

EMPLOYEE SURVEY 2018

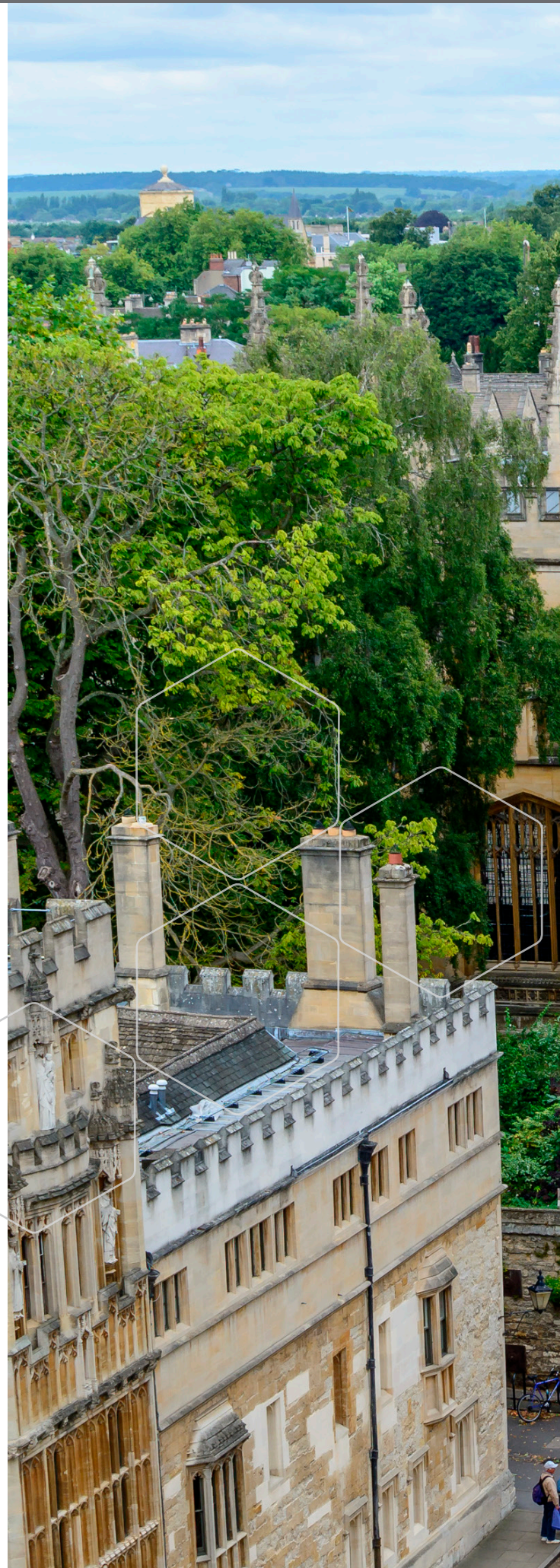
For Advanced Oxford



This report contains the key findings of the 2018 employee survey, conducted by Qa Research on behalf of Advanced Oxford.

Advanced Oxford (AO) wished to explore the attitudes and experiences of AO members' employees of living and working in the Oxfordshire region, along with any challenges that arise. They specifically sought opinions on housing, transport, amenities, schools and opportunities for culture in Oxfordshire; and the influence of these factors on decisions to work in the area.

