December 2025

ODS Economic Impact Assessment 2024/25

Final report

SQW

Contents

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Date: 08/12/2025

ODS Economic Impact Assessment

2024/25

1,174 Total jobs supported by ODS activities, including 742 jobs supported in Oxford.

£69.0m Total GVA impact generated by ODS in the UK, including £43.8m GVA impact in Oxford.

539 People employed by ODS, with 46% based in Oxford and 44% based in the rest of Oxfordshire

£84.2m Turnover generated by ODS activities

£48.5m spent with UK businesses.

This generates **£27.7m** in indirect GVA, and supports **411 jobs** across the UK.

£33.6m employment costs and **£21.2m** in wages and salaries.

This generates **£8.0m** in induced GVA, and supports **224 jobs** in the UK.

ODS places 'doing good' at the centre of its activities. In 2024/25, the company:

- collected and recycled 27,000 tonnes of waste resources
- donated 72 hours of staff time to a range of local organisations and raised £13,000 in donations
- gained Clean Sheet Employer status, reaffirming their commitment to inclusivity in the workplace
- delivered several initiatives to support potential employees, including participation in careers fairs
- offered 56 hours of job experience in several departments

Executive Summary

1. In June 2025, SQW was commissioned by ODS to undertake an update of the economic impact assessment of its services and activities in Oxford and Oxfordshire in FY 2024/25. This follows the economic impact assessment of activities in FY 2023/24 undertaken by SQW, completed in March 2025.

2. Oxford Direct Services (ODS) was established in 2012 to deliver direct services to the public on behalf of Oxford City Council (OCC) and offer commercial services to local businesses and organisations. In 2018, ODS separated into two local authority trading companies; ODS Limited (ODSL), which provides statutory services to Oxford and maintains Oxford City Council's housing stock, and ODS Trading Limited (ODSTL), which is a commercial entity providing a similar range of services to a range of organisations in the local area.

3. ODS provides specialist services around total waste management, grounds maintenance, property management, highways and fleet maintenance, integrated facilities management, and construction. The Group's strategy is centred around delivering excellent value-for-money public services, and generating profit, which is reinvested back into public services.

Local socioeconomic context

4. The Oxford economy is underpinned by nationally and internationally significant anchor institutions including the University of Oxford, Oxford Brookes University, Oxford Science Park, Oxford Business Park, John Radcliffe Hospital, and MINI Plant.

5. The city is part of the Oxford-Cambridge Growth Corridor, which has been promoted by successive UK Governments for the opportunities to grow world leading science and technology firms in life sciences, manufacturing, and AI. Reflecting the economic strengths of the area, GVA continues to grow in the area. In 2023, Oxford contributed £8.6bn to the UK economy, 26% higher than in 2019. In the same period, GVA in Oxfordshire and the UK both grew at 24%.

6. Despite Oxford's continued economic growth, the recent update to the Index of Multiple Deprivation in October 2025 illustrates the persistent gap between the most and least deprived areas in the city. Of the 83 neighbourhoods in Oxford, 21 are among the 10% most well off and six are among the 20% most deprived.

7. The business base in Oxford makes up about 15% of businesses in Oxfordshire. There is also a relatively higher concentration of large employers (with at least 250 employees) in Oxford compared to the surrounding area.

8. In 2024, there was an estimated 126,325 people in employment in Oxford-based businesses. The most common occupations were engineering and technology professions (13%), teaching and educational professionals (8%), and business, media, and public service professionals (8%).

9. While unemployment has decreased in the last 12 months, economic inactivity has slightly risen. In the 12 months to June 2025, the unemployment rate in Oxford was 3.2%, 2.7 percentage points lower than in the 12 months to June 2024. On the other hand, economic inactivity has slightly increased from 17.7% in June 2024 to 21.6% in June 2025. Of those who are economically inactive, 86% do not want a job.

10. Historically, the labour market in Oxford has been characterised by a strong skills base compared to the rest of the UK. Nearly 73% of the city's population have a degree-level qualification or higher. This is higher than Oxfordshire (61.2%) and over 25 percentage points higher than the proportion in the UK (47.1%).

11. ODS provides several key services to a range of organisations in the city and the wider region, enabling them to operate efficiently and to a higher capacity. As one of the 40 large employers in the city, ODS also provides employment opportunities across a wide range of occupations, including professional roles, elementary trades and transport operatives.

Economic impact of ODS

12. The economic impact of ODS can be understood in terms of its direct effects, and how the company's activity creates demand elsewhere in the UK economy through indirect and induced effects.

- **Direct effects:** The number of people employed by ODS and the consequent Gross Value Added (GVA).
- **Indirect effects:** Positive effects of the goods and services purchased by ODS from other UK companies – these purchases lead to subsequent increases in demand on its suppliers, and so on.
- **Induced effects:** Effect on the wider economy of the spending derived from wages and salaries and other supply chain businesses.

13. In 2024/25, ODS directly employed 539 people (FTEs) and generated GVA of £33.3m. Of the 539 employees, 46% live in Oxford, 44% live in the rest of Oxfordshire, and the remaining 9% live in the rest of the UK.

14. In the same period, ODS spent £48.5m with suppliers in the UK, including £14.2m (29%) spent in Oxford and £13.7m (28%) in the rest of Oxfordshire. Based on this expenditure, the indirect GVA impact of ODS across the UK is £27.7m, with £7.3m generated in Oxford and £14.4m generated in Oxfordshire. This supports 411 jobs across the UK, including 114 in Oxford and 216 in Oxfordshire.

15. ODS generates further effects through the wages and salaries paid to employees, a proportion of which will then be spent in the local and regional economies. In 2024/25, the company paid a total of £33.6m in employment costs, which includes £21.2m in salaries, bonuses, and overtime pay. Using ONS data to estimate the expenditure patterns of employees in the local economy, it is estimated that the total induced impact of ODS in the UK was about £8.0m, which includes £3.1m generated in Oxford and £6.8m in Oxfordshire. The induced GVA supports 224 jobs in the UK, 88 of which are based in Oxford and 191 based in Oxfordshire.

16. **In 2024/25, ODS contributed a total of £69.0m to the UK economy, which includes an estimated £43.8m for the Oxford economy. This supported a total of 1,174 jobs across the UK, 742 of which were in Oxford.**

Impacts over time

17. **The total number of jobs supported by ODS has increased from 1,091 in 2021/22 to 1,174 in 2024/25. The GVA impact for the UK economy has also increased from £37.2m in 2021/22 to £69.0m in 2024/25.**

Table 1: ODS impacts over time

	2021/22	2023/24	2024/25
Employment	1,091	1,154	1,174
Direct GVA	£20.1m	£35.1m	£33.3m
Indirect GVA	£12.6m	£20.3m	£27.7m
Induced GVA	£4.5m	£10.2m	£8.0m
Total GVA	£37.2m	£65.6m	£69.0m

Source: SQW

Wider socioeconomic impact of ODS

18. Social value initiatives play a key role in the wider impact of ODS to the local and regional community. The group's approach to social value and sustainability are driven by four key principles – workforce, community, environment, and supply chain.

19. In the last financial year, ODS gained Clean Sheet Employer status, reaffirming their commitment to inclusivity in the workplace. This status means that the company have made a commitment to consider potential employees even when they disclose having a conviction. The company has also delivered several initiatives to support potential employees, including participation in careers fairs and offering 56 hours of job experience in several departments.

20. Each year, ODS provides employees with the opportunity to volunteer with their chosen charity though the company's Volunteering Bank. In 2024/25, 72 hours of staff time was provided by ODS employees to a range of organisations. The company also hosted several fundraising initiatives throughout the year to support local and national charities, raising £13,000 in donations.

21. ODS activities are centred around providing public services to keep the city a thriving place to live, work, and visit. This includes cleaning the streets, emptying the bins, repairing and maintaining dwellings, and providing essential social housing. In the last year, 270,00 tonnes of valuable resources were collected and recycled by ODS. In addition, 12 tonnes of CO2 were saved in 2023 through the control and management of heating systems.

