Local Investment Plan Colchester

Evidence Base
Updated July 2012

Disclaimer

Maps

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 2010 estimated Colchester borough's population at 181,016 people. This is an increase of 3,916 people since the mid-2009 population estimate of 177,100 people, equating to a 2.2% rise. Colchester has seen very rapid population growth since mid-2001.

Data shows that the population of Colchester has experienced the most change in Essex County between mid-2001 and mid-2010, growing by 16.0% (25,000 people). In mid-2009 percentage growth from mid-2001 was 13.5%.

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 227,700 people in 2032, an increase of 26.3% (47,400 people) over a 20 year period. This is the largest population growth in Essex County, (Uttlesford district is predicted to see the next highest growth at 26.2%). Alternative population forecasts are also available, and predict slower growth (17.5% from 2010-2033), this forecast is shown in more detail in Section 3.7. It may be beneficial to take both sets of forecasting data into consideration when planning for the future.

Young people
An estimated 41,700 young people were living in the borough in 2010 (those aged 19 years or younger), which accounted for 23.0% of the total population. This was slightly lower than the composition of Essex overall (23.5%), and lower than the East of England (23.7%). Compared to mid-2009 the proportion of young individuals had decreased by 0.4%.

Older people
An estimated 33,000 people in Colchester were of retirement age (60+ for women, 65+ for men) in 2010 accounting for 18.2% of the population in 2010. The percentage of older individuals has not changed since 2009 estimates. Colchester had a significantly lower proportion of older individuals compared to Essex overall (21.5%) and the East (20.7%), and slightly lower than England (19.5%).

Minority ethnic groups
There has been an increase in minority ethnic groups since Census day 2001, from 3.8% to 11.1% of the Colchester population. This was higher than the

Essex proportion of 8.2%[1], and may be in part due to factors such as the presence of the University in Wivenhoe, and Colchester Garrison.

1.3 Employment (see Section 4)

Employment/unemployment
From July 2010-June 2011 75.3% of the borough's working age population were in employment, the East of England had a rate of 73.5%. The rate in Colchester had fallen by 1.1% compared to 2008 data (76.4% employment rate). The Jobseekers allowance claimant rate had climbed from 2.7% in January 2011, to 2.9% in January 2012. However, this figure was lower than the Essex (3.2%), East (3.2%) and Great Britain (4.0%) averages.

Jobs
In relation to jobs sought and vacancies advertised through Job Centre Plus in January 2012, there were 3,085 occupations sought compared to 1,281 vacancies notified. 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 category; sales and retail assistants, there were 810 people seeking this type of job, with only 91 vacancies.

Not in Employment, Education or Training (NEET)
In October 2011, 450 individuals aged 16-19 years were classified as NEET (7.8% of the population). This was an increase of 2.1% from the figure published in the previous Local Investment Plan report (March 2010 figure). The percentage of Colchester NEET individuals is slightly higher than the Essex figure (7.7%), and Colchester ranks 4th highest when comparing all Essex local authorities (12 authorities in total).

Wage levels
Colchester's gross median annual wage for full-time workers, according to the Annual Survey of Household Earnings, was £27,243 in 2011. This is approximately 8% lower than the median pay for Essex overall (£29,446), and ranks 9th out of the 12 Essex districts, (Brentwood has the highest median pay with £39,286). Compared to England as a whole, pay in Colchester is slightly higher (approximately 2%), the median salary in England was £26,615 in 2011.

1.4 Skills (see Section 5)

No qualifications
In 2010 the Annual Population Survey estimated that 7.4% of Colchester's working age population had no qualifications. This was lower than the figure of 11.1% for Essex, the East (10.4%) and the 11.1% figure for England.
In 2008, it was estimated that 11.1% of Colchester's working age population had no qualifications, this suggests that the proportion of individuals with no qualifications had decreased.

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[1] Mid-2009 Experimental Ethnicity Estimates, Population Estimates Unit, ONS © Crown Copyright 2011

NVQ level 4
In 2010, 27.9% of Colchester residents held an NVQ level 4 qualification, an increase of 2.4% from 2008. This was higher than the Essex average of 23.0%, 0.6% lower compared to the East as a whole (26.1%), and 3.2% lower than the average for the whole of England (31.1%).

Students
Of those University of Essex graduates who responded to the survey the percentage in work in all areas had increased from 56.2% in 2008/09 to 57.1% in 2009/10. The proportion who had gained work in the Colchester area (CO1-CO8), the ‘graduate retention rate’ had also increased. There had been a slight reduction in the percentage of graduates staying on for further study at Essex University (a fall of 2.2% from 2008/09-2009/10).

Occupations
In July 2010- June 2011 Colchester had a lower level of the workforce employed in higher level occupations (SOC 2010 level 1: Managers and senior officials) at 9.1% of all occupations, than Essex at 10.1% and the East of England at 10.5%. Previous figures showed that at its peak in June 2010, Colchester had 18.0% of its workforce in these occupations.

Inequalities
There are inequalities between small areas in relation to skills and training. For instance, in relation to the Indices of Deprivation 2010, St Anne’s Estate 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
In the previous LIP evidence base document, information was sourced from the East of England Development Agency (EEDA). This was abolished on the 31st March 2012, and has not been replaced. There is however the potential for multi-agency work at a local level, to produce a similar local skills statement in the future. Any updates will be published within this section.

1.5 Enterprise (see Section 6)

According to the Business Register Employment Survey (BRES) 2010, there were approximately 71,300 individuals in private or public sector employment. In 2010 there were 5,990 VAT and/or PAYE registered businesses in the borough. These businesses accounted for 7,380 local units – effectively "workplaces" and were distributed by number across a wide range of sectors.

Business size and employees
2010 BRES data showed that when looking at the number of VAT and/or PAYE based enterprises by employment size band, 88.8% of Colchester enterprises had 0-9 employees. This figure is the same as the England percentage, but slightly lower than the Essex (89.9%), and East of England (89.5%), percentages.

BRES data also indicated that the largest proportion of enterprises in Colchester had been established for ten or more years (42.3%). This was a similar proportion to England (42.1%), but slightly lower than the East (43.4%), and higher than Essex overall (41.7%). 14.6% of Colchester businesses had been established for less than two years.

Business characteristics
In 2010, education and health represented a large proportion of the borough's employee jobs (30.1%), motor trades, wholesale and retail also made up a substantial proportion of employees (18.9%).

When looking at all individuals in employment (this includes employees and working proprietors), Colchester had a higher percentage of public sector employment (21.4%) compared to Essex (20.6%) and the East (19.8%).

'Buoyant' economy
In 2010 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 might be taking place could be 'less high value' than in those other areas.

Retail
Nomis data indicated the borough's retail sector employed 9,274 individuals in 2010. In the UK CACI Survey Colchester had slipped from 36th in the UK in 2006 to 46th in 2009. Annual retail expenditure in the town centre was £540m in 2010 – this figure has fallen by £10m since 2008.[2] The 2010 Venuescore listing from Javelin (used in the 2011 Colchester retail study), ranked Colchester 74th nationally, alongside areas such as Canterbury and High Wycombe.

1.6 Economic development and growth (see Section 7)

Colchester's Core Strategy target for job growth is 14,200 jobs between 2001 and 2021. Currently the borough is on track to achieve this target.

[2] CACI Retail Footprint © CACI Limited 2010

Floorspace
The net balance of employment floorspace shows a positive level of increase for 2010-11 given the current economic climate, although the total of 12,908 sq m was down on last year's high level of 62,598 sq m.

A slight improvement in Colchester town centre commercial completions was seen in 2010-11, up from nil the year before. The commercial property market for existing town centre property is however, buoyant, and vacancy rates were 9.7% in May 2011, which is below national averages of approximately 12-13% (source: Colchester Town Centre Retail Study, King Sturge, 2011).

In order to fulfil Core Strategy 2021 targets, the borough will need to provide a further 48,259 sq m of retail floorspace in the town centre. That target will be slightly surpassed with the development by 2015 of the Vineyard Gate shopping complex which will deliver 50,000 sq m.

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 Colchester town. Many have won awards and continue to develop their network of influential contacts nationally and internationally.

Value of tourism
Tourism was worth £224.8m to the economy of Colchester borough in 2010. The value of tourism to Colchester has risen by 256% 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 4.7m visitor trips in 2010. This was a 67% rise on the 1993 figure of 2.8m visitor trips. There were 61,000 staying trips taken by overseas staying visitors and 215,000 staying trips taken by domestic staying visitors. Of the 4.7m trips 4.4m were day trippers.

Visitors' views
The 2009 '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 included visitors of 45 years and over who accounted for 41% of all respondents. Nearly half of all respondents were 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, that 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. This was confirmed through an independent study of Colchester's retail performance and future opportunity in 2011. 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 star full service hotels in the medium to long term.

1.8 Deprivation (see Section 9)

According to the Indices of Deprivation 2010 Colchester is a relatively affluent borough but has pockets of deprivation. The borough deprivation score at 14.83 was below the England average of 19.15 (average of all England LAs). In 2007, three small areas[3] in Colchester were 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 2010, two small areas were in the top 10% most deprived in England. These were Magnolia in St Andrew's ward and St Anne's Estate in St Anne's ward.

1.9 Health (see Section 10)

According to the Association of Public Health Observatories (APHO) Health Profile 2011 for Colchester, the health of people in Colchester is generally better than the England average. 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 8.4 years higher than that for men living in the most deprived areas.[4]

Housing and health
Poor quality housing can contribute to poor health. 2010 modelled estimates for households showed that New Town North in New Town ward had the highest percentage of households that were fuel poor. 25.2% of households were estimated to be fuel poor in this small area.

Half of the six of the small areas which make up New Town ward were located in the top fifteen (out of 104) most fuel poor areas in Colchester. This ward is an area with a high proportion of private rented accommodation.

[3] There are 104 'small areas' also known as Lower Layer Super Output Areas (LSOAs) in the borough and 32,482 in England. Small areas have an average population of 1500 people and 'fit' into the existing ward boundaries.
[4] Association of Public Health Observatories (APHO) Health Profile 2011 for Colchester, Department of Health, Crown Copyright ©2010.

1.10 Crime (see Section 11)

When looking at British Crime Survey (BCS) comparator data for Colchester, from, there looks to have been a continued decrease in the overall crime rate per 1,000 individuals, decreasing by 4% from 2009/10-2010/11. Thus, Colchester maintains its reputation as being one of the safest towns in the UK. As with previous data, 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 that 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 offending 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
The Place Survey was abandoned by the government in 2010, thus the following data reflects the 2008 Place Survey.

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 those 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 Eastbourne 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

Between 2009 and 2011 the average English attainment for all schools in Colchester had remained the same, whereas the average Maths attainment percentage increased by 4%. The Colchester attainment level in 2011 at 80% (of all pupil's achieving level 4 and above in English), was slightly below the Essex and England attainment values. In Maths, the percentage of pupils achieving level 4 was the same as Essex, and England, and slightly above the East of England value (79%).

GCSE levels (5 A* to C grades)

Colchester, along with the other comparator areas, has seen an increase in the percentage of pupils gaining five or more A* to C grades at GCSE. In 2011 78.6% of pupils in Colchester obtained 5 A*-C grades.

1.13 Schools provision (see Section 14)

The Commissioning School Places in Essex 2011-2016 report replaces the Essex School Organisational Plan.

From 2007-2011, overall Essex has seen a decrease in school places falling by approximately 1.3% in all schools, with primary school places falling by 0.4% and secondary places by 2.4%. However, for Colchester, primary school pupil places have *increased* by 4.7%. Colchester secondary schools follow regional trends with a 4.3% reduction in places.

In 2011, 12.9% of Colchester school pupils were from minority ethnic groups, this is the joint fourth highest proportion out of the 12 Essex school areas (alongside Basildon).

In 2011, only six Colchester schools have sixth forms, largely due to further education being undertaken in the further education colleges. In 2010/11 Colchester had a very high number of pupils attending Colchester Institute and the Sixth Form College. 7,309 students attended these further education colleges, an 11.6% increase from 2008/09 (6,552 students). This accounts to over a third of the Essex total for those attending further education colleges.

Primary school number forecasts

Colchester's pupil forecasts of pupils on the academic roll to 2016, show figures of 16.7% with anticipated housing development (11.2% without). These are well above the next highest forecast in Epping Forest and second only to Harlow's forecasts for primary school pupils.

There will be considerable housing development over the future years in Colchester. Areas under development include additional housing on the Garrison site, the Hythe and the north of Colchester. Forecasts, when adjusted for the impact of new housing, indicate that there will be a significant deficit of school places in Colchester town in the medium / long term. Significant housing development has resulted in pupil growth across the town, and the need for additional primary provision. Additional Reception places were created at some schools in urban Colchester to meet demand for Reception places in 2010/11 and 2011/12.

1.14 Housing delivery (see Section 15)

At 31st March 2011 there were approximately 75,370 dwellings within the borough of which 6,273 are owned by the local authority. A total of 673 homes were built between 1 April 2010 and 31 March 2011, compared to 1,041in 08/09 and 518 in 09/10. Under current policies, 830 dwellings are expected to be built in the borough each year. There have been 192 recorded affordable housing completions.

1.15 The housing market and affordability (see Section 16)

The 2011 update to the Strategic Housing Market Assessment shows that of survey respondents, approximately 79% of households were homeowners. 13% rented from the council or housing association, 7% were renting from a private landlord and 1% was in 'other' rented accommodation.

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

The SHMA update 2011 shows that rent levels have shown a significant increase from 2010-2011, with average rents for 2 and 3 bedroom properties rising over 10%. Local Housing Allowance (LHA) levels in Colchester have been broadly stable over the past year with some minor variations.

There has been an increase in the number of Housing Benefit claims overall, but the housing benefit claimants in the affordable rented sector have remained broadly similar for the past 3 years. The increase is mainly due to private tenants claiming housing benefit. The most recent data shows that 3,904 private tenants in borough are claiming housing benefit to help pay their rent.

The total payments of housing benefit for private tenants have increased by 10% on average each year over the last three years. The cost of renting a home in the borough has broadly remained stable with only minor increases in some areas, so this increase must be attributed to the increase in the number of claimants or in existing claimants qualifying for more benefit due to a reduction in income for those in work.

Migration: England, Wales and the East of England

Migration estimates suggest that Colchester is a popular migration destination for all age groups, with only the 45-64 age group showing slight net outflow. Estimates suggest that net migration into Colchester has reduced from approximately 1600 individuals in mid 2008, to 610 individuals in mid 2010. These individuals are from across the country[5]. Traditionally London and other areas in Essex are places of significant migration into Colchester and this data confirms that. 35% of all migration into Colchester is from other parts of Essex and 19% from London. There is a small net inflow from the Greater Haven Gateway sub region into Colchester.

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

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

families. 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.

Homelessness and temporary accommodation
During 2010-11, 354 homelessness applications were made to the council, a reduction on the previous year. Please note during this period the service underwent restructure and working practices changed. Colchester's rate of acceptances per thousand households remains significantly higher than the England average. During 2010-11 66% of all Colchester's applications were accepted compared to 43% of all applications for England. This significant difference may be attributed to Colchester's working practices which mean applications for homelessness are likely to be taken from those households with a high probability of being accepted although we cannot stop anyone from making a homelessness application. At the end of March 2011 there were 163 households in temporary accommodation; the council achieved the Governments target of reducing by half the number of households in temp by December 2010.

Affordable housing need: Housing Needs Register
At 1st February 2012 there were 4,525 households on the register (excluding transfer applicants of which there were 1,499, i.e. households already housed in social rented accommodation that are seeking a move). The majority of households on the register require one and two bedroom homes, including sheltered, and accounts for more than ¾'s of all those on the register. The percentage of lets to one and two bedroom properties is broadly in line with the need of those on the register. Whilst there is less demand in terms of numbers for three and four or more bedroom homes these are the most difficult group to house as there are far fewer properties available and therefore 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[6].

The interurban movements are catered for by the A12 and A120 Trunk Road networks and the Great Eastern Railway Mainline. The new A12 Junction 28 was opened in December 2010 which allows for the future release of land for housing and employment. Access to the North Colchester Park and Ride will be from this junction. A planning application for Park and Ride park and ride was submitted by the County Council and, with support from Colchester Borough Council, was approved in August 2011.

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

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
One of the biggest challenges to Colchester is population growth and the dominance of the car as the main mode of travel. Significant congestion can occur during peak times within Colchester, the A12 and on several of the minor roads to the south of the borough.

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.

The LDF Core Strategy sets out the borough council’s approach to transport, which seeks to change travel behaviour to manage demand, especially of 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 and a planning permission has been granted for the site. Improvements for cycling and public transport are also being sought along with initiatives to reduce traffic in the town centre.

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. In addition, a key indicator from the adopted core strategy is the provision of a new sub station in the north growth area.

Water

The Water Cycle Study reported that Anglian Water Services can supply demand for water in Colchester borough up to at least 2035. However, the AMR 2011 highlights that water usage is increasing, both through ongoing development and increased demand. This coupled with drier summers could lead to sustained periods of restrictions on water supply. The inevitable increased rate of development will put further pressure on the water resources available in the borough.

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 now 4 Air Quality Management Areas (AQMAs) in Colchester. These are located around: Lucy Lane North in Stanway, East Street & Lower Ipswich Road, Harwich Road/St Andrews Junction, and the area known as the ‘Central Corridor’, (encompassing areas including; Mersea Road, Brook Street, the High Street & North Hill). Like most districts in the region which do not have large industrial processes, the main source of local air pollution is from motor vehicles.

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

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.

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”. [7]

Figure 1: Colchester location

[7] Haven Gateway Partnership ‘Smarter Solutions for Growth 2008-2011’

3. POPULATION

3.1 Population mid 2010

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 16.0% since mid-2001 to 181,016 in mid-2010, and 2.2% since mid-2009 (estimated population 177,100). As the largest district in Essex, Colchester accounts for 12.8% of the County population.

3.2 Population growth

Table 1: Percentage increase in population

	Colchester	Essex	East	England
2012-2016	6.2%	3.8%	4.0%	3.4%
2016-2020	5.2%	3.8%	3.8%	3.1%
2020-2024	4.7%	3.6%	3.6%	2.9%
2024-2028	4.2%	3.3%	3.2%	2.6%
2028-2032	3.7%	3.0%	2.9%	2.3%
2012-2032	**26.3%**	**18.8%**	**18.7%**	**15.0%**

Source: 2010-based Subnational Population Projections, Office for National Statistics (ONS).

Data shows that the population of Colchester has experienced the most change in Essex County between mid-2001 and mid-2010, growing by 16.0% (25,000 people). In mid 2009 percentage growth was 13.5%.

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 227,700 people in 2032, an increase of 26.3% (47,400 people) over a 20 year period. This is the largest population growth in Essex County by 0.1% (Uttlesford having the next highest growth at 26.2%). 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-2010 figures the average population density of Colchester was 550 people per square kilometre. This is an increase of 16.0% from 2001 when there were 474 people per sq km, and an increase of 2.2% from the mid-2009 estimate.

3.4 Young people

An estimated 41,700 young people were living in the borough in 2010 (those aged 19 years or younger), which accounts for 23.0% of the total population. This is slightly lower than the composition of Essex overall (23.5%), and lower than the East of England (23.7%). Compared to Mid 2009 the proportion of young individuals has decreased by 0.4%.

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 28.7% between 2012 and 2030. [8]

3.5 Older people

An estimated 33,000 people in Colchester were of retirement age (60+ for women, 65+ for men) in 2010, accounting for 18.2% of the population. The percentage of older individuals has not changed since 2009 estimates. Colchester had a significantly lower proportion of older individuals compared to Essex overall (21.5%) and the East (20.7%), and slightly lower than England (19.5%).

3.6 Ethnic minority groups

There has been an increase in minority ethnic groups since Census day 2001, from 3.8% to 11.1% of the Colchester population. This is higher than the Essex proportion of 8.2%[9], and may be in part due to factors such as the presence of the University in Wivenhoe, and Colchester Garrison.

3.7 Alternative Population Projections – Demographic Forecasts

In 2012 Edge Analytics published phase 3 of the Greater Essex Demographics Forecasts. Changes and restructuring mean that local authorities are now charged with the production of a new evidence base to support the preparation of Local Plans and to contribute to other planning activities within Essex. The information shown below is an extract from the document. It shows a range of scenarios produced to enable an evaluation of alternative growth trajectories.

Based on the information below, the population scenario that appears most applicable to the Colchester is the Approved RSS – R scenario. This appears to be most reflective of the current Colchester population, and takes into account approved policy that has been applied within Colchester Borough Council. Figure 2 shows that migration led forecasting predicts the largest population growth, followed by ONS derived sub national population projections (SNPP) – see section 3.2.

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[8] 'Mid-2010 Population Estimates, Population Estimates Unit, ONS © Crown Copyright 2011' and '2008-based Subnational Population Projections, ONS © Crown Copyright 2010'
[9] Mid-2009 Experimental Ethnicity Estimates, Population Estimates Unit, ONS © Crown Copyright 2011

If the Approved RSS – R scenario forecasts are used, population growth is likely to be lower than figures forecasted by the ONS. It is important to take this into account when looking at future need and demand on the local area.

Figure 2: Scenario Based Population Growth Colchester, 2001-2033

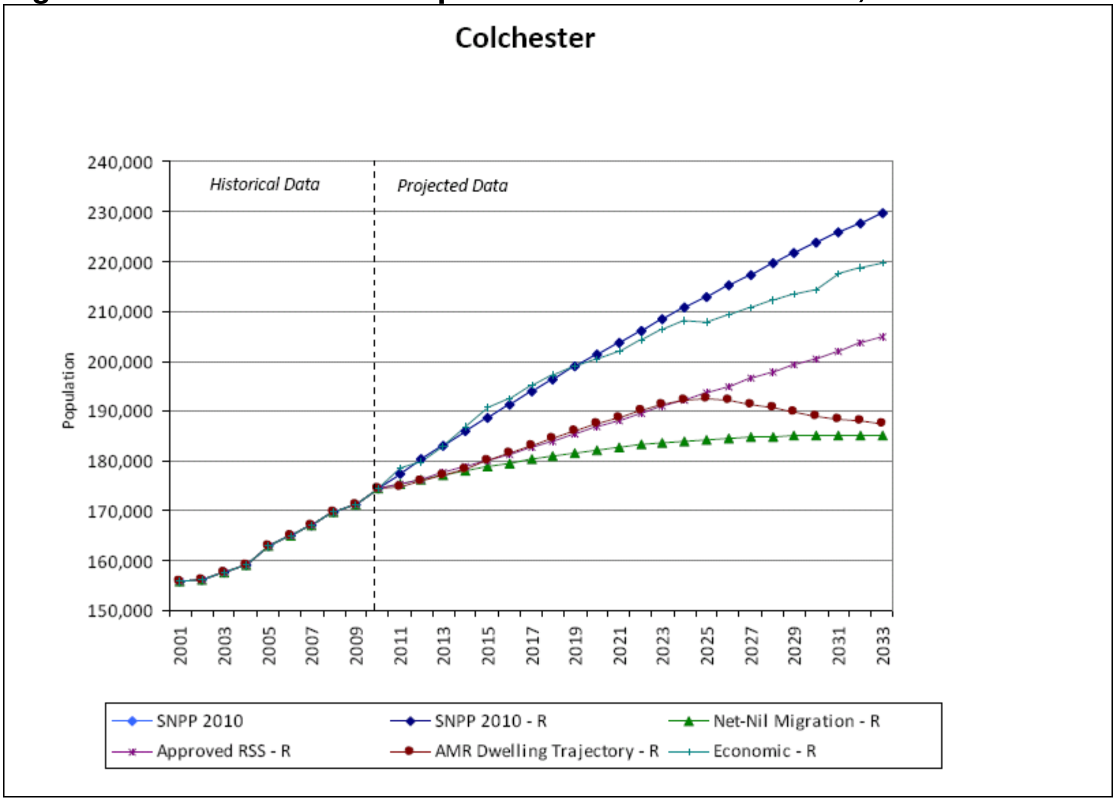


Table 2: Forecasted Population Growth Colchester, 2010-2033

	Change 2010 - 2033				Average per year		
Scenario	Population Change	Population Change %	Households Change	Households Change %	Net Migration	Dwellings	Jobs
SNPP 2010	55,265	31.7%	27,758	38.4%	1,450	1,238	1,186
SNPP 2010 - R	55,265	31.7%	27,902	38.4%	1,450	1,244	1,186
Economic - R	45,300	26.0%	24,775	34.1%	1,075	1,105	965
Approved RSS - R	30,501	17.5%	18,905	26.0%	603	843	619
AMR Dwelling Trajectory - R	12,997	7.5%	12,093	16.6%	-110	539	183
Net-Nil Migration - R	10,778	6.2%	11,529	15.9%	0	514	20

4. EMPLOYMENT

4.1 Employment and unemployment

Table 3: Employment, unemployment and economic activity (July 2010-June 2011)

All people	Colchester (numbers)	Colchester (%)	East (%)	Great Britain (%)
Economically active†	97,800	79.0	78.9	76.2
In employment†	93,400	75.3	73.5	70.2
Employees†	82,400	67.5	63.2	60.7
Self employed†	10,700	7.5	9.9	9.1
Unemployed (model-based)§	6,100	6.1	6.7	7.7

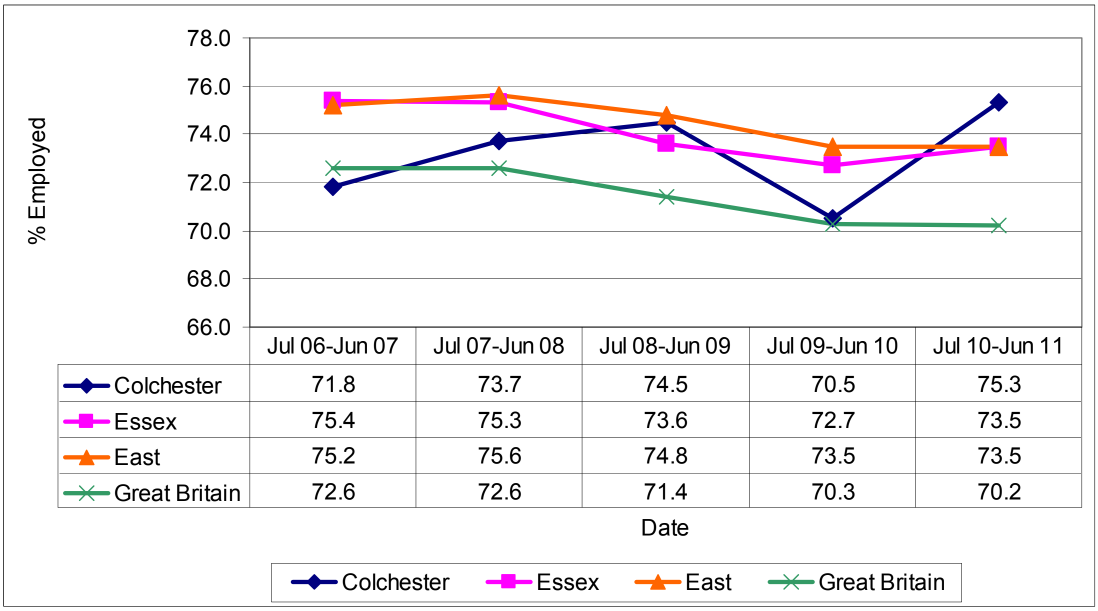
\# Sample size too small for reliable estimate (see definitions)
† numbers are for those aged 16 and over, % are for those of working age (16-59/64)
§ numbers and % are for those aged 16 and over. % is a proportion of economically active

Source: ONS Annual Population Survey July 2010-June 2011, downloaded from Nomis, March 2012.