www.AdvancedOxford.com





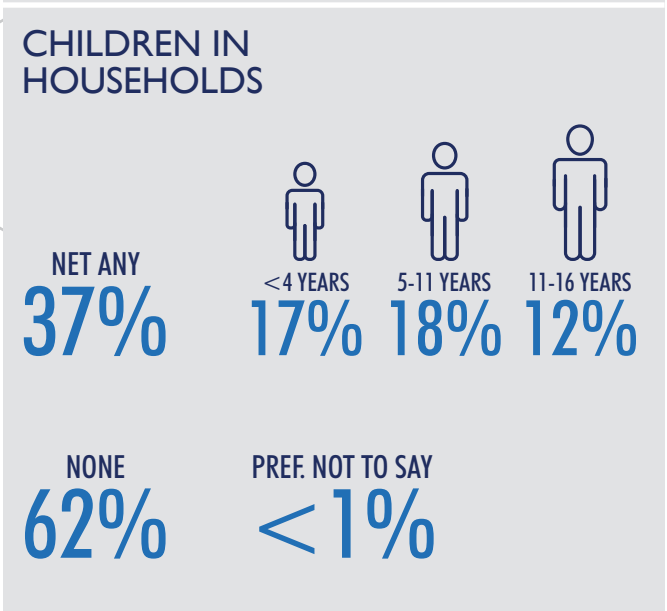
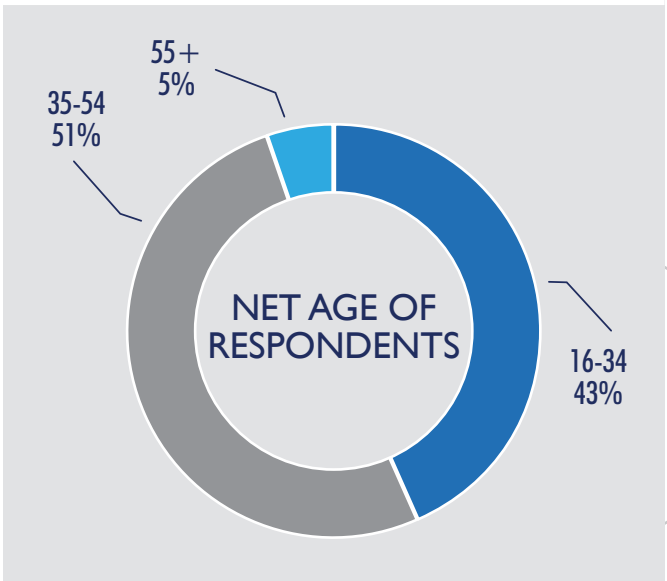
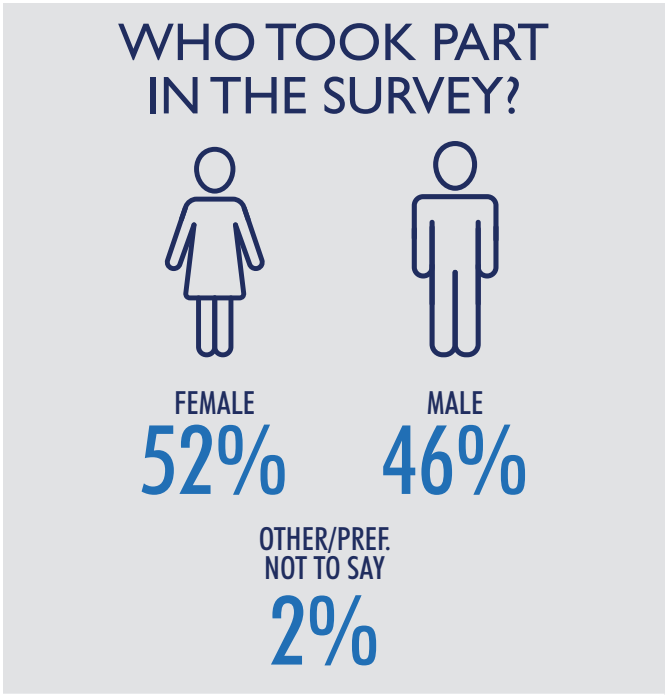

BACKGROUND AND METHODOLOGY

HOW THIS SURVEY WAS CARRIED OUT

PARTICIPANTS IN THIS SURVEY WORK FOR THE MEMBERS OF ADVANCED OXFORD (www.AdvancedOxford.com)

DATA WAS COLLECTED USING AN ONLINE SURVEY

DATA WAS COLLECTED AT THE END OF 2018



WHERE RESPONDENTS' LIVED

48%

LIVED IN A 3-4
BEDROOM HOUSE



24%

LIVED IN A 1-2
BEDROOM FLAT OR
APARTMENT

15%

LIVED IN A 1-2
BEDROOM HOMES

4%

LIVING WITH
PARENTS, FAMILY
OR FRIENDS

45%

WERE PAYING OFF
A MORTGAGE OR
LOAN

37%

WERE RENTING

12%

OWNED THEIR
HOUSE OUTRIGHT

THE REST INCLUDED THOSE:
LIVING RENT FREE (2%) OR BUYING A HOUSE THROUGH A
SHARED OWNERSHIP SCHEME (2%)

RESPONDENTS' EMPLOYMENT

93%

WORKED FULL TIME



5%

WORKED PART TIME

66%

HAD A JOB
CLASSED AS A 'PROFESSIONAL
OCCUPATION'



15%

WERE 'MANAGERS,
DIRECTORS OR SENIOR
OFFICIALS'

