value of loans from the peak of the housing market in 2007.

Table 26: Payments and mortgages at entry Level (lower Quartile) purchase price

No. of Bedrooms	Weekly payments	Monthly payments	80% mortgage	20% Deposit	Overall Price
1	£75.42	£326.81	£61,265	£15,317	£76,582
2	£109.58	£474.86	£89,019	£22,255	£111,274
3	£159.71	£692.08	£129,740	£32,435	£162,175
4	£208.52	£903.55	£169,384	£42,346	£211,730

Source: Council of Mortgage Lender Website – mortgage calculator and research

Table 26 indicates the financial resources needed to be able to purchase a home in the Borough of Colchester. The table was created using the entry level or lower quartile purchase prices from Figure 39 and the Council for Mortgage Lenders data on average amount of deposit required to purchase and average mortgage rate at that level of deposit.[46]

Prior to the recession the barriers to home ownership were principally high housing prices and high mortgage repayments, since then main restriction is availability of credit and the requirement to have a significant deposit in order to purchase. No 100% mortgages are available in the market. Even at 95% of value mortgages will cost significantly more than the 4% on average being charged in the example used above.

The average income multiplier for new first time buyers is 3.22. Which means that a new homeowner is borrowing 3.22 multiplied their gross annual household income to have a large enough mortgage to secure a property. It is likely that the only households who can buy a home for themselves are

[46] Figures are from May 2010 with the cost at 4% APR Repayment Mortgage for a term of 25 years.

likely to be receiving significant financial assistance to have the deposit necessary.

The SHMA published in 2008 following a decision by the Housing Market Partnership determined that for a mortgage to be affordable and sustainable in the long term it should cost no more than 25% of gross household income

For someone to pay a mortgage on a 3 bed property at the lower end of the market they would need an annual household income of £33,220, well above the median income for the borough but close to average income for the borough. In addition to this they would need a deposit of £32,435, equivalent to just over a year's salary to be able to purchase a home in this way.

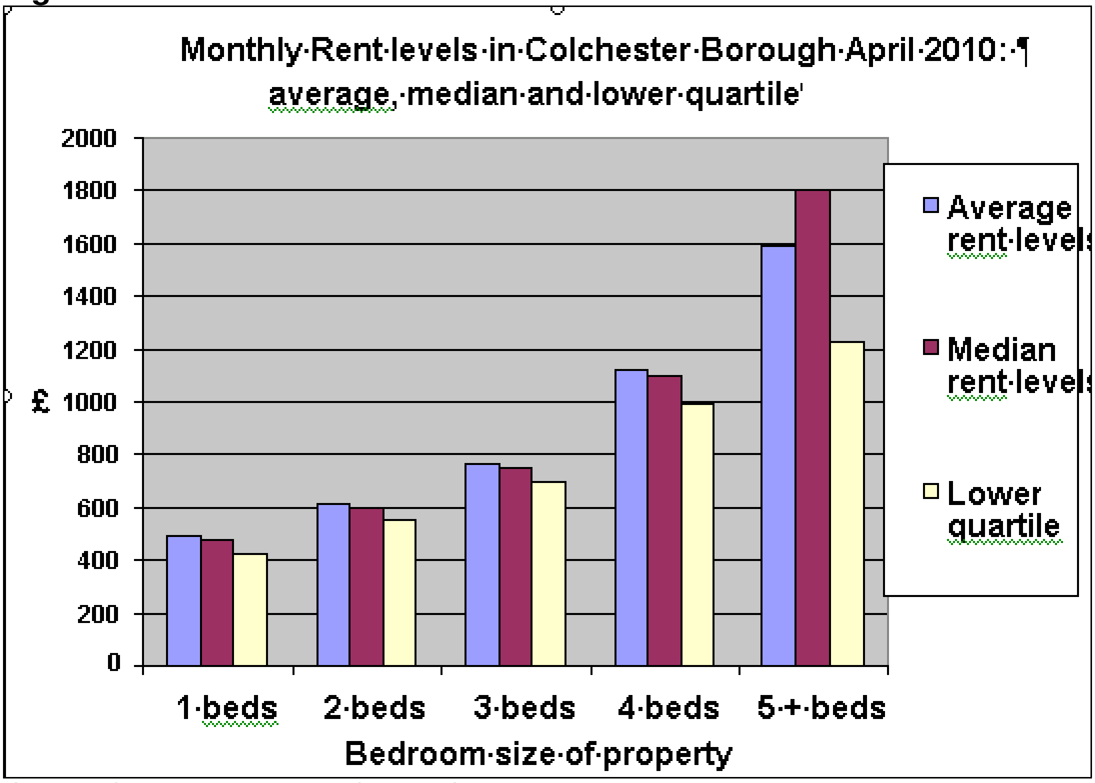
The equivalent figures for different size properties are:

Size of Property	**Income needed**	**Deposit required**
1 bedroom	£15,687	£15,317
2 bedroom	£22,793	£22,255
4 bedroom	£43,370	£42,346

For a home to be affordable to purchase approximately a year's gross household income is needed for a deposit. This will exclude most households from being able to purchase and is reflected in the contraction of the size of the active housing market.

16.5 The housing market: Private rented sector

Figure 40:



Source: Colchester Borough Council Strategic Market Housing Assessment Update 2010

Table 27: Rent levels May 2010

Monthly Rent	Average rent	Median rent	Lower quartile
1 beds	492	475	425
2 beds	617	600	550
3 beds	767	750	700
4 beds	1123	1100	995
5+ beds	1591*	1800*	1225*

*Source: Rightmove website www.rightmove.co.uk (May 2010) *only 11 properties were available for letting in the 5+ bedroom size. This figure is therefore less reliable because of the small sample size but does at least offer some reflection of this part of the market and explain the wide variations in the rent figures here and in the Local Housing Allowance for 5 bed properties.*

Figure 40 shows the lower quartile, median and average monthly rent for one to five or more bedroom properties in Colchester borough.

Rent levels have remained broadly stable over the past two to three years. Only lower quartile rents are below the levels set by the Local housing Allowance (LHA). The LHA is meant to be the median rent level for that size property but the research undertaken for the 2009 SHMA update suggests that actual rent levels advertised are always in excess of the LHA meaning tenants claiming housing benefit will always need to make a top up to their rent levels.

16.6 Housing Benefit and Local Housing Allowance

Table 28: Monthly equivalent amount Local Housing Allowance

	Shared room	1 bedroom	2 bedroom	3 bedroom	4 bedroom	5 bedroom
June 2009	£265.98	£475.02	£595.01	£700.01	£924.99	£1199.99
May 2010	£292.50	£448.76	£573.43	£708.07	£897.52	£1196.69
% change over 1 year	+ 9.97%	- 5.53%	- 3.63%	+ 1.15%	- 2.97%	- 0.28%

Source: Colchester Borough Council Strategic Market Housing Assessment Update 2010

The monthly equivalent amounts are should reflect the median rent for that size of property in the borough. The data shows that rent levels in Colchester have been broadly stable over the past year with some minor variations. Shared rooms have experienced a nearly 10% increase and 3 beds have increased by just over 1% over the year. All other rental prices have dropped slightly with the largest being 1 bed properties and the smallest for larger properties.

Table 29: Housing Benefit claims 2008 to 2010

	April 2010	April 2009	April 2008
Total HB claims	10 489 15% increase from 2008	9 894	9 096
Council Tenants	4 191 1% increase from 2008	4 206	4 157
Housing Association Tenants	2 593 1% increase from 2008	2 429	2 287
Private Tenants	3 705 (2 244 on LHA = 61%) 40% increase from 2008	3 259	2 652

The number of Housing Benefit (HB) claimants and the changes to this give a good indication of what is going on in the rental market in Colchester. Table 28 above gives a breakdown of the kinds of claims made over the past three years and increases in claims.