According to the Annual Population Survey, the percentage of individuals in Colchester that were economically active was 79.0%, between July 2010 and June 2011. This figure is slightly higher than the regional figure of 78.9% and higher than the Great Britain rate of 76.2%. The Colchester numbers were 97,800 of which 93,400 were in employment, 82,400 were employees, 10,700 were self employed and 6,100 were unemployed. The latter figure (6.1% of the working age population) is slightly lower than the East (6.7%) and national (7.7%) averages.

4.2 Employment rate time series

Figure 3: Annual Employment Rate (Percentage of Working Age Population)



	Jul 06-Jun 07	Jul 07-Jun 08	Jul 08-Jun 09	Jul 09-Jun 10	Jul 10-Jun 11
Colchester	71.8	73.7	74.5	70.5	75.3
Essex	75.4	75.3	73.6	72.7	73.5
East	75.2	75.6	74.8	73.5	73.5
Great Britain	72.6	72.6	71.4	70.3	70.2

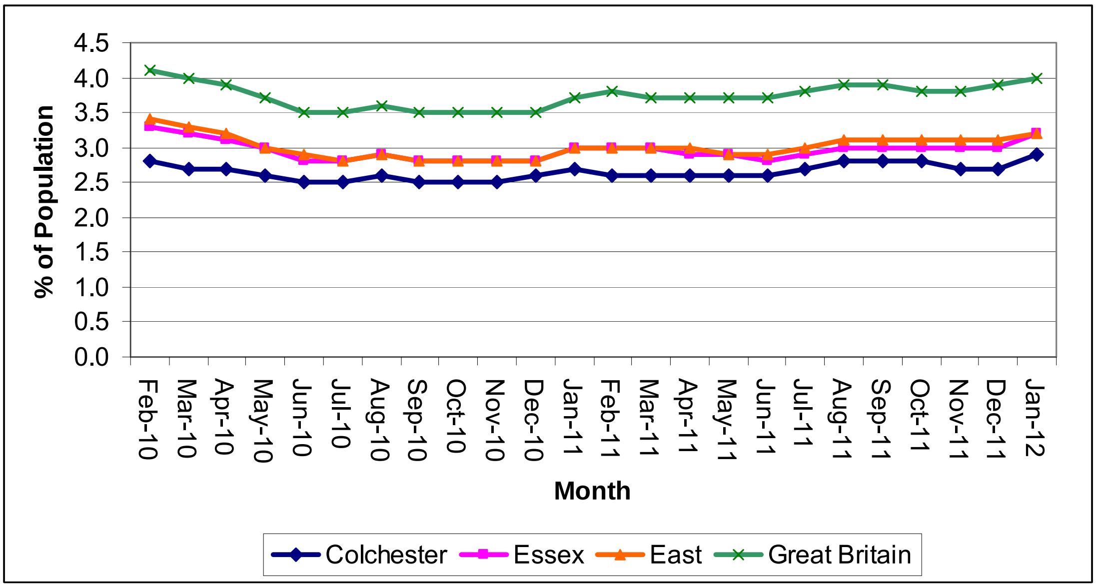
Source: ONS Annual Population Survey July 2010-June 2011, downloaded from Nomis, March 2012. Note – This is % of working age population in employment

As figure 3 illustrates, Colchester's employment rate dipped sharply in 2009-2010, falling below employment rates for Essex and the East of England (EoE). However, 2010-2011 data showed a recovery in terms of employment rate, that overtook both Essex and EoE rates. Employment rates increase by 4.8% from 2009-2010 to 2010-2011.

4.3 Jobseekers allowance

The percentage of Job Seeker Allowance (JSA) claimants in Colchester in January 2012 was 2.9%, lower than Essex (3.2%), EoE (3.2%) and national (4.0%) averages. The claimant rate for Colchester has been continually lower than that of Essex, the EoE and Great Britain as a whole. The largest increase in JSA claimants has been in the 16 to 24 year old age group which accounts for 20.7% of all JSA claimants, followed by 25 to 34 year olds at 12.6%, meaning the majority of JSA claimants (55.1%) are aged 34 and under.

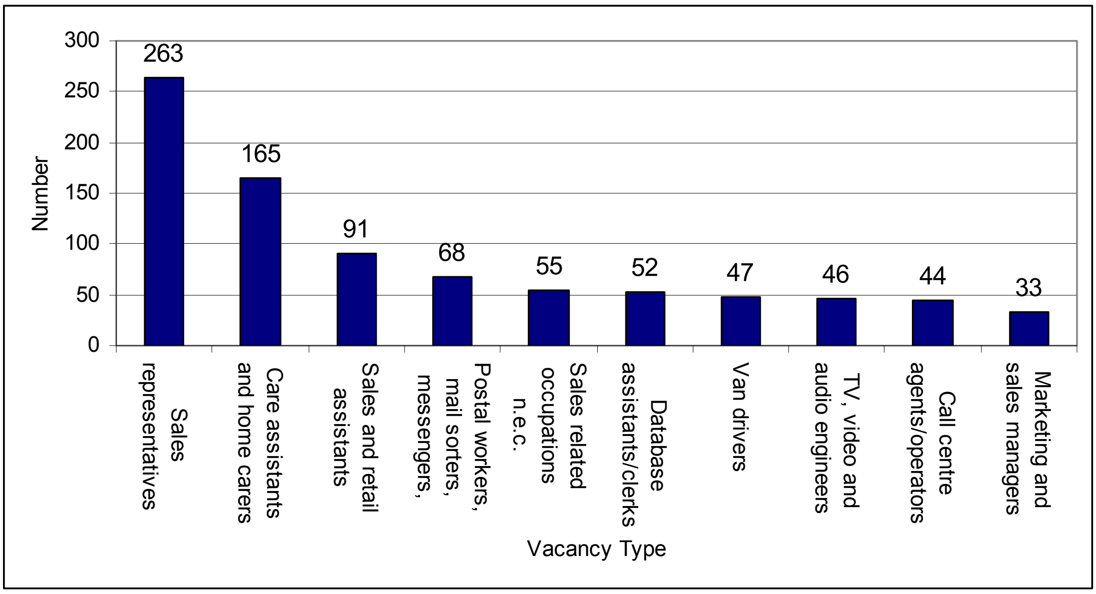
Figure 4: Rate of Working Age Population Claiming JSA, February 2010 – January 2012



Source: ONS claimant count as a percentage of the working age population, Rates from 2011 onwards are calculated using the mid-2010 resident population aged 16-64. © Crown copyright, 2012 downloaded from Nomis March 2012.

4.4 Jobseekers and vacancies

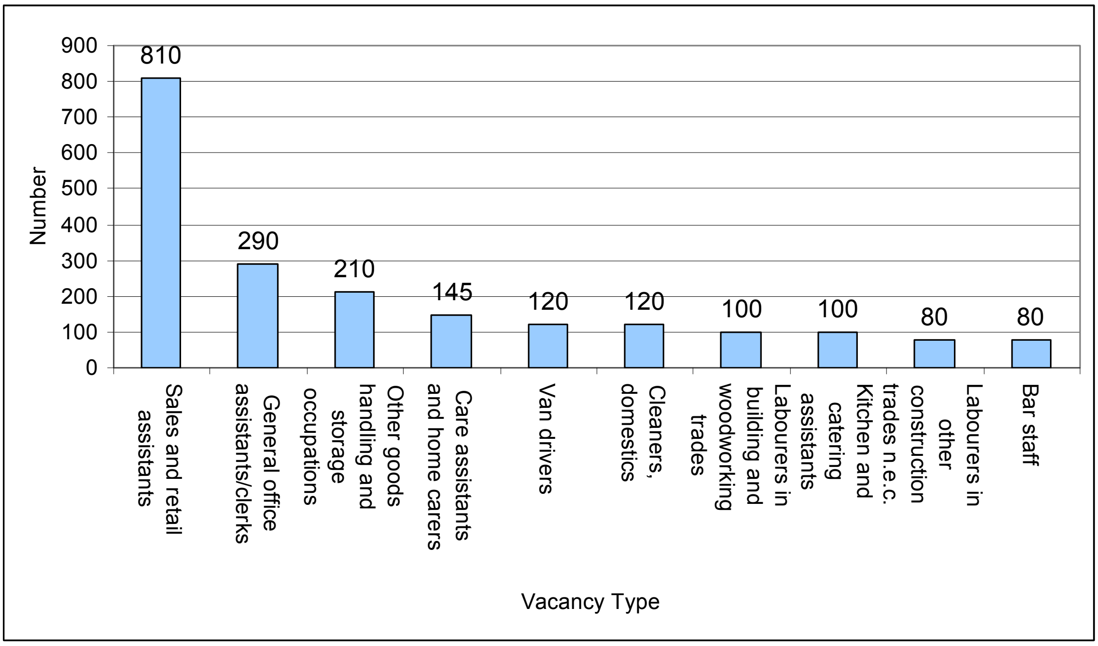
Figure 5: Job Centre Plus Vacancies, Notified by Occupation, in Colchester, January 2012



Source: Job Centre Plus & Nomis, Colchester branch site level vacancies, March 2012

1,281 vacancies were notified in January 2012, with the highest number of vacancies in sales representative occupations (263 vacancies), followed by care assistants and home carers (165 vacancies notified).

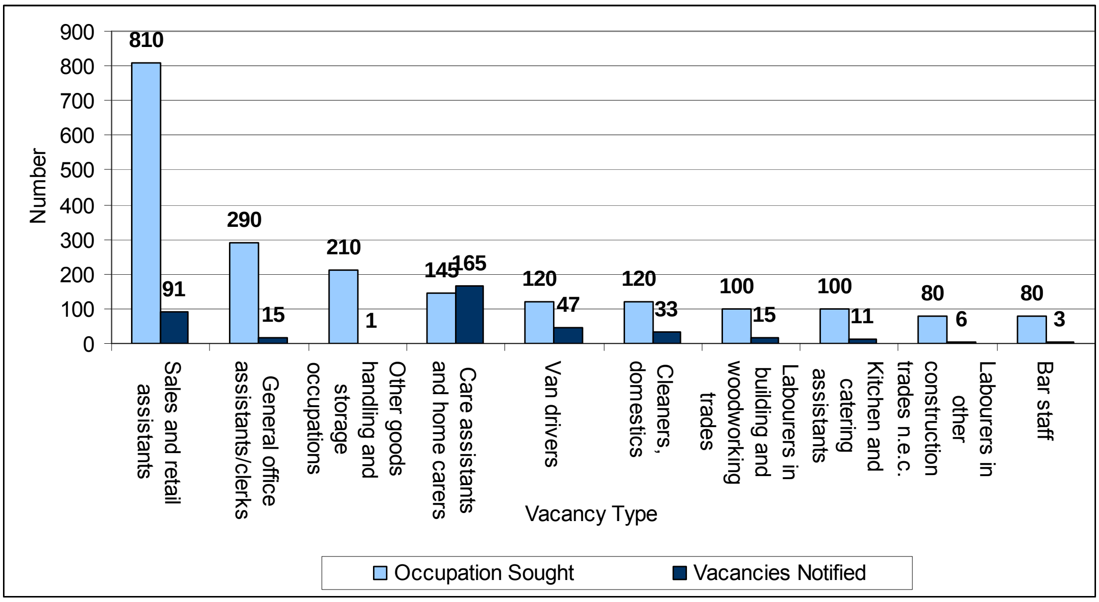
Figure 6: Job Centre Plus, Occupations Sought in Colchester, January 2012



Source: Job Centre Plus, Colchester branch site level vacancies, March 2012

As shown in figure 6, in January 2012, 810 individuals were searching for sales and retail assistant jobs through the Job Centre Plus. 290 people were seeking general office assistant/ clerk work, and 210 were looking for other goods handling and storage work.

Figure 7: Comparison of Top Ten Occupations Sought, with Number of Notified Vacancies in Colchester, January 2012



Source: Job Centre Plus, Colchester branch site level vacancies, March 2012; Colchester branch site level vacancies, March 2012

Figure 7 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 810 jobs sought for only 91 vacancies.

4.5 Jobseekers to jobs (all jobs)

Table 4: Numbers of vacancies to jobs sought

Job Centre Plus	June 2010* percentage	Jan 2012 vacancies	Jan 2012 occupancy sought	Jan 2012 percentage (vacancies to occupancy)
Basildon	18.8%	967	5,005	19.3%
Braintree	40.2%	751	2,330	32.2%
Brentwood	44.6%	420	1,035	40.6%
Canvey Island	9.7%	96	1,120	8.6%
Chelmsford	39.2%	1,260	3,885	32.4%
Clacton	19.0%	278	2,780	10.0%
Colchester	**37.1%**	**1,281**	**3,805**	**33.7%**
Grays	33.6%	760	3,870	19.6%
Harlow	24.3%	431	3,370	12.8%
Harwich	11.3%	138	805	17.1%
Loughton	18.5%	318	1,950	16.3%
Rayleigh	29.3%	490	1,420	34.5%
Southend	17.0%	686	5,930	11.6%
Witham	25.9%	218	1,030	21.2%

Source: Nomis, April 2010 & March 2012
**June 2010 figures are included as a comparison as they were the figures used in the previous LIP.*

Table 4 shows the value of vacancies advertised through the Job Centre Plus was 33.7% of the number of job seekers in Colchester. Of the areas shown, Colchester had the third 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)

In Essex since April 2011, reporting has been based on all 16 to 19 year olds who are resident in our area. (These are 2008, 2009 and 2010 cohort groups). Previously the reporting was based on the numbers of 16 to18 year olds who were resident in Essex if they were NEET, Unknown, in Employment or training and if they were educated in Essex LA. As a result the total cohort size has increased, unknowns have gone up considerably due to the residency rule and 19 year olds being included in our figures.

In Districts – it is worth noting that previous year's data has been calculated on the basis of those in post 16 education being counted in the location of their educational establishment, with the rest of the cohort being calculated on residency. In 2011-12 they are all counted on the basis of their residency. The previous year's data is consequently not comparable, hence the comparisons in the following section are compared within the same financial year.

Table 5: September 2011- October 2011 (NEET – Adjusted Figures)

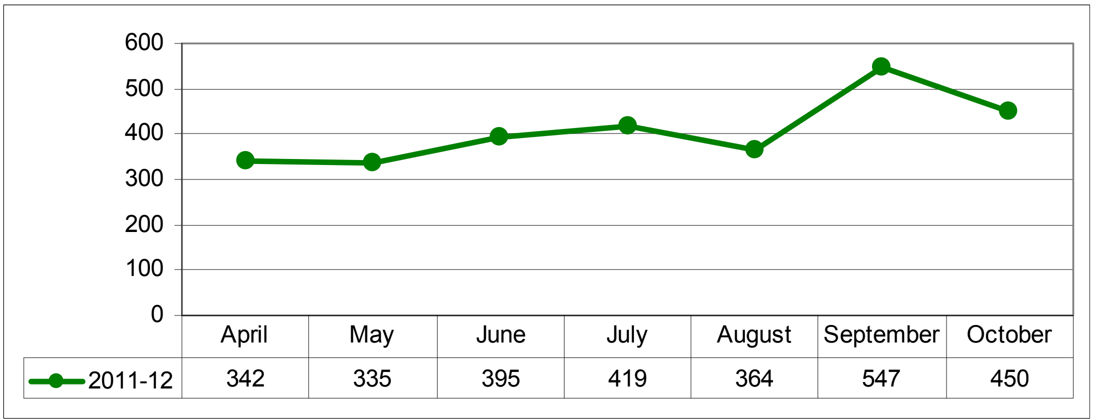
	NEET Adjusted					
	%		**Numbers**			
District	**Sep-11**	**Oct-11**	**Sep-11**	**Oct-11**	**Difference**	**DOT***
Basildon	9.6%	7.9%	637	526	-111	↓
Braintree	8.9%	7.8%	451	397	-54	↓
Brentwood	7.0%	6.4%	176	159	-17	↓
Castle Point	9.5%	8.2%	323	279	-44	↓
Chelmsford	7.7%	7.9%	463	476	13	↑
Colchester	9.4%	7.8%	547	450	-97	↓
Epping Forest	7.1%	6.6%	237	221	-16	↓
Harlow	9.2%	7.4%	270	217	-53	↓
Maldon	8.1%	7.2%	190	169	-21	↓
Rochford	7.1%	6.3%	228	204	-24	↓
Tendring	11.2%	10.0%	544	490	-54	↓
Uttlesford	6.8%	5.9%	163	141	-22	↓
Essex	**8.7%**	**7.7%**	**4229**	**3729**	**-500**	↓

** DOT = Direction of Travel – Numbers of Individuals NEET*
Source: Colchester 14 to 19 Area Planning Group (APG) NEET data set, provided by NE Area Integrated Youth Services, © Essex County Council (December 2011)

As table 5 indicates, in October 2011 7.8% of Colchester's 16 to 19 year old population were classed as NEET. This was slightly higher than the Essex average of 7.7%, and placed Colchester fifth out of the twelve Essex districts.

In terms of numbers of NEET 16 to 19 year olds, Colchester had the fourth highest number of the twelve districts at 450.

Figure 8: Time series NEET April 2011 to October 2011



Source: Colchester 14 to 19 Area Planning Group (APG) NEET data set, provided by NE Area Integrated Youth Services, © Essex County Council (December 2012)

The adjusted NEET figure is shown on a monthly basis in figure 8. Across the year, the lowest adjusted NEET figure was given for May 2011, whereas the highest NEET figure given was 547 in September 2011.

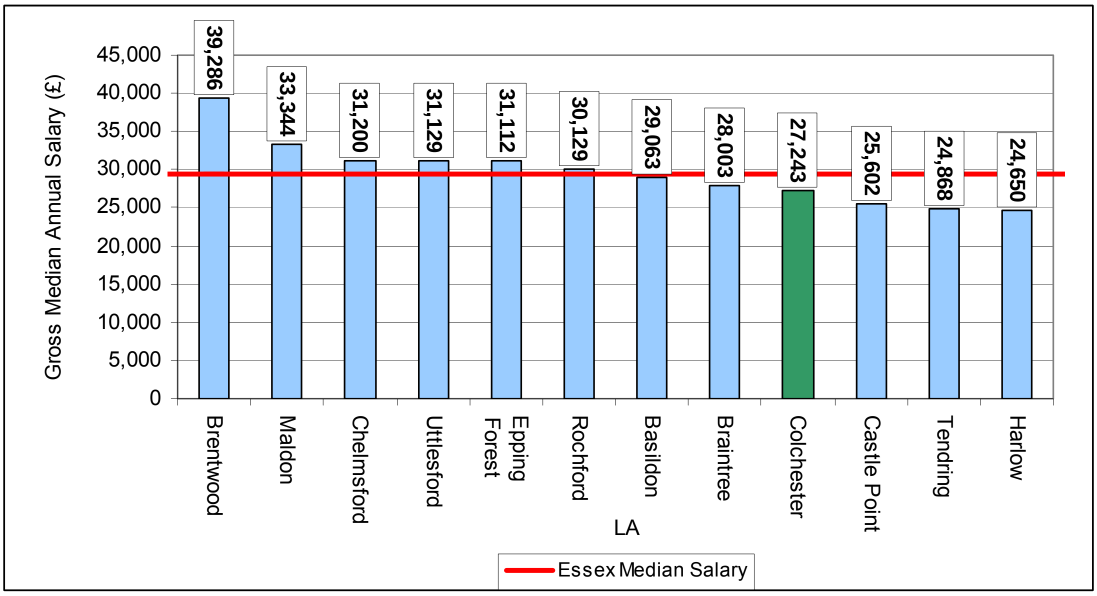
However, Essex County Council note that historically, NEET figures peak in September, as young individuals often commence college/ further training and transfer from the NEET classification to the EET (education, employment or training). Thus, numbers can be distorted in September and October, as the information is fed from college/providers on to the NEET system.

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, in 2009 the density value was 0.73. This figure is lower than the regional and national figures and other districts such as Chelmsford (0.82) and Ipswich (0.87).

4.8 Earnings

Figure 9: Median Wage by Essex Local Authority, 2011



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

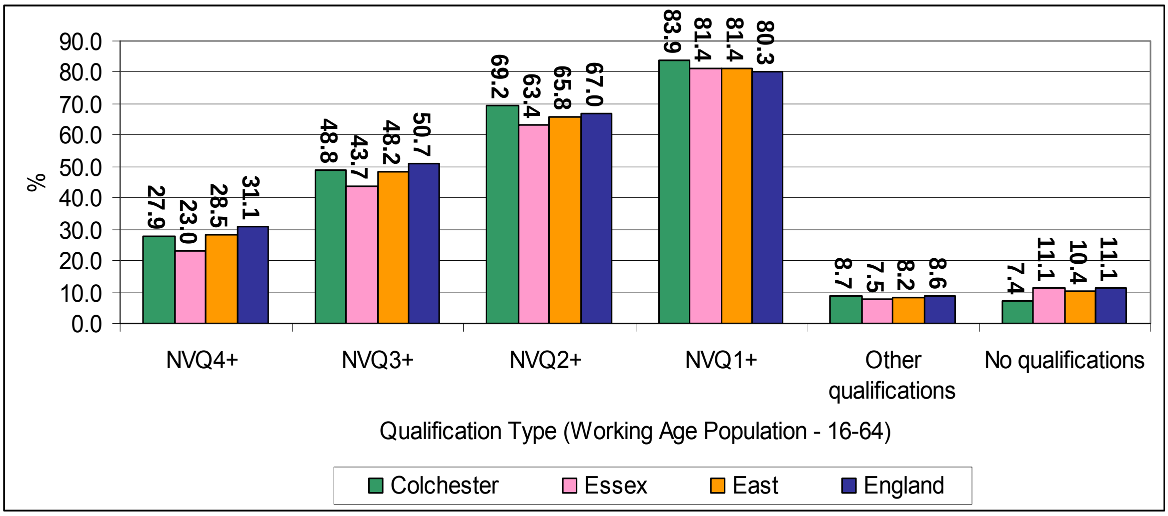
The Annual Survey of Household Earnings 2011 showed that the median gross annual salary was estimated to be £27,243 in Colchester. This placed Colchester ninth out of the 12 Essex districts and well below the overall Essex median of £29,446. This difference may partially be due to the proximity to London 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 was £530.20 in 2011. For males this figure was £575.8 and for females £489.50. The median hourly pay for fulltime workers was £13.13. For males this was £13.45 and for females £12.45. Between 2010 and 2011, there was an increase of 2.3% in gross weekly wage values in Colchester.

5. SKILLS

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

Figure 10: Qualification Type for the Working Age Population (16-64) by Area, January – December 2010



Source: Annual Population Survey, ONS crown copyright (From Nomis March 2012)

Between January and December 2010, the Annual Population Survey (figure 10) estimated that 7.4% of Colchester's working age population had no qualifications, a reduction of 3.7% from 2008 data. This was lower than the estimated 11.1% for Essex, 10.4% for the East and 11.1% for England.