1. Introduction

1.1 In June 2025, SQW was commissioned by ODS to undertake an update of the economic impact assessment of its services and activities in Oxford and Oxfordshire in FY 2024/25. This follows the economic impact assessment of activities in FY 2023/24 undertaken by SQW, completed in March 2025. This report presents the findings of this assessment.

Overview of ODS

1.2 Oxford Direct Services (ODS) was established in 2012 to deliver direct services to the public on behalf of Oxford City Council (OCC) and offer commercial services to local businesses and organisations. In 2018, ODS separated into two local authority trading companies, both of which remain wholly owned by the public sector and controlled by OCC. These are:

- **ODS Limited (ODSL):** provides statutory services to Oxford and maintains Oxford City Council's social housing stock.
- **ODS Trading Limited (ODSTL):** is an entirely commercial entity and provides a similar range of services provided by ODSL to businesses, public sector bodies, and not-for-profit organisations in Oxfordshire and beyond.

1.3 ODS provides specialist services in the following areas:

- **Environment**: ODS provides Total Waste Management solutions to over 1,400 businesses and 60,000 households in and around Oxford, providing complete recycling and waste management services six days a week. The company also provides waste consultancy and account management to help clients reduce waste, improve recycling, minimise waste to landfill, and achieve significant cost savings.
- **Grounds maintenance and cleansing services**: This includes initial design, ad-hoc constructions, soft or hard landscaping, and scheduled maintenance programmes for Oxfordshire businesses.
- **Property management and maintenance solutions**: ODS provides a range of property services in building construction, maintenance, refurbishments, and repairs. This activity includes electrical and gas repairs and servicing, heating upgrades, kitchen and bathroom replacements, decarbonisation and retrofit works and refurbishments and extensions.

- **Highways maintenance and management**: ODS maintains 267 miles of streets and towpaths in Oxford. Maintenance services it provides include resurfacing, marking and signage manufacture and installation, drainage management and the installation of EV charging points.

- **Fleet maintenance**: ODS provides tailored services to maintain corporate fleets, including MOT testing for class 4, 5, and 7 vehicles, and specialised servicing, including for hybrid and EVs.

1.4 The Group's strategy centres on delivering excellent, value-for-money public services, and generating profit, which is reinvested back into public services.

Approach and methodology

1.5 The study was carried out between June to November 2025 and involved the following research tasks:

- **ODS company data collection** – SQW provided templates to ODS to complete with overall company performance data, supplier expenditure and workforce data.

- **Desk-based review of contextual data** – this included socio-economic data on the local and regional economies.

- **Developing the economic impact model** – drawing on a variety of primary data provided by ODS and secondary data from government sources.

- **A review of wider ODS impacts** – reviewing the company's activities around community engagement, social value and sustainability.

1.6 The remainder of this report is structured as follows:

- Chapter 2 provides a brief overview of the local area, highlighting key socio-economic characteristics of Oxford and Oxfordshire.

- Chapter 3 presents the findings from the economic impact assessment.

- Chapter 4 provides a qualitative overview of the wider-socioeconomic impacts of ODS, highlighting the company's initiatives around community engagement, social value and sustainability.

2. Local socioeconomic context

2.1 To better understand the scale and impact of ODS activities, it is important to consider the characteristics of the local and regional economy. This section summarises key trends in terms of population, economic growth, business activity, employment, labour market and skills.

Introduction

2.2 For the purpose of this study, we have defined the "local economy" using three areas, namely:

- **Oxford:** Oxford City Council area
- **Oxfordshire**: covering the City of Oxford, Cherwell, South Oxfordshire, West Oxfordshire, and Vale of White Horse
- **The UK**

Figure 2-1: Map of Oxfordshire

Source: SQW (Made using QGIS)

2.3 In mid-2024, the population in Oxford was estimated to be around 166,034, making up about 22% of the population in Oxfordshire (763,218). The population in Oxford grew by 3.3% between 2019 and 2024, less than half the rate of population growth in Oxfordshire (7.7%) and slightly lower than population growth in the UK in the same time period (4%).

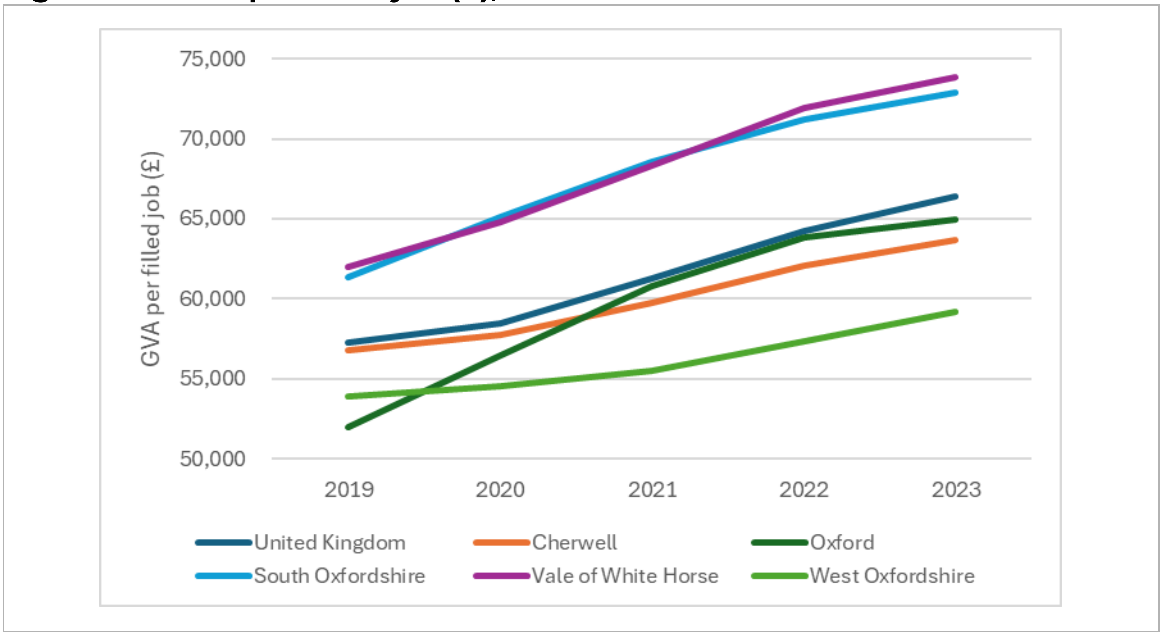
Economic growth

2.4 The Oxford economy is underpinned by nationally and internationally significant anchor institutions including the University of Oxford, Oxford Brookes University, Oxford Science Park, Oxford Business Park, John Radcliffe Hospital and MINI Plant[1]. The city is part of the Oxford-Cambridge Growth Corridor, which has been promoted by successive UK Governments for the opportunities to grow world leading science and technology firms in life sciences, manufacturing, and AI.[2]

2.5 According to the most recent available data, GVA continues to grow in the area, but at a slower pace than the UK in the last year. In 2023, Oxford contributed £8.6bn to the UK economy, 26% higher than in 2019. In the same period, GVA in Oxfordshire and the UK both grew at 24%. However, GVA growth in Oxford between 2022 and 2023 (3%) lags behind the Oxfordshire (6%) and the UK (8%).

2.6 In 2023, average GVA per filled job in Oxford was £64,937, slightly lower than the UK (£66,402). Since 2019, GVA per filled job in Oxford has grown by 25%, higher than growth in the UK in the same period (16%). Figure 2-2 illustrates GVA per filled jobs in Oxfordshire and the UK.