10%

HAD 'ASSOCIATE
PROFESSIONAL
AND TECHNICAL ROLES



5%

WORKED IN
'ADMINISTRATIVE AND
SECRETARIAL OCCUPATIONS'

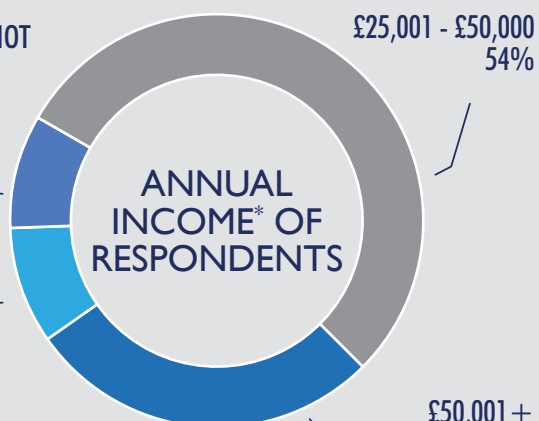
VERY FEW WORKED IN 'CARING, LEISURE AND SERVICE
JOBS' OR 'SKILLED TRADES'

How long have you worked for your current employer?



PREFER NOT
TO SAY
9%

UP TO
£25,000
9%

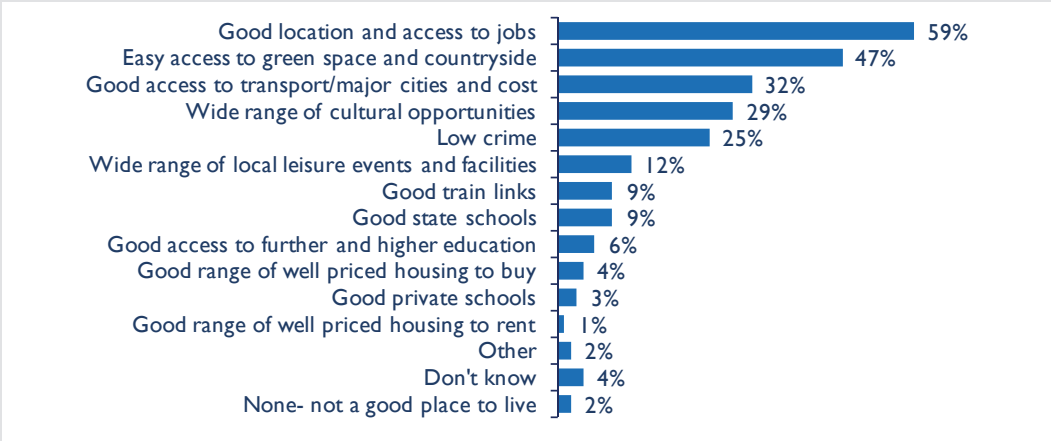


* PERSONAL INCOME, NOT HOUSEHOLD



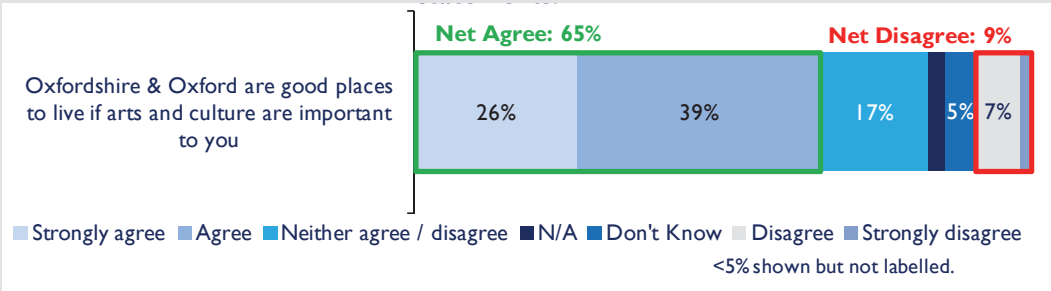
LIVING IN OXFORD AND OXFORDSHIRE

WHEN ASKED ABOUT THE **BEST** FEATURES OF OXFORDSHIRE AS A PLACE TO LIVE:



CULTURAL ASPECTS OF THE AREA WERE ALSO IMPORTANT TO RESIDENTS

In addition to its location for certain industries and green space, as well as its transport links; respondents clearly enjoyed the range of cultural activities available in Oxford and Oxfordshire.