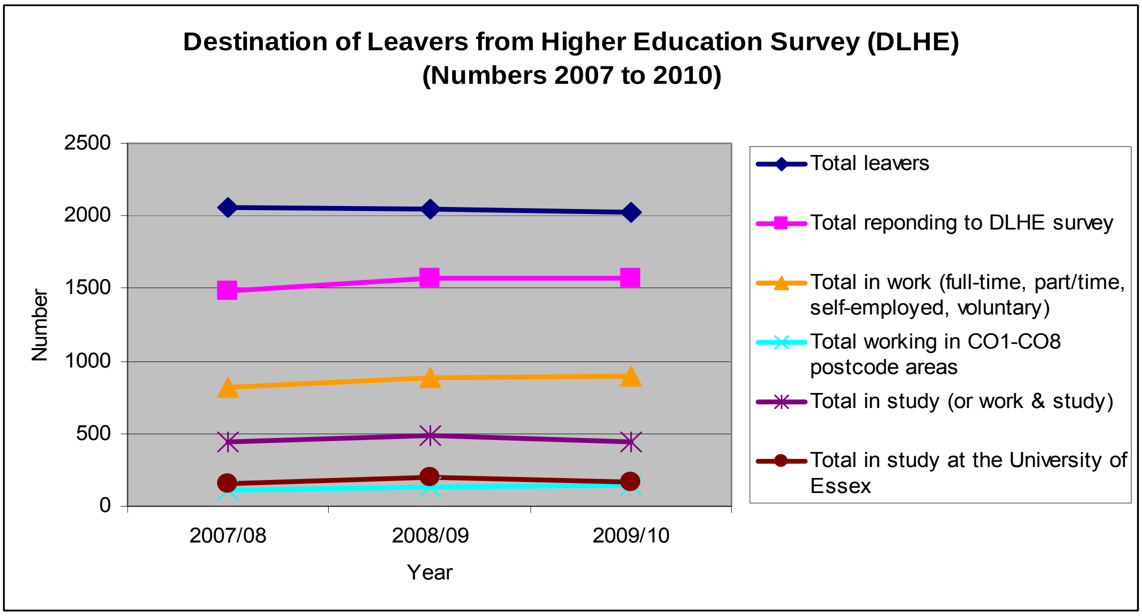
Colchester had a higher percentage of individuals obtaining NVQ levels 1-3 than Essex, the East and England as a whole. However, the East had a higher proportion of individuals qualified to NVQ4 level compared to Colchester, (28.5% in the East compared to 27.9% in Colchester). 83.9% of Colchester's working age population had obtained NVQ level 1 or above. An increase of 2.6% from 2008, suggesting that Colchester's population has become more qualified over time.

The fact that the largest proportion of Colchester residents achieve NVQ level 1 or above is to be 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.

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 11:



Source: University of Essex, 2007-2010.

Figure 11 above and Table 6 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 in 2009/10 the response rate was 77.7%. For the purposes of this survey 'work' includes full-time work part-time work, self-employment and voluntary work.

Table 6: Percentage of graduates in work and study

Completing during academic year	Total leavers	Total responding to DLHE survey	% UoE graduates in work	% UoE graduates in work Colchester (CO1-CO8)	% UoE graduates in study (or work & study)	% UoE graduates in study at UoE
2007/08	2057	1484	55.5	7.3	30.2	10.8
2008/09	2051	1568	56.2	8.5	30.9	12.5
2009/10	2021	1571	57.1	9.0	27.9	10.3

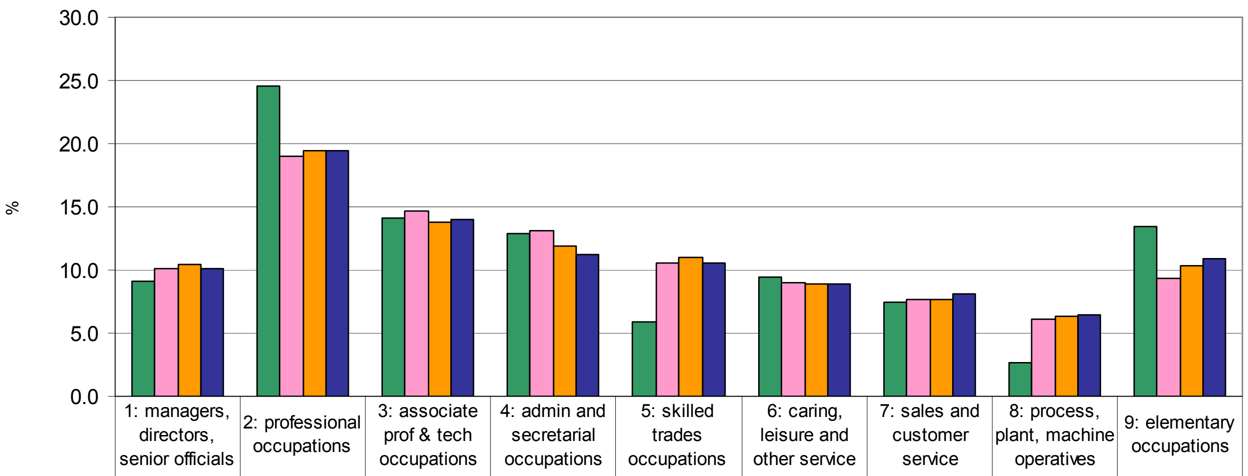
Source: Destination of Leavers from Higher Education Survey, University of Essex, 2007-2010.

Of those University of Essex graduates who responded to the survey the percentage in work in all areas had increased from 56.2% in 2008/09 to 57.1% in 2009/10. The proportion who had gained work in the Colchester area (CO1-CO8), the 'graduate retention rate' has also increased. There has been a slight reduction in the percentage of graduates staying on for further study at Essex University (a fall of 2.2% from 2008/09-2009/10).

Please note calculations do not include data from academic partners (Writtle College, South Essex College, Colchester Institute), and it does include data about students from Essex University's other campuses (Southend and Loughton).

5.3 Occupational levels

Figure 12: SOC 2010 Occupation Group by Area, July 2010- June 2011



	1: managers, directors, senior officials	2: professional occupations	3: associate prof & tech occupations	4: admin and secretarial occupations	5: skilled trades occupations	6: caring, leisure and other service	7: sales and customer service	8: process, plant, machine operatives	9: elementary occupations
Colchester	9.1	24.6	14.1	12.9	5.9	9.5	7.4	2.7	13.4
Essex	10.1	19.0	14.7	13.1	10.6	9.0	7.7	6.1	9.3
East	10.5	19.4	13.8	11.9	11.0	8.9	7.7	6.3	10.3
England	10.1	19.4	14.0	11.2	10.6	8.9	8.1	6.4	10.9

Source: Annual Population Survey, ONS crown copyright (From Nomis March 2012). Please note numbers and % are for those of 16+, and % is a proportion of all persons in employment.

In Colchester, as figure 12 illustrates, the largest percentage of those in employment were employed at Standard Occupational Classification (SOC) level 2 (Professional Occupations), this pattern was the same for all geographies. This differs from October 2008 –September 2009 data when SOC level 1 (Managers and senior officials) was the classification category with the highest percentage of employees (at all geographies).

24.6% of Colchester employees were in professional occupations, a much larger proportion than Essex (19.0%), the East (19.4%) and England (19.4%). Colchester had a significantly lower proportion of the workforce employed in skilled trades occupations (5.9% compared to 10.6% in Essex as a whole), and a lower proportion of process, plant & machine operatives (2.7% compared to 6.1% in Essex).

5.4 Indices of deprivation 2010 (ID10): Education, skills and training domain

Table 7: Small areas[10] within highest 10% in England for Education, skills and training deprivation, ID10

Deprivation %	Ward name	Local area name	Rank ID2010	Rank ID2007	Movement from 2007 to 2010
1-10%	St Anne's	St. Annes Estate	387	553	UP
	St Andrew's	Magnolia	579	929	UP
	St Andrew's	Salary Brook South	1,102	1,938	UP
	St Andrew's	Forest	1,207	1,675	UP
	Shrub End	Iceni Square	2,972	2,888	DOWN

Looking at small areas within Colchester can highlight inequalities that exist within the borough in education, skills and training. Table 7 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 Estate small area within St Anne's ward, was within the highest 2% in the country. This mirrors findings from the Indices of Deprivation 2007. It ranked 387th out of all 32,482 small areas in England (it ranked 553rd in 2007). These findings indicate extreme disadvantage. Since 2007, the number of deprived small areas within the top 10% in England in relation to Education, skills and training has decreased from 8 small areas to 5 small areas. However, of these 5 small areas, 4 had a higher (more deprived) rank than 2007.

Three of these small areas were in St Andrews ward, which meant that half of the small areas in St Andrew's were in the most education, skills and training deprived in the country. St Anne's Estate small area was also the third highest small area in Essex for this type of disadvantage (out of 863 small areas).

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

5.5 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

[10] 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.

skill initiatives. A recent report, (the CBI/EDI Education and Skills Survey 2010[11]) highlights concerns that employers have around the literacy, numeracy and IT skills of their lower skilled workforces.

In the previous LIP evidence base document, information was sourced from the East of England Development Agency (EEDA). This was abolished on the 31st March 2012, and has not been replaced. There is however the potential for multi-agency work at a local level, to produce a similar local skills statement in the future. Any updates will be published within this section.

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).

5.6 Training opportunities

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. 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 this skills gap.

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

6. ENTERPRISE

6.1 Major employers in Colchester

Table 8: Key Employers in Colchester

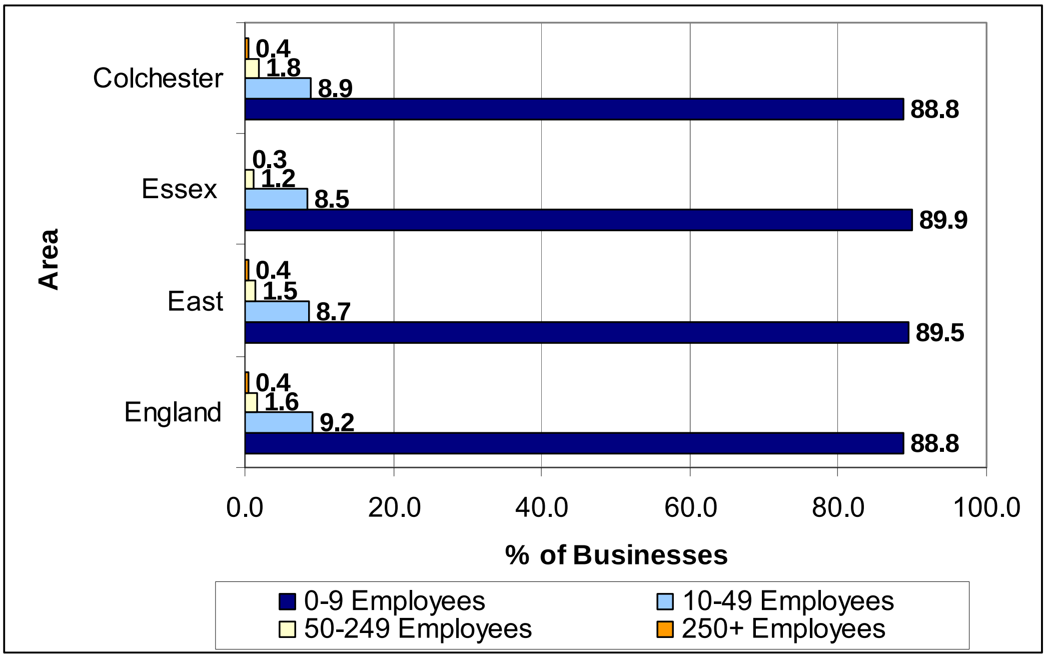
Employer	Numbers of employees	Activity
COLCHESTER DISTRICT GENERAL HOSPITAL	3000	Hospital Activities
UNIVERSITY OF ESSEX	2000	Higher Education
COLCHESTER BOROUGH COUNCIL	1500	Local Authority
COLCHESTER INSTITUTE	900	Adult And Other Education
MONTHIND CLEAN	800	Industrial Cleaning
SEVERALLS HOSPITAL	800	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 8 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). This data is due for an update in mid 2012, and will be updated when the information is made available to us.

6.2 Number and types of businesses

According to the Business Register Employment Survey (BRES) 2010, there were approximately 71,300 individuals in private or public sector employment. In 2010 there were 5,990 VAT and/or PAYE registered businesses in the borough. These businesses accounted for 7,380 local units – effectively "workplaces" and were distributed by number across a wide range of sectors.

Figure 13: Breakdown of Businesses by Employment Size Band and Area, 2010



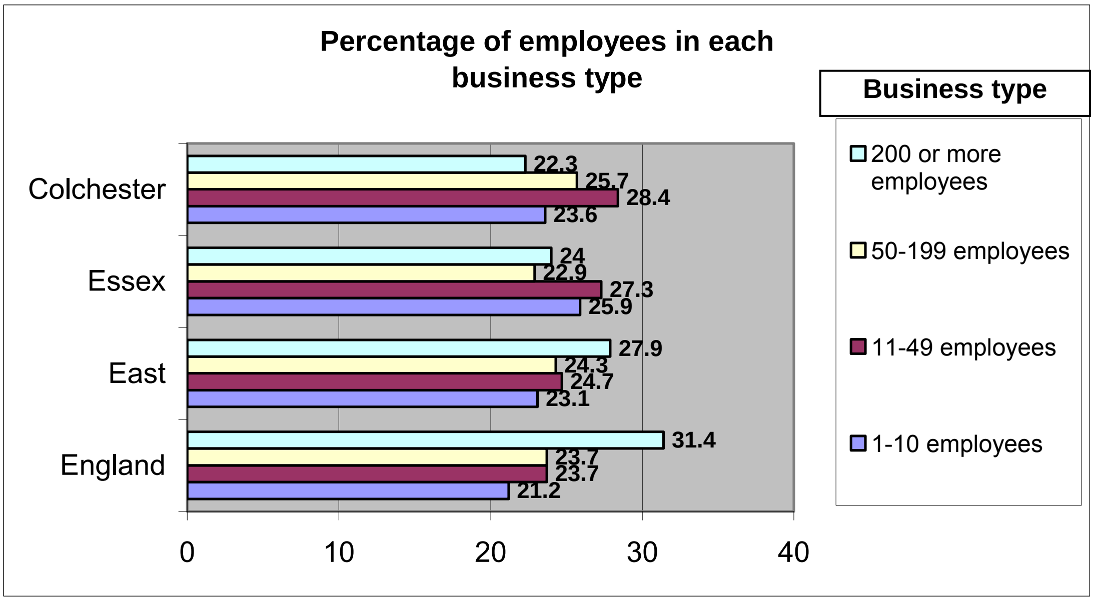
Source: BRES data ©Crown Copyright ONS/NOMIS 2012.

As Figure 13 illustrates, 2010 BRES data shows that when looking at the number of VAT and/or PAYE based enterprises by employment size band, 88.8% of Colchester enterprises had 0-9 employees (micro businesses). This figure is the same as the England percentage, but slightly lower than the Essex (89.9%), and East of England (89.5%), percentages. Small businesses (10-49) accounted for 8.9%, medium sized businesses (50 -249) for 1.8% and large businesses (249+) for 0.4%.

6.3 Numbers of employees in each business type

Please note this section relates to 2008 data, as more recent data is not available. Thus, it should not be compared with data in section 6.2.

Figure 14:



Source: Annual Business Inquiry ©Crown Copyright ONS 2008.

As figure 14 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%).

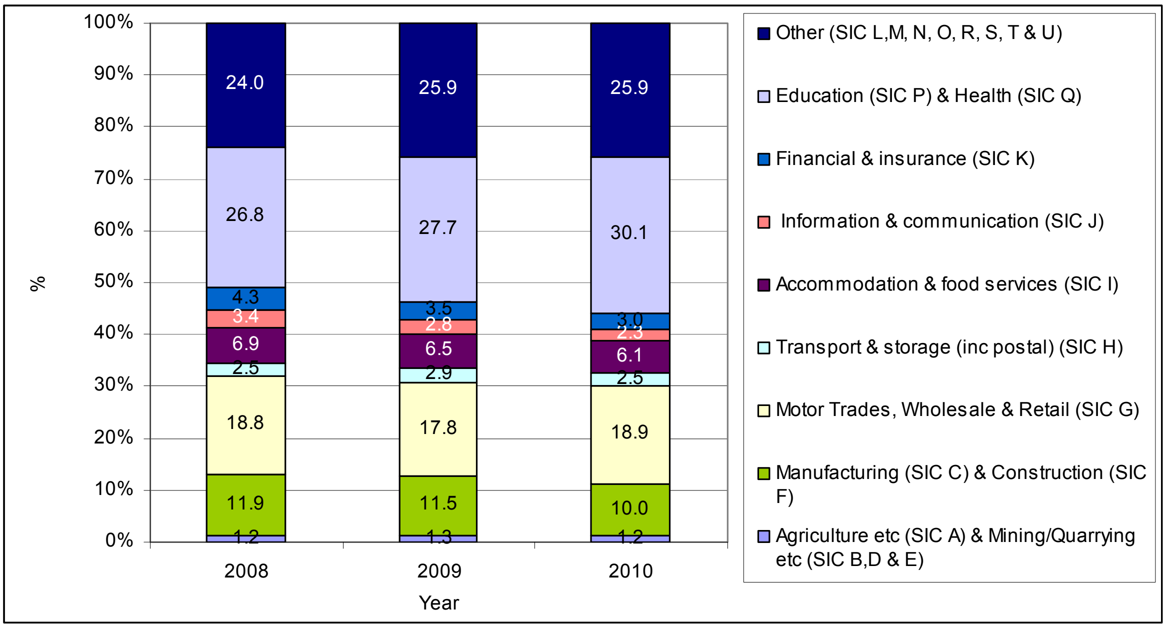
Small businesses (employing 11-49 people) employed 28.4% of all employee jobs in Colchester. This was slightly higher than the proportion for Essex of 27.3%, and higher than the figure for the East (24.7%) and England (23.7%).

Medium sized businesses (employing 50-199 employees) employed 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 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 15: Colchester Economic Structure according to UK SIC 2007 Classifications 2008-2010



Source: BRES data ©Crown Copyright ONS/NOMIS 2012.

As figure15 reveals, in 2010, education and health represented a large proportion of employee jobs (30.1%), motor trades, wholesale and retail made up a substantial proportion of employees (18.9%). The 'other' category included; Arts, entertainment, recreation & other services as well as property, professional, scientific & technical, business administration & support services and public administration & defence. These SIC classification groups have been amalgamated to enable easier visual interpretation of data.

Splitting out the SIC categories and comparing them on a regional and national level, reveals that Colchester had a lower proportion of employees in manufacturing industries in 2010, (6.1% in Colchester, compared to 8.9% in Essex and 8.8% in England). 16.5% of Colchester employees were employed in health related professions in 2010, this was much higher than Essex (12.7%), Eastern (12.1%) and England (12.9%) levels. The education sector (13.6%) makes up the second highest proportion of employees in Colchester, this is similar to the composition of Essex. However, in the East of England and England as a whole, retail makes up the second largest proportion of employees.

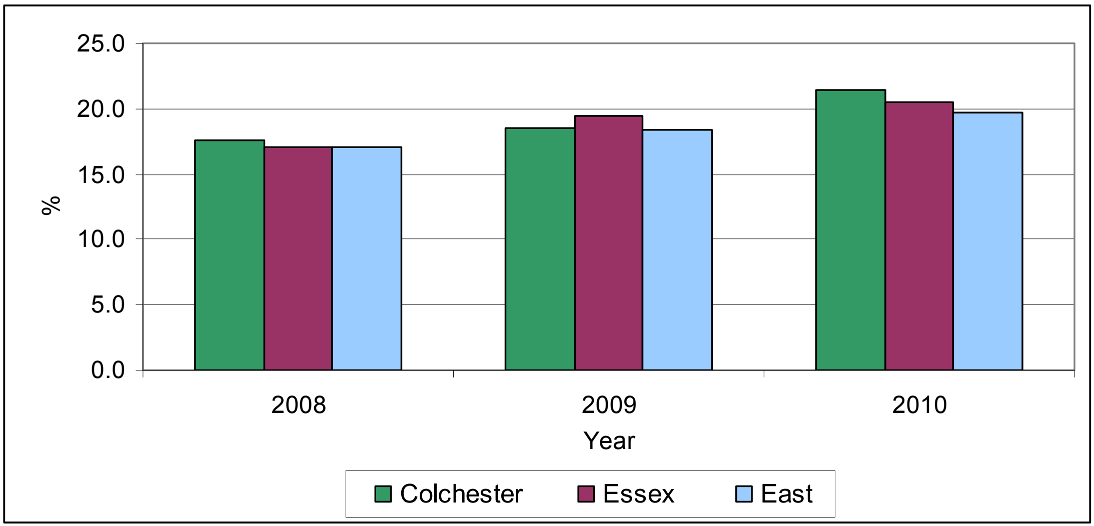
6.5 Creative industries

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 16: Percentage Employed in the Public Sector by Area, 2008-2010



Source: BRES data ©Crown Copyright ONS data is shown for 2008-2010 (2010 Provisional). For this analysis the Public Sector is defined as Public corporations/ Nationalised Bodies, Central Government and Local Authority.

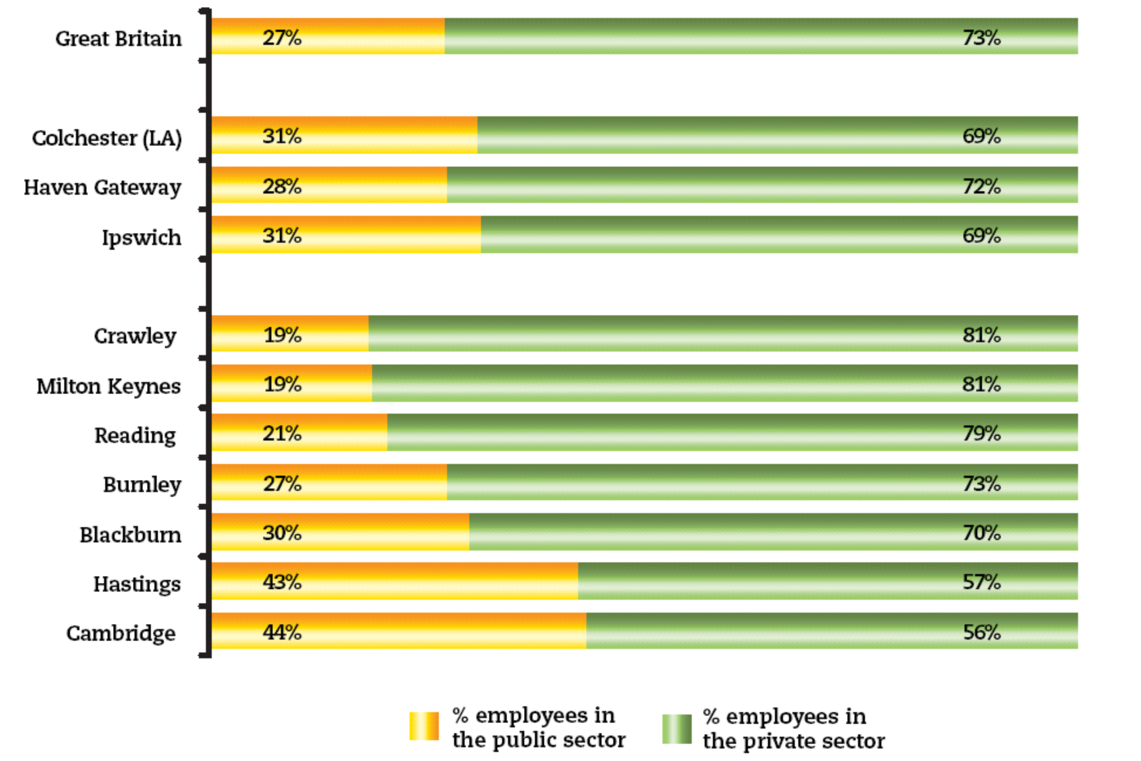
When looking at all individuals in employment (this includes employees and working proprietors), Colchester had a higher percentage of public sector employment (21.4%) compared to Essex (20.6%) and the East (19.8%). Employment in the public sector has been consistently higher compared to the East as a whole since 2008, however it was lower than the value for Essex in 2009 (18.5% compared to 19.4% in Essex).

It is important to note that this is the latest local level data available, however national figures show that in 2011, over a quarter of a million public sector jobs were cut as part of reforms and cost cutting measures[12]. This is an area that needs monitoring as the major overhaul of the public sector continues.

Figure 17 below highlights findings reported in the previous LIP evidence base, it is worth including these in the update for historical and comparative purposes, however the outlook since these were initially reported has changed significantly.

[12] The Guardian 2012 http://www.guardian.co.uk/business/2012/mar/14/osborne-austerity-270000-public-sector-jobs

Figure 17: Ratio of public to private sector jobs, 2008



Source: Annual Business Inquiry

Figure 17 shows how the ratio of public to private sector jobs in Colchester and the Haven Gateway[13] area compares to a selection of other cities in England. Figure 17 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[14] More work would be needed to understand whether Colchester is equally as vulnerable as its neighbour.[15]

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[16].

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[13] The Haven Gateway sub-region is defined as Colchester, Tendring, Ipswich, Babergh, Suffolk Coastal and Mid Suffolk districts.
[14] Larkin K (2009*) Public Sector Cities: trouble ahead.* London: Centre for Cities.
[15] Webber, C (July, 2010) *Colchester, Ipswich and the Haven Gateway sub region: comparative analysis, London:* Centre for Cities.
[16] 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.[17]

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'[18]. 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.

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[19]. See item 6.7 below.

Recently, government changes have paved the way for massive changes in the public sector. Restructuring of the NHS means that Primary Care Trusts will be phased out from 2013, and this has led to job insecurity for many public sector workers. In addition reports suggest that the continuing weak employment market in 2012 has been characterised by a fall in public sector employment, with local government shedding jobs with more force than was initially expected[20]. Data published in the next couple of years should give an idea as to the extent of local public sector cuts.

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

In July 2010 the Haven Gateway Partnership commissioned 'Centre for Cities'[21] 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*[22]. The typology categorises the economies of England's cities as 'buoyant', 'stable' or 'struggling'. Below are extracts from the research[23]:

---

[17] 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.
[18] Oxford Economics, 2010.
[19] Webber, C and Swinney, P (2010) *Private sector cities: a new geography of opportunity © Centre for Cities.*
[20] The Guardian 2012 http://www.guardian.co.uk/business/2012/mar/14/public-sector-job-cuts-unemployment-economists
[21] 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
[22] Webber, C (July, 2010) *Colchester, Ipswich and the Haven Gateway sub region: comparative analysis, London:* Centre for Cities.
[23] 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 9 lists England's buoyant cities and shows that Colchester would fit comfortably into this category, alongside places like Cambridge, Reading and Bristol.