Figure 2-2: GVA per filled job (£), 2019-2023



Source: SQW analysis of ONS data

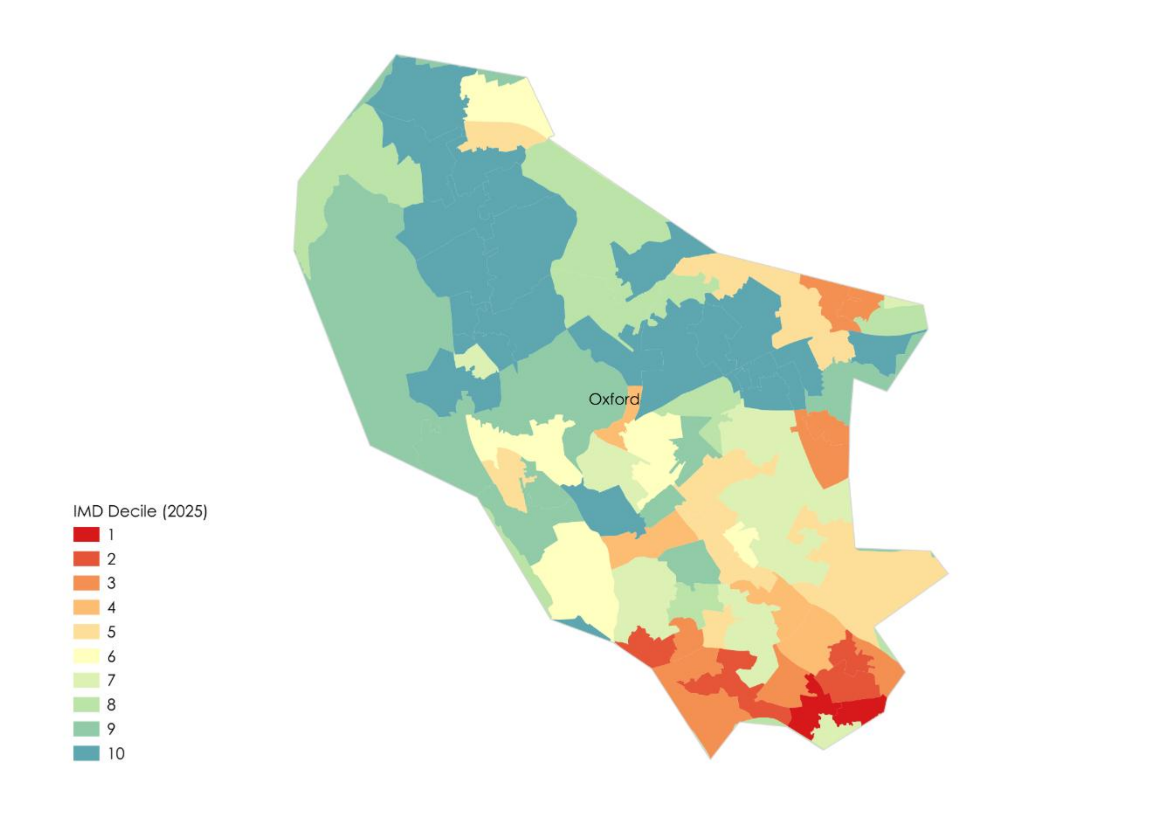
[1] Oxford City Council (2021) *Oxford's Economic Strategy 2022-32*
[2] BBC News (2025) *Oxbridge growth corridor 'to add £78bn to economy'*

Local deprivation

2.7 The recent update to the Index of Multiple Deprivation in October 2025 illustrates the persistent gap between the most and least deprived areas in the city. 21 of 83 neighbourhoods in Oxford are relatively well off, with a range of indicators (e.g. crime levels, skills, income) placing them among the 10% least deprived areas in England. One area in Headington was also included in the 1% least deprived areas in England. In contrast, six areas in Oxford, namely in Northfield Brook, Blackbird Leys, Littlemore, and Rose Hill, are in the 20% most deprived areas in the country.

2.8 Figure 2-3 shows a map of the Index of Multiple Deprivation in Oxford, illustrating the differences in deprivation across the city. Recognising the persistent inequality highlighted by the recent update to the index, Oxford City Council reiterated their commitment to address underlying issues, such as housing affordability.[3]

Figure 2-3: Index of Multiple Deprivation (IMD) 2025 map of Oxford



Source: SQW (Made using QGIS) using 2025 Index of Multiple Deprivation (IMD) data

[3] Oxford City Council (2025) [Deprivation across Oxford has reduced, but city remains unequal – new data reveals | Oxford City Council]

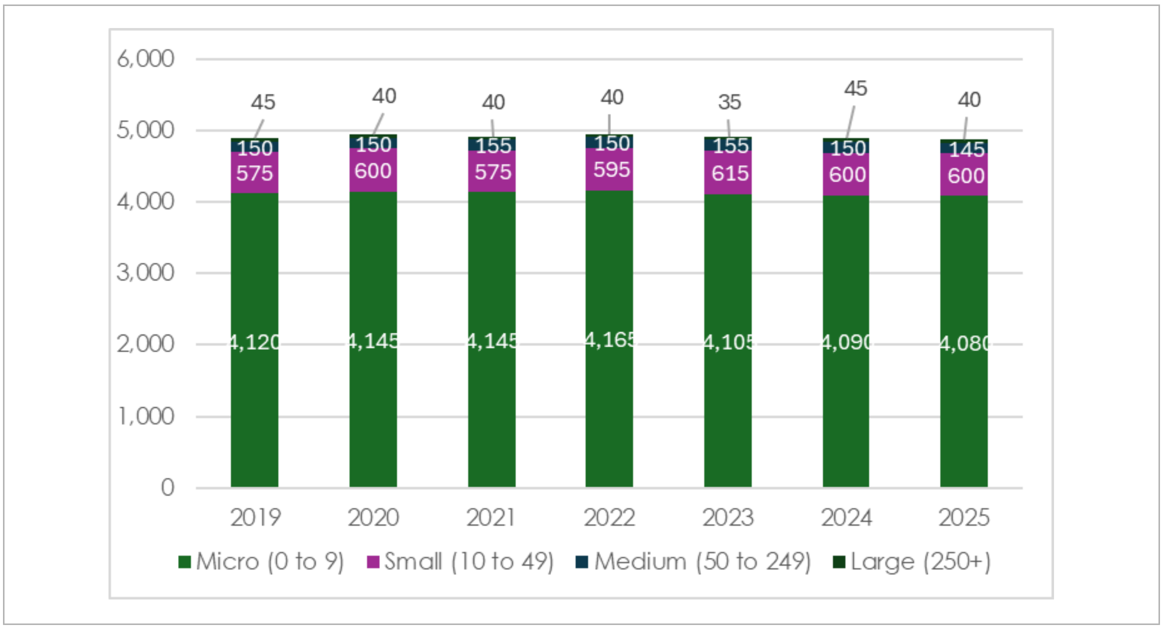
Business activity

2.9 Since the Covid-19 pandemic, there has been a slowdown in the business births in Oxford. In 2023, the estimated number of business births per 10,000 people was 30.87, 23% lower than the same figure in 2019. However, this decrease broadly aligns with trends in Oxfordshire and nationally, where business births have similarly decreased by 22% and 20%, respectively.