There was a 40% increase in the number of Housing Benefit claims made by tenants in the private rented sector between April 2008 and April 2010. The most recent data shows that 3,705 private tenants in the borough are claiming housing benefit to help pay their rent. This is nearly half of all private tenants in the borough claiming HB. Currently however, anecdotally it is estimated that 80% of adverts for private rented properties will not accept tenants claiming housing benefit. This dislocation between demand and supply in the private rented market could risk tenants being unable to secure a home they can rent (even if it is otherwise affordable and landlords are experiencing increased vacancies). One of the main causes of this unwillingness to rent to tenants on benefit, according to the Eastern England Landlords Association, is the insurance landlords take out which require a credit check housing benefit claimants are very unlikely to pass.

The amount of housing benefit claimants in the affordable rented sector has remained broadly similar for the past three years.

Looking at the breakdown of Housing Benefit by type of claimant data indicates that the biggest increase is for claimants who are in work. This may indicate that they are receiving reduced wages (if they are now qualifying for housing benefit when they were previously ineligible).

16.7 Repossessions

Table 30: Repossessions Data from Colchester County Court

Year	Mortgage claims issued	Mortgage possession claims leading to orders made	Landlord possession claims issued	Landlord possession claims leading to possession order
2010 (1st quarter)	45	30	120	80
2009 (4th quarter)	50	40	115	80
2009 (3rd quarter)	70	75	125	85

Source: Possessions action, Colchester County Court (taken from 2010 SHMA update)

In relation to mortgages table 30 shows a reducing number of possession actions initiated in each quarter and a steady decrease in the numbers leading to an order. Between quarter 3 2009 and quarter 1 in 2010 almost half as few orders were made in mortgage possession claims.

The number of landlord claims and numbers of possession orders awarded have remained broadly stable over the period. This could indicate that these tenants have not benefited from the upturn in the economy in the same way that those with mortgages may have. The beneficial impact of very low interest rates will not be felt directly by tenants.

16.8 Migration: England, Wales and the East of England

Migration estimates are provided by the Office of National Statistics using the new patient registrations at GP surgeries across the country. This is the most robust data to show movement of individuals between districts. The net in migration into Colchester is approximately 1600 individuals per year. The total movements within England and Wales are approximately 8,900 people coming into the Borough each year and approximately 7,300 individuals moving out of the Borough each year. Migration from Scotland and Northern Ireland are also not included, nor is international migration.

The numbers suggest that nationally more families with children and older people are moving into the borough. The only age group where there is a net outflow of people is in the 45 to 64 age group and for those over 65 the numbers are broadly balanced with slightly more people moving in than leaving the borough.

Movement within the East of England represents approximately 75% of all migration in and out of the Borough of Colchester. Most of the migration experienced occurs within the region. Across the region there is in migration in every age group.

16.9 Migration: London

The original SHMA in 2008 also examined the impact of London on the housing market in Colchester and assessed that 22% of all movers into the Borough came directly from London. While it is more than 50 miles to London the proximity of such a large city continues to have an impact on the housing market.

The data shows that the largest amount of in migration for single districts comes from the outer London borough in east London. Again the picture is one of net in migration into the borough from London. If the individuals are those seeking to purchase homes, this will have a slightly inflationary effect on house prices. Nearly a half of those individuals moving into the borough are children suggesting that families with children are a significant part of the in migration. The figure for 16 to 24 year olds is broadly balanced with only a slight in migration in this age group could be accounted for by people starting and leaving as students of Essex University.

Overall the data shows that clearly Colchester is a destination for people seeking to move. The data indicates that the largest group is likely to be families with children which may explain why larger family homes have remained relatively stable in price with demand continuing to remain high unlike the demand for smaller properties and flats.

16.10 Households with a physical or learning disability or other support need.

On average around a third of affordable rented tenants have some form of disability or impairment. This group of households are likely to experience increased barriers in securing market housing suitable for them and their families. This group also represents a wide variety of different kind of impairments and disabilities.

The biggest groups are those with a medical condition and physical disability. But in addition between a fifth and a quarter are frail and elderly.

Our most recent data from the Gateway to Homechoice register shows that the most common specialist housing need is a physical disability and the least common is because English is not the first language. Other large groups include households with learning disabilities.

16.11 The needs of particular groups

A wide range of particular groups was investigated in the 2008 SHMA. The following are brief summary results of the extensive analysis in the report:

- Black and minority ethnic households amount to 6.85% of the population, mainly 'white other'. They show slightly larger households and are at least as well off as the average for the population (not true at the national level, where they are poorer).
- Nearly 17% of all households have a support need, and 40% of them live on their own. A wide range of support needs was stated.
- Nearly 16% of all households are classed as key worker. Their incomes are about the same as the average for the population.
- Older households are about 25% of the total number of households, slightly above average. (They are 15% of the population but comprise 25% of households) They tend to be concentrated in owner occupied and social rented housing and to be in smaller household units. Not surprisingly many have a medical condition.
- Some 32% of the Colchester households are classed as rural. They have much higher incomes, and there is less housing need in rural areas than in urban ones.
- About 26% of households have children living at home. They are more likely than other owners to have a mortgage (being on average younger). One parent families live in much smaller dwellings, and much more likely to be in social rented housing.
- The private rented sector is the most dynamic. A fifth of its household are on Housing Benefit, and so is an extension of the social rented sector, in that they could not afford the market without subsidy. They do not have the same security of tenure as social tenants.
- The results suggest that 1.4% of all households are overcrowded and 37.7% underoccupy their dwelling

16.12 Voids

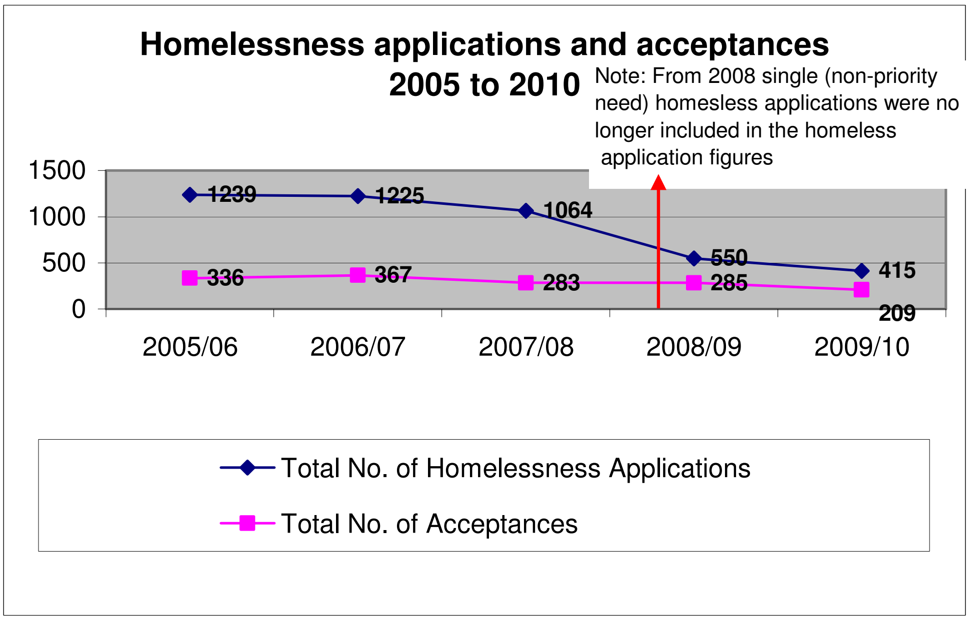
In June 2010 1,930 properties were registered as empty, a decrease on recent years. 788 of these have been empty for only for a few months, a further 767 for a year and only 115 for more than 4 years. The majority of vacant dwellings are privately owned.

16.13 Decent homes

Between 2008 and 2009 18.8% of council homes were classified as 'non-decent.' This is below the Government target of 21% and contracts have been let to recommence and complete the Council's 'decent homes' programme (National Indicator NI 158).