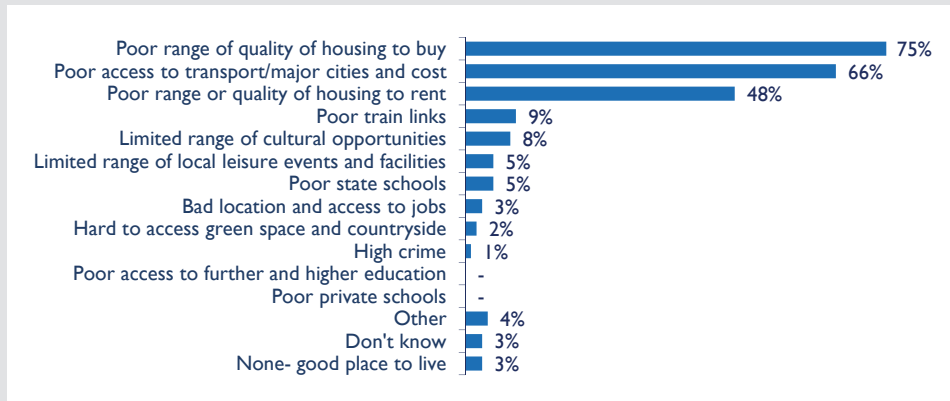


WHEN ASKED ABOUT THE **WORST** FEATURES OF OXFORDSHIRE AS A PLACE TO LIVE:

75%
POOR RANGE OR QUALITY
OF HOUSING TO BUY

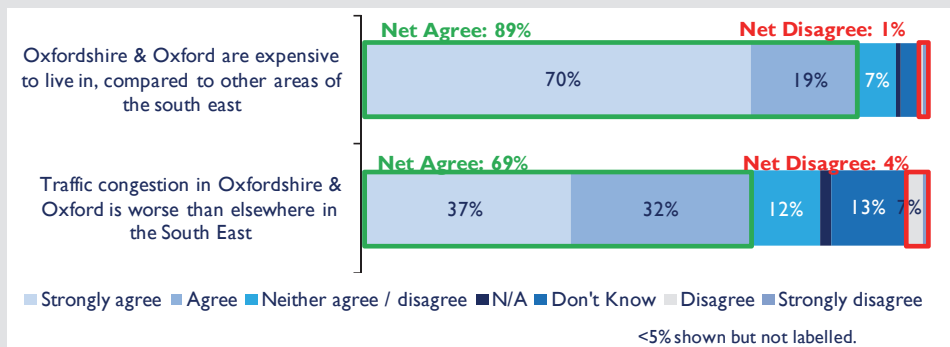
48%
POOR RANGE OR QUALITY
OF HOUSING TO RENT

66%
POOR ACCESS TO TRANSPORT/
MAJOR CITIES & COST



89%
(NET) AGREED OXFORDSHIRE
WAS AN EXPENSIVE REGION
TO LIVE IN

69%
(NET) AGREED CONGESTION
WAS WORSE THAN OTHER
AREAS IN THE SOUTH EAST

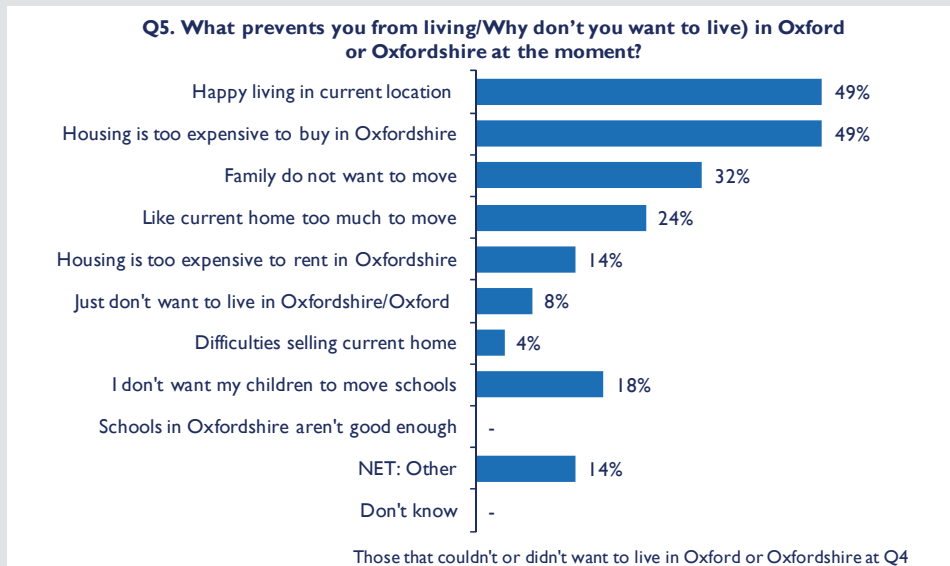


There is evidently a feeling that there is a considerable issue with the range and cost of property available to buy and rent in Oxfordshire and Oxford. There also appears to be a feeling that congestion in the area is particularly bad.