Table 9: 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.

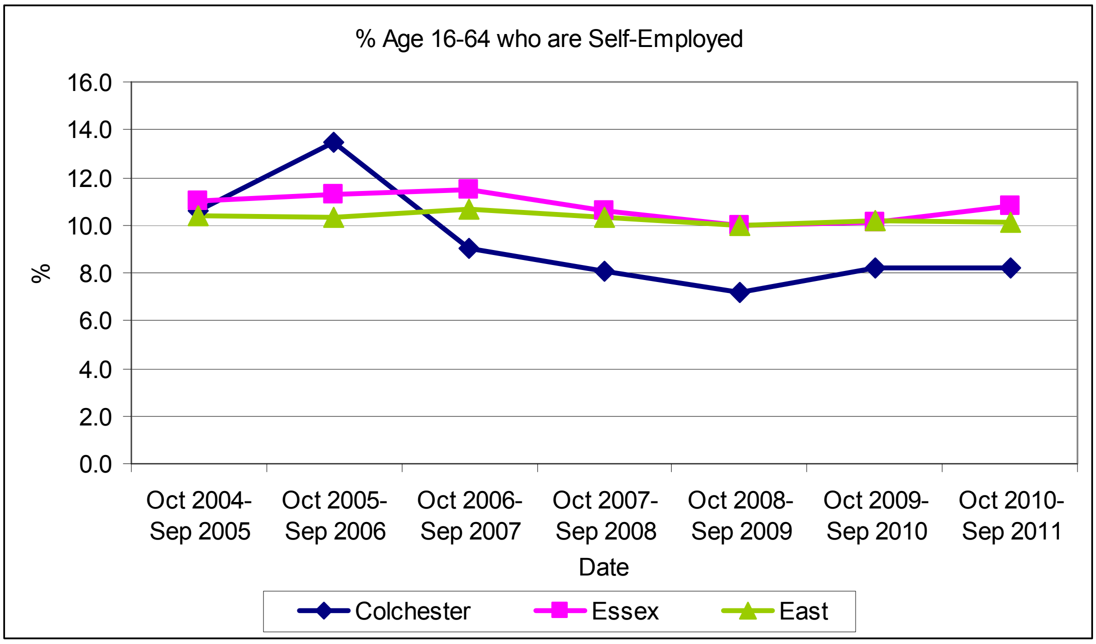
Figure 18: Mean weekly wages, 2008 (see also item 4.8)

Source: Annual Survey of Hours and Earnings

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 19:



Source: Annual population survey data ONS © Crown Copyright Downloaded from Nomis April 2012

The rate of self employment in Colchester averaged 9.3% of the economically active population between October 2004 and September 2011. This rate is lower than the both the regional rate (10.3%) and the Essex rate (10.8%). The rate has fluctuated between a high at 13.5% in 2005/06 to the low rate of 7.2% in 2008/09 (see figure 19 above).

6.9 New business formation

When looking at births of new enterprises, 2010 ONS data shows that in Colchester 625 new businesses were formed. This is a 7.4% decrease from 2009, when there were 675 new enterprises. Compared to other Essex LAs, Colchester had the 4^{th} highest number of enterprise births. At 2 years, 76.2% of businesses formed in 2008 had survived by 2010. This is slightly higher than the Essex (74.2%) and England (73.9%) business survival percentages. The 2 year business survival percentage has fallen year on year for the past few years. In 2008 the 2 year survival rate for businesses formed in 2006 was 83.6%.

6.10 The retail sector & retail study

Although the Centre for Cities report provides some useful information, more recently (2011) Colchester Borough Council commissioned King Sturge to conduct a retail study for Colchester town centre. This gives us more of an insight into the retail sector in Colchester.

Strengths identified in Colchester include; a healthy balance between national multiples and local traders, and a robust population and spend growth. The 2011 retail study reinforces the Centre for Cities notion that Colchester is 'buoyant', explaining that most evidence suggests that Colchester is weathering the storm better than many other centres elsewhere in the country. Weaknesses were also identified, specifically the report identified the St Botolph's and Queen Street areas as being neglected and in need of regeneration (projects are ongoing). The absence of some major retail names along with voids in large retail units (i.e. the old Odeon site), and an apparent negative perception amongst many local residents were also identified as weaknesses.

The 2010 Venuescore listing from Javelin ranked Colchester 74^{th} nationally, alongside areas such as Canterbury and High Wycombe. This is slightly at odds with other ranking systems, which place Colchester around the top 50 mark. Compared at a regional level Colchester ranks above Chelmsford (90^{th}) but below Ipswich (48^{th}), it also appears that Colchester has drifted downward over time, suggesting the need for regeneration and investment.

The report notes the extraordinarily diverse geo-demographic base in Colchester, which presents both a challenge and an opportunity. A challenge in the respect of addressing all the different groups, and an opportunity in terms of delivering a multi-dimensional offer, that spans the full 'value – mass market – aspirational' spectrum. The report also highlights that the apparent under-utlilisation of the independent sector in Colchester, with the idea that with the right strategy this could flourish like the Lanes in Brighton for example. The report also estimates that Colchester attracts annual comparison goods spend of around £498 million, a figure which shouldn't be affected by the new Stratford City development.

In a further update, in April 2012 the Javelin group published the White Paper entitled "Battlefield Britain: Survivors and Casualties in the Fight for the High Street". This report documented the town centres deemed as the most 'robust' and those most 'at risk'. 'At risk' is defined as those town centres that are most at risk of future decline, with the robust centres being those that are in the strongest position to defend themselves. In the largest location grades assessed, Colchester was included as one of Great Britain's most robust retail destinations. This may be beneficial in terms of future development and investment in the town.

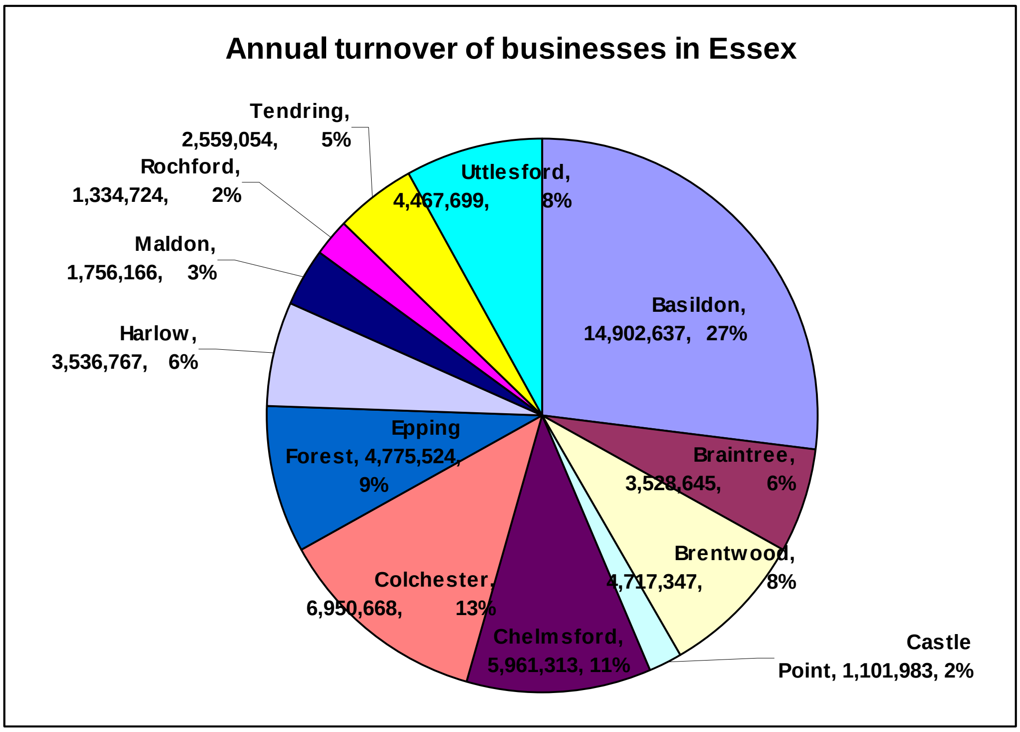
6.11 Knowledge based industries

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'[24]. 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.

6.12 Annual turnover of businesses

Please note this section relates to 2008 data, as more recent data is not available.

Figure 20:



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

As figure 20 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.

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[24] Office for Economic Cooperation and Development OECD definition

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).

6.14 LEP Networks review of LEP economies 2012

In 2012 the LEP Network produced a review about Local Enterprise Partnership (LEP) area economies[25]. The review highlighted that there are common economic challenges facing England's localities, however there are also significant differences in terms of economic structure, historical development path, rurality and size. The reports also explains that there are significant global opportunities that England's local economies could capitalise on, especially as the world economy is predicted to grow by 3-4% over the next 3 years.

Developing nations are a particular target for local businesses that can operate internationally, with growth strongest on the fast-growing developing nations such as India and China. The review explains that LEP and the local economies and enterprises that they seek to promote and develop, very much represent a local opportunity in an expanding global economy. Due to wide spread public sector cuts local growth and restructuring must be private-sector led. The report also details that there is much potential for attracting Foreign Direct Investment (FDI) to LEP areas, in 2011 the UK retained its ranking as Europe's number one FDI destination.

Although some LEP areas are more resilient than others, all LEP areas experienced localised job losses during the recession. The report highlights that whilst recovery from recession brings new challenges, the long term challenges also remain. For example, for many local economies, future prosperity is intrinsically linked to past performance, meaning that changing the economic profile and performance of a local area substantively is a long-term exercise.

LEP areas with a high 'churn rate' (high levels of births and deaths) and are highly enterprising, however deaths exceeded births in every LEP area in 2010, highlighting the economic difficulties faced. The most successful local economies are those with high levels of innovation and knowledge-based employment. Also vital to the location and the success of a business are factors such as access, availability of qualified staff, quality of telecommunications, transport links and value for money office space.

Local economies need to create local jobs and prosperity, particularly after the recession and loss of public sector jobs. The South East LEP area

[25] The LEP Network (2012) Creating Successful Local Economies - Review of Local Enterprise Partnership area economies in 2012

experienced an annual economic growth rate of 5.2% (1998-2008), and exhibited a significant improvement in performance, moving from a ranking of 29th in 1998 to 23rd in 2008. Historically, LEP areas with the slowest-growing populations tend to be those with lower than average rates of economic performance. At a very local level, Colchester has a rapidly growing population, which should imply above average rates of economic performance.

The report explains how skills significantly contribute to economic output and are a driver for enterprise, investment, value and new industries. High-performing local economies have a significant number of high-skilled residents and a highly qualified workforce, (see section 5). At a national and local level identifying priorities and allocating public-sector resources to investments in different skills is challenging. One of the many challenges is ensuring that the appropriate skills provision is in place, also as expected skill levels vary across regions, and are dependent on the local industries present.

Also mentioned is the importance of access to technology, specifically broadband access. 16.9% of Essex do not have access to download speeds of 2 mbps or greater[26]. 2 megabits per second (mbps) connections allow the use of multimedia services, and slow connection speeds hinder the facilitation of economic growth, and constrain business development. The governments aim is to deliver 2 mbps to the whole of the country by 2015.

[26] Ofcom Broadband connection data 2011
http://maps.ofcom.org.uk/broadband/downloads/ofcom-uk-broadband-speed-data-2011.csv

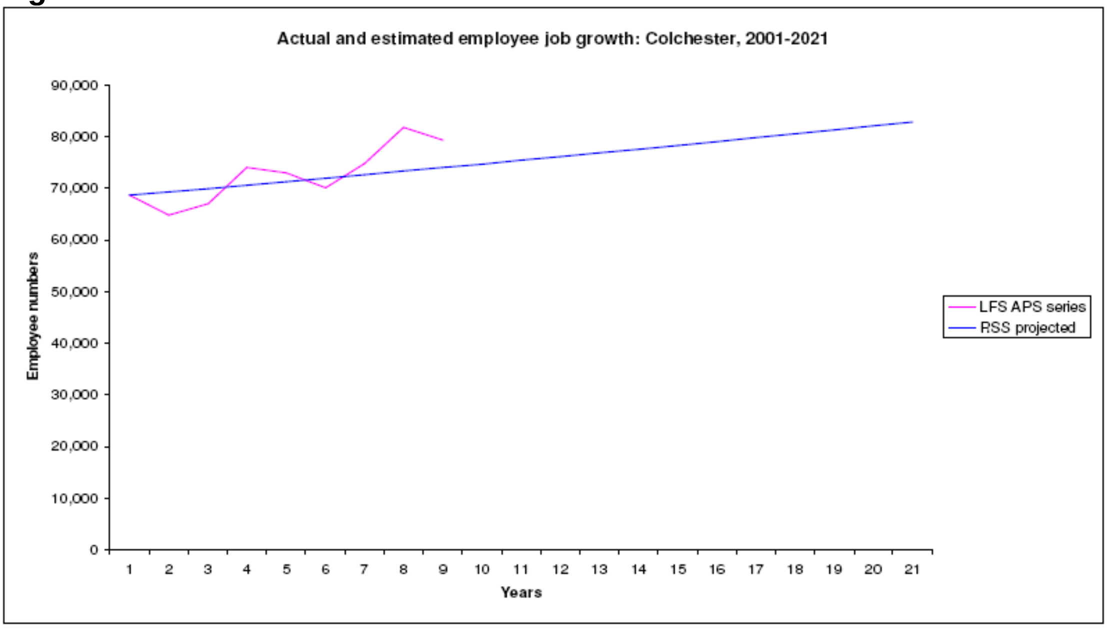
7. ECONOMIC DEVELOPMENT AND GROWTH

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 (2010 is the most recent figure) against the projected target. (From 2001-2004 the dataset was known as the Labour Force Survey (LFS). Major employment-generating projects in the Regeneration Areas and Employment Zones will boost progress towards the target as they come on-stream over the next few years.

Figure 21:



Source: Colchester Annual Monitoring Report 2011

7.2 Economic development: land and buildings

Employment land is being provided in suitable locations within the borough to meet Core Strategy targets. It is recognised however, that both the delivery of additional employment and retail development are dependent on external factors unrelated to planning such as market interest and the overall state of the economy. The net balance of employment floorspace shows a positive level of increase for 2010-11 given the current economic climate, although the total of 12,908 sq m was down on last year's high level of 62,598 sq m.
A slight improvement in town centre commercial completions was seen in 2010-11, up from nil the year before. The commercial property market for existing town centre property is, however, buoyant and vacancy rates were

9.7% in May 2011[27], which is below national averages of approximately 12-13%.

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:

- 67,000sq m (net) of retail floorspace, predominantly in the town centre (Retail Study, Feb. 2007)
- 106,000sq m (gross) of office floorspace (Use Class B1a & B1b), predominantly in the town centre and at the University Research Park. (Employment Land Review, May 2007)
- 45,000sq m (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 sq m 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 sq m .

The Site Allocations document (adopted October 2010) identified 3 Strategic Employment Zones (totalling 152.9 hectares) and 47 Local Employment Zones covering both urban and rural locations, totalling 129.3 hectares. Together with 4 mixed use sites totalling 19.4 hectares, over 300 hectares of employment land is available across the borough.

7.3 Regeneration

The borough council has a regeneration programme with 37 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

[27] Colchester Town Centre Retail Study, King Sturge, 2011

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 is undergoing redevelopment. 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 few 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 open and has proven to be the catalyst for the adjacent Cultural Quarter development scheme. The new magistrates' court has also recently opened. 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).

In addition to this, new Traffic Regulation Orders (TROs) have been published. The main changes will be made in the High Street, to improve the pedestrian environment and reduce unnecessary traffic across the town centre. Between 10am and 6pm the High Street will not be accessible for any cars or delivery vehicles. The improvements are designed to reduce congestion and enhance the town centre environment.

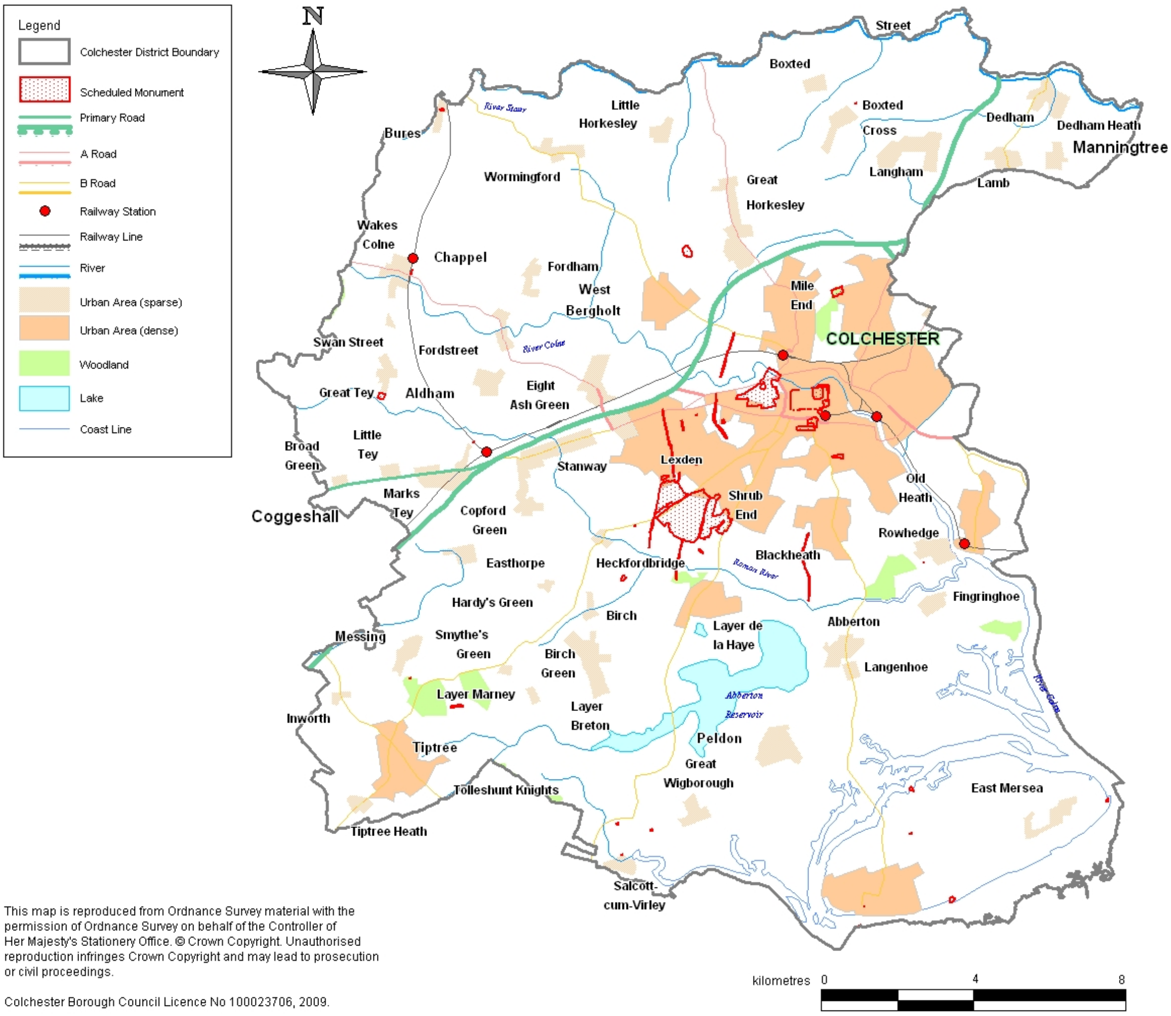
Future regeneration: It is anticipated that delivery of key projects will continue in accordance with the Regeneration Programme and other new areas are emerging which will in due course be added to the programme e.g.

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 22: Map of Colchester (monuments and features)



There are 22 conservation areas, and some 1,578 listed buildings in Colchester borough. There are also 52 Scheduled Monuments. 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 4.7m 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.

The new Firstsite building, opened on Sunday 25 September 2011. From opening to the beginning of November, the Firstsite had approximately 50,000 visitors, which equated to 1/3rd of the total 150,000 visitors expected for a year. Firstsite is the catalyst for the regeneration of St Botolph's which will see three new hotels, new social spaces, a new Magistrate's Court as well as new shops, restaurants, cafes and bars.

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 10: Key economic indicators of tourism in Colchester

Value of Tourism to the borough	**Tourism was worth £224.8m** to the economy of Colchester borough in 2010* **The value of tourism to Colchester has risen by 256%** from £63.1m in 1993 (*2010 is the latest year for which figures are available).
Number of trips taken to Colchester	• **Colchester attracted 4.7m visitor trips in 2010** • **A 67% rise on the 1993 figure of 2.8m visitor trips**. • **This includes:** • 61,000 staying trips taken by overseas staying visitors • 215,000 staying trips taken by domestic staying visitors • 4.4m day trippers

Source: Economic Impact of Tourism to the borough of Colchester (Cambridge Model) 2009 & Enterprise & Tourism Dept.

The trends for volume and value of tourism are outlined in table 10 above and figures 23 and 24 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 tourism supports more than 6500 jobs in the borough, a rise of over 75% since 1993[28].

[28] *NOMIS, the official Office of National Statistics Labour Market Statistics website* https://www.nomisweb.co.uk/Default.asp *accessed April 2012*

Figure 23:

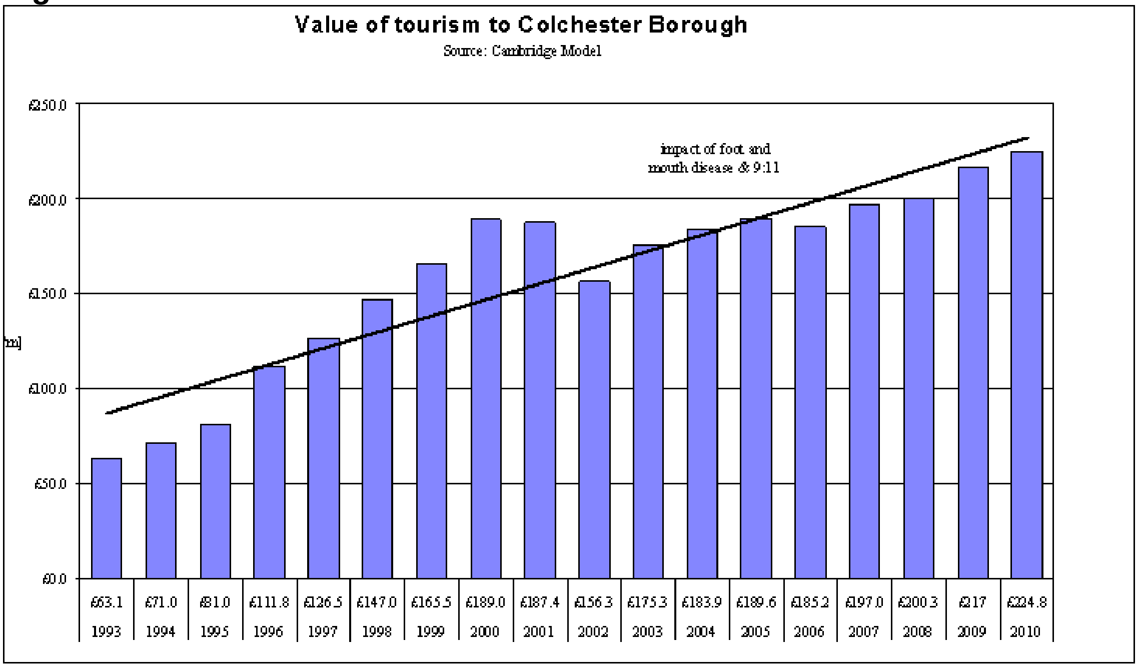
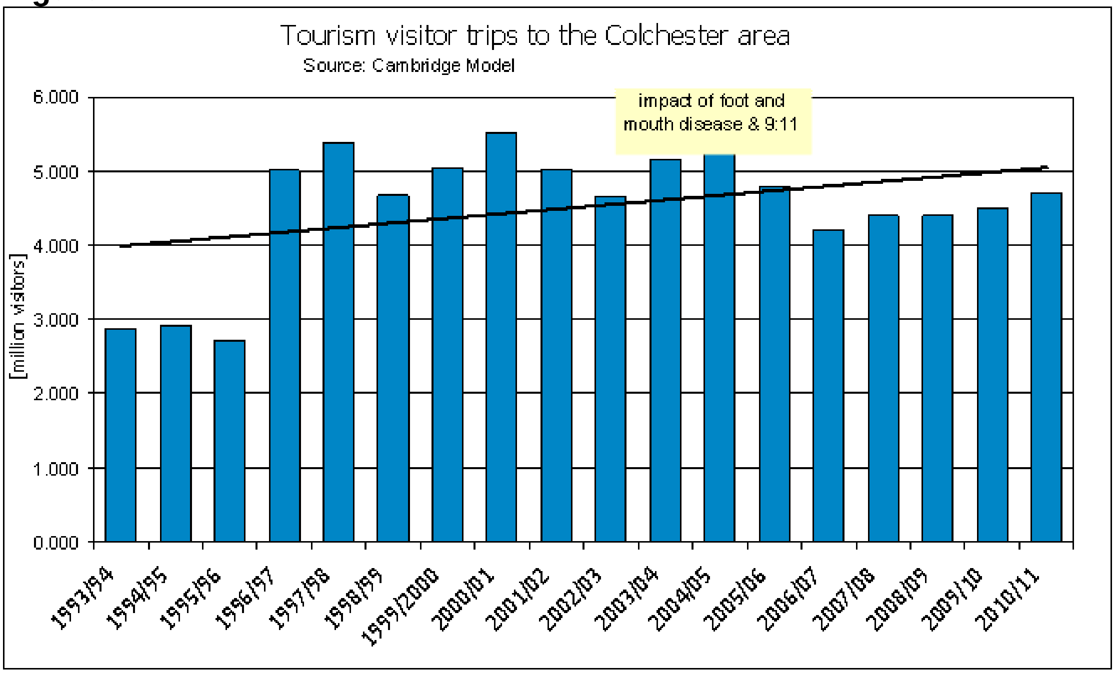


Figure 24:



In addition, Colchester has much future potential to realise. Colchester is looking forward to new attractions, new hotels (see item 8.5) and up to half a million projected additional visitor trips to add to the 4.7m 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
- 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 has built 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 Visit Colchester Information Centre (VIC) in Queen Street.