2.10 In 2025, a total of 4,865 businesses were registered in Oxford, 0.5% lower than in 2019 (4,890) and 0.5% lower than in 2024 (4,885). Businesses in Oxford make up about 15% of businesses in Oxfordshire. Of these, about 4,680 (96%) are micro or small businesses that employ less than 50 people. There is a relatively higher concentration of large businesses with at least 250 employees in Oxford (0.8%) than in the wider region (0.5%). There is also a higher proportion of businesses that had a turnover of over £1m in Oxford (13.4%) compared to Oxfordshire (11.9%) and the UK (11.5%).[4]

2.11 In 2025, over a fifth (22%) of businesses in Oxford were Professional, Scientific, and Technical businesses, compared to just 15% nationally. 11% of businesses were in Information and Communication, 9% in Accommodation and Food Services, 9% in Arts, Entertainment and Recreation, and 8% were in Business Administration and Support Services. This broadly aligns with data from 2024.[5]

Figure 2-4: Number of businesses in Oxford, by employment size band, 2021-2025



Source: SQW analysis of UK Business Counts – enterprises by industry and employment size band

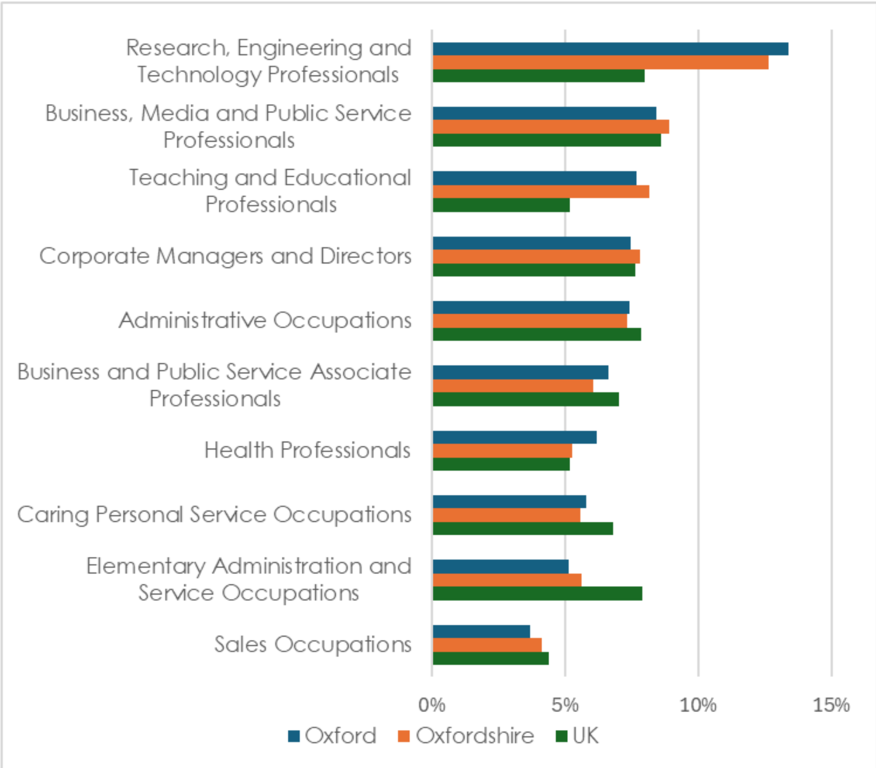
[4] ONS (2025) UK business: activity, size and location
[5] ONS (2025) UK business: activity, size and location

Employment

2.12 In 2024, there were 126,325 people in employment[6] in Oxford-based businesses. This makes up about 32% of those in employment in Oxfordshire, about one percentage point higher than in 2023. Nearly a third (32%) work in the education sector. This was followed by the health (21%), and professional, scientific and technical (9%) sectors.

2.13 The most common occupations of residents in Oxford are research engineering and technology professionals (13%), teaching and educational professionals (8%), and business, media and public service professionals (8%). Figure 2-5 provides an overview of the most common occupations among Oxford residents, and how this compares with Oxfordshire and the UK.

Figure 2-5: Employment by occupation (SOC2020) sub-major group, Jul 2024-Jun 2025



Source: SQW analysis of ONS Annual Population Survey data

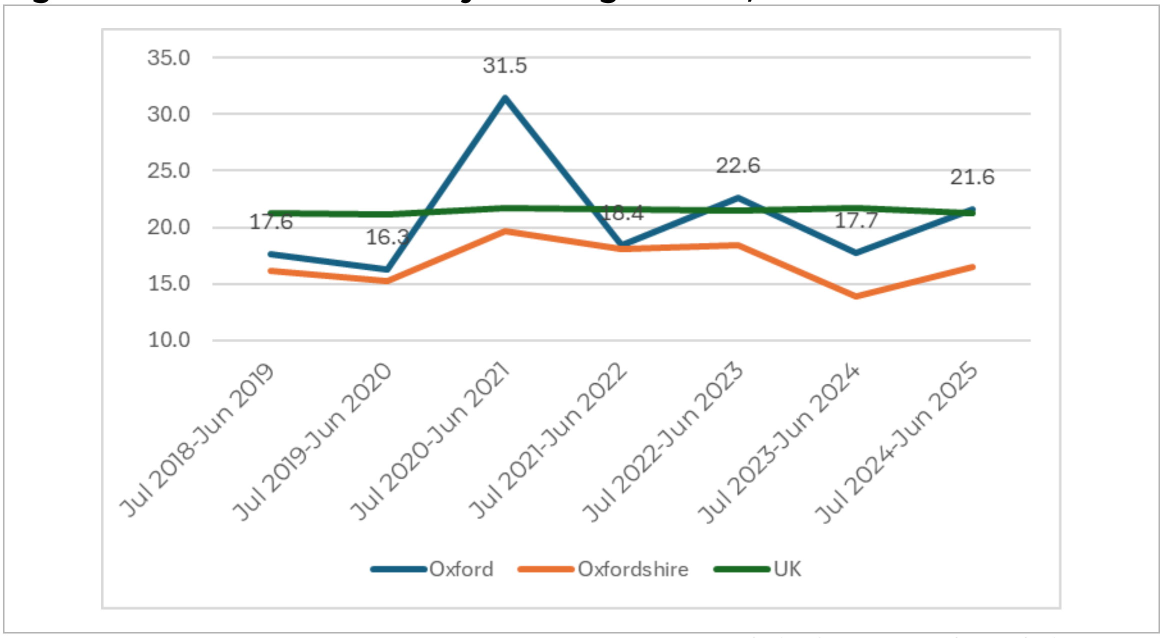
NB: Only top 10 occupations for residents in Oxford were included in this graph.

[6] Employment includes employees plus the number of working owners. BRES therefore includes self-employed workers as long as they are registered for VAT or Pay-As-You-Earn (PAYE) schemes. Self employed people not registered for these, along with HM Forces and Government Supported trainees are excluded.

Labour market

2.14 According to most recent estimates, the unemployment rate in Oxford in the 12 months to June 2025 was 3.2%, 2.7 percentage points lower than in the 12 months to June 2024. During this period, unemployment in Oxford was slightly higher than in Oxfordshire (1.9%) and lower than in the UK (4.1%). Economic inactivity has risen in the last year. In the same period, over a fifth (21.6%) of people in Oxford aged 16-64 were not engaging in the labour market. This is comparatively higher than in Oxfordshire (16.5%) but similar to the UK average (21.3%). The long-term trend in economic inactivity is shown in Figure 2-6 but it should be noted there are sometimes variations in labour market data at the local authority level due to small sample sizes.