Alongside this, around a quarter of respondents that lived in Oxfordshire had plans to leave the area within the next 5 years (26% net: likely to move within next 5 years). Amongst the 9% that either had firm plans to move already or would do so within the next 2 years, the majority (86%) said the cost of housing both to rent and buy had a strong influence on this decision. It should be noted however that this 86% is a very small number of the total sample, less than 10%.

Supporting this, of the 23% that lived outside of Oxfordshire, over half (60%) said they didn't want to live in the area and just over a fifth (21%) said they couldn't. Amongst this, 54% said the cost of housing (Net: housing- renting and buying) was one of the factors stopping them.

Whilst this is a small proportion of the overall sample, it adds further evidence that the cost of property in Oxford and Oxfordshire is seen as an issue.



WORKING IN OXFORD AND OXFORDSHIRE

RESPONDENTS' COMMUTE



82%
TRAVELLED TO WORK
IN OXFORDSHIRE
5 DAYS A WEEK



78%
NORMALLY TRAVELLED TO
WORK BY CAR (BOTH DRIVING
AND AS A PASSENGER)



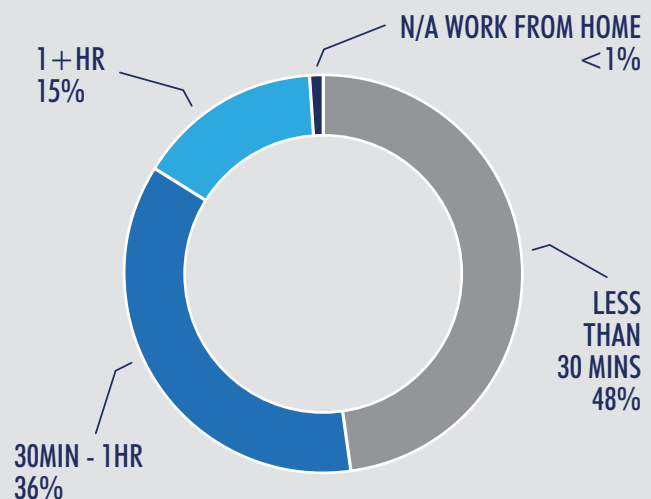
26%
NORMALLY TOOK
PUBLIC TRANSPORT
21% MOST COMMONLY THE BUS.



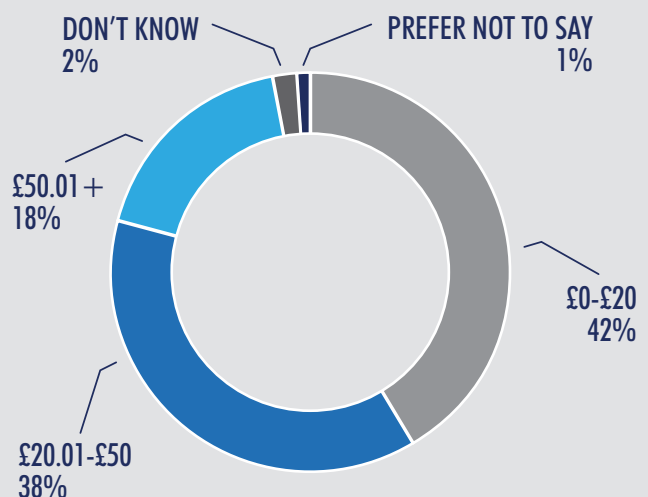
23%
CYCLED TO WORK

NOTE THAT PARTICIPANTS COULD CHOOSE MULTIPLE OPTIONS HERE SO
PERCENTAGES WILL TOTAL MORE THAN 100%

HOW LONG IS YOUR NORMAL
COMMUTE FROM YOUR HOME
TO YOUR EMPLOYER'S PREMISES
IN OXFORDSHIRE/OXFORD?



