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# Winchester Ten-Year Green Economic Development Strategy - Draft Evidence Base

PREPARED FOR:

Winchester City Council





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The Catalyst, Newcastle Helix  
Newcastle upon Tyne, NE4 5TG  
United Kingdom  
+44 (0)191 814 2210

[urbanforesight.org](http://urbanforesight.org)

Flour Mill, 34 Commercial Street,  
Dundee, DD1 3EJ  
United Kingdom  
+44(0)138 549 946

@UrbanForesight

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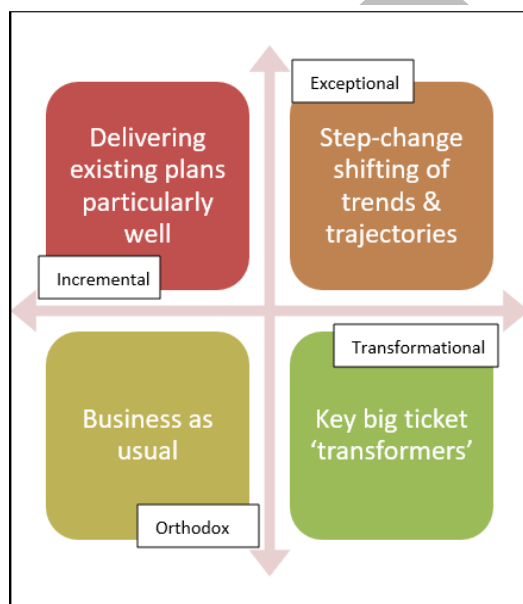
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# Executive Summary

The detailed review presented in the accompanying document surfaces a number of key issues that provide the foundations for an evidence-informed, ambitious and forward looking Green Economic Development Strategy (GEDS) for Winchester. Perhaps key to this is how ambitious and exceptional Winchester and WCC wish to be during the 2020s, and how far the post-pandemic recovery and new global and national contexts provide opportunities for ambitious and exceptional transformation of the district and its communities.

Overall, Winchester is a relatively well performing district in national and also in Hampshire terms. But it has some weaknesses compared to more successful parts of the South East, including some neighbours to the north. It is also probably not yet consistently at the forefront of green development and can learn much from comparator districts nationally and internationally.

WCC and the district have a suite of plans and strategies covering most of the GEDS themes, and the Local Plan is in the process of being updated. They and partners will also be required by government to review and refine these plans to steward post-COVID recovery and reboot place-based strategies – especially around ‘levelling up’.



As the figure opposite illustrates, WCC and partners face strategic choices on how and where to focus a GEDS. For which small number of policy areas should the GEDS seek to deliver or at least nudge step change (top right quadrant)? Are there any major ‘big ticket’ interventions that will be required of most districts that can anchor the GEDS (bottom right quadrant)? How can existing plans and strategies be delivered at the highest levels of quality and GEDS relevance (top left quadrant)? And where will business as usual incrementalism suffice?

None of the quadrants are exclusive – and the reality is the GEDS will have interventions in each of them. This section of the report summarises what the evidence suggests as the elements of the choices entailed in the framework above.

## Headline fundamentals:

Winchester is a relatively large, sparsely populated district anchored by an unusual town/city: WCC is the largest district spatially in Hampshire after New Forest, and (like New Forest), a significant part of the district (40%) is national park – in this case South Downs National Park (SDNP). Despite being anchored by the city of Winchester's built-up area of [49,000](#) (almost 40% of total population) which represents a population density similar to Bristol's and within 20% of Southampton's, overall the district has the lowest population density in Hampshire (189 persons per square kilometre) and third lowest in the whole of South East (after Chichester & West Oxfordshire).

Winchester, the town/city, is classified as a sui generis 'cathedral city' in [EM3LEP's town classification](#) study – neither a growth nor a step-up town, but significant enough to be a place of particular interest. Within WCC, for the purposes of the GEDS, the narrowly defined town sub-area needs to be reconsidered to look at the BUA urban system as a whole and to prevent Winchester suburbs distorting the approach to market towns and rural areas.

**Trend population growth may be stalling:** Over 2001-19 Winchester was the fastest growing district in population terms in Hampshire with the 16.4% increase being above England (13.8%), South East (14.4%) and county (11.4%) averages. However, in recent years population growth has fallen below England and regional averages and is now close to the county average and 6<sup>th</sup> of 11 Hampshire districts. Going forward ONS 2018-43 central forecasts of 8% growth continues to be below England (9.3%), at South East (8.1%) but above county averages (7.0%).