Figure 2-6: Economic inactivity rate – aged 16-64, 2019-2025



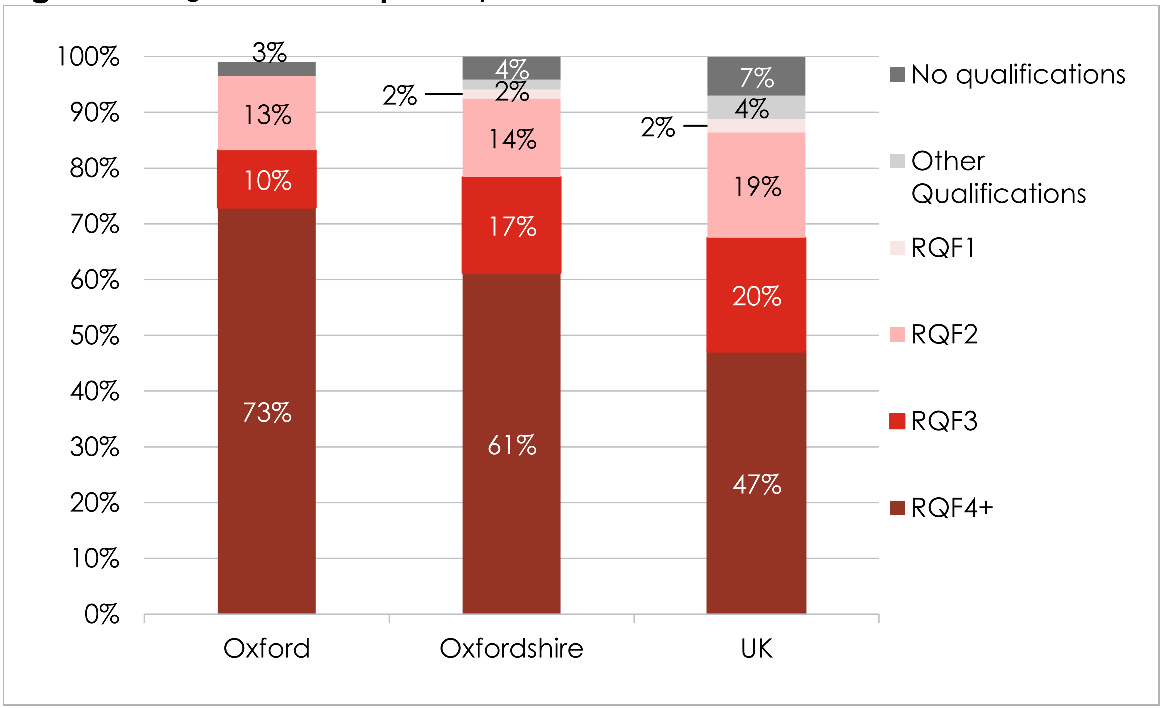
Source: SQW analysis of ONS Annual Population Survey

2.15 Of those who are economically inactive in Oxford, it is estimated that 86% do not want a job, one percentage point lower than in the 12-month period to June 2024. Full time education is the most commonly cited reason for economic inactivity among Oxford residents, with an estimated 61% of those aged 16-64 in this category. The number of people in Oxford in full time education is much higher than the UK (26%), but this is not unexpected given the large educational institutions in the region. The other most common reasons for economic inactivity are long term sickness (21%) and looking after the family/ home (11%).

Skills and income

2.16 Historically, the labour market in Oxford has been characterised by a strong skills base compared to the rest of the UK. Nearly 73% of the city's population have a degree-level qualification or higher. This is higher than Oxfordshire (61.2%) and over 25 percentage points higher than the proportion in the UK (47.1%). The proportion of the population with no qualifications is also lower, with 2.5% of people in Oxford estimated to have no qualifications compared to 6.9% nationally.

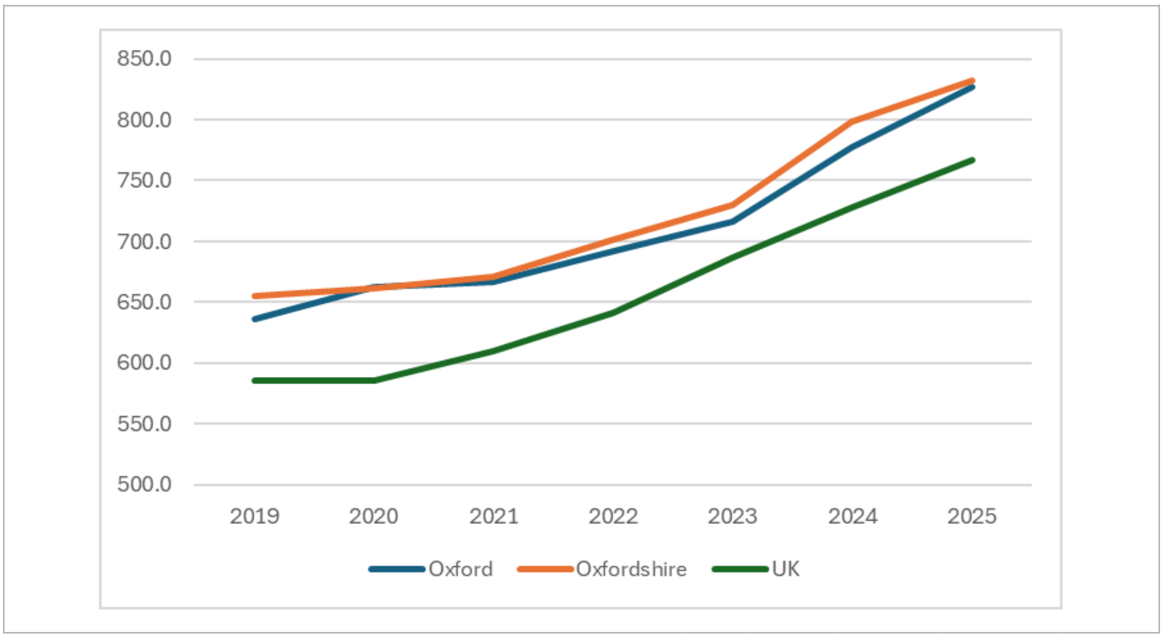
Figure 2-7: Qualification profile, Jan 2024-Dec 2024



Source: SQW analysis of ONS Annual Population Survey

2.17 Gross weekly pay of full-time workers in Oxford has remained slightly lower than the average pay for Oxfordshire workers since 2019 (Figure 2-8). In 2025, the average weekly pay was £827, 7.9% higher than the UK (£766) but just below Oxfordshire (£832).

Figure 2-8: Weekly pay – gross (median) in Oxford, Oxfordshire, UK, 2014-2024



Source: SQW analysis of Annual Survey of Hours and Earnings

Summary

2.18 Oxford City has continued to grow over the last five years, generating £8.6bn in GVA in 2023. However, annual GVA growth has slowed down, from 11.8% in 2022 to 2.7% in 2023. In 2024, there were 126,325 people in employment in Oxford-based businesses, making up about 32% of employment in Oxfordshire.

2.19 ODS provides several key services to a range of organisations in the city and the wider region, enabling them to operate efficiently and to a higher capacity. As one of the 40 large employers in the city, ODS also provides employment opportunities across a wide range of occupations, including professional roles, elementary trades and transport operatives.

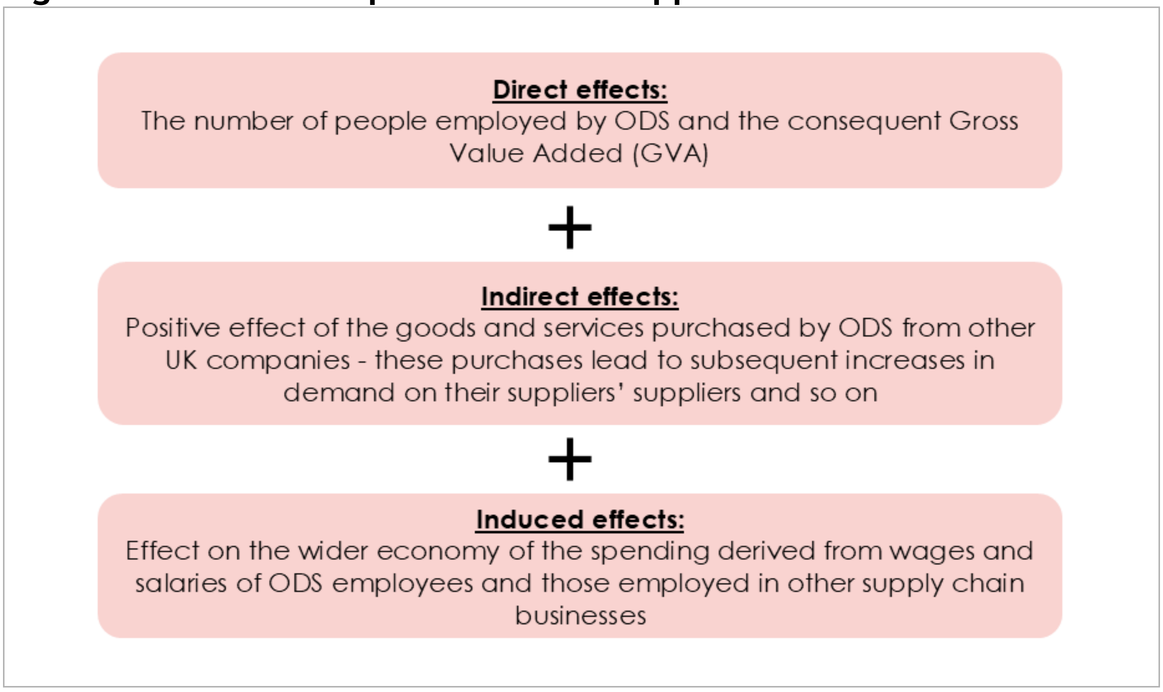
3. Quantifying the economic impacts of ODS

Introduction

3.1 This section describes the economic impact of the ODS Group focusing on the employment and Gross Value Added (GVA) supported by the company. We have developed an economic impact model drawing on data supplied by ODS, as well as other relevant secondary data from the Office for National Statistics (ONS).