16.14 Homelessness

Figure 41:



As of 1 April 2010 there were 4,591 people on the Colchester Borough Council Housing Register. This figure includes 1,395 transfer applicants which are excluded from our HIP return.

Between 2009 and 2010 there were 415 people who made a homelessness application to the Council. This was a reduction on the previous year's figures of 550 people. In relation to the total number of homeless people that were accepted 209 people were accepted in 2009/10 which is a reduction from the previous year's figure of 285.

In comparison to the average for England who were accepted as homeless, we only have figures for 2008/09. These have been calculated per thousand households by the Association of Public Health Observatories (APHO)[47] at 4 per 1000 households as opposed to only 2.48 for England. Colchester therefore has a significantly higher level of homelessness than England according to this measure (see also item 10.2 for the impact of homelessness on health).

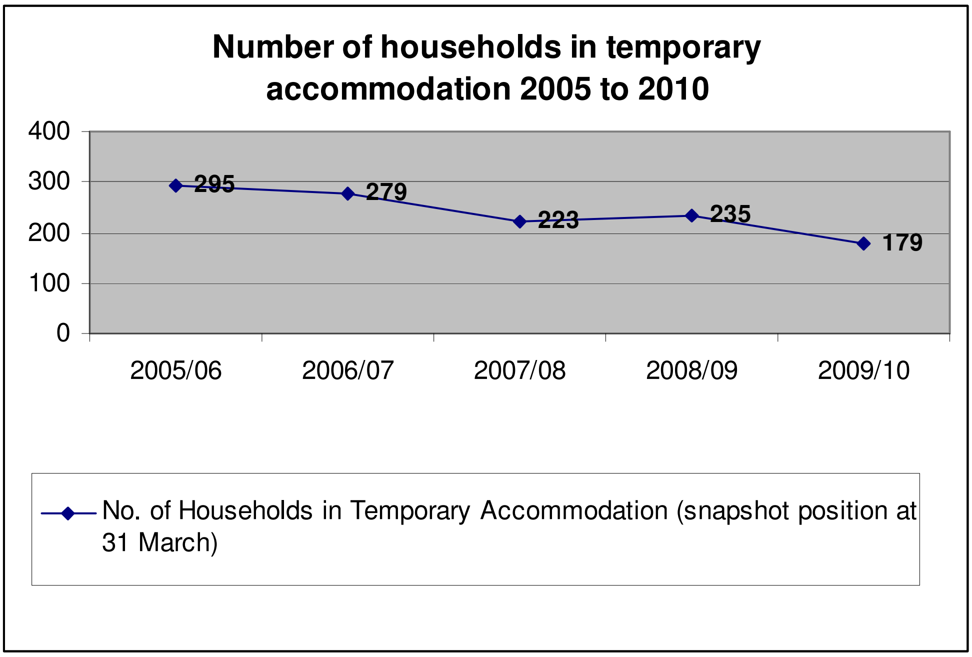
Figure 41 shows the number of homelessness applications and acceptances between 2005 and 2010. Between 2005 and 2008 the numbers of applications decreased by 14% (175 people). Due to a change in recording methods (see figure 41 for details) the figures from 2008 cannot be compared

[47] Association of Public Health Observatories (APHO) Health Profile 2010 for Colchester, Department of Health, Crown Copyright ©2010

with those of previous years. However, from 2008 to 2010 there was also a decrease in the number of homeless applications; from 550 in 2008/09 to 415 in 2009/10; a decrease of 25% (135 people). There has also been a decrease in the numbers of acceptances (with some fluctuations) between 2005 and 2010 from 336 to 209 people. This is a decrease of 37% (127 people).

16.15 Temporary accommodation

Figure 42:



At the end of March 2009, there were 235 households in temporary accommodation. This means that the Council has missed the NI 156 end of year target of 206 households in temporary accommodation. Consequently, the Government target of a reduction of all households in temporary accommodation by 50% by 2010 is at risk. However, the Council has put a number of interventions into the housing service to help us achieve the target. We have increased our capacity for housing advisers to take on homelessness prevention and more detailed casework.

Currently the Council offers 35 appointments per week with an average waiting time of 1 week to be seen. It is also worth noting that this figure is a snapshot of the amount of people in temporary accommodation at the end of each quarter and not cumulative for the financial year. At 31 December 2008, 232 households were in temporary accommodation.

16.16 Rural housing

The Council seeks to enhance the vitality of rural communities by supporting appropriate housing development on infill sites and previously developed land (PDL) within the settlement development boundaries of villages. Affordable housing development in the villages will also be supported on rural exception sites contiguous with the existing village envelopes, provided a local need is demonstrated by the Parish Council on behalf of their residents. The Council is also seeking to sustain and enhance local employment and rural enterprises.

16.17 Affordable housing need: Housing Needs Register (HNR)

Table 31: Applicants on the Housing Needs Register, May 2010

Numbers of applicants on Housing Register		**Max Bed Size**						
Band	**Studio**	**1**	**2**	**3**	**4**	**5**	**6**	**Total**
A		23	106	13	8	2		152
B		188	126	167	63	12	1	557
C	1	1069	381	160	49	9	1	1670
D		113	45	38	20	5	1	222
E	2	735	828	334	40	2	2	1943
F		11						11
Grand Total	3	2139	1486	712	180	30	5	4555

Source: Abritas Reporting, Gateway to Homechoice, May 2010.

Our housing needs register, Gateway to Homechoice, records all households who have an expressed need for housing and the table above shows the numbers in each band and broken down by bedroom size. Band A are those with the most urgent and critical housing need, band D & E are those with no assessed need to move according to the Allocation Policy criteria and are very unlikely to ever successfully bid on a property.

Colchester has 4,555 households on its housing register. The data shows that the majority of homes needed in the affordable rented sector are for one and two bedroom homes, including sheltered housing (more than half). The overall difference between vacancies and need shows a broad split across all sizes of property.

Although in terms of numbers there is less demand for three and four bedroom homes these are often the most difficult group to re-house due to many fewer vacancies and consequently larger families experience much longer waiting times. The original 2008 SHMA showed that the biggest shortfall between demand and supply is for larger family homes and one bedroom accommodation for people under 60. This was still broadly the case in May 2010.

The Gateway to Homechoice system is operated sub regionally across the districts of Babergh, Braintree, Colchester, Ipswich, Maldon, Mid Suffolk and Suffolk Coastal. We can for the first time understand movements of affordable rented tenants across the sub region. It shows a net outflow from Colchester, Ipswich and Maldon and a net inflow to Babergh, Braintree and Suffolk Coastal with Mid Suffolk remaining relatively balanced. This level of mobility across the sub region offers applicants more choice and opportunity to secure a property which meets their need. It also shows that in many respects the affordable rented geographical market is as wide as the purchase market and is not restricted to narrow district boundaries.

Approximately 13.6% of new tenancies started in the sub region were taken up by people who had previously lived in a different district. In terms of the housing market this figure would be nearer 30 to 35%. Gateway to Homechoice has offered potential council and housing association tenants more choice over where they live than ever before

Using the CLG formula to determine Housing Need, the 2008 SHMA determined that the annual need for new affordable housing was 1,082 new dwellings per annum.

16.18 Affordable Housing Completions

Table 32: Affordable Housing Completions, 2001 to 2010

Year	Affordable Rented	Intermediate Tenures	Shared Ownership	HomeBuy Direct	Total
2001/02	40	3			43
2002/03	85	35			120
2003/04	33	1			34
2004/05	143	15			158
2005/06	32	52			84
2006/07	146	42			188
2007/08	211		54		265
2008/09	97	23			120
2009/10	118	15	8	15	156

Table 32 shows the trends in delivering the different tenures of affordable housing over the past decade. The high point of delivery was in 2007/08 prior to the credit crunch and the recession. The impact on delivery was minimised by extensive Kickstart funding which has now come to an end. Colchester will now need to go back to delivering its homes through section 106 agreements. Affordable rented continues to be the most important tenure in meeting housing need in the Borough. Intermediate homes are more useful in supporting households who wish to move towards becoming home owners.