In the year April 2011-March 2012, the Visit Colchester Information Centre team helped over 81,322 visitors, took 8,009 phone calls, helped visitors electronically via 1,151,973 emails, kiosk enquiries and web users and sent and received a total of 52 letters. This amounts to a grand total of 1,242,644 customer contacts.

Annual Visit Colchester website usage has risen dramatically between 2004 and 2011 from only 109,511 contacts in 2004 to 1,360,421 in 2011.

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 room nights (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[29] 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.

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 11 below.

[29] These include the new Visual Arts Facility 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.

Table 11: 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

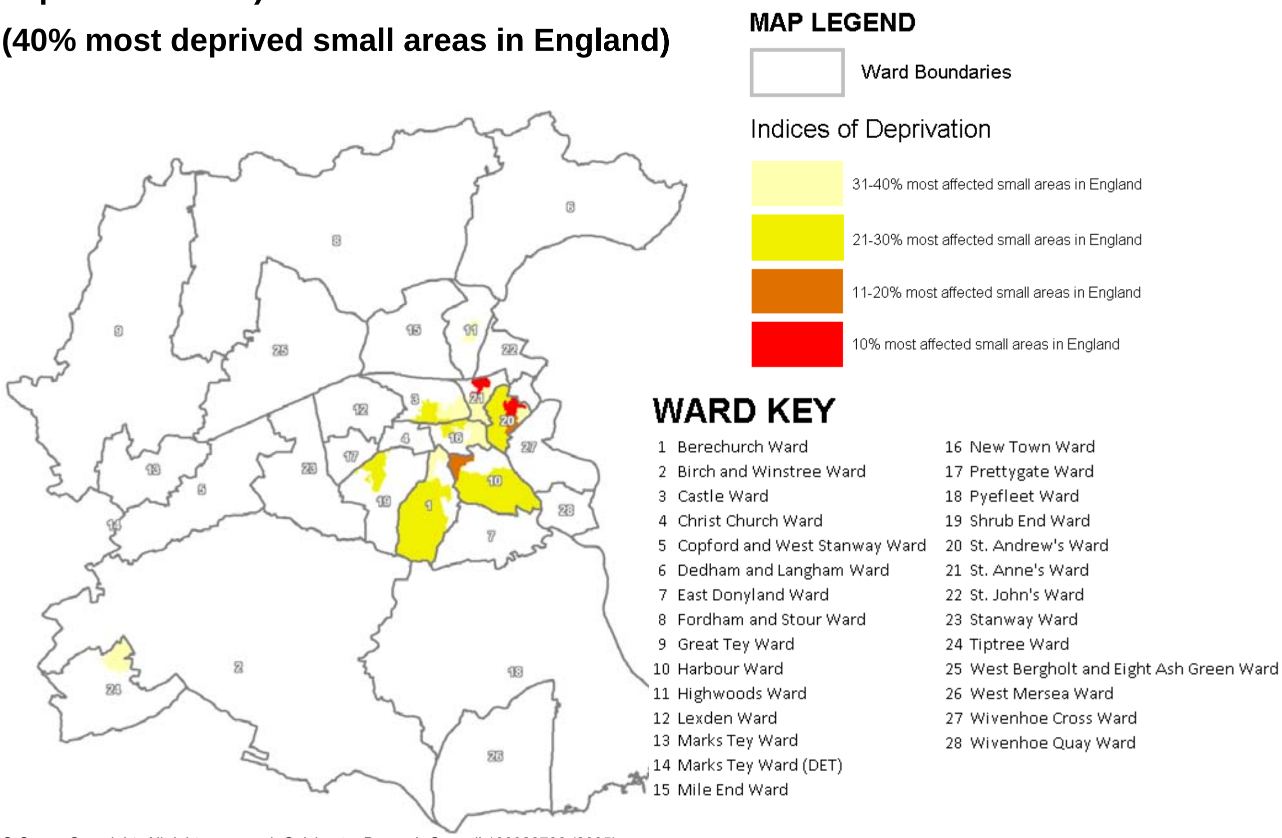
According to the Indices of Deprivation 2010, Colchester is a relatively affluent borough. The deprivation score at 14.83 was below the England average of 19.15. Although the overall scores for Colchester are lower in 2010 than in 2007, which would indicate an increase in deprivation, this is relative to a smaller number of local authorities. Between 2007 and 2010, the number of authorities in England has changed from 354 to 326. In terms of relative deprivation, Colchester was in a similar percentage ranking as it was in the IMD07 for the measures shown.

In relation to the Essex districts, Colchester had decreased in relative deprivation for average score, average rank and local concentration values between 2007 and 2010. For the extent measure, the borough had the same score. In Essex, Colchester had the fourth highest score for extent of deprivation, deprivation. The figures suggest there are pockets of intense deprivation in Colchester. 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[30]

Figure 25: Deprived small areas in Colchester wards (Indices of deprivation 2010)

(40% most deprived small areas in England)



In 2007, none of the small areas in Colchester appeared in the top 10% most deprived in England. However, in the 2010 Index of Multiple Deprivation two small areas were in the top 10% most deprived in England. These were Magnolia in St Andrew's ward and St Anne's Estate in St Anne's ward.

9.3 Child poverty and Income deprivation

In both 2007 and 2010 income domain, there were 28 small areas in Colchester which fell into the top 40% most deprived nationally. In both years, St Anne's Estate in St Anne's ward was the only small area ranked in the top 10% most income deprived nationally.

There were also three areas which did not appear in the 2007 top 40% income deprived but which did in 2010. These were Castle East in Castle ward, West Mersea centre in West Mersea ward and Parsons Heath in St Anne's ward.

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[30] 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.

In relation to child poverty[31] there were two small areas in Colchester which were among the top 10% most deprived small areas nationally. They were Salary Brook South in St Andrew's ward and St Anne's Estate in St Anne's ward, with 55.7% and 46.9% of children affected by income deprivation respectively. Out of the 865 small areas in Essex these two small areas were ranked 6th and 16th respectively – within the top 2% in Essex.

[31] This measure relates to the Income Deprivation Affecting Children sub index of the Indices of Deprivation 2010.

10. HEALTH

10.1 General health and inequality

According to the Association of Public Health Observatories (APHO) Health Profile 2011 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 8.4 years higher than that for men living in the most deprived areas.[32] These findings are very similar to the 2010 report.

10.2 Key health indicators (APHO)

Table 12: 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 high quality PE and school • sport 2009/10) • Tooth decay in children (Weighted mean number of teeth per 5 yr old child sampled that were actively decayed, missing or filled 2008/09) • Teenage pregnancy (Under-18 conception rate per 1,000 females aged 15-17 (crude rate) 2007-2009 (provisional)) • Physically active adults (% aged16+ 2009/10) • Hospital stays for alcohol related harm (Directly age and sex standardised rate per 100,000 population 2009/10 (rounded)) • People diagnosed with diabetes (% of people on GP registers with a recorded diagnosis of diabetes 2009/10) • New cases of tuberculosis (Crude rate per 100,000population 2007-2009) • Life expectancy (male and female, at birth 2007-2009) • Deaths from smoking (Per 100,000 population age 35+, directly age standardised rate 2007-2009) • Early deaths form heart disease, stroke or cancer (Directly age standardised rate per 100,000 under 75, 2007-2009)	• Smoking in pregnancy (% of mothers smoking in pregnancy where status is known 2009/10) • Incidence of malignant melanoma (small numbers) (Directly age standardised rate per 100,000 population under 75, 2005-2007) • Homelessness (crude rate per 1000 households 2009/10)

[32] Association of Public Health Observatories (APHO) Health Profile 2011 for Colchester, Department of Health, Crown Copyright ©2011.

10.3 Contextual excerpt from APHO report:

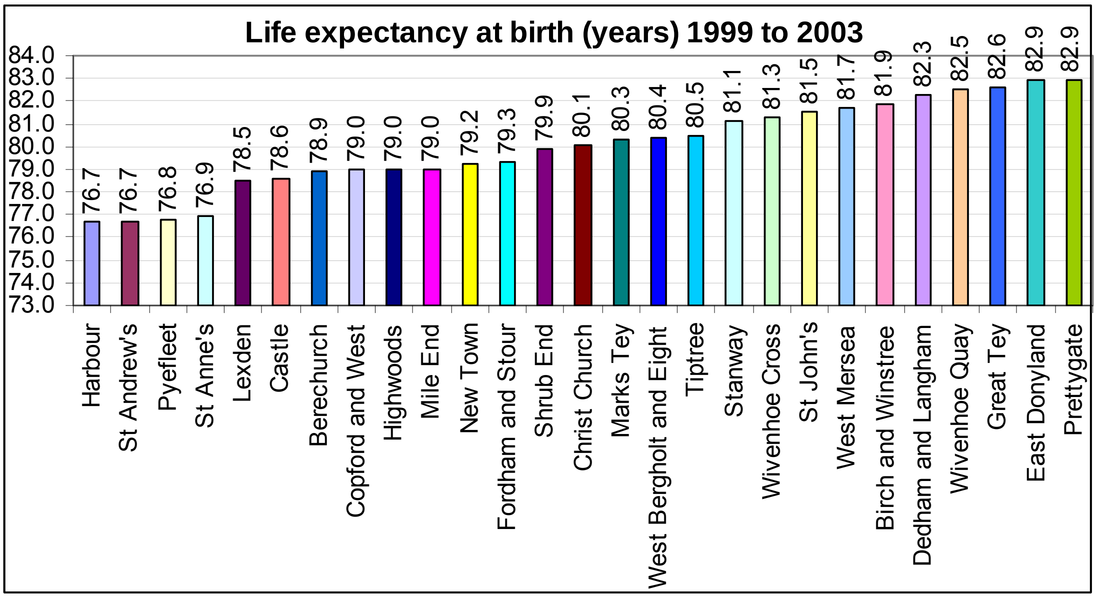
Below is an excerpt from the 2011 APHO report for Colchester:

- *Life expectancy is 8.4 years lower for men and 3.9 years lower for women in the most deprived areas of Colchester than in the least deprived areas (based on the Slope Index of Inequality published on 5th January 2011).*
- *Over the last 10 years, all cause mortality rates have fallen. Early death rates from cancer and from heart disease and stroke have fallen and are better than the England average.*
- *About 17.1% of Year 6 children are classified as obese. A higher percentage than average of pupils spend at least three hours each week on school sport.*
- *74.6% of mothers initiate breast feeding and 22.5% of expectant mothers smoke during pregnancy.*
- *An estimated 17.6% of adults smoke and 23.6% are obese. There were 2,362 hospital stays for alcohol related harm in 2009/10 and there are 213 deaths from smoking each year.*
- *Priorities in Colchester include improving educational attainment and addressing homelessness*[33]*.*

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').

10.4 Life expectancy at birth: difference between wards

Figure 26:



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

[33] Association of Public Health Observatories (APHO) Health Profile 2011 for Colchester, Department of Health, Crown Copyright ©2011.

As figure 26 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 13: The impact of housing on health and social care: overview of the evidence[34]

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.

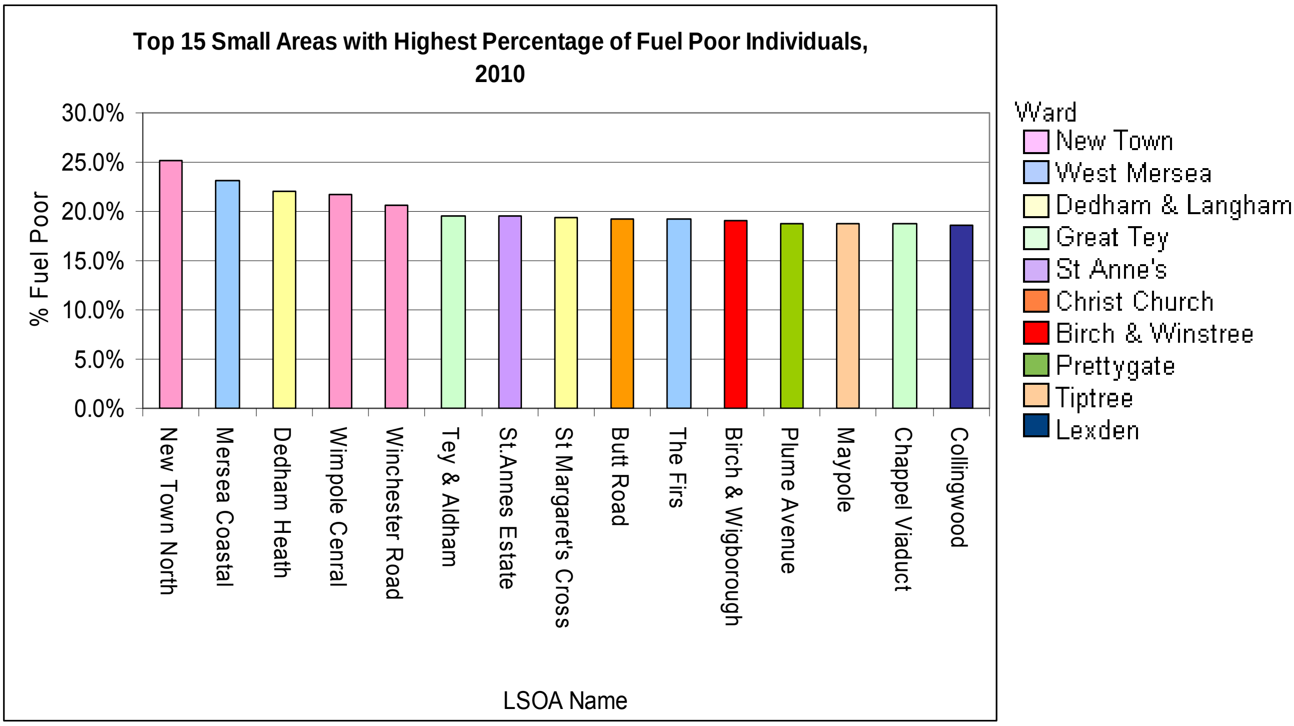
Source: Adapted from Marsh, A; Gordon, D; Pantazis, C. and Heslop,P Home Sweet Home:The impact of poor housing on health, The Policy Press, Bristol,1999)

34 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 13 above shows the specific conditions which link homelessness and poor housing with health. In relation to homelessess, in 2009/10 we had a significantly higher 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 27:



Source: http://www.decc.gov.uk/en/content/cms/statistics/fuelpov_stats/regional/regional.aspx
Department for Energy & Climate Change, 2010 regional data

2010 modelled estimates for households show that New Town North in New Town ward had the highest percentage of households that were fuel poor. 25.2% of households were estimated to be fuel poor in this small area. Half of the six of the small areas which make up New Town ward were located in the top fifteen (out of 104) most fuel poor areas in Colchester. This ward is an area with a high proportion 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 14: Crime in Essex and Colchester: Incidence per 1,000 population (2010/11)

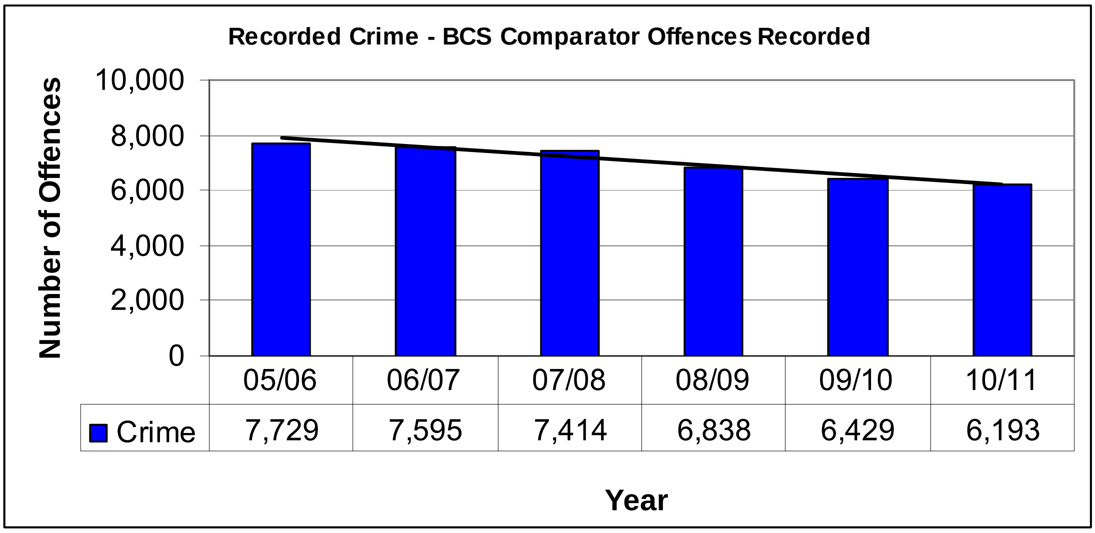
	Offences Per 1,000 Population 2010/11							
Area	**Violence against the person**	**Sexual**	**Robbery**	**Burglary dwelling**	**Theft of a motor vehicle**	**Theft from a vehicle**	**Interfering with a motor vehicle**	**Recorded crime BCS comparator**
Colchester	13.3	0.8	0.4	2.9	1.1	4.6	0.3	35.0
Essex	12.2	0.8	0.7	3.8	1.9	4.9	0.5	33.6

Source: Home Office

As table 14 illustrates crime in Colchester is generally similar for all major crime categories to average for the whole of Essex. For 2010/11, the number of British Crime Survey (BCS) comparator offences recorded was 6,139, a drop of 4% from 6,429 in 2009/10. The greatest percentage reduction when split by crime type was in thefts of motor vehicles, with a 16% reduction from 2009/10-2010/11. Only burglaries in a dwelling saw an increase in the same period (2% rise).

11.2 Colchester crime: time series

Figure 28:



Colchester appears to have been consistently safe from any significant crime levels over the last few years with year on year falls in BCS Comparator offences recorded, which makes Colchester one of the safest towns in the UK. Historically, 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.

Table 15: Number of incidences of crime against business

Dec-11	8
Jan-12	5
Feb-12	3
Mar-12	5
Apr-12	0
May-12	4

Source: COLBAC June 2012

As table 15 illustrates, the Christmas period appears to be when the levels of crime against COLBAC members were highest.

Table 16: Warnings and exclusions

MONTH	PROFILES 16 & UNDER	FIRST WARNING LETTER	EXCLUSIONS
Dec-11	0	0	0
Jan-12	1	6	2
Feb-12	0	1	1
Mar-12	1	4	0
Apr-12	0	0	0
May-12	0	3	0

Source: COLBAC June 2012

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 16 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 British Crime Survey in 2011[35], 60.2% of the local population agree that Essex Police and the local council are dealing with the ASB and crime issues that matter. 61.0% of individuals thought Essex Police do a good or excellent job. 75.1% of respondents had confidence in the police in Essex, however only 55.2% of respondents agreed that Essex Police can be relied on to be there when you need them. This is an area that needs to be monitored for future comparison.

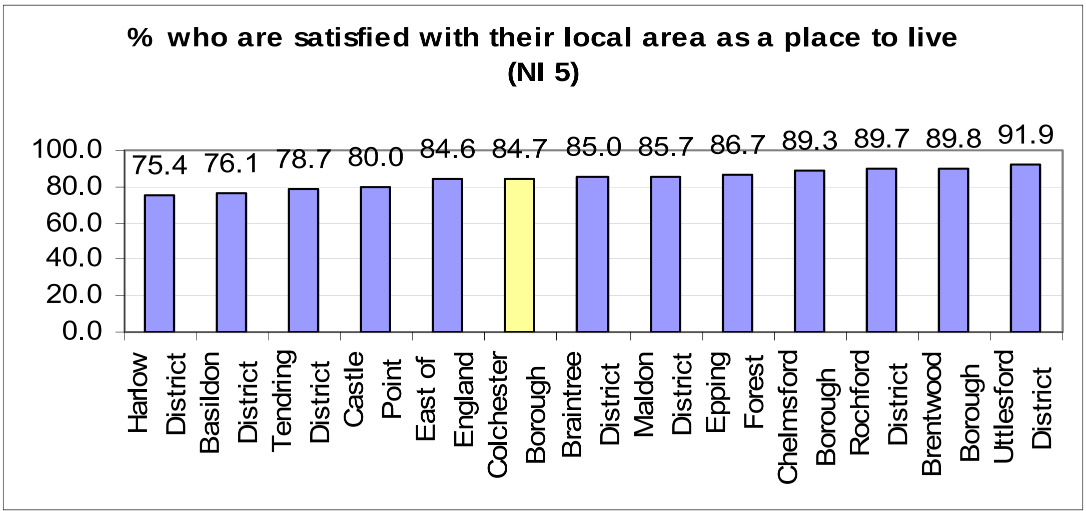
[35] Data extracted from Iquanta in April 2012

12. COMMUNITIES

12.1 Satisfaction with local area

The information below is taken from the 2008 Place Survey, which was abandoned by the government in 2010. In April 2012 a consultation into a potential replacement for this was undertaken. Hopefully, this will result in a similar survey being rolled out in Local Authorities, which can be reported on in the next LIP update.

Figure 29:



Source: Place Survey, 2008

Figure 29 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 30: Place survey 2008: Colchester in relation to the UK

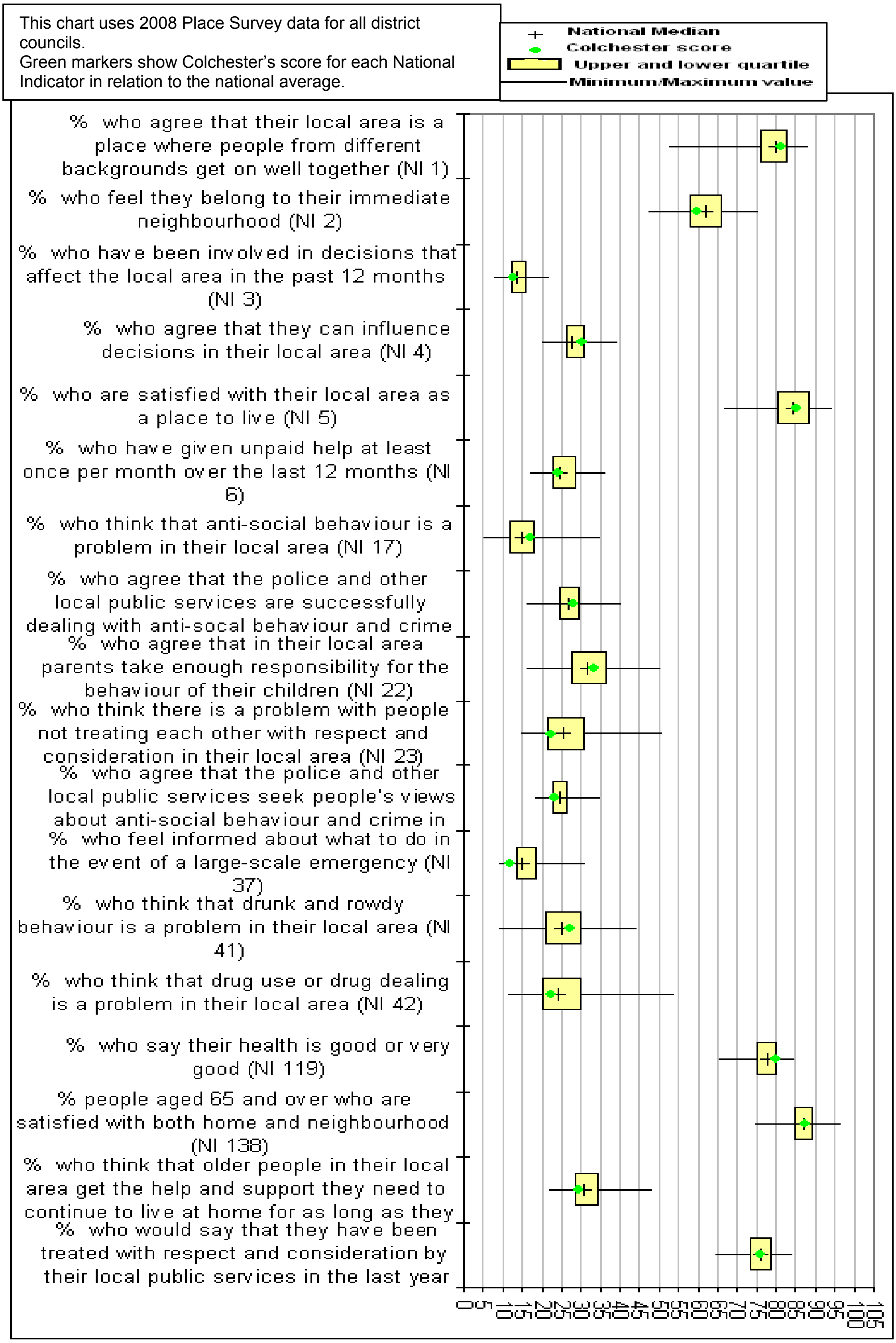


Figure 30 contains a set of key indicators from the borough's 2008 Place Survey in comparison to the national scores. It shows the upper and lower quartile and the minimum and maximum values in local authorities nationally for each Place Survey question.