3.2 The economic impact of ODS needs to be understood in terms of its direct effects and then how the company's activity creates demand elsewhere in the UK economy through indirect and induced effects.

Figure 3-1: Economic impact assessment approach



Source: SQW

3.3 The model sets out the impacts for three geographies: Oxford, Oxfordshire, and the UK.

ODS Workforce

3.4 Based on workforce data provided by ODS, the company currently employs 549 people. Based on postcode data provided, 254 employees live in Oxford (46%) and 243 (44%) live in the rest of Oxfordshire. The remaining 52 employees (9%) live in the rest of the UK. (Table 3-1).

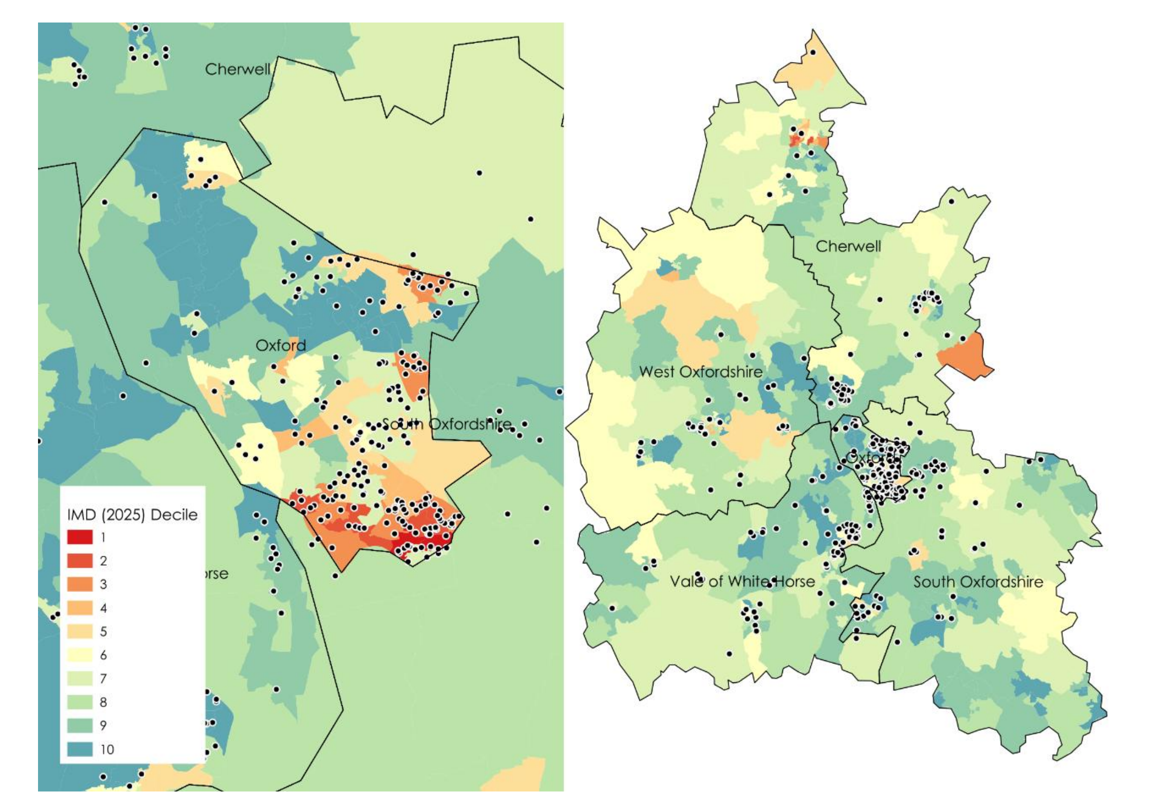
Table 3-1: Location of the ODS workforce, 2024/25

Location	Number of employees	%
Oxford	254	46%
Rest of Oxfordshire	243	44%
Rest of the UK	52	9%
Total	**549**	**100%**

**Postcode data was not available for two employees. It was assumed that these employees live in the rest of the UK. Source: SQW analysis of ODS data*

3.5 The map below (Figure 3-2) shows the postcode location of the company's workforce. We have also included the latest Index of Multiple Deprivation map (2025) to highlight the importance of ODS as an employer for people living in the more deprived areas of the region.

Figure 3-2: ODS Employees' home address postcodes



Source: SQW (Made using QGIS)

Profile of the workforce

3.6 The vast majority (96%) of ODS staff are full-time employees and most are male (85%). Just under half of ODS employees (44%) are aged 30-49, followed by 43% who are aged 50-64, and just under a tenth (8%) who are under 30. A small number of employees (4%) are over the age of 65.

Table 3-2: Employment status of ODS workforce, 2024/25

Employment status	Number of employees	%
Full Time	529	96%
Part Time	20	4%
Total	**549**	**100%**

Source: SQW analysis of ODS workforce data

Table 3-3: Age profile of ODS workforce, 2024/25

Age grouping	Number of employees	%
Under 30	44	8%
30-49	243	44%
50-64	238	43%
65+	24	4%
Total	**549**	**100%**

Source: SQW analysis of ODS workforce data

3.7 About four in 10 (42%) ODS employees are operatives, which includes roles such as drivers, surveyors, and technicians. In addition, 22% are in skilled trades, 21% are management and office staff, and 7% are professional and technical staff. A smaller number of employees (8%) work in supervisory roles.

Table 3-4: Occupational breakdown of ODS workforce, 2024/25

Job category	Number of employees	%
Management	61	11%
Office	56	10%
Operative	232	42%
Professional/Technical	36	7%
Skilled trades	119	22%
Supervisor	45	8%
Total	**549**	**100%**