**The aging demographic challenge is acute – especially outside Winchester city:** Like most of non-metropolitan England, the age profile and trends are dominated by rapid aging. Winchester's current median age (43.7) is above national (40) and regional (41.7) averages. Population over 70 is forecast to be 23% by 2043, just above Hampshire's 22.9% and much higher than England's 18.7% and the South East's 20.4%.

The young adult population (18-24) is heavily concentrated in the town – highly influenced by the presence of the University. Although graduate retention is relatively good compared to other Central Southern universities, around 80% of graduates of both University and Sparsholt College appear to pursue their careers outside the town and 2/3rds outside the EM3 LEP area.

Winchester has a relatively healthy resident population, with only small pockets of deprivation – but these might change and become more acute post-pandemic: None of Winchester's LSOAs are in the 20% most deprived in England's Index of Multiple Deprivation although there are a small number of LSOAs with pockets of housing, education, and crime deprivation. Health indicators are generally positive, and health inequalities are less pronounced than England averages. Although the incidence may not

be high, there is considerable emerging evidence of households in financial difficulties post-pandemic, and this will increase as Government direct support is withdrawn. Similarly, some groups seem to be particularly prone to Long-Covid and other enduring underlying health conditions.

Winchester's housing market is high price, with affordability and also low carbon challenges: [Winchester's median house price \(September 2020\) is £420,000](#) – the highest in Hampshire, and a position they have held since the noughties when they overtook Hart. [The affordability ratio](#) – even with high average resident earnings – is also the worst in Hampshire (although less than many Surrey districts for the EM3 geography. The revision of the Local Plan, and the housing strategy has measures in place both to seek to address this – and to improve the green credentials of the stock. There are also a number of innovative pilots. Evaluating how these align with and create synergies in the GEDS will be an important consideration.

The working age population is higher skilled, in higher occupational classification jobs, with higher average salaries than county and regional averages...but the relatively high difference between residential (£689.30) and workplace earnings (£636.40) illustrates the importance of outward (and inward) commuting: In the 2011 Census, 41% of resident workers (23,642) commuted outside the district whilst 55% of jobs locally were filled by in-commuters (42,003) – both key issues for a post-pandemic home working trend. Most in-commuters (26,000) come from SOLENT LEP area and other origins to the South – and may work in the South of the district – which is effectively part of the national South Hampshire Urban Area – the sixth largest Built Up Area (BUA) in the country.

Job density and jobs growth is high and growing – with which labour market participation is not commensurate: Winchester's 101,000 jobs (2019) was, along with Guildford, the highest local authority (LAD) total in the EM3 geography, and the density (1.35) is 55% above the national (0.87) and county (0.88) averages. However, local economic activity (79%) in the working age resident population is more modest – at national and below regional and county averages, having declined quite significantly to as low as 75% in the period before 2019.

GVA and productivity growth has historically been high – but not compared to some neighbours and regional pacesetters: Winchester's GVA is the largest Local Authority District (LAD) economy in EM3 after Runnymede (largely determined by Heathrow) and its growth over the decade to 2018 is in the top 50 LADs in England and well above national and regional averages. Productivity per hour worked is 12% above national averages and relative growth over the decade has been faster than average. However, this is not at the level of many LADs in Thames Valley Berkshire, Buckinghamshire Thames Valley – nor is the relative improvement (4.4 on the UK index) comparable to key neighbours (Fareham 22.5, Hart 9.6) or comparators like Stratford-upon-Avon (13.8).

Winchester is a strongly service led economy and fairly diversified within this: Particular concentrations in health, retail, public administration and education (especially in the town), are matched by stronger than average profiles in higher value sectors like professional, finance, real estate and ICT, and a well-regarded creative and cultural sector. Key niche capabilities like, for instance, the high concentration of architects are particularly appropriate for GEDS development. There is a suggestion that, in the round, the workforce may be more resilient than average in terms of both post-COVID-19 recovery and increased home or flexible working.

Business dynamism is high – but arguably the district lacks the major corporate anchors most likely to drive science and innovation-led growth: Metrics on business density, business births and deaths is higher than national, regional and EM3 averages – suggesting a dynamic local economy. However, Winchester has neither large global corporate anchors nor large developed innovation districts or eco-systems. It is also on the boundaries of EM3 and SOLENT LEP economic geographies. So EM3 LEP has tended to focus on leveraging Heathrow and on areas further north up the M3, and on science and manufacturing sectors. There is, however, a prominent strengthened priority on clean, green economic growth – with a pre-pandemic recognition of the LEP area as having the highest green economy sales per capita in England. Taken together with the specialism in architecture, this may offer new opportunities for Winchester to take a lead in niche areas like green construction, modern methods of construction and innovative house building over the coming period.