HOW MUCH DO YOU ESTIMATE
YOU SPEND COMMUTING TO
AND FROM WORK ONLY, IN A
TYPICAL WEEK?



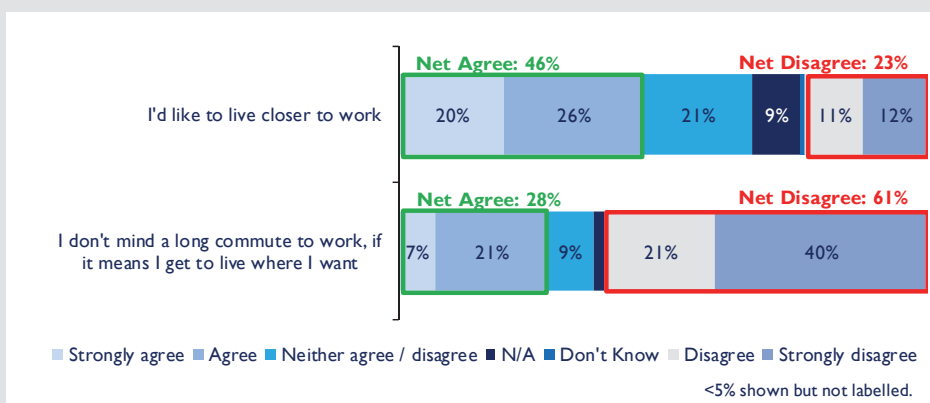
RESPONDENTS WERE ALSO ASKED FOR THEIR AGREEMENT WITH CERTAIN STATEMENTS ABOUT WORKING IN OXFORDSHIRE

Perhaps reflecting this unhappiness with the cost of property, just under half (46%) wished they could live closer to their workplace.



46%

WISHED THEY COULD LIVE CLOSER TO THEIR WORKPLACE



TRAVELLING

Nearly half (49%) worked from home on occasions, with considerable minorities travelling both overseas and around the UK. This question however doesn't suggest how often travelling or home working occurs so it can't be said whether these happen frequently or very rarely.



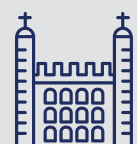
49%

WORKED FROM HOME ON OCCASIONS



40%

TRAVEL OVERSEAS



34%

TRAVEL TO LONDON



OXFORD

32%

TRAVEL AROUND OXFORDSHIRE/OXFORD



30%

TRAVEL TO OTHER UK CITIES

24%
NONE



HOME WORKING OPPORTUNITIES

A considerable majority (87%) had access to fast and reliable broadband, sufficient for home working. Given that nearly half have already worked from home at some point, this could be a potential option to explore given traffic and transport issues.