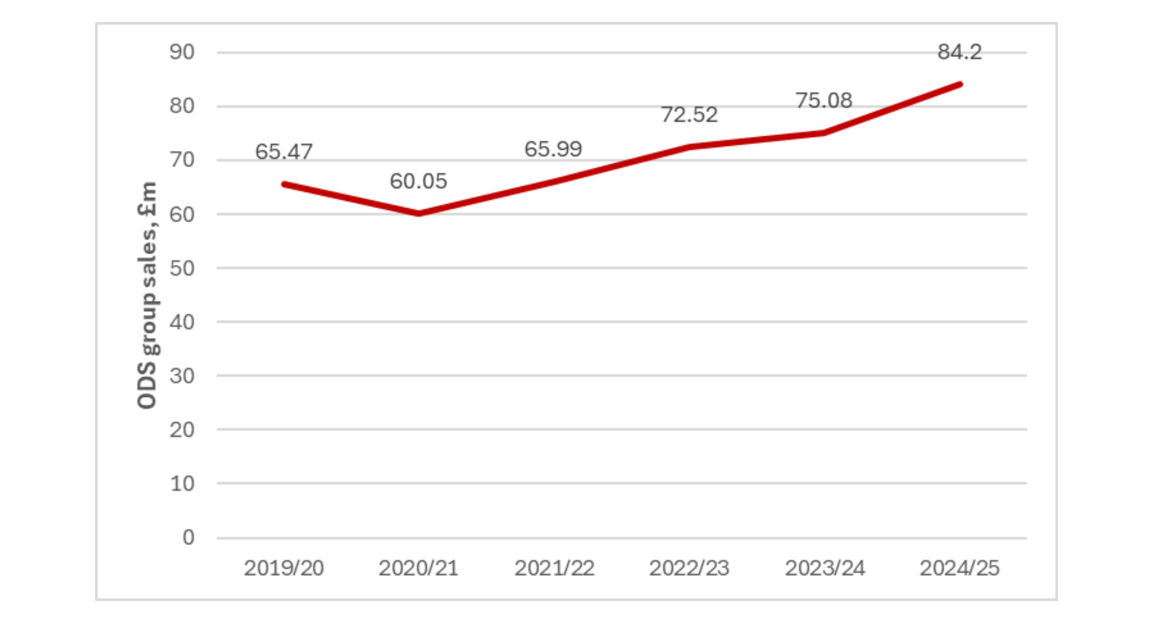
Source: SQW analysis of ODS workforce data

Direct effects

Total sales

3.8 The total value of ODS sales increased from £75.1m in 2023/24 to £84.2m in 2024/25.

Figure 3-3: ODS sales (£m), 2019/20 to 2024/25



Source: SQW analysis of ODS data

Direct GVA and employment

3.9 Direct employment is the number of jobs directly supported by ODS. In 2024/25, the group employed a total of 549 people. GVA is calculated as the difference between the value of sales (£84.2m) and the purchase of "bought in" goods and services associated with delivering those sales and other business costs, such as business rates. In 2024/25, the direct GVA impact of ODS was £33.3m.

Table 3-5: Direct GVA calculations (£), 2024/25

	2024/25
Total sales	84,200,744
Bought-in goods and services	46,318,363
Other costs	4,600,000
Direct GVA	33,282,381

Source: SQW impact model

Indirect effects

3.10 In addition to its direct GVA effects, ODS also generates economic activity through its purchases of goods and services in the UK economy. Based on supplier expenditure for FY 2024/25 provided by ODS, the company purchases around £48.5m from UK suppliers.

3.11 Table 3-6 summarises the purchases of ODS by cost category. Expenditure in 2024/25 was highest in construction (£23.4m), council services (£8.7m), and professional services (£8.7m).

Table 3-6: Breakdown of ODS purchases, by cost category (£), 2024/25

	Oxford	Rest of Oxfordshire	Oxfordshire total	Rest of UK	UK total
Administrative and support services	-	417,466	417,466	5,007	422,473
Arts entertainment and recreation	-	31,826	31,826	23,058	54,884
Construction	4,909,803	9,427,024	14,336,827	9,058,386	23,395,214
Council services	8,661,885	18,995	8,680,880	11,959	8,692,839
Equipment and materials	20,801	256,359	277,160	1,653,049	1,930,209
Facilities management services	93,112	702,772	795,884	1,037,973	1,833,857
Food and drink	5,925	64,344	70,269	43,181	113,450
Health and social care	22,688	5,065	27,753	23,145	50,898
ICT	3,006	-	3,006	509,764	512,770
Office costs	3,987	470	4,458	33,356	37,813
Other	5,837	162,729	168,566	206,182	374,748
Professional services	332,902	2,159,591	2,492,494	6,167,348	8,659,842
Training	8,271	30,358	38,629	24,963	63,592
Transport	5,744	10,335	16,079	9,170	25,248
Vehicle maintenance	77,656	410,654	488,310	1,810,504	2,298,814
Total	**14,151,617**	**13,697,989**	**27,849,606**	**20,617,045**	**48,466,652**

Source: SQW impact model

3.12 Over half (57%) of purchases are made with suppliers based in Oxford or the rest of Oxfordshire. The remaining 43% is spent with UK-based suppliers (Table 3-7).

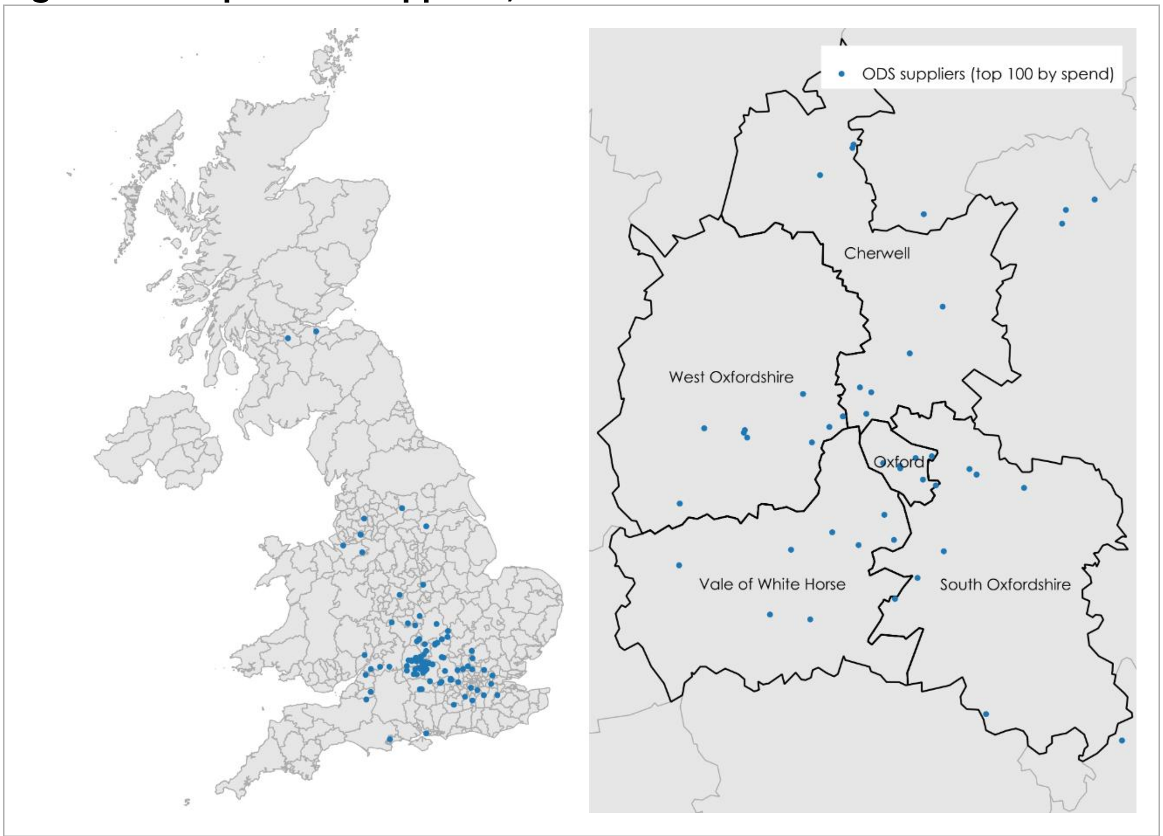
Table 3-7: Total value of ODS purchases by geography (£), 2024/25

Geography	Value of purchases (£)	%
Oxford	14,151,617	29%
Rest of Oxfordshire	13,697,989	28%
Rest of the UK	20,617,045	43%
Total	**48,466,652**	**100%**

Source: SQW impact model

3.13 The location of the top 100 ODS suppliers (based on spend) is shown in Figure 3-4.

Figure 3-4: Map of ODS suppliers, 2024/25



Source: SQW (Made using QGIS)

3.14 Indirect GVA and employment impacts of ODS were estimated by looking at purchases made by the group in the local, regional, and UK economy. Data from the Annual Business Survey was used to calculate turnover to GVA ratios. Sector employment data from the BRES was used to calculate average GVA per job for relevant sectors. Multipliers were then used to estimate subsequent supply chain effects. The indirect GVA and employment effects are set out in Table 3-8. The total indirect GVA generated by ODS in the UK was estimated to be £27.7m, which supports around 411 jobs.