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*:**

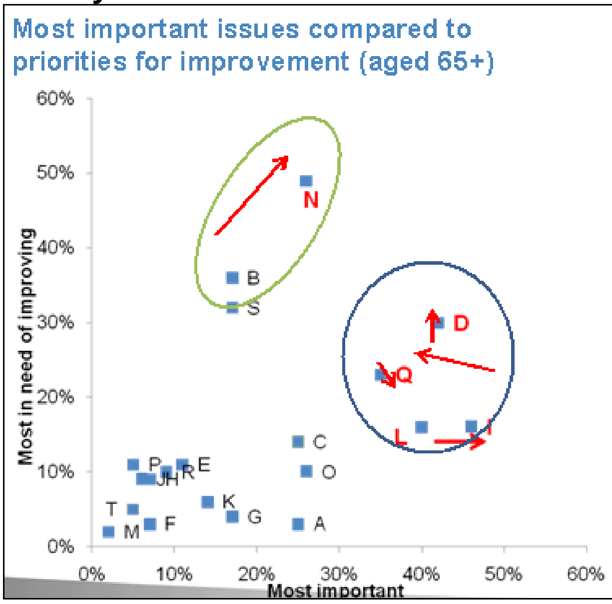
- The level of crime- 49%
- Clean streets- 39%
- Health services- 38%
- Public transport- 34%
- Shopping facilities- 27%

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 31: Older people's most important issues and priorities: Place Survey 2008



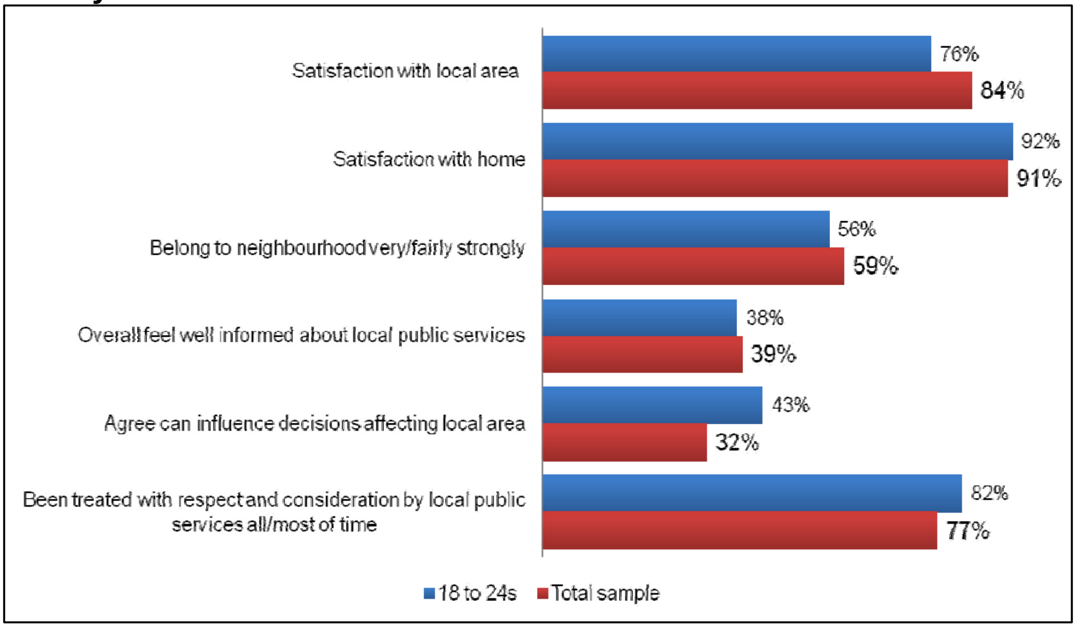
Access to nature	A	Parks and open spaces	K
Activities for teenagers	B	Public transport	L
Affordable decent housing	C	Race relations	M
Clean streets	D	Road and pavement repairs	N
Community activities	E	Shopping facilities	O
Cultural facilities (e.g. libraries, museums)	F	Sports and leisure facilities	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 31 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 32: Young people's opinions compared to all opinions: Place Survey 2008



Source: Place Survey, 2008 (BMG graph)

Figure 32 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 2010 as part of the work around the Settlement Boundary Review, community facilities in local villages/parishes were examined. The table below highlights key facilities in each area.

Table 17: Community Facilities in Local Villages/Parishes

Village/Parish	Village Facilities	Public Transport
Abberton	Village hall/Post Office/Grocery/ Doctors/ Pubs/Primary School/Play area	Bus services- 67, 67A, 67B, 67C, 67D, 67E
Aldham	Village hall/ Pubs/Primary School/Play area	Bus services- 88, 731
Birch	Village hall/Post Office/Grocery/ Doctors/ Pubs/Primary School	Bus services- 75, 92,
Boxted	Village hall / Doctors/ Pubs/Primary School/ Play area	Bus services- 2, 80, 755, 756
Chappel	Village hall/Post Office/Grocery/ Pubs/Primary School/Play area	Bus service 83 Train Services – hourly to Marks Tey and Sudbury
Copford	Village halls / Pubs/Primary School/Play area	Bus services- 70, 70X, 71, 83
Dedham	Village hall/Post Office/Grocery/ Doctors/ Pubs/Primary School/Play area	Bus services- 87, 87A, 102, 247
East Mersea	Village hall/Post Office/Grocery/ Pubs	Bus services- 67E, 176
Easthorpe	Village hall	
Fingringhoe	Village hall/Post Office/Grocery/ Pubs/Primary School/Play area	Bus services- 175
Fordham	Village hall/Post Office/Grocery/ Pubs/Primary School/Play area	Bus services- 80, 88A, 88B
Great Horkesley	Post Office/ Pubs/ Play area	Bus services- 2, 8E, 84
Great Tey	Village hall/Post Office/Grocery/ Doctors/ Pubs/Primary School/Play area	Bus services- X16, 83, 88B
Inworth	Messing-cum-Inworth Primary School	
Langham	Village hall/Post Office/Grocery/Pubs/Primary School/Play area	Bus services- 247, 755, 756
Layer Breton	Pubs/Play area	Bus services- 50, 92
Layer-de-la-Haye	Village hall /Grocery/Pubs/Doctors/Primary School/Play area	Bus services- 50, 64, 92, 176
Little Horkesley	Pub/ Play area	
Marks Tey	Village hall/Post Office/Grocery/ Doctors/ Pubs/Primary School/Play area	Bus services- X22, X5, 70, 70X, 71, 71C, 83, 505, 525 Train Services – Regular (every 10 mins) to London, Ipswich, Lowestoft, Peterborough, Sudbury.
Messing	Village hall/Pubs/Primary School/Play area	
Mount Bures	Village hall/Pub	Bus services- 83, 753
Myland	Post Office/Grocery/ Doctors/ Pubs/Primary School/Play area	Bus services- 8, 8A, 8C, 8E, 65, 69, 80, 84, 121, 122, 176, 247, 755, 756, 999
Peldon	Village hall/ Pubs /Play area	Bus services- 67A, 67B, 67C, 176
Rowhedge	Village halls/Post Office/Grocery/ Doctors/ Pubs/Primary School/Play area	Bus services- 66, 66A, 175, 275.
Salcott	Village hall and Play area	Bus services- 50, 92
Stanway	Village hall/Post Office/Grocery/ Doctors/ Pubs/Primary School	Bus services- 4, 17, 65, 70, 70X, 71, 71C, 80, 83, 88, 88A, 88B, 176, 505, 525
Tiptree	Post Office/Grocery/Pubs/Doctors/ Primary School/ Play area	Bus services- 14, 75, 91, 91A, 505
West Bergholt	Village hall/Post Office/Grocery/Pubs/Doctors/ Primary School/ Play area	Bus services- 17, 66, 67B, 69, 753
Wivenhoe	Village hall/Post Office/Grocery/Pubs/Doctors/ Primary School/ Play area	Bus services- 61, 61A,62, 62A, 74, 74B, 78, 78X
Wormingford	Village hall/ Pubs / Primary School/ Play area	Bus services- 753

The level of community facilities reflects local situations as well as national trends.

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.

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.

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, and Maths 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 18: Key Stage 2 attainment (Percentages)

Area	English		Maths	
	2009	2011	2009	2011
Colchester	80	80	76	80
Essex	80	81	79	80
East of England	80	80	78	79
England	80	82	79	80

Please Note: National Curriculum tests in Science for all pupils were discontinued after the 2009 academic year.

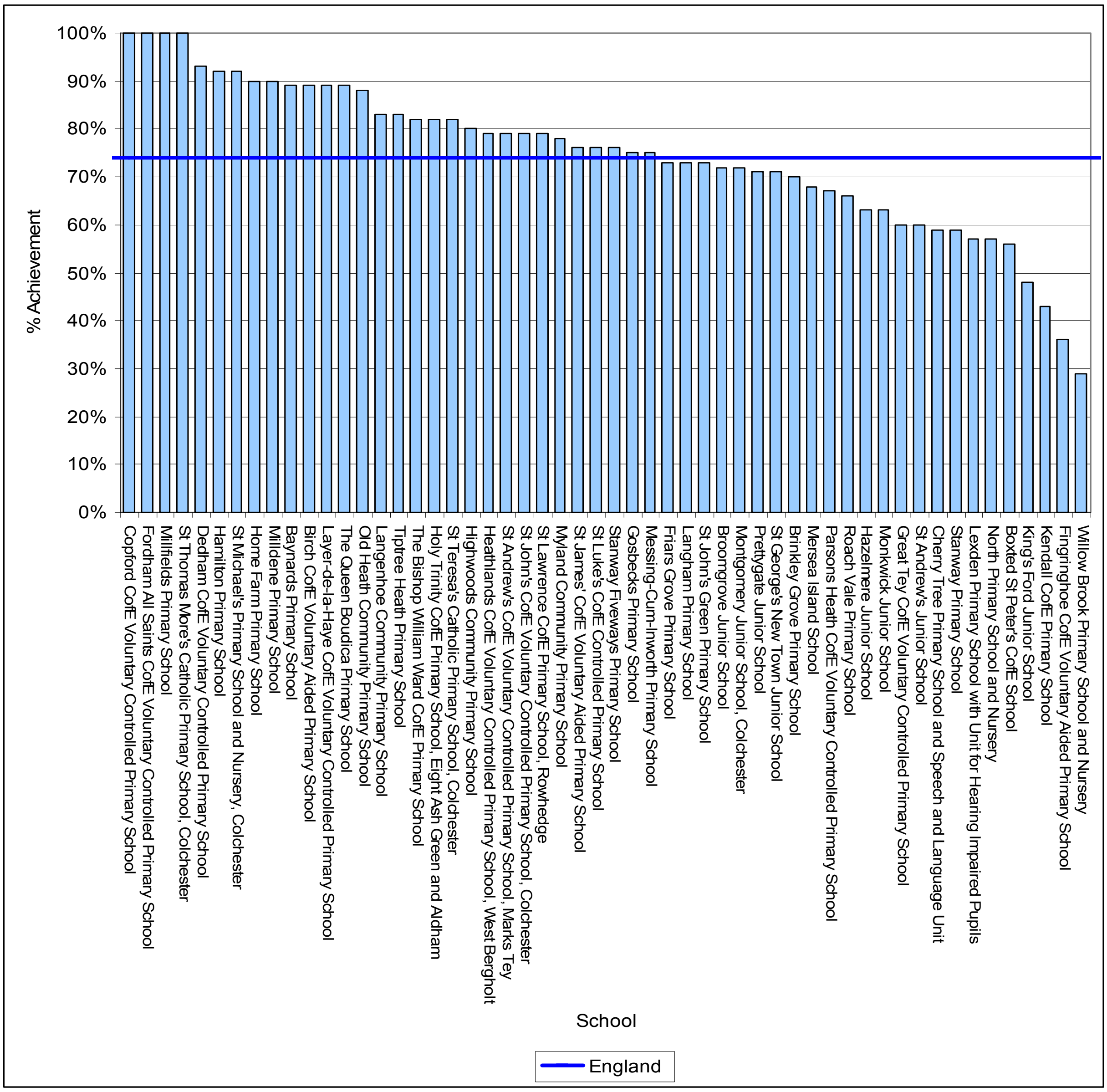
As shown in table 18, between 2009 and 2011 the average English attainment for all schools in Colchester had remained the same, whereas the average Maths attainment percentage increased by 4%. The Colchester attainment level in 2011 at 80% (of all pupil's achieving level 4 and above in English), was slightly below the Essex and England attainment values. In Maths, the percentage of pupils achieving level 4 was the same as Essex, and England, and slightly above the East of England value (79%).

When these results were split by ward, the highest achieving wards for English were Copford and West Stanway and Wivenhoe Quay (both had 100% attainment). Berechurch and St Anne's wards had the lowest attainment for Level 4 English, with results of 67% and 56% respectively.

In Maths, Copford and West Stanway and Wivenhoe Quay both had 100% attainment echoing the English findings. The wards with the lowest performance were St Anne's and Pyfleet, with results of 63% and 58% respectively. When examined in relation to deprivation, the highest performing wards typically have low levels of deprivation, and vice versa. This substantiates the general consensus that deprivation and lower educational attainment are intrinsically linked.

13.2 English and Maths: Primary schools in Colchester

Figure 33: Both English and Maths KS2 Primary schools in Colchester, 2011

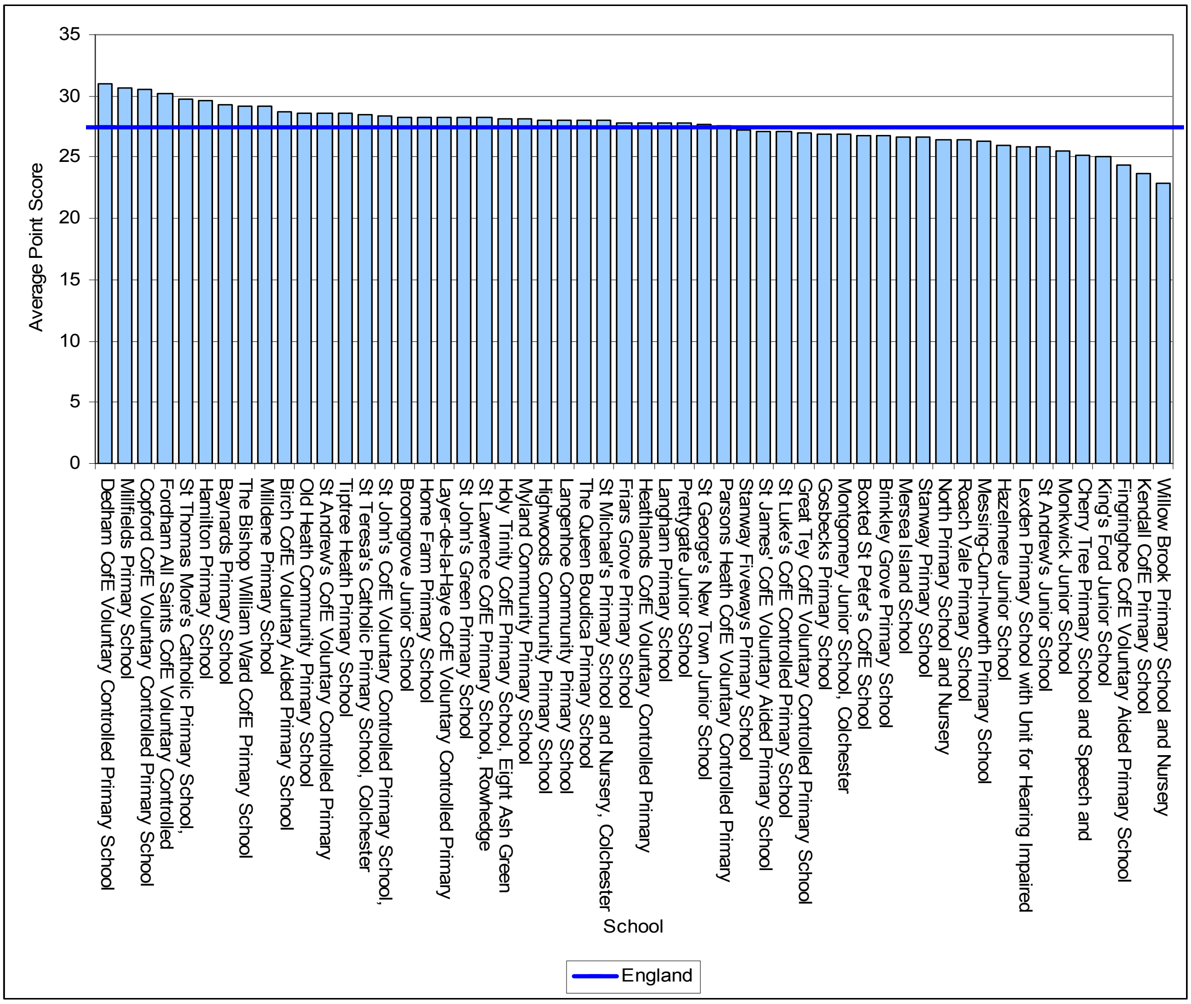


Source: DCSF, 2012. Please note: Schools with suppressed data, or no data have been excluded

Figure 33 illustrates the combined Key Stage Two attainment scores for English and Maths for all primary schools in Colchester schools and the average for England shown by the blue line. Thirty primary schools score above the England average of 74% with four schools achieving 100%. These schools are: Copford CofE Voluntary Controlled Primary School, Fordham All Saints CofE Voluntary Controlled Primary School, Millfields Primary School, and St Thomas More's Catholic Primary School, Colchester.

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

Figure 34: Key stage 2 average points score, 2011



Source: DCSF, 2012. Please note: Schools with suppressed data, or no data have been excluded

Figure 34 shows the average point scores for all primary schools in the borough. 32 schools had point scores above the England average score of 27.5, with the top five being led by Dedham primary with 31, followed by Millfields (30.7), Copford (30.5), Fordham (30.2) and St Thomas More's (29.7).

13.4 GCSE levels

Table 19: GCSE 5 A* to C grades, 2007-2011

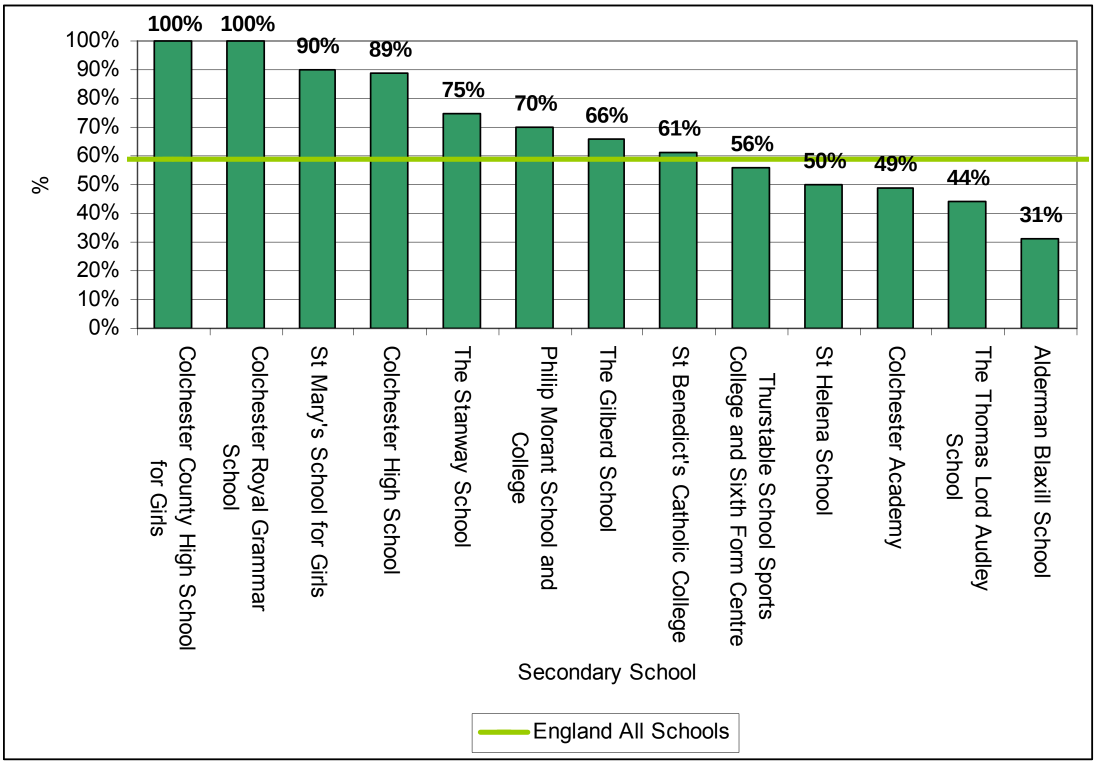
Area	2007	2008	2009	2010	2011
Colchester	61.1	64.0	66.0	71.3	78.6
Essex	60.9	63.3	68.2	73.3	78.7
East of England	61.2	64.7	69.0	74.3	78.0
England	61.4	65.3	70.0	75.4	79.5

Source: DCSF, 2012.
http://www.education.gov.uk/inyourarea/results/la_22UG_wards_3.shtml

As table 19 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. In 2011 78.6% of pupils in Colchester obtained 5 A*-C grades.

13.5 Pupil's achieving 5 GCSE A* to C grades in Colchester schools 2011[36]

Figure 35:



Source: DCSF, 2012. Please note: Schools with suppressed data, or no data have been excluded

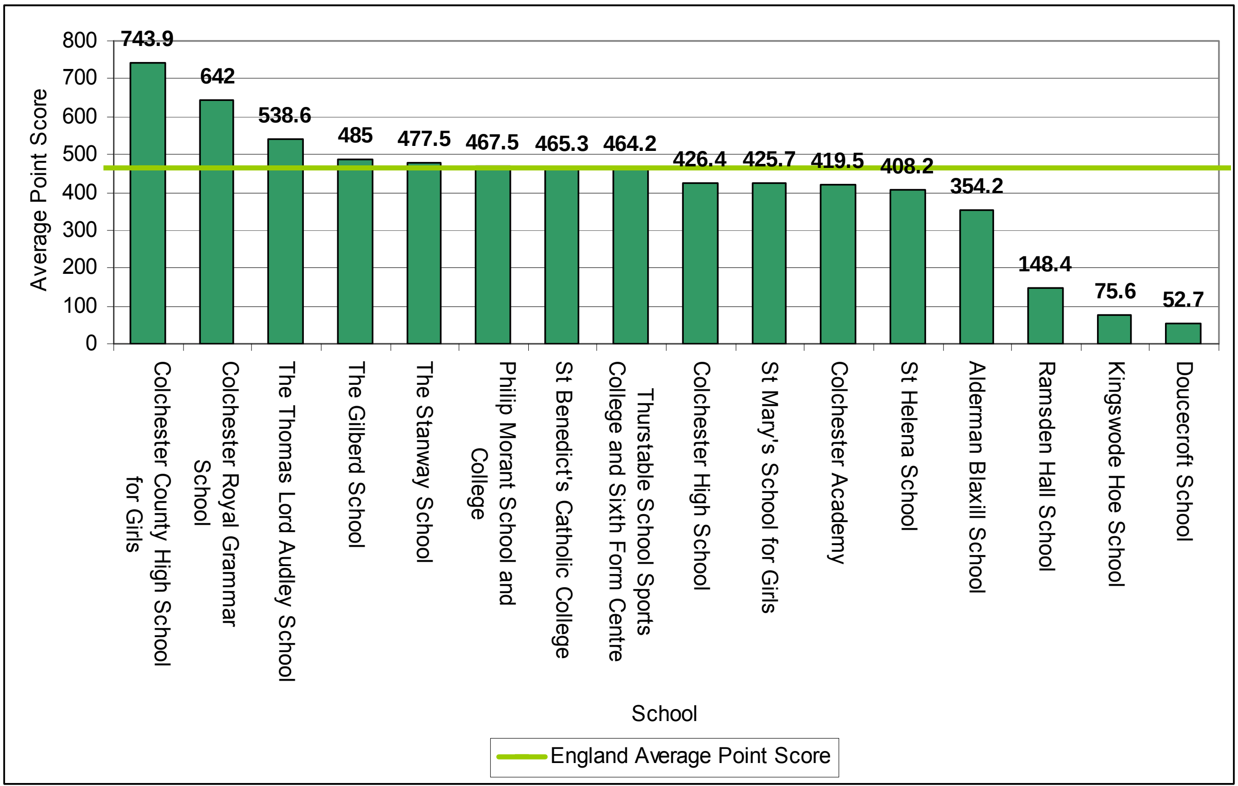
Four of the mainstream state schools[37] in Colchester, failed to meet the England average for GCSE A* to C grades in 2011. These schools were St

[36] NB the calculations for the data in figures 33 and 34 employ different methodologies, hence a different percentage figure for 5A* to C grades for Colchester.

Helena, Colchester Academy, The Thomas Lord Audley School and Alderman Blaxill School. 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

Figure 36: Average point scores at GCSE for schools in Colchester 2011



Source: DCSF, 2012. Please Note: Ramsden Hall School, Kingswood Hoe School and Doucecroft School are all classified as Special Schools.

As figure 36 illustrates, eight schools were at or above the average GCSE point score for England in 2011 (462.9). 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).