In 2009/10 156 affordable housing units were completed. This exceeded the target of 128 units and was an improvement on the 2008/09 figure of 120 units.

The Core strategy provides that the Council will seek to secure 35% of new dwellings to be provided as affordable housing, with thresholds of 10 units in urban areas and 3 units in rural areas. This is a significant increase over the 2004 Adopted Local Plan target of 25% and a 25 unit threshold.

16.19 Stalled Sites

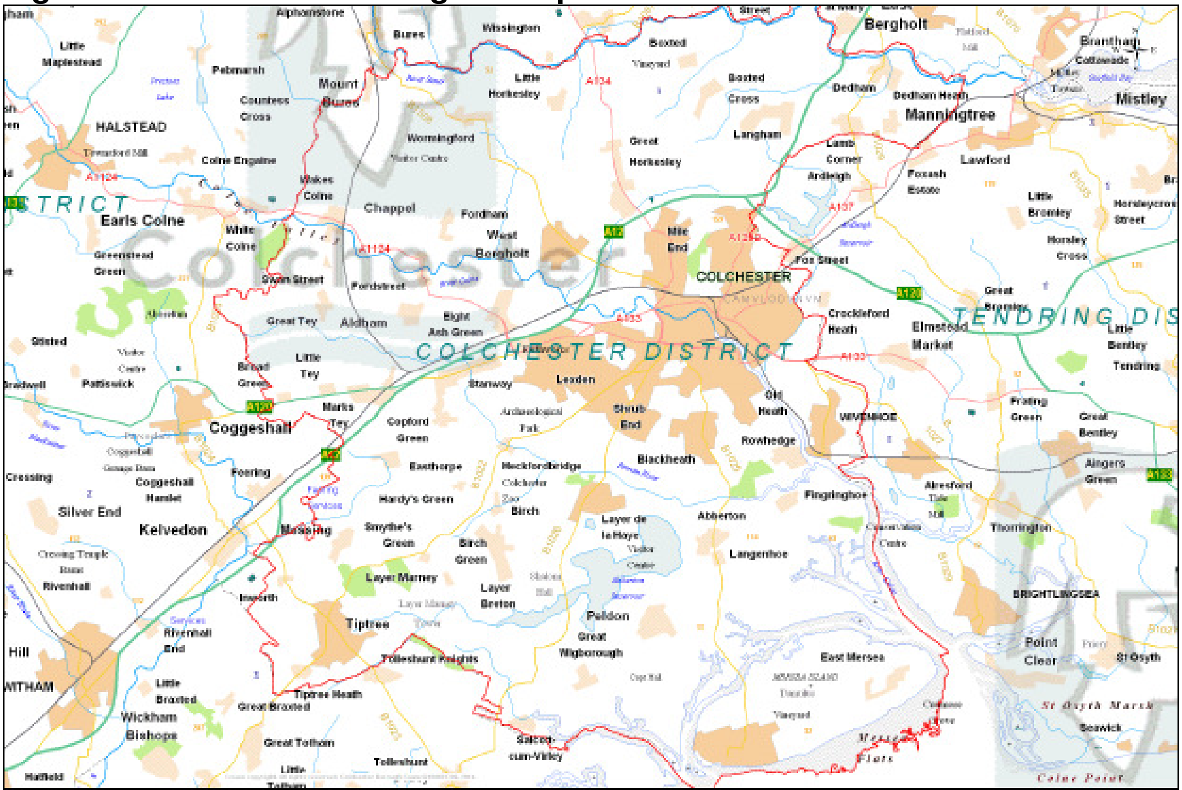
Some development in the borough has stalled as a result of the economic downturn for various reasons, including a lack of availability in mortgage lending leading to a collapse in demand for private housing, a perceived oversupply of flats and insufficient viability to encourage development.

Only one stalled site in Colchester has received Kickstart funding in order to be developed. This site will deliver 224 units in total of which 56 will be affordable homes. Without Kickstart funding this site would not have continued leading to a significant delay in the delivery of both market and affordable homes in the Borough.

17. TRANSPORT

17.1 The Transport Network

Figure 43: Colchester borough transport networks



This map is reproduced from Ordnance Survey material with the permission of Ordnance Survey on behalf of the Controller of Her Majesty's Stationery Office © Crown copyright. Unauthorised reproduction infringes Crown copyright and may lead to prosecution or civil proceedings. Colchester Borough Council. Licence No 100023706, 2010.	Not to scale	**Date 20/7/2010** **Colchester Borough Transport Networks** Centre = 597004 E 223259 N

The transport network can be split into three: the urban, the rural and the inter urban. The characteristics of each are:

Urban – heavily utilised and dense network of roads in the main urban area of Colchester serving major residential, employment, retail, health, education and leisure areas. The road network is heavily congested at peak times, at certain times and locations[48]. There is an extensive bus network serving the main urban area with 95% of the residential areas having access to a regular bus service throughout the day[49]. The reliable operation of buses is greatly affected by traffic congestion. The walking and cycle networks in the main follow the roads however there are some attractive off road sections through park land and following the river.

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48 Local Transport Plan 2, Essex County Council; Transport Monitoring Report 2008, Essex County Council.
49 Bus Timetable for Essex, June 2010, Essex County Council.

Rural – This is a less dense network of roads radiating out from the main urban area. According to the Transport Monitoring Report 2008 by Essex County Council (ECC), these roads are less trafficked than the urban network and in the main are single carriageway A and B class roads. A network of minor roads connects these roads and villages together. The bus network is less developed than the rural areas. Services are less regular but serve destinations further afield such as Sudbury, Clacton and Chelmsford[50]. Locally run voluntary transport schemes provide an option in certain rural areas. To the west of the Borough the Marks Tey Sudbury rail line serves a number of villages, giving connection to mainline trains at Marks Tey.

Inter Urban -The interurban movements are catered for by the A12 and A120 Trunk Road networks and the Great Eastern Railway Mainline. These are busy interurban routes serving a major freight and passenger arteries, operating at capacity in peak times and suffer from poor reliability of service. The A12 connects Colchester to the M25 (approx 40 minutes away) and London, giving access to major employment and leisure opportunities. To the north the A12 connects to the A14 giving an alternative but longer route to markets in the Midlands, and to the major port of Felixstowe. There are currently 4 main junctions around the urban area of Colchester. There are some sub standard limited access junctions serving the rural areas of North Colchester. The A120 runs east west from Harwich in the east to Stansted and the M11 in the west, giving access to two major international gateways. The A120 is accessed by the A12 junctions. To the west of Marks Tey it is a single carriageway route.

The Great Eastern Mainline connects Colchester to the City of London (55 minutes away) with employment opportunities there and in Docklands. There are regular and frequent services along the line, but capacity is severely restricted due to the high demand along the line and the mix of trains including freight from the Haven ports. Passenger access to main line services is via Colchester and Marks Tey stations.

Local inter urban networks radiate out from Colchester and are in the main single carriageway A roads. To the east of the Colchester, the Tendring peninsular is connected to Colchester via the A133, the A120, the A137 and the Colchester Clacton Rail line. The roads are heavily used by people of Tendring to access employment in Colchester. The rail line provides through services to London and into Colchester Town.