Table 3-8: Indirect GVA (£) and employment, 2024/25

	Oxford	Oxfordshire total	UK total
Indirect GVA (£)	7,345,155	14,403,343	27,708,190
Indirect employment	114	216	411

Source: SQW impact model

Induced effects

3.15 ODS generates induced economic impacts through the wages and salaries paid to employees, a portion of which will then be spent on the local and regional economies. Based on the workforce data provided by ODS for 2024/25, employment costs for the group were £33.6m. Total basic salaries were £20.8m and paid out salaries (including bonus and overtime pay) were £21.2m. Net salaries, after employee tax and pension payments, were £15.9m.

3.16 Using the net salary data, employee spend by sector and geography were estimated. The ONS Family Spending Survey[7] provides data on the average patterns of household expenditure by age group. This data was used to estimate where ODS employees spend their salaries. Table 3-9 provides a breakdown by sector and geography.

[7] ONS (2022) Family Spending Survey

Table 3-9: Breakdown of employee expenditure by geography (£), 2024/25

	Oxford	Rest of Oxfordshire	Oxfordshire total	Rest of the UK	UK total
Alcoholic drinks, tobacco and narcotics	165,249	177,222	342,471	44,285	386,756
Clothing and footwear	233,266	252,149	485,415	65,781	551,196
Communication	272,519	290,679	563,198	74,669	637,867
Education	64,517	70,172	134,690	18,667	153,357
Food and non-alcoholic drinks	776,897	830,425	1,607,321	211,322	1,818,643
Health	105,863	110,374	216,237	26,587	242,823
Household goods and services	446,512	473,723	920,235	119,923	1,040,158
Housing(net), fuel and power	1,142,692	1,201,295	2,343,987	314,990	2,658,977
Miscellaneous goods and services	509,398	545,326	1,054,724	140,450	1,195,173
Other expenditure items	904,188	974,457	1,878,645	253,344	2,131,989
Recreation and culture	739,276	790,464	1,529,739	200,574	1,730,313
Restaurants and hotels	448,032	474,549	922,581	120,892	1,043,472
Transport	1,004,570	1,076,148	2,080,718	275,243	2,355,961
Total	**6,812,977**	**7,266,984**	**14,079,961**	**1,866,725**	**15,946,687**

Source: SQW impact model

3.17 Relevant turnover-to-GVA and GVA per job ratios from the ONS Annual Business Survey and BRES were then used to calculate induced GVA and employment effects. Similar to the indirect impacts, multipliers were included to account for subsequent supply chain impacts. The induced GVA and employment effects are set out in Table 3-10. The total induced GVA generated in the UK is estimated to be £8.0m, which supports 224 jobs.

Table 3-10: Induced GVA (£) and employment, 2024/25

	Oxford	Oxfordshire total	UK total
Induced GVA (£)	3,142,230	6,802,936	7,977,019
Induced employment	88	191	224

Source: SQW impact model

Total economic impact

3.18 Summarising the estimated values above, the total GVA and employment impacts are set out in the tables below. The total economic impact of ODS for the different geographies are as follows:

- **Oxford – £43.8m in GVA and 742 jobs**
- **Oxfordshire – £54.5m in GVA and 946 jobs**
- **UK – £69.0m in GVA and 1,174 jobs**

Table 3-11: Total GVA impacts (£), 2024/25

	Oxford	Oxfordshire total	UK total
Total direct GVA	33,282,381	33,282,381	33,282,381
Total indirect GVA	7,345,155	14,403,343	27,708,190
Total induced GVA	3,142,230	6,802,936	7,977,019
Total GVA effects	**43,769,766**	**54,488,661**	**68,967,590**

Source: SQW impact model

Table 3-12: Total employment impacts (FTEs), 2024/25

	Oxford	Oxfordshire total	UK total
Total direct employment	539	539	539
Total indirect employment	114	216	411
Total induced employment	88	191	224
Total employment effects	**742**	**946**	**1,174**

Source: SQW impact model

ODS impacts over time

3.19 The total number of jobs supported by ODS has increased from 1,091 in 2021/22 to 1,174 in 2024/25. The GVA impact for the UK economy has also increased from £37.2m in 2021/22 to £69.0m in 2024/25.

Table 3-13: ODS impacts over time

	2021/22	2023/24	2024/25
Employment	1,091	1,154	1,174
Direct GVA	£20.1m	£35.1m	£33.3m
Indirect GVA	£12.6m	£20.3m	£27.7m
Induced GVA	£4.5m	£10.2m	£8.0m
Total GVA	£37.2m	£65.6m	£69.0m

Source: SQW

4. Wider socioeconomic impacts of ODS

4.1 Social value initiatives play a key role in the wider impact of ODS to the local and regional community. The group's approach to social value and sustainability are driven by four key principles – workforce, community, environment, and supply chain.

4.2 This section provides a brief overview of the recent social value activities and initiatives undertaken by ODS in 2024/25.

Workforce support and development

4.3 ODS continues to take steps in fulfilling its commitment to supporting inclusivity in the workforce. During 2024/25, the group gained the status of 'Clean Sheet Employer'. Clean Sheet is an initiative aimed at supporting people with convictions in finding employment, with the longer-term goal of helping people rebuild their lives and reduce the probability of reoffending. Clean Sheet Employers are committed to actively considering Clean Sheet Members (people with convictions) for employment – members can confidently disclose having a conviction and be assured that this won't automatically discount them from the employment process.

4.4 ODS also delivered several initiatives to support potential employees in gaining relevant work experience and finding out about possible roles within the company. These included:

- Dedicating over 56 hours of staff time to spread awareness and offer advice to potential applicants through workshops, forums, and events. Events included: Youth Ambition apprenticeships fair, an employability event hosted in partnership with Abingdon and Witney College, a careers event at the Oxford Spires Academy, and a job fair in Oxford.
- Offering a total of 5 weeks work experience with the company, equating to about 185 hours of work experience provided by a number of teams across the company, including HR, learning and development, highways, and waste and recycling teams.

Community partnership and engagement

4.5 Each year, ODS provides employees with the opportunity to volunteer with their chosen organisations through the ODS Volunteering Bank. In 2024/25, 72 hours of staff time was provided by ODS employees to a range of organisations including:

- St John Ambulance
- Oxfordshire Army Cadets Camp
- Children in Need
- Oxford Hub Community Garden

4.6 The company also hosted several fundraising initiatives throughout the year to support local and national charities, raising £13,000 in donations. This included £8,000 for Cancer Research UK, through cake sales, participation in Race for Life, and the Chiltern 50 Challenge.

4.7 In the local area, ODS was the official maintenance partner of the Sobel House Hospice's OxTrail. This was an art project that encouraged members of the public to explore Oxfordshire, with the aim of raising awareness and funds for Sobell House Hospice. The Hospice provides expert and compassionate care to people at the end of life. Throughout the eight-week event, the company provided complimentary cleaning services for the large oxen structures displayed across Oxford. The event helped to raise £155,000 for the hospice from July to September 2024.

Environmental sustainability

4.8 ODS activities are centred around providing public services to keep the city a thriving place to live, work, and visit. This includes cleaning the streets, emptying the bins, repairing and maintaining dwellings, and providing essential social housing. In the last year, 270,00 tonnes of valuable resources were collected and recycled by ODS. In addition, 12 tonnes of CO2 were saved in 2023 through the control and management of its heating systems.

4.9 ODS holds several certifications demonstrating their commitment to environmental sustainability. This includes ISO 14001 and PAS2030 Decarbonisation Retrofit Installer Status.

SQW

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