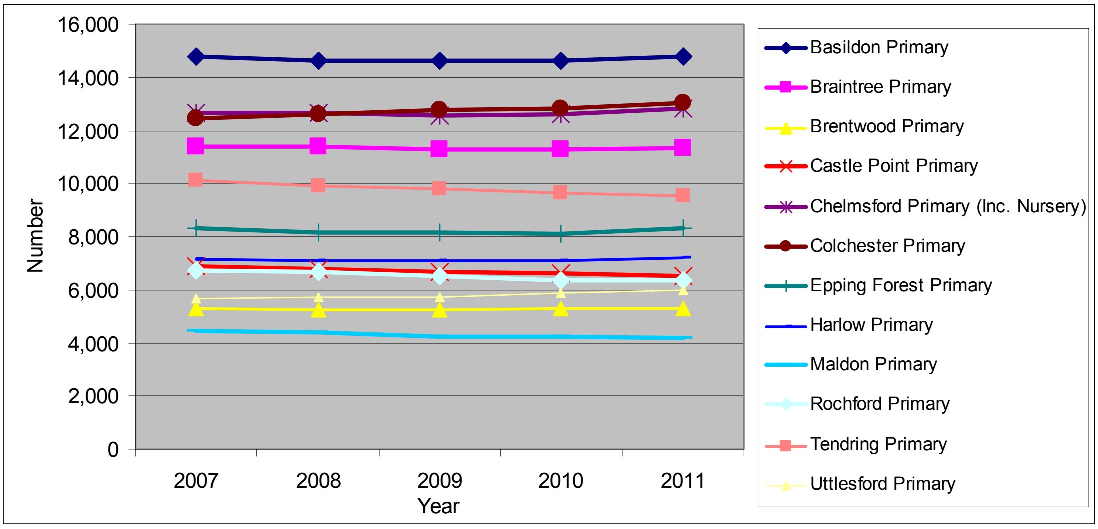
[37] Please note analysis is based on all schools with data, and thus includes independent schools. Colchester Academy was previously known as Sir Charles Lucas Arts College.

14. SCHOOLS PROVISION

The Commissioning School Places in Essex 2011-2016 report replaces the Essex School Organisational Plan 2009-2014. This report 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 report. Further calculations appropriate to Colchester have been undertaken where appropriate.

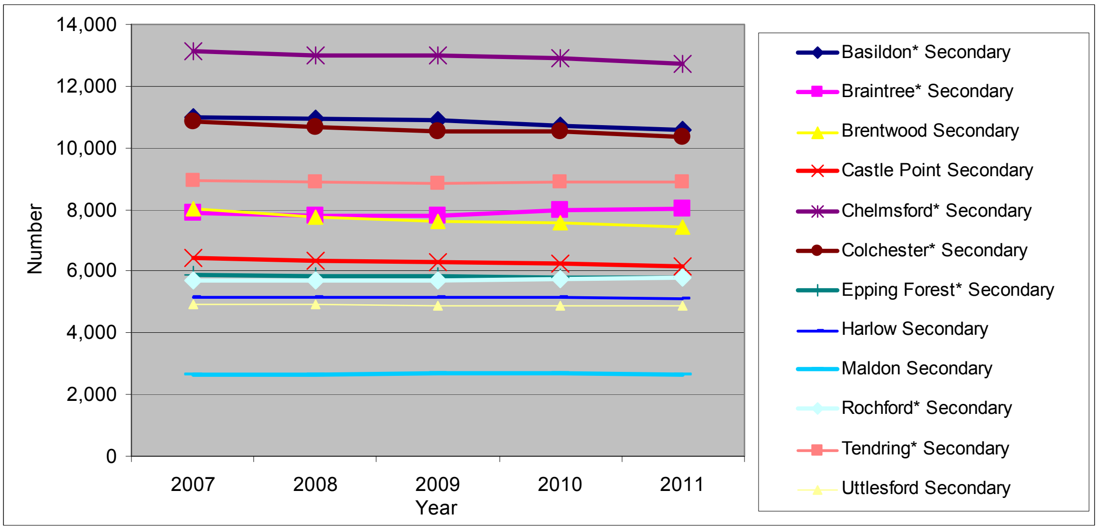
14.1 Number of pupils in schools 2007-2011

Figure 37: Number of Pupils in Primary Schools in Essex, 2007-2011



Source: DfE School Census, January 2011 – all pupils including pupils in sixth forms, part time pupils and pupils in designated nursery classes.

Figure 38: Number of Pupils in Secondary Schools in Essex, 2007-2011



*Source: DfE School Census, January 2011 – all pupils including pupils in sixth forms, part-time pupils and pupils in designated nursery classes. * The secondary school data for these districts include pupils now attending successor Academies to schools previously maintained*

According to the Commissioning School Places in Essex report, overall Essex has seen a decrease in school places falling by approximately 1.3% in all schools, with primary school places falling by 0.4% and secondary places by 2.4%. However, for Colchester primary school pupil places have *increased* by 4.7%. Colchester secondary schools follow regional trends with a 4.3% reduction in places.

14.2 Ethnic groups in schools

Table 20: Ethnic groups: schools in Essex, January 2011

District	Ethic minority groups (EMG)	EMG %	White British	White British %	Number on roll
Basildon	3,187	12.9	21,552	87.1	24,739
Braintree	1,543	8.1	17,566	91.9	19,109
Brentwood	2,031	16	10,659	84	12,690
Castle Point	728	5.8	11,833	94.2	12,561
Chelmsford	3160	12.5	22,120	87.5	25,280
Colchester	**2,967**	**12.9**	**20,057**	**87.1**	**23,024**
Epping Forest	2,844	20.6	10,934	79.4	13,778
Harlow	2,350	19.8	9,544	80.2	11,894
Maldon	356	5.3	6,402	90.1	6,758
Rochford	746	6.3	11,120	93.7	11,866
Tendring	1,201	6.6	16,911	93.4	18,112
Uttlesford	880	8.2	9,812	91.8	10,692
Essex	**21,993**	**11.5**	**168,510**	**88.5**	**190,503**

Source: Commissioning School Places in Essex 2011-2016 Report

Table 20 provides aggregate ethnicity data for children of reception year group and above in all Essex schools as at January 2011[38]. In 2011, 12.9% of Colchester school pupils were from minority ethnic groups, this is the joint fourth highest proportion out of the 12 Essex school areas (alongside Basildon).

14.3 School sixth forms

In 2011, only six Colchester schools have sixth forms, largely due to further education being undertaken in the further education colleges as discussed in item 14.4. In January 2011, 894 pupils were recorded as on the roll for schools operating sixth forms.

[38] 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 21: Actual numbers of 16-18 year old students, 2010/11 and projected numbers to 2013/14

College	District	Number of 16 – 18 year old students 2008/09	Number of 16 – 18 year old students 2010/11	% Change (Where Available)	Projected numbers of 16 – 18 year old students 2013/14
Braintree College *	Braintree District	1,046	*See Note*		1,075
Chelmsford College	Chelmsford Borough	2,014	2,206	9.5%	2,577
Colchester Institute	**Colchester Borough**	**3,605**	**4,287**	**18.9%**	**3,758**
The Sixth Form College, Colchester	**Colchester Borough**	**2,947**	**3,022**	**2.5%**	**3,025**
SEEVIC, Benfleet**	Castle Point District	2,718	3,007	10.6%	3,350
Thurrock & Basildon College***	Basildon District *	2,062	*See Note*		2,400
Epping Forest College,	Epping Forest District	1,831	2,102	14.8%	2,286
Harlow College,	Harlow District	2,539	2,802	10.4%	2,958
Essex County Council		*See Note*	274		
South Essex College of Further & Higher Education***	See Note	*See Note*	910		
Essex total		**18,762**	**18,610**	-0.8%	**21,429**

Source: Essex School Organisation Plan, 2009 to 2014 & Commissioning School Places in Essex 2011-2016 Report

Notes: 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.
Colchester Institute merged with Braintree College in January 2010, with the Braintree campus renamed as The College at Braintree. Learners attending the campus in Braintree are included in figures for Colchester Institute.
*** Includes learners enrolled with SEEVIC at New Campus Basildon (run in partnership with Prospects College and South Essex College), as well as learners who attend the Benfleet campus.*
**** South Essex College of Further and Higher Education, based in Southend-on-Sea, was formed from the merger of Thurrock & Basildon College and South East Essex College in January 2010. The new college runs courses from Thurrock and Basildon College's Nethermayne campus in Basildon, as well as from sites in Southend-on-Sea and Thurrock. South Essex College is also a partner in New Campus Basildon. The above figures show the number of 16-18 year old FE learners enrolled with the college at their Basildon sites.*

In 2010/11 Colchester had a very high number of pupils attending Colchester Institute and the Sixth Form College. 7,309 students attended these further education colleges, an 11.6% increase from 2008/09 (6,552 students). This accounts to over a third of the Essex total for those attending further education colleges. There appears to be a slight decrease in the overall numbers of 16-18 year old students. Due to the large number of restructures, and mergers, a lot of the data is not directly comparable (please see notes above).

14.5 Pupil number forecasts for 2016

Birth rates in Colchester rose steadily between 2002 and 2010. 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 Commissioning School Places in Essex report *"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"* (Commissioning School Places in Essex, 2011 to 20164: p32).

Table 22: Primary School Pupil number forecasts to 2016

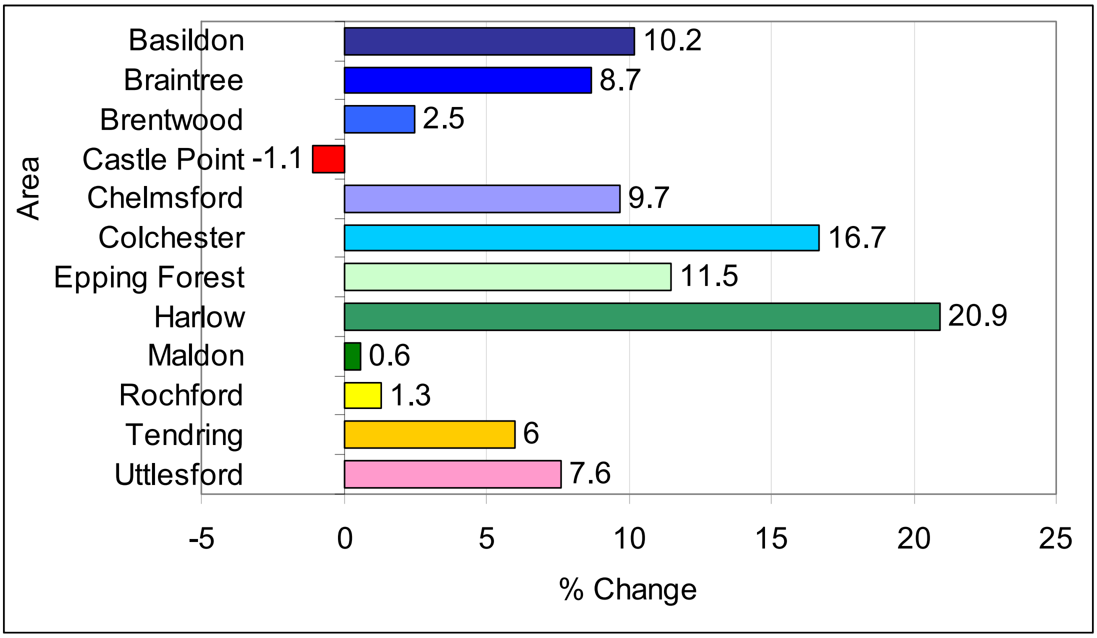
District / Area	Pupils 2011	Pupils 2016	Pupils 2016 with housing	% difference without housing	% difference with housing
Basildon	14,187	15,393	15,632	8.5	10.2
Braintree	11,100	11,849	12,071	6.7	8.7
Brentwood	5,332	5,344	5,463	0.2	2.5
Castle Point	6,271	6,072	6,199	-3.2	-1.1
Chelmsford	12,387	12,914	13,583	4.3	9.7
Colchester	**12,592**	**14,003**	**14,695**	**11.2**	**16.7**
Epping Forest	8,079	8,807	9,012	9.0	11.5
Harlow	6,799	7,973	8,223	17.3	20.9
Maldon	4,179	4,099	4,203	-1.9	0.6
Rochford	6,240	6,182	6,323	-0.9	1.3
Tendring	9,217	9,404	9,774	2.0	6.0
Uttlesford	5,918	6,001	6,367	1.4	7.6
Essex	**102,301**	**108,041**	**111,545**	**5.6**	**9.0**

Source: Commissioning School Places in Essex 2011-2016 Report

The original LIP reported that, in relation to Colchester's pupil forecasts of pupils on the academic roll, an increase of 15.1% was expected between 2009 and 2014. Updates show that from 2011 to 2016, show an estimated increase of 16.7% with anticipated housing development (11.2% without). These are well above the next highest forecast in Epping Forest and second only to Harlow's forecasts for primary school pupils. These changes are highlighted in Table 22 (above) and Figure 39 (below).

Overall, the plan states that Essex primary school numbers are likely to increase by 2016. However it acknowledges that some areas are likely to see much higher increases (Colchester and Harlow) and only one of the districts is forecast to experience a decrease in primary school pupil numbers (Castle Point).

Figure 39: Projected Percentage Change in Primary School Pupils from 2011-2016, Essex



Source: Commissioning School Places in Essex 2011-2016 Report

14.6 Local Delivery Groups (LDGs): Colchester

The information below is taken from:
The Commissioning School Places in Essex 2011-2016 Report
&
The Statutory Public Notice for Primary School Places in Colchester
(http://www.essex.gov.uk/Education-Schools/Schools/Delivering-Education-Essex/School-Organisation-Planning/Pages/Statutory-Proposals.aspx)

Primary schools

Colchester 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, but has now been approved for expansion. The forecasted net capacity for this school is 420, with the forecast for new pupils being 443 (including housing). This indicates that there will be a 23 place deficit by 2016.

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. The Bishop William Ward, Heathlands Primary and North Primary schools have been approved for expansion following recent consultation, to accommodate the growing demand for primary places in the area from September 2012.

Colchester South

Colchester south includes Cherry Tree Primary School and Speech and Language Unit, and Monkwick infant & junior Schools. Monkwick junior school is forecasted to have a large surplus (75 places) particularly when adjusted for housing forecasts.

Colchester West

In the Stanway area, consideration is being given as to how to provide the school places required to accommodate additional pupils resulting from housing developments. Overall, there should be sufficient capacity to meet demand in the next five years. However as the new housing developments planned get underway there will be pressure for school places

Colchester primary notes: across LDGs

There will be considerable housing development over the future years in Colchester. Areas under development include additional housing on the Garrison site, the Hythe and the north of Colchester. Forecasts, when adjusted for the impact of new housing, indicate that there will be a significant deficit of school places in Colchester town in the medium / long term. Significant housing development has resulted in pupil growth across the town, and the need for additional primary provision. Additional Reception places were created at some schools in urban Colchester to meet demand for Reception places in 2010/11 and 2011/12.

Pupil numbers are forecast to continue to increase across the town over the course of the next 5 years due to the rising birth rate and new housing developments in the area and further proposals are being developed with local schools. Latest predictions indicate the need for up to 240 additional reception places (8 forms of entry) in primary schools across parts of Colchester over the next 4 years: up to 3 in the North/Centre of the town and up to 5 in the South/Centre.

Forecasts for Colchester Group 8 (South East), which is comprised of the following oversubscribed schools, Kendall, Old Heath, St George’s (infant), 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. St John's Green Primary School has been approved for expansion on the Abbeyfields site, which Essex County Council has reserved for primary provision. St George's Infant and Junior and St James' Primary have also been approved for expansion.

There will be considerable housing development over the period of this Plan and beyond, and officers are working closely with Colchester Borough Council and developers to ensure that educational priorities can be met. 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.

Secondary

Alderman Blaxill School will close on 31st August 2014 and Year 7 admissions will cease with effect from September 2012. Proposals are being developed with the Colchester secondary schools about a way forward to address the high levels of growth expected from around 2017 onwards in both the north and south of the town.

15. HOUSING DELIVERY

15.1 Households

At 31 March 2011 there were approximately 75,370 dwellings within the borough of which 6,273 are owned by the local authority[39]. 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 total of 673 homes were built between 1 April 2010 and 31 March 2011. There have been 192 recorded affordable housing completions.

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 had already delivered 8,674 new homes between 2001/02 and 2009/010 at an average rate of 964 dwellings per year. In 2009/10 there were outstanding permissions for over 6,082 (net) 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. House building has slowed down in recent years due to the recession but over the 15 year period the council is on course to achieve the targets referred to above.

[39] Council Tax data from HSSA. Colchester Borough Council, 2010.

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 July 2011 there were a total of 21 gypsy and traveller caravans in Colchester, 18 of these caravans were privately owned and on authorised sites with planning permission. The remaining 3 were caravans on sites on gypsies own land, and were seen as ‘tolerated’. Compared to Essex as a whole, the number of gypsy and traveller caravans in Colchester represents 1.3% of the total. Compared to July 2010 there has been an increase of 4 caravans (or 24%).

Colchester is well advanced with its 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 was granted for twelve new pitches at Severalls Lane which have been delivered by Essex County Council. The site has now been completed, and travellers started to move in at the beginning of April 2012. 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 23: 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 23). The social rented and particularly the private rented sectors are proportionately below their national averages.

16.2 Length of residence by tenure

Table 24: 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 24 above indicates the relative stability of the owner occupied and social rented sectors and the instability 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 40[40]:

Figure 40 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 2011. Three bedroom properties increased by 14% from a median figure of £161,000 to £183,131; whilst four bedroom properties by 14% from £232,000 in 2007/08 to £264,315 in 2011. 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.

- [40] Figure 40 the data for the table is captured from asking price data of all properties available for sale from the home.co.uk website. The April sales to asking price ratio from Hometrack has been applied to arrive at a robust estimate of sales price by bedroom size. Lower quartile prices have been extrapolated using last year's data.

16.4 Affordability and home ownership

Table 25: Household income

	Original SHMA data 2007	% up rate ASHE 2008	Gross Household Income 2009	% up rate ASHE 2009	Gross Household Income 2010	% up rate ASHE 2010	Gross Household income 2011
Average Household Income	£31,396	-2.0%	£30,768	1.4%	£ 31,198	18.3%	£36,908
Median Household Income	£23,874	4.1%	£24,853	1.7%	£ 25,275	2.9%	£26,008

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)[41].

The data shows that there has been an increase in median incomes since original publication. Average incomes have increased in 2011, despite decreases in 2009. 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 the original SHMA published 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. What it does suggest however is that many households in the borough are unlikely to be able to save enough money in order 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:

[41] 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 26: 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
May 2011	15,900	1,900	80%	3.14	13.3%
Change from April 2011	0.6%	n/c	n/c	3.13	n/c
Change from May 2010	-2.5%	-5%	79%	3.26	n/c

The number and value of loans nationally have decreased in the past year but this is a fraction of the value of loans from the peak of the housing market in 2007.

Table 27: Payments and mortgages at entry Level (lower Quartile) purchase price.
Note: Data for April 2011, costs at 4% repayment mortgage for a term of 25 years

No Of bedrooms	Lower quartile price	20% deposit	80% mortgage	Monthly repayments	Weekly repayments
1	£76,229.24	£15,245.85	£60,983.40	£321.89	£74.28
2	£112,425	£22,485.05	£89,940.20	£474.74	£109.56
3	£156,969	£31,393.80	£125,575.18	£662.83	£152.96
4	£221,835	£44,367.04	£177,468.16	£936.74	£216.17

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

Table 27 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 and the Council for Mortgage Lenders data on average amount of deposit required to purchase and average mortgage rate at that level of deposit.[42]

Prior to the credit crunch the barriers to home ownership were principally high housing prices and high mortgage repayments, since the credit crunch the main restriction is about 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 3.14. Which means that a new homeowner is borrowing 3.14 multiplied their gross annual

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

household income to have a large enough mortgage to secure a property. This has reduced from 3.22 in the last SHMA (2010) update. It is likely that the only households who can buy a home for themselves are likely to be receiving significant financial assistance to have the deposit necessary.

The SHMA was published in 2008 following a decision by the Housing Market Partnership which 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 £39,992, well above the median income for the borough and above the average income for the borough. In addition to this they would need a deposit of £31,393, equivalent to over a year's salary to be able to purchase a home in this way.

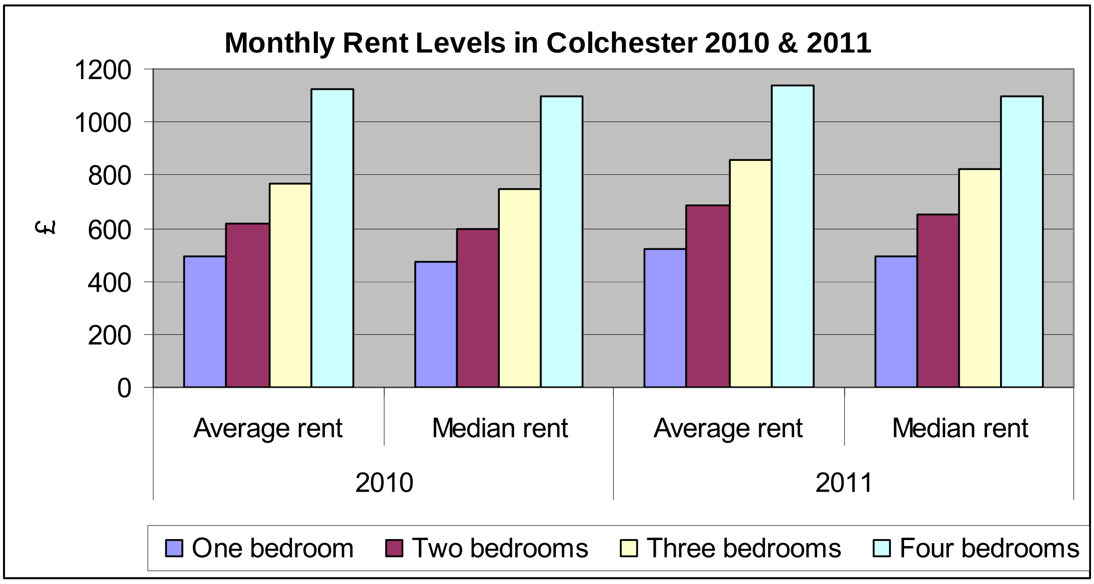
Table 28: Equivalent quartile figures for different size properties, with deposits & income needed

No Of bedrooms	Lower quartile price	80pc mortgage	Deposit required	Income needed
1	£76,229.24	£60,983.40	£15,245.85	£19,421.46
2	£112,425.25	£89,940.20	£22,485.05	£28,643.38
3	£156,968.98	£125,575.18	£31,393.80	£39,992.10
4	£221,835.20	£177,468.16	£44,367.04	£56,518.52

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 41:



Source: Colchester Borough Council Strategic Market Housing Assessment Update 2011

Table 29: Rent levels 2010-2011

	Average rent		% difference	Median rent		% difference
	2010	2011		2010	2011	
One bedroom	492	521	6%	475	495	4%
Two bedrooms	617	686	11%	600	650	8%
Three bedrooms	767	854	11%	750	825	10%
Four bedrooms	1123	1135	1%	1100	1100	0%

Source: home.co.uk

Figure 41 & Table 29 shows the median and average monthly rent for one to 4 bedroom properties in Colchester borough. Rent levels have shown a significant increase over the past year, with average rents for 2 and 3 bedroom properties rising over 10%.

16.6 Housing Benefit and Local Housing Allowance

The latest available data shows that LHA levels in Colchester have been broadly stable from 2010-2011 with some minor variations. Following a change in the LHA calculations in April 2011, where the LHA is based on the 30th percentile rather than the 50th percentile, LHA levels are significantly lower in May 2011 than in June 2010 but market rents as seen above have increased in the same period.

Table 30: Monthly equivalent amount Local Housing Allowance

	Shared room	1 bedroom	2 bedroom	3 bedroom	4 bedroom	5 bedroom
May-11	**£270.83**	**£434.98**	**£549.99**	**£694.98**	**£895.00**	***£895.00**
Jun-10	**£292.50**	**£448.76**	**£573.43**	**£718.03**	**£897.52**	**£1,196.69**
% change over 1 year	**-7.41%**	**-3.07%**	**-4.09%**	**-3.21%**	**-0.28%**	**-25.21%**

Source: Colchester Borough Council Strategic Market Housing Assessment Update 2011
* maximum LHA equal to 4 bed rate following rule change in April 2011

Table 31: Housing Benefit claims 2008 to 2011

	Apr-08	Apr-09	Apr-10	Apr-11	% Change from 2010 to 2011
Total HB claims	9,096	9,894	10,489	10,919	4.1%
Council Tenants	4,157	4,206	4,191	4,285	2.2%
Housing Association Tenants	2,287	2,429	2,593	2,730	5.3%
Private Tenants	2,652	3,259	3,705	3,904 (73% on LHA)	5.4%

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 31 above gives a breakdown of the kinds of claims made over the past four years and increases in claims.

The results show that there has been an increase in the number of Housing Benefit claims overall but that the housing benefit claimants in the affordable rented sector have remained broadly similar for the past 3 years. The increase is mainly due to private tenants claiming housing benefit. The most recent data shows that 3,904 private tenants in borough are claiming housing benefit to help pay their rent.

There was a 47% increase in the number of Housing Benefit claims made by tenants in the private rented sector between April 2008 and April 2011. The most recent data shows that 3,904 private tenants in the borough are claiming housing benefit to help pay their rent, a large proportion of all renters. However, anecdotally it is estimated that 80% of adverts for private rented properties will not accept tenants claiming housing benefit[43]. 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.

[43] Strategic Housing Market Assessment Update 2010

Looking at the breakdown of Housing Benefit by type of claimant data it is interesting to note that the biggest increase is for claimants who are in work and may therefore be receiving reduced wages, if they are now qualifying for housing benefit when they haven't been previously.

16.7 Repossessions

Table 32: Landlord claims and Possession Orders awarded

Year	Landlord possession claims issued	Landlord possession claims leading to possession order
Q1 2011	140	90
Q1 2010	120	80

Source: Colchester County Court (taken from 2011 SHMA update)

The number of claims and of possession orders awarded have slowly increased since the SHMA was published. Latest figures (above) show a 15% year on year increase. Repossessions data shows a reducing number of possessions action initiated in each year and a steady decrease in the numbers leading to an order. 2010 figures are approximately half of 2007.