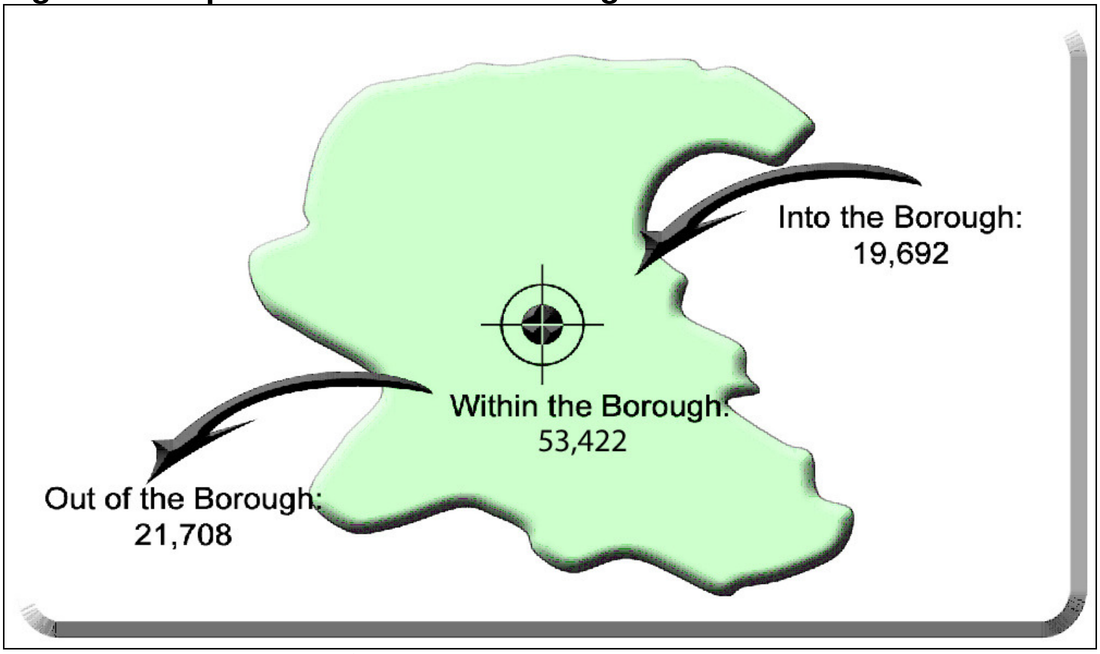
17.2 Movement Patterns

The 2001 Census showed that there were 94,822 daily work trips within to or out of the borough. This is summarised in figure 48 below. 53,422 daily work trips were made within the Borough. 21,708 of employed residents were leaving the Borough – of these 25% were going to Greater London, 16% to Braintree District, 14% go Tendring District and 12% to Chelmsford Borough.

[50] Bus Timetable for Essex, June 2010, Essex County Council.

19,692 people were coming into the borough to work was of which 8,767 (45%) came from Tendring. In 2001 Colchester was a net exporter of 2,016 employees.

Figure 44: Trips in and out of the borough

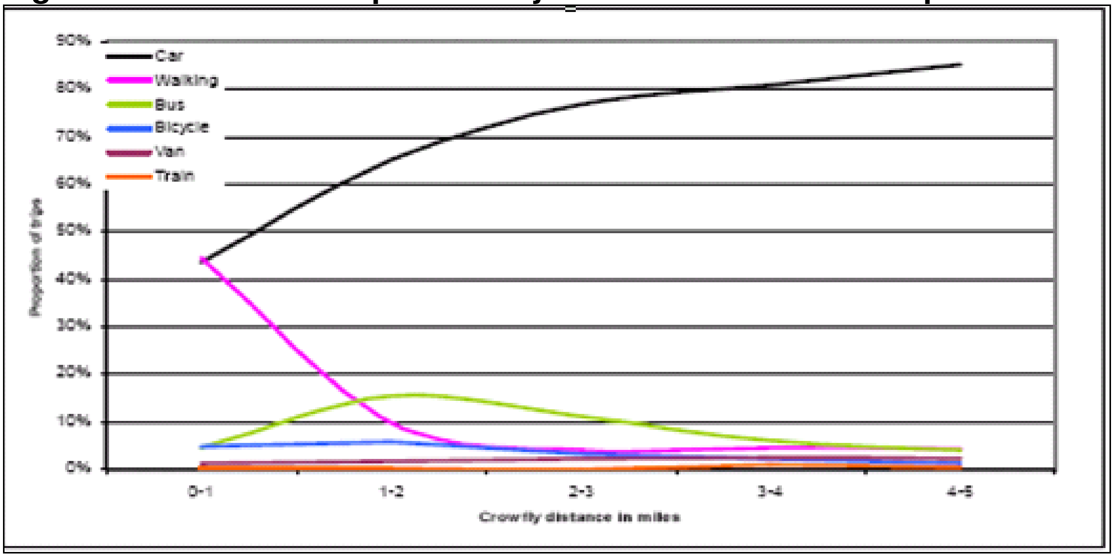


Source: 2001 Census; ONS © Crown Copyright.

According the 2001 Census, there was high level of "local labour market self-containment" – 72% people living and working locally. Excepting the large movement from Tendring the borough was not overly reliant on other towns/cities for its employment. At the ward level, in 19 out of 27 cases the largest number of trips started and finished in the same ward. Castle Ward (the town centre) was the most popular employment destination and is a clear focus for employment (and retail, education and leisure opportunities).

17.3 Congestion and modes of transport

Figure 45: Colchester trips taken by different modes of transport



Source: Household Travel Diary surveys, Colchester Borough Council, July 2007

Locally there is a real concern that traffic congestion is affecting growth, causing avoidable environmental impact and limiting the operation of bus services and the promotion of alternative modes of travel. Household Travel Diary surveys undertaken the urban area in July 2007 (recording approximately 54,000 trips) show that there is a significant proportion of short trips undertaken by car; some 45% of car trips are less than 1 mile in length.

According to the Census 2001, the car dominates travel to work (71% for all locations – in the urban area car is only 56%); only in the inner urban wards the sum of alternative modes is greater than car where the journey is short. Over 80% of the journeys starting outside Colchester Borough are made by car.

With a high level of local trips, according to Census 2001 travel to work outside the borough is relatively low. Greater London is a more popular destination than the neighbouring boroughs. The train is used for the majority of trips to London.

The main external movement is east to west according to Census 2001. Approximately 11,350 journeys head west out of the Borough. These are complemented by nearly 9,000 coming from Tendring into the Borough.

17.4 Local perceptions and Congestion “Hotspots”

In both the Colchester Annual Business Survey 2008 and the Essex Employer and Business Survey 2010 local traffic congestion is cited as a major issue impacting upon business performance. Traffic congestion is also seen locally as a major issue by the public.

Essex County Council's Local Transport Plan 2 shows that most of the congestion on the road network occurs in the peak hours. There are more localised problems at other times e.g. Saturday morning. The operation of the bus network is greatly hampered by the traffic congestion. Congested locations :

- Town centre and approaches from the east and west
- Junctions along the A133 Cymbeline Ave/Cowdray Avenue/St Andrews Avenue between Spring Lane and Greenstead Roundabouts
- Ipswich Road Severalls Lane junction
- Junctions around the North Station area

In addition the plan suggested that the issue with the A12 is maintaining reliable operation along a heavily trafficked route. Between junction 25 Marks Tey and junction 27 Colchester Spring Lane traffic flows are approximately 70,000 vehicles per day and are in excess of capacity. The Highways Agency has concerns on the capacity on this section of A12, and management of the junctions.

17.5 Growth in Demand for Movement

As the population of the Borough grows there will be growth in the in demand to travel. From the Government's TEMPRO trip end forecast for the Colchester it predicts an increase in morning peak hour the demand of 29% between 2007 and 2023. However, only 9% of this growth is linked to LDF housing growth. The remaining growth of 20% accounts for the growth in trips from the existing population and from growth in trips such as proposals for increased employment.