87%

HAD ACCESS TO FAST AND RELIABLE BROADBAND

12%

HAD ACCESS TO BROADBAND BUT IS NOT FAST/RELIABLE ENOUGH TO WORK AT HOME

1%

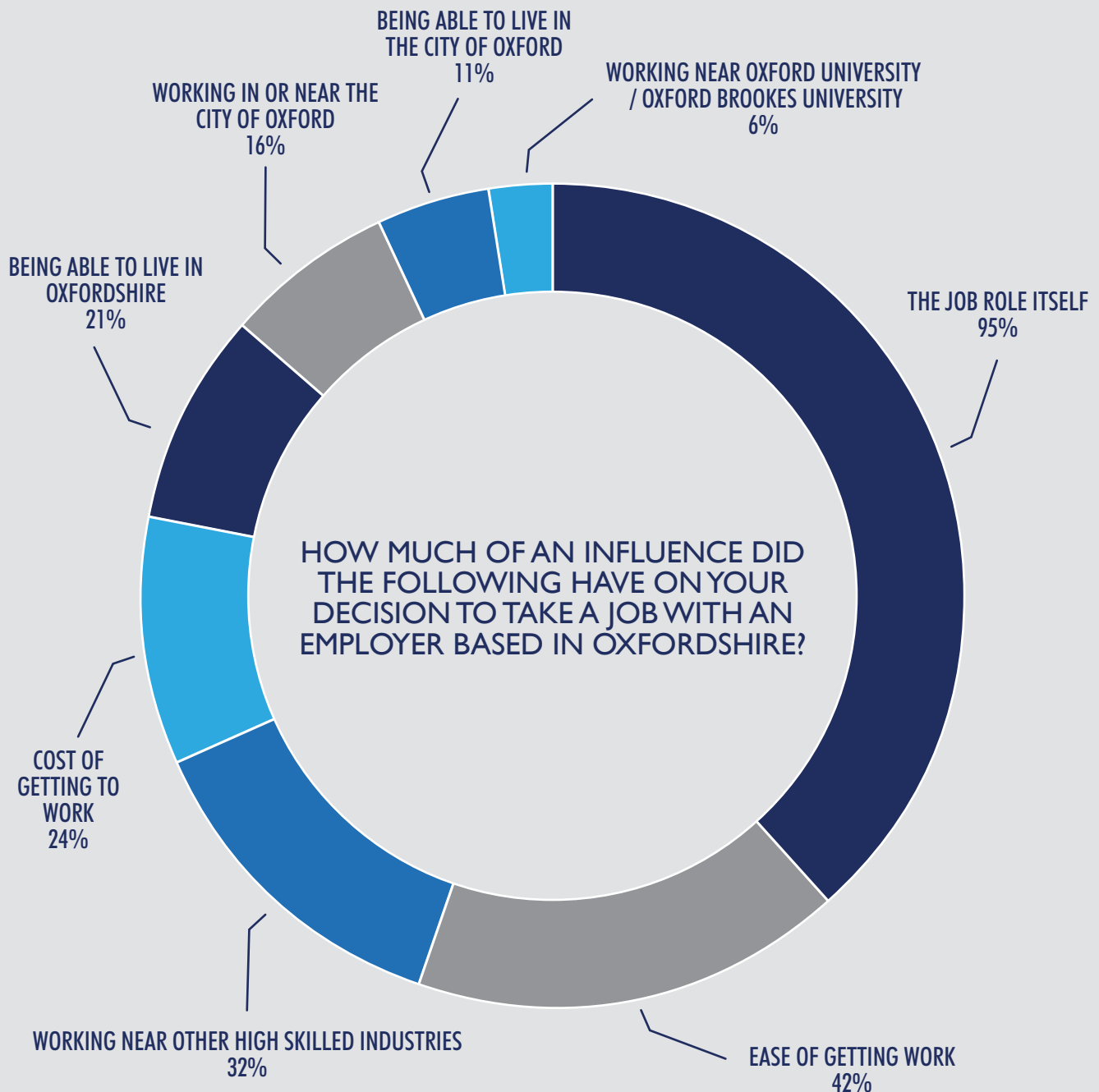
NO BROADBAND

1%

DON'T KNOW

REASONS TO WORK IN OXFORDSHIRE

Respondents were asked to rate the importance of a number of factors in their decision to work in Oxfordshire, from 'not relevant at all' to 'it was the main reason I took the job'. The chart below shows the proportion of respondents that rated each factor as 'Net main factor' which combined ratings 'main reason I took the job' and 'it was a strong influence along with other considerations'.



By a considerable margin, 'the job role itself' was a key factor in choosing to work in Oxfordshire, with 95% rating this as being the main reason. Just under half (42%) rated the 'ease of getting work' as another main reason. Decisions to work in the region then appear to be linked more to specific jobs rather than a desire to live in Oxfordshire specifically. In fact 'being able to live in Oxfordshire' was only rated as a main reason by 21% of respondents.

DEAL BREAKERS

Respondents were also given the opportunity to raise anything they would regard as a 'deal breaker' that would 'definitely stop them working in the area'. This was an open question and so respondents could mention anything at all they felt was an issue. These answers were coded into broad themes, shown in the table opposite.

As can be seen a variety of 'deal breakers' were highlighted. Of those that commented, 37% raised the high cost of housing as an issue, the most commonly mentioned. A further quarter said 'poor access or transport links' was another key issue. Once again, the cost of housing appears to be a key issue.