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.

Migration estimates suggest that Colchester is a popular migration destination for all age groups, with only the 45-64 age group showing slight net outflow. Estimates suggest that net migration into Colchester has reduced from approximately 1600 individuals in mid 2008, to 610 individuals in mid 2010. These individuals are from across the country[44]. Traditionally London and other areas in Essex are places of significant migration into Colchester and this data confirms that. 35% of all migration into Colchester is from other parts of Essex and 19% from London. There is a small net inflow from the Greater Haven Gateway sub region into Colchester.

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.

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

When looking at net inward migration Havering, Barking & Dagenham and Redbridge were the top three London areas with the highest net inward migration into Colchester.

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 younger individuals and 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.

In 2010, 4,859 individuals were registered on the specialist housing requirement register.

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 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 October 2011, 2,024 properties were registered as empty, an increase on previous years[45]. 591 of these were classified as long term vacant properties - dwellings which have been unoccupied and substantially unfurnished for over six months. The majority of vacant dwellings are privately owned.

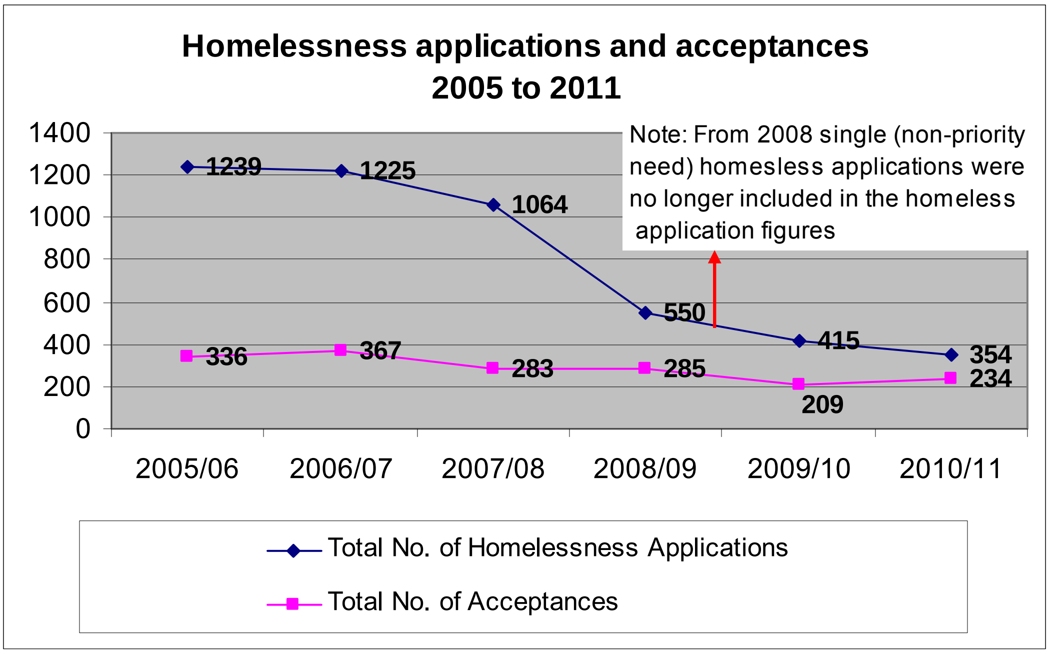
16.13 Decent homes

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). In 2010/11 this figure had decreased to 0% meaning there were zero non-decent houses in the council's stock.

16.14 Homelessness

Figure 42:

[45] http://www.communities.gov.uk/documents/housing/xls/1815794.xls



During 2010-11, 354 homelessness applications were made to the council, a reduction on the previous year. Please note during this period the service underwent restructure and working practices changed. Colchester's rate of acceptances per thousand households remains significantly higher than the England average.

During 2010-11 66% of all Colchester's applications were accepted compared to 43% of all applications for England. This significant difference may be attributed to Colchester's working practices which mean applications for homelessness are likely to be taken from those households with a high probability of being accepted although we cannot stop anyone from making a homelessness application. At the end of March 2011 there were 163 households in temporary accommodation; the council achieved the Governments target of reducing by half the number of households in temp by December 2010.

In comparison to the average for England who were accepted as homeless, we only have figures for 2009/10. These have been calculated per thousand households by the Association of Public Health Observatories (APHO)[46] at 2.9 per 1000 households as opposed to only 1.9 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 42 shows the number of homelessness applications and acceptances between 2005 and 2011. Between 2005 and 2008 the numbers of applications decreased by 14% (175 people). Due to a change in recording

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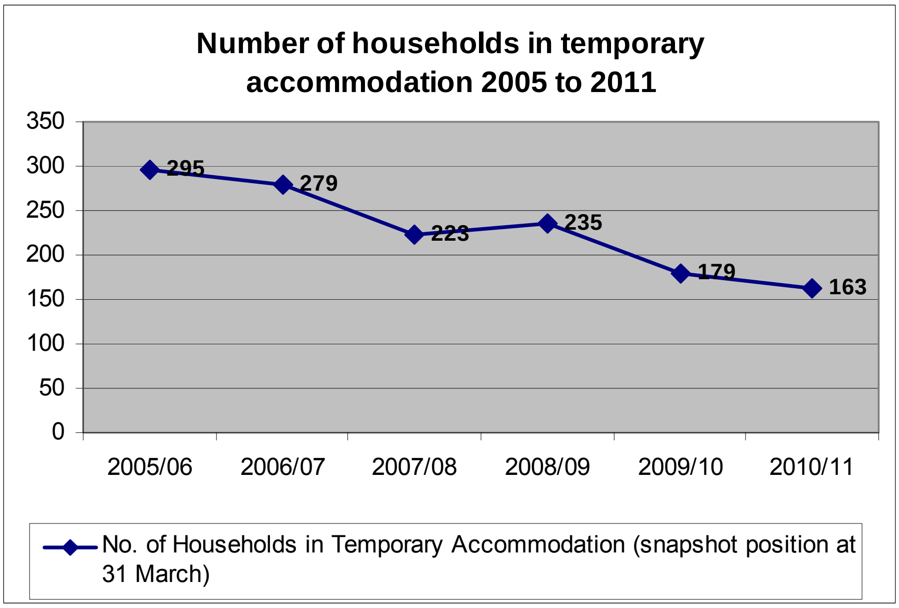
[46] Association of Public Health Observatories (APHO) Health Profile 2011 for Colchester, Department of Health, Crown Copyright ©2011

methods (see figure 42 for details) the figures from 2008 cannot be compared with those of previous years. However, from 2008 to 2011 there was also a decrease in the number of homeless applications; from 550 in 2008/09 to 354 in 2010/11; a decrease of 36% (196 people).

16.15 Temporary accommodation

Figure 43:



At the end of March 2011 there were 163 households in temporary accommodation; the council achieved the Governments target of reducing by half the number of households in temporary accommodation by December 2010. The council put a number of interventions into the housing service to help meet the target. For example, capacity for housing advisers to take on homelessness prevention and more detailed casework was increased.

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 33: Applicants on the Housing Needs Register, April 2012

Count of HousingRegisterRef	Max Bed Size Override								
BandID	Studio	1	2	3	4	5	6	8	Grand Total
A		63	95	16	3		1		178
B	1	186	132	123	64	8			514
C		1187	457	206	46	6	1		1903
D		159	97	55	25	2		1	339
E		838	1005	433	52	10	2		2340
F		8	4		1				13
Grand Total	1	2441	1790	833	191	26	4	1	5287

Source: Abritas Reporting, Gateway to Homechoice, April 2012.

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.

At 1st February 2012 in Colchester, there were 4,525 households on the housing needs 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 75% of those on the register).

Whilst there is less demand in terms of numbers for three and four or more bedroom homes these are the most difficult group to house as there are far fewer properties available and therefore 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.

The Gateway to Homechoice system is operated sub regionally across the districts of Babergh, Braintree, Colchester, Ipswich, Maldon, Mid Suffolk, Suffolk Coastal and Waveney. 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, Suffolk Coastal and Waveney 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 34: Affordable Housing Completions, 2001 to 2011

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
2010/11	130	11		51	192

Table 34 shows the trends in delivering the different tenures of affordable housing over the past decade. The year end figure of 192 affordable homes is 28.5% of all units provided. This year's result is higher than the previous two years figures of 156 in 2009/10 and 120 in 2008/2009. This is a very positive trend especially in light of the current economic climate. The percentage of 28.5% compares to 30.1% in 2009/10 and 11.5% in 2008/09. The continuing delivery of affordable housing, however, is likely to be constrained by the fact that the new affordable rent tenure is seen by Government as a replacement or grant.

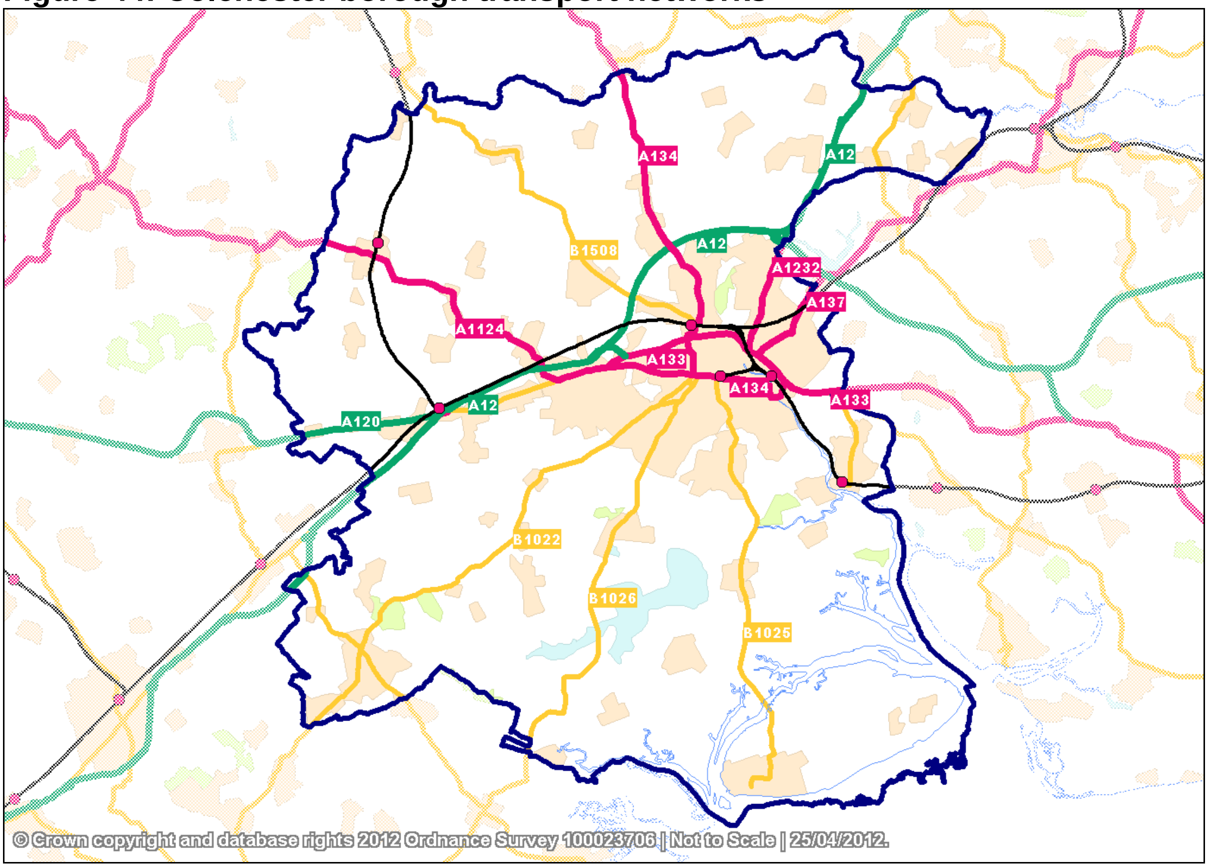
192 units of affordable housing were completed between April 2010 and March 2011. A total of 141 were affordable rental (130 social rented, 11 intermediate tenure) and 51 units were built through the Homebuy Direct scheme which offers equity loans towards the purchase of a new build home on selected developments.

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.

17. TRANSPORT

17.1 The Transport Network

Figure 44: Colchester borough transport networks



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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[47]. 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[48]. The reliable operation of buses is greatly affected by traffic congestion. The Transport Plan for Essex 2011 highlights one of the Haven Gateway's key priorities as tackling congestion within Colchester (including the provision of Park & Ride facilities).
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. Major new transport infrastructure delivered as part of the previous Essex local transport plans, include the new J28 on the A12 at Colchester are also helping to support new development which will secure the long-term growth of the Essex economy; though significant further infrastructure investment will be required if this is to be achieved

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[49]. 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 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

[47] Essex Transport Strategy, the Local Transport Plan for Essex 2011, Essex County Council.
[48] Bus Timetable for Essex, June 2010, Essex County Council.
[49] Bus Timetable for Essex, June 2010, Essex County Council.

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.

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. Passenger access to main line services is via Colchester and Marks Tey stations. It is reported that serious overcrowding has been recorded during peak periods, particularly on inner-suburban services during peak periods, but also on outer suburban services (linking Chelmsford, Clacton and Colchester). Services are operating close to capacity on large sections. The Local Transport Plan highlights improving journeys for commuters travelling to London from Colchester as a key priority. Particularly in regards to improving access to railway stations and improving facilities for passengers.

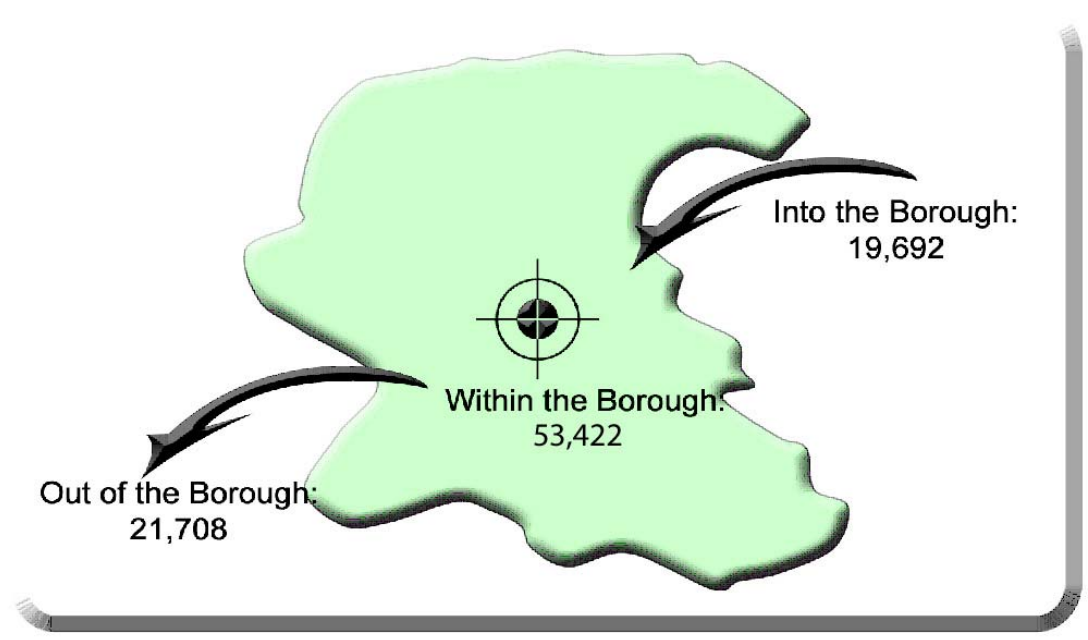
Local inter urban networks radiate out from Colchester and are in the main single carriageway A roads. To the east of the Colchester, the Tendring peninsular is connected to Colchester via the A133, the A120, the A137 and the Colchester Clacton Rail line. The roads are heavily used by people of Tendring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

Cycling
Since 2007 cycling levels have risen substantially, the Colchester Cycle Town initiative has helped to promote cycling, and investment in cycling within the borough has also occurred. Colchester was selected by the Government as one of 18 UK Cycling Towns, with over £4 million invested in improving the cycling experience and getting more people onto their bikes through the 'Cycle Colchester' project. The project has enabled the development of 7 clearly signposted and easy to follow cycle routes, and improved town centre and Colchester station access for cyclists.

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 45 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. 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 45: Trips in and out of the borough

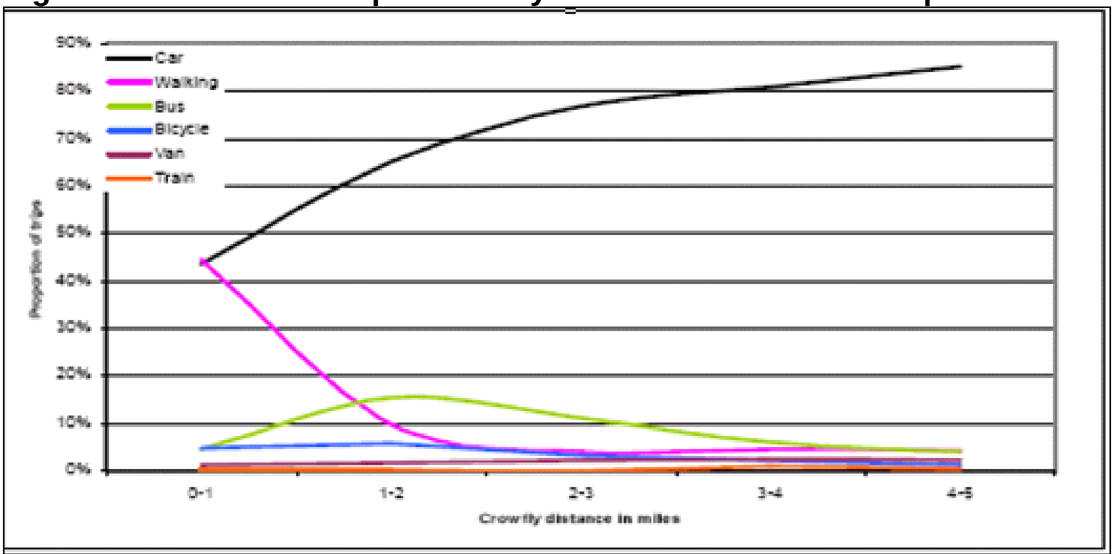


Source: 2001 Census; ONS © Crown Copyright.

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 46: 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. The results from the Census 2011 are due for publication over the next 2-3 years, and should provide a more up to date insight into travel in the region.

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.

The third edition of Essex County Council's Local Transport Plan shows that a number of key routes into and around Colchester town centre suffer congestion, especially during the peak periods, with specific problems at some junctions along these routes. This can also lead to poor public transport journey time reliability. The report states that novel transport measures will be required, in order to ensure that growth can be accommodated sustainably.

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.

More information can be found in the Colchester Interim LDF Transportation Report.

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 initiatives have been implemented and improvements to public transport are being sought along with initiatives to reduce traffic in the town centre.

The Essex Economic Assessment (EEA) (2010), explains that although Essex is well connected, with the M25, M11, A12 & A13 providing the main road arteries. However, the report also explains how congestion remains a problem in parts of the county, particularly in South Essex. The EEA also noted that businesses identified transport reliability, road networks, and road/pavement maintenance as priority issues.

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[50]. 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[51]. 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.

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[50] Introduction of 20mph areas in Colchester, CBC report, November 2009.
[51] 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 35 is taken from the Water Cycle Study and shows the various schemes and timings of the proposed water management measures.

Table 35: 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 36 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.

Table 36: 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 37: CO2 emissions 2005 to 2009

Year	Industry and Commercial (kt CO2)	Domestic (kt CO2)	Road Transport (kt CO2)	Grand Total	Population ('000s, mid-year estimate)	Per Capita Emissions (t)	% per capita reduction since 2005
2005	365.2	383.2	365.5	1113.9	162.9	6.8	
2006	366.6	386.8	362.5	1115.9	165.7	6.7	
2007	348.3	379.6	365.9	1093.8	169.6	6.5	
2008	335.1	376.9	350.8	1062.8	174.3	6.1	
2009	291.5	343.5	340.1	975.1	177.1	5.5	19.0%

Source: Department for Energy & Climate Change

The baseline for Colchester was 6.8 tonnes CO_2 per capita and the results for 2005, and this reduced to 5.5 tonnes CO_2 per capita in 2009. This is a 19% reduction, and ranks joint fourth alongside Maldon, in relation to Essex LAs with the largest per capita reduction.

Evidence shows that the domestic sector was responsible for 35.2% of CO2 emissions in Colchester in 2009[52].

[52] Department of Energy and Climate Change 'Local Authority Datasets 2005 – 2009'

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 energy usage by 2012. The total LACM savings (up to September 2011) stood at 1,337 tonnes CO2.

18.5 Air quality

In 2011 a detailed Air Quality Assessment was published, superseding the 2009 Screening Assessment. The 2011 report highlighted the extent of exceedences across Colchester town centre, hence it was administratively simpler to declare an Air Quality Management Area (AQMA) to cover the whole town, incorporating the existing AQMAs at Brook Street and Mersea Road. This is known as the Central Corridor AQMA.

There are now 4 AQMAs in Colchester, compared to 2 in the previously published report. These are located around: Lucy Lane North in Stanway, East Street & Lower Ipswich Road, Harwich Road/St Andrews Junction, and the area known as the 'Central Corridor', (encompassing areas including; Mersea Road, Brook Street, the High Street & North Hill). 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.

The 2011 report also recommended that Colchester Borough Council should continue to monitor concentrations of nitrogen dioxide at sites of relevant exposure to determine the long-terms effects of implementing the Air Quality Action Plan. The council was also advised to consider installing an automatic monitor in Head Street/High Street to confirm exceedences of the hourly mean objective.

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[53]. 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[54]. In the UK up to 35,000 people in the UK died prematurely in 2005 as a result of exposure to air pollution[55].

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

18.6 Waste

Between 2010 and 2011 there was an average of 479kg of residual household waste per household which is below the annual target of 710kg per household. During this time 40.24% of household waste was reused, recycled and composted. This was above the annual target of 34.0% (National Indicators NI 191 and NI 192). Compared to the figures published in the original evidence base, there has been a reduction in residual waste, and an increase in the amount of household waste that has been reused, recycled and composted.

Despite increase in household numbers, the overall figure for waste sent to landfill is now reducing year on year, as more material is diverted through the council's reduce, reuse, recycle policies, and the economic climate. As the land available to dispose of waste (landfill sites) is reducing, this is a positive move. The current landfill site at Stanway, Colchester is likely to have spare capacity left to accept commercial and household waste for approximately another 10 - 15 years. The shortage of available landfill, coupled with the increasing costs of using landfill, primarily through increasing Landfill Tax alongside the environmental impacts associated with land-filling waste, mean that Essex County Council as well as local businesses need to look for alternative waste disposal options.

Colchester Borough Council started a food waste trial on 8th November 2011, to last around one year, and test around 7,100 properties. This trial will give insight into how successful the roll out of the scheme would be across the borough in reducing waste to landfill.

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 has been incorporated into strategies such as the Parks and Green Spaces Strategy, Play Strategy and Allotment Strategy. 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.

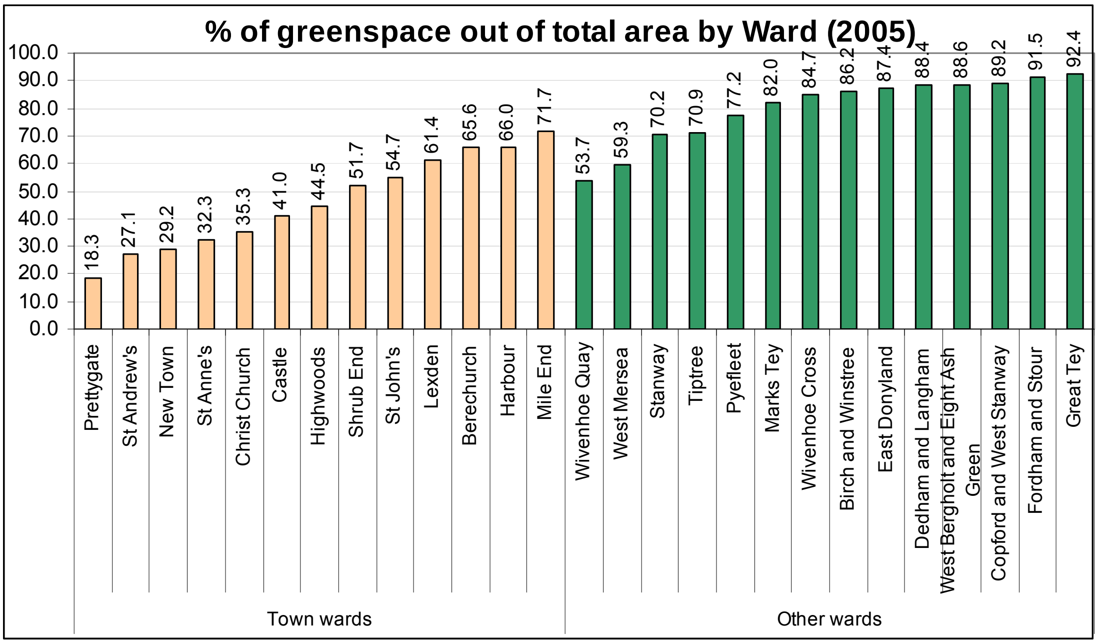
New areas of open space have been provided in Colchester as part of recent development schemes including:

- 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);
- Abbey Fields Play area, and
- Tile House Farm, Great Horkesley

A number of additional open spaces including play sites are due to be transferred from residential developers to the council in the near future.

18.8 Greenspace by ward

Figure 47:



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

Figure 47 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.