TEMPRO has it limitations and can only give an overview for the demand in movement. It does not take into account congestion and how people may change their travel behaviour to avoid congestion e.g. choose a different mode from the car, choose a different time to travel or decide not to travel at all. Further work is required to understand the demand for movement in the future associated with development and growth and how the demand for movement can be best catered for.

17.6 Approach to Movement

The Core Strategy sets out the borough councils approach to transport, which seeks to change travel behaviour to manage demand, especially peak hour car traffic. Certain major infrastructure is to be provided through development in north and west Colchester. Park and ride is to be provided in north Colchester. Cycling and improvements to public transport are being sought along with initiatives to reduce traffic in the town centre.

Essex Business Survey 2008, ECC highlights that the road network is seen as a priority issue for business who would wish to see greater investment in the transport network to support economic growth. Tackling congestion is a priority for the businesses and the local community. Building sustainable travel in every day life continues to be a challenge. Travel change behaviour programmes are in place in a number of locations across the town. Businesses tend to focus on seeking inter urban improvements to the A12 and A120, and ways to enhance road capacity in urban areas.

Communities generally wish to see a safer environment especially in residential areas and are frustrated by congestion[51]. Public transport improvements are sought. Park and ride is a priority as this is seen as an initiative to reduce traffic entering the town centre and is a feature to maintain the competitiveness of the town[52]. Parking supply and charging is often seen as a problem for businesses but most of the town centre car parking is in private control. The Cycle Town project is proving successful as it addresses congestion, environmental and health issues, demonstrating that a well structured programme can change travel behaviour.

[51] Introduction of 20mph areas in Colchester, CBC report, November 2009.
[52] Cuckoo farm park and ride, Essex County Council report, March 2010.

18. ENVIRONMENT AND SUSTAINABILITY

18.1 Electricity requirements

The Colchester electricity network is supplied by three Grids; Colchester, Lawford and Abberton. EDF, the Borough's electricity supplier, has advised that growth will overload the Severalls and Braiswick primary substations and there is insufficient capacity to support new Town Centre development. EDF has a number of proposals to ensure that new development within the Borough is supplied with electricity:

- A new town centre primary substation will be initiated by the Vineyard Street development and will be fed by the Colchester Grid;
- A new primary substation is required in north-west Colchester to serve the north Colchester growth area;
- New cable routes need to be identified from the Abberton or Colchester Grids and new cables are needed from the Abberton Grid to Shrub End and from the Colchester Grid to Braiswick.;
- To create headroom at the Severalls primary substation 11kV will need to be transferred from other primary substations

18.2 Water requirements

The Haven Gateway Partnership commissioned a Water Cycle Study in 2007 (the final report was published in November 2009) to ensure that water supply, water quality, sewerage and flood risk management issues can be properly addressed in the sub-region and thus enable the substantial growth proposed in the East of England Plan to 2021 to be accommodated in a sustainable way.

Domestic water demand for Anglian Water Services East Suffolk and Essex Water Resource Zone, which includes the main towns of Colchester, Ipswich and Braintree, is currently 82 mega-litres per day (Ml/d) and is expected to grow to 90 Ml/d in 2035. The Water Cycle Study reported that Anglian Water Services can supply demand for water in Colchester borough up to at least 2035. However, there are potential supply deficits against dry year averages or critical peak period forecasts.

The Water Cycle Study states that there is a potential deficit of 6.21 Ml/d against a dry year average and a potential deficit of 2.74 Ml/d against a critical peak period. Anglian Water Services Water Resource Management Plan Final Report (February 2010) updates these figures slightly and forecasts a deficit in 2036/7 of 4.13 Ml/d. As a comparison with the other two large towns in the East Suffolk and Essex Water Resource Zone Braintree has a forecasted deficit of 6.37 and Ipswich has a forecasted deficit of 20.18.The report explains that the forecasted deficits are not solely due to the planned growth in the zone; they are also due to the predicted impact of climate change on reservoir supplies.

Within Colchester Borough there are three planning zones (PZs); PZ 55: Bures, PZ 56: Colchester and PZ 63:Tiptree. In order to meet predicted demand, Anglian Water Services propose that for PZ 55: Bures they will need to implement general demand management measures in 2025 to 2030 and consider water transfers from adjacent planning zones in the period 2030 to 2035. For PZ 56: Colchester they will need to implement general demand management measures in 2010 – 2015, expand Ardleigh Reservoir in 2020 to 2025 and transfer from a planning zone in Ipswich in 2025 to 2030. For PZ 63:Tiptree they will need to transfer water from a neighbouring planning zone in the period 2010 – 2015. Anglian Water Services Water Resource Management Plan also states that there is the potential to utilise water from unused licenses.

Table 33 is taken from the Water Cycle Study and shows the various schemes and timings of the proposed water management measures.

Table 33: Preferred Water Management Option: timeline

Planning Zone (PZ)	2010 to 2015	2015 to 2020	2020 to 2025	2025 to 2030	2030 to 2035	Activity
55 (Bures)						General demand management
						Transfer from PZ56: Colchester
56 (Colchester)						General demand management
						Ardleigh reservoir extension
						Transfer from PZ60: Ipswich
63 (Tiptree)						Transfer from PZ56: Colchester

Source: Haven Gateway Water Cycle Study, 2007.

Colchester borough is serviced by fifteen sewage treatment works (STWs) of which two (Dedham and Tiptree) also receive discharges from adjacent local authorities. Table 34 below shows the capacity of the STWs in the Borough. Four STWs are above current consented capacity, although the vast majority of the growth within Colchester will be located in the catchment area of the Colchester STW. Anglian Water Services has recently secured an increase in consented dry weather flows (DWF) for the Colchester STW up to 36,288m^3 per day. However, from 2013/4 a further increase of 5,771 m^3 per day in DWF (16%) will be needed to accommodate growth up to 2021 (see table 34).

Table 34: Discharge capacities of Sewage Treatment Works (STWs) in Colchester area

Site name (STW)	Consented DWF (m^3 per day)	Measured DWF 2007/JR08 (m^3 per day)	Headroom (m^3 per day)
Birch	300	238	62
Colchester	29284	30256	-972
Copford	1300	1474	-174
Dedham	610	755	-145
Eight Ash Green	650	517	133
Fingringhoe	367	335	31
Great Tey	150	97	53
Great Wigborough	not available	-	
Langham	400	768	-368
Layer de la Haye	380	289	91
Salcott	not available	-	
Tiptree	2400	1940	460
West Bergholt	1430	***825***	***605***
West Mersea	2900	***1510***	***1390***
Wormingford	65	48	17

*Note: values in **bold italics** are based on calculated values from the older JR07 results rather than those measured and presented in the JR08 data.*

18.3 Carbon emissions and climate change

Table 35: CO2 emissions 2005 to 2007

Year	Population	Industry and commercial (kt CO2)	Domestic (kt CO2)	Road Transport (kt CO2)	Per capita
2005/06	167,500	355	378	330	6.3
2006/07	171,000	365	387	324	6.3

Source: DEFRA

The baseline for Colchester was 6.3 tonnes CO_2 per capita and the results for 2005/06 and the same the following year. The target for the indicator over the LAA2 period is a 9% reduction.

Evidence shows that industry and commerce is responsible for 31% of CO2 emissions in Colchester[53].

18.4 Local Authority Carbon Management Scheme (LACM)

The Council has been signed up to the LACM since 2007 and with guidance from the Carbon Trust we have substantial energy savings in our day-to-day operation. The overall target set by the Carbon Trust is the 25% reduction in

[53] Department of Energy and Climate Change 'Local Authority Datasets 2005 – 2007'

energy usage by 2012. The total savings so far under the LACM stand at 660 tonnes of CO_2 (taking into account baseline 06/07, 07/08 and 08/09).