37%
HIGH COST OF HOUSING



25%
POOR ACCESS OR TRANSPORT LINKS

HIGH COST OF HOUSING	37%
POOR ACCESS OR TRANSPORT LINKS	25%
HIGH COST OF LIVING	18%
COSTS OF TRAVEL OR TRANSPORT	16%
HEAVY TRAFFIC OR CONGESTION	16%
IMPACTS OF BREXIT	8%
CHANGES IN PERSONAL OR FAMILY SITUATION	7%
POOR QUALITY OF HOUSING	4%
POOR OR NO CAR PARKING OPTIONS	3%
LOW QUALITY OF SCHOOLS	3%
POOR JOB OR CAREER PROSPECTS	3%
IF SPECIFIED WORK OR DEVELOPMENT GOES AHEAD	3%
HIGH LEVEL OF CRIME	2%
IF WORK LOCATION MOVED TO FURTHER AWAY	2%
LACK OF ENTERTAINMENT OR PLACES TO GO	1%
I WOULD MOVE TO BE CLOSER TO MY FAMILY	1%
OTHER	8%
NONE	-

BASE: THOSE THAT COMMENTED (225)

WHAT ONE ASPECT WOULD YOU IMPROVE ABOUT WORKING IN THE REGION?

41%

IMPROVE THE ROAD NETWORK
AND TRAFFIC CONGESTION

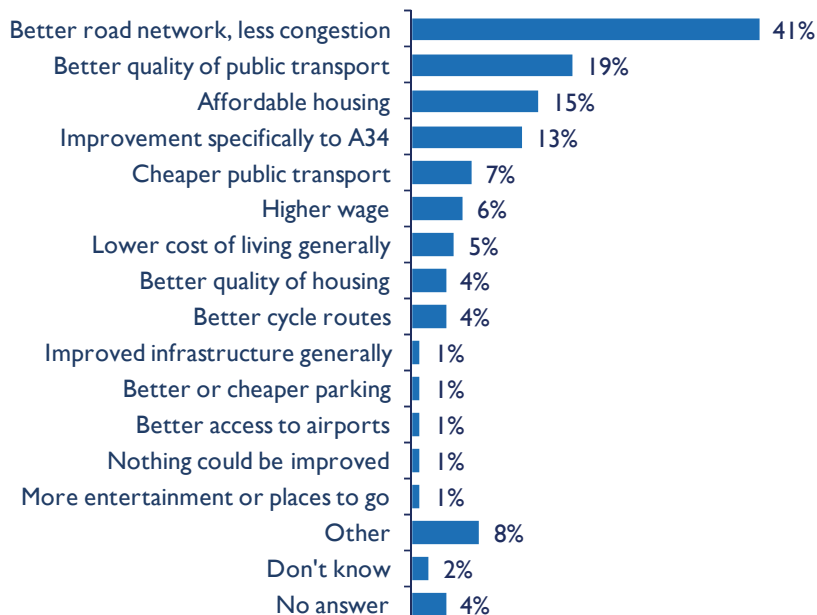
19%

BETTER QUALITY PUBLIC TRANSPORT

15%

AFFORDABLE HOUSING

A lot of suggested improvements revolved around transport and traffic. Nearly half (41%) wanted to improve the road network and traffic congestion. Other areas highlighted as needing improvement were public transport (19%), and once again the cost of housing (15%).



CONCLUSIONS

- The **location** of Oxfordshire and its **access to jobs** was felt to be the best feature of the region as a place to live. Respondents also enjoyed the ease of access to the countryside. Culture in Oxfordshire was also perceived positively, with most agreeing that there were plenty of cultural opportunities and activities.
- However issues with living in the region predominantly surrounded the **cost of property**. Both sale and rental property were deemed to be too expensive, and the region in general was felt by the majority to be an expensive area to live in.
- The cost of property could be a barrier to people working in the area. It was the most commonly raised 'deal breaker' to putting off potential employees. As well as this, it was one of the main reasons why people that lived outside of Oxfordshire hadn't moved into the region.
- There also appears to be a feeling that **traffic congestion** is a problem, 69% felt it was worse in Oxfordshire than other areas in the region. Easing congestion was also the most commonly mentioned improvement (41%) respondents would like to see in the area. Whilst perception that traffic is a problem is common to many local areas, survey respondents did feel that it was worse than other areas in the South East.
- This issue with congestion could be in part down the vast majority of respondents (78%) that normally commute to work by car. At present, only around a quarter of respondents take public transport to work. When asked about improvements they would like to see to the region, better public transport was the second most commonly raised issue, which could be factoring into this.
- Decisions to work in Oxfordshire seem to be driven by the offer of a particular job role rather than a specific desire to live or work in the region itself. By far the strongest influence on deciding to work in Oxfordshire was reported to be the 'job role itself' (95%). Nonetheless, other results on the survey do suggest that Oxfordshire offers a strong 'package' of a safe, rural, cultural high quality place to live – whilst the job was the most important single factor in working there, other factors undoubtedly did have an impact.