18.5 Air quality

There are two Air Quality Management Areas (AQMAs) in Colchester. These are located on Mersea Road and Brook Street. Like most districts in the region which do not have large industrial processes, the main source of local air pollution is from motor vehicles. These emit, amongst other things, oxides of nitrogen, carbon monoxide, carbon dioxide and fine particular matter. Particular problems arise where traffic is slow moving through old, narrow streets near the historic centre of town.

Following the Updated Screening Assessment of 2009, we have now progressed to a detailed assessment of the thirteen monitoring sites outside the declared AQMAS where exceedences of the annual mean objectives for Nitrogen dioxide (N02) were measured.

A detailed assessment for the two centre monitoring sites which exceeded the hourly objectives for NO2 is currently being undertaken. Depending upon the findings in this report it may become necessary to declare the Town Centre an AQMA. Work with the regeneration team is currently considering options to restrict vehicles though the town Centre.

Short term exposure to air pollutants can affect peoples breathing, while long term exposure can permanently damage lungs. Air pollution has been linked to the worsening of asthma, chronic bronchitis, heart and circulatory disease and cancer. Research suggests that people whose death is caused by air pollution die on average 9.8 years earlier[54]. The UK air quality strategy estimates that the health impact of man made pollution in the UK in 2005 cost between £8.5 billion and £20.2 billion[55]. In the UK up to 35,000 people in the UK died prematurely in 2005 as a result of exposure to air pollution[56].

18.6 Waste

Between 2008 and 2009 there was an average of 527.642kg of residual household waste per household which is below the annual target of 710kg per household. During this time 36.9% of household waste was reused, recycled and composted. This was above the annual target of 34.0% (National Indicators NI 191 and NI 192).

However, the amount of waste produced in Colchester is increasing, and at the same time the land available to dispose of this waste (landfill sites) is reducing. The current landfill site at Stanway, Colchester is likely to have spare capacity left to accept commercial and household waste for

[54] Assessment of deaths attributable to air pollution (Kunzili et al , 2001)
[55] Uk air quality strategy, www.defra.gov.uk
[56] Source: Evidence to the House of Commons Audit Committee 2010

approximately another 10 - 15 years. If the 'landfill allowance trading scheme' targets are not met, or if commercial and industrial waste or imports of London's waste do not behave as forecast, it could lead to a higher demand for landfill space than was predicted in a waste arisings, capacity and future requirements study published in 2007. The shortage of available landfill, coupled with the increasing costs of using landfill, primarily through increasing Landfill Tax alongside the environmental impacts associated with landfilling waste, mean that Essex County Council as well as local businesses need to look for alternative waste disposal options.

The Essex Waste Partnership, which comprises Essex County Council and 12 district councils and Southend-on-Sea Borough Council, is currently procuring a PFI-funded waste treatment contract, which included Mechanical Biological Treatment as its reference technology. This process has the potential to use municipal and residual commercial and industrial waste that is currently landfilled and treat it to produce a solid recovered fuel. This solid recovered fuel could then be used in a combined heat and power (CHP) plant to produce electricity, heat and steam, which can either be used locally or be exported to the National Grid. Newer waste management technologies such as anaerobic digestion (AD) and in-vessel composting (IVC) could produce renewable energy for local businesses. Market opportunities exist to develop these technologies as a replacement to the traditional methods of dealing with waste but require planning and funding into the future.

In terms of economic development waste disposal facilities do not currently impact on the potential growth of business, in fact potential new business opportunities exist in areas of recycling and waste treatment that replaces traditional landfill in the future.

18.7 Open space provision

CBC originally worked to a universal standard of 2.83ha/1000 people for open space provision. In 2006, CBC commissioned an Open Space, Sport and Recreation study in accordance with national Planning Policy Guidance PPG17, as part of the evidence base for the new Local Development Framework to test these standards in terms of meeting local existing and future population needs for open space and sports facilities.

An audit of existing open space/sport facilities provision was completed as part of the PPG17 study. This showed that for some types of open space the current 2.83ha standard was being met however for other types of open space this was not the case i.e. allotments.

In response to the outputs from the PPG17 study, which assessed open space needs across a range of different open space typologies, new accessibility, quality and quantity standards have been developed to ensure that the future of open space provision will meet existing and future population needs.

The revised quantity standards are set out below for the different typologies per 1,000 people in Colchester.

- Parks and Gardens 1.76ha
- Natural and semi natural open space urban 5.00ha
- Amenity greenspace 1.10ha
- Provision for children 0.05ha
- Provision for teenagers 0.05ha
- Allotments 0.2ha
- Outdoor sports facilities 1.5ha

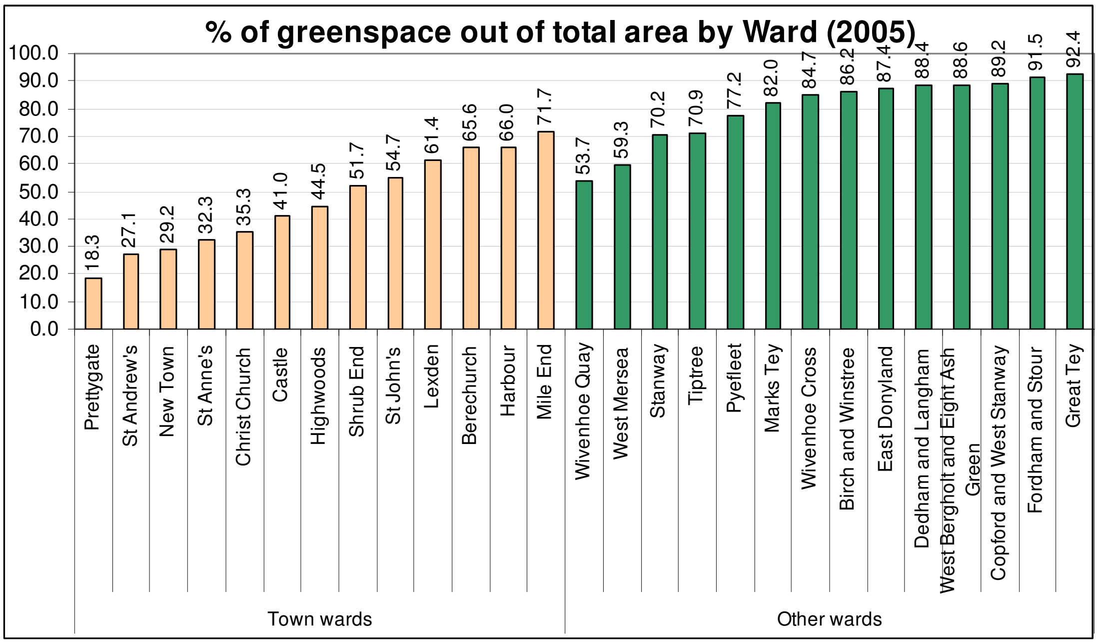
Open Space, Sport and Recreation provision is being incorporated into strategies such as the Open Space and Play Strategy. Work is also commencing on a new Allotment Strategy which will also make reference to the PPG17 standards and access requirements. These documents will provide a mechanism for ensuring that the Council provides adequate Open Space, Sport and Recreation facilities in the Borough. New areas of open space and sport and recreation facilities will be provided as part of new development in accordance with Core Strategic Policy and secured through the Council's Development Team negotiations to secure planning contributions as part of planning decisions.

The following new areas of open space were provided in Colchester as part of recent development schemes:

- Grove Road (Tiptree);
- East Road (West Mersea);
- Hopkins Homes (Mile End Road);
- Residential development West of District Hospital;
- Marsh Crescent (Rowhedge);
- Annington Homes (Elmwood Avenue);
- Croudace POS (Severalls Lane); and
- Abbey Fields Play area.

18.8 Greenspace by ward

Figure 46:



Source: Land Use Statistics (Generalised Land Use Database) 2005 (Enhanced Basemap).

Figure 45 above shows the percentage of greenspace out of the total area of each ward in 2005. The ward with the lowest percentage of greenspace was Prettygate, with only 18.3% of the total ward area, which was less than half of the 41% of greenspace available in Castle ward which accommodates the town centre. The wards with the second and third lowest percentage of greenspace were also in the town wards, St Andrews with 27.1% greenspace, followed by New Town (29.2%).

Of the wards outside of the Town, there were four with less greenspace than Mile End (71.7%), which was the town ward with the largest percentage of greenspace. These were Wivenhoe Quay, with 53.7%, West Mersea (59.3%) Stanway (70.2%) and Tiptree (70.9%)

Great Tey had the highest percentage of greenspace, with 92.4%, followed by Fordham and Stour with 91.5% and Copford and West Stanway with 89.2%.

APPENDIX A: Essex Skills Priorities Statement

This statement synthesises the priorities for sectors, spatial targeting and targeting by employer and learner types. It sets out overall priorities for Essex County Council for the year 2010/11.
Historical Trends These reflect progress towards skills targets/impacts and identified need for investment
• Essex is a very large county in population terms so when we talk about our targets/priorities in percentage terms, we are looking at a total population of 1,396,400 and a working age population of 843,400, far more than most other counties in England. • Skills interventions remain supply-led and learner-led. Essex needs to privilege employer-led provision, targeting interventions towards localised key sectors that increase employment, offer higher level wages, and stimulate economic growth • Poor skills levels relative to regional and national averages at Levels 2, 3 & 4. 30% of Essex working age population have either no qualifications or low level skills (NVQ1). 168,400 people in employment without Level 2 qualification. To meet Essex's 2011 LAA target (69%) – from 62.2% today, an additional 20,000 adults must gain level 2 qualifications. Essex needs to outstrip this, however, to achieve parity regionally and nationally. Significant geographical variations exist with 7 Essex districts falling below the Essex average of level 2 or above qualifications - Tendring languishes at 45.9%. • Lack of skills is an employability barrier - The reductions in funding for adults and for level 1 qualifications exacerbate this problem. Skills for life – functional skills (numeracy & literacy) gaps limit adult learning potential • Essex needs to improve its educational attainment in schools. Almost half of 16 yr olds leave statutory education without 5+ GCSEs incl. English & Maths. Essex also has a low level of participation in post-16 education in comparison to other counties, so a number of our young people leave education with a low level of education and either enter low paid/level jobs/NET or become NEET. Providing a skills driven education from a younger age would help to mitigate this. • High NEET levels – from September-November 2009 there were 3,000 NEETs 16-19s (9%), our LAA target is 5% (2010/11). The figure has remained resilient (2624 or 7.1% in April 2010), despite an increase in participation in learning by 7.7 percentage points to 81.1% since October and by 17.7 points since September – participation rates are consistently below the England average. • Sharp increases in unemployment to c.30,000 JSA claimants from 16,000 in 2008 and 13,000 five years ago. This camouflages the full total of 105,000 working age benefit claimants, which includes 44,000 incapacity benefit claimants and 13,000 in lone parent income support claimants. 41,400 people have been claiming working age benefits for 5 years or more. In the downturn, unemployment rose fastest for under 25s.

Current needs These will be based on demand identified by Essex County Council, Business Organisations and Jobcentre Plus, current skills vacancies and shortages and inward investment opportunities – distinct local information to inform adult skills
Areas for action: • Expanding apprenticeships to build a new technician class: • Extensive programme of 1,750 Essex Apprenticeships to allow young people to earn while they learn with SMEs that otherwise would not recruit them – targeting key growth sectors, and districts with the highest NEETs levels. • Pre-apprenticeship provision to prepare young people who are (most at risk of becoming) NEETs to access work through the apprenticeship route • Building multi-agency capacity to deliver unemployment and worklessness support, co-produced by Essex County Council, working closely with local businesses to link individuals with skills shortage and growth sectors, equipping adults for future jobs • Initiating a new programme of adult apprenticeships, employing funding from a variety of government agencies to deliver skills development into locally defined key sectors for growth, particularly for those in areas affected by the recession (Harlow, Basildon, Castle Point) • Need for additional interventions/local non-domestic rates discounts to incentivise/encourage SMEs to invest in workforce development – i.e. to support employees to undertake adult or advanced apprenticeships • Improving support for disadvantaged and vulnerable people to access employment and improve their skills • Improving information, advice & guidance (IAG) for people of all ages, including wraparound services for those trapped in the revolving door between employment and unemployment, working closely with the new Integrated Employment & Skills Service, Jobcentre Plus & IYS Connexions • Responding to business and key sectors, Essex County Council will focus interventions on priority skills needs in local industrial clusters (see below)
Future needs These will be based on known demand and expected key investments in places as well as more generic needs (customer service skills, adaptability, working communications)
• To focus interventions on sectors growing jobs, supporting higher wages for local people, or contributing high gross value added, as well as priority sectors identified below. • Localised key sectors will drive demand for skills in Essex. Provision needs to be reshaped to support sectoral and business demand for skills at an appropriate geography – e.g. Marine (Brightlingsea/Maldon), Aviation (Southend-on-Sea), ICT (Chelmsford, Basildon, Harlow), Engineering & Manufacturing (Harlow, Colchester, Basildon), Ports & Logistics (Harwich, Tilbury, Stansted/Harlow, Basildon), Construction (Basildon), Environment – Renewable Energy (Harwich), Waste Management & Recycling (Harlow, Brentwood, Chelmsford), Creative (Chelmsford, Colchester, Harlow, Basildon), and Financial & Business Services (Basildon, Chelmsford,

Brentwood, Harlow, Colchester, Braintree)

- To develop a technician class, in line with national and regional priorities, targeting young people and adults into sustainable careers in growth sectors
- To increase access to higher education and higher vocational qualifications, encouraging FE and HE providers to (re-)shape provision to business and skills development needs in Essex and in neighbouring authorities
- To support individuals and businesses with improved IAG on skills development, and offering business-led incentives and non-domestic rate discounts for businesses that take the initiative in assisting Essex to develop the skills of the future
- To increase subsidised work-based training in high quality provision, based on business demand and its contribution to the local and regional economy of sectors, expanding the offer to all people of working age
- Essex County Council to co-ordinate partnership offers to expand mentoring support for those wanting to start their own businesses or become self-employed, and to support business incubation centres that feed into key growth sectors
- Essex County Council is looking to develop a suite of Skills Centre with specialised foci in key growth sectors, delivering high quality vocational and technical education; akin to the Governments aspiration for Technical Academies.
- To provide wraparound services within the Essex Partnership for those caught in the revolving door of employment and unemployment

High growth opportunities

These will be based on inward investment opportunities and identified regional sectors under New Industry, New Jobs.

In terms of support for businesses, Essex County Council wishes to privilege measures that encourage SMEs to recruit additional staff. SME's are the key drivers for employment growth, representing 96% of all companies in the county. They are also more embedded in the local economy than multinational corporations, and therefore provide a greater certainty in their contribution to sustainable development in Essex.

To meet the needs of local businesses and future jobs, interventions need to:

- Increase technical and higher skilled people to reflect local economic needs
- Higher & Further Education institutions and qualifications need to be more responsive to local businesses and skills needs; and
- Focus on high employment sectors, particularly on sectors growing jobs or higher value added

Currently, EEDA's approach emphasises macro level interventions and appears to target larger businesses. It focuses on sub-sectors with significant concentrations of R&D assets and businesses, yet fails to consider the role played by small business clusters within local communities. The current regional view neglects sectors where Essex has higher concentrations of businesses and employment opportunities than the regional average in engineering & manufacturing; construction; tourism, hospitality and catering, and retail customer services, and omits Essex from consideration within regionally and nationally defined priority sectors such as Nuclear (Bradwell) and Offshore Wind (Harwich/Colchester). These sectors need to be reflected as priorities for local development in Essex.

Essex County Council, Skills Unit, June 2010