Winchester has a strong location on national road and rail transport routes between London and Southampton, with reasonable accessibility to major airports – but intra-district transport can be much more problematic: The M3 and South Western/Southern railways between London and Southampton, together with the A34 corridor to Oxford and the Midlands are backbone infrastructure for the district. Although, beset with challenges, the advent of Transport South East, together with LEP transport and County Council LTP roles suggest the district may adapt well to post-pandemic national and regional connectivity. Within the district, Winchester as the county town has major congestion and resultant air quality challenges; the South Hampshire Urban Area is quite detached from the rest of the district; and east-west and rural – Winchester travel and connectivity needs significant change to meet green and low carbon ambitions.

Digital infrastructure is not as strong as Hampshire averages – especially in the rural areas: And Hampshire and UK averages are a long way short of premier EU and global smart places.

Utilities: The Winchester Infrastructure Delivery Plan for LPP2 2016 outlines there are four water companies who have infrastructure interests within Winchester District. Southern Water has both water supply and water treatment responsibilities over the majority of the District. Portsmouth Water supply water in the south eastern area, Albion Water have wastewater infrastructure around Knowle, and Thames Water's sewerage area covers a



small part of the eastern side of the District. Data from Water UK shows that on average, leakage from pipes sees Winchester lose 83 litres per property, which is below the national average of 116 litres.

The energy mixes across the South of England is dominated by gas, which forms 60% of energy supply. As a result, the carbon intensity (CO<sub>2</sub> emissions per unit of energy) of the South of England's national grid is higher than the South East and South West where gas makes up 30% and 23% of supply. However, latest BEIS estimates are that 21% of homes on Winchester are not connected to the gas network.

Winchester's current CO<sub>2</sub> emissions performance remains poor although improvements are being made rapidly. More broadly, the district has striking opportunities and potential for a green-led recovery: With the national park (SDNPA) and its attention and support from DEFRA and extensive other green spaces, Winchester has huge potential for a high-quality environment, improving biodiversity and a natural capital approach in the GEDS. Current high per capita CO<sub>2</sub> emissions are being addressed but need radical improvements in key areas of transport, energy and built environment to make WCC's net zero ambitions a reality. The national Green Recovery Plan, and EM<sub>3</sub>/SOLENT LEPs focus on low carbon environmental goods and services (LCEGS) can contribute to and augment the GEDS to make rapid sustainable progress.

Although not as severe as other places, Winchester's COVID-19 impact will introduce new dimensions and opportunities into the GEDS: Most analyses suggest that the impact of COVID19 and the lockdown on Winchester has mirrored national experience, but possibly with more resilience and rapid recovery than areas of more acute pressures. Nevertheless, it will have created profound long-term implications that the GEDS needs to address. For instance (and as examples only):

- Need to improve digital infrastructure to meet both business, resident and GEDS purposes.
- Related to this, the growth of home and hybrid working offer shift-change potential in a number of ways – employment, commuting, use of infrastructure, housing markets etc.
- Accelerated shift of vendors online is significant given the high retail densities of the district.
- The increased interest in open space (and accompanying social distancing), health living, in green and nature recovery agendas (especially with impending COP26) offer major opportunities to a relatively low-density district like Winchester, with the SDNP and other open space, within an hour of London and the South Hampshire cities.
- The realistic potential for the town's growth to be designed in exemplary low carbon ways and to reboot Winchester as a 15-20minute city.
- The potential of the large anchors – district, county, University, College, Hospital

- each will need to develop and embrace post-pandemic recovery strategies and responsibilities to collaborate in new coherent, cohesive ways.

## Towards a GED strategic discussion

To capture the evidence base of Winchester performance in a high-level strategic tool for GEDS planning and prioritisation at this early stage of the exercise and for preliminary discussion only, we have used a SWOT analysis. A condensed summary is presented below. These are not the ONLY strengths-weaknesses-opportunities-threats facing Winchester – but we consider them significant in terms of formulating a GEDS framework with WCC, Reference Group and partners (Figure 1). As a prompt to the beginnings of a strategic discussion with WCC, Reference Group and partners, the SWOT is offered as a ‘straw man’ starter. By asking does it summarise the evidence review accurately? And what is inaccurate, omitted and/or in need of qualification? The SWOT will be collaboratively expanded to include move points.

Figure 1: Winchester GEDS-related Strengths-Weaknesses-Opportunities-Threats (SWOT)

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> <li>• Relatively affluent, high performing district with a rich diverse geography, economy and culture, considerable business vitality, high level skills, and important anchor institutions with public/ social/ environmental purposes</li> </ul>	<ul style="list-style-type: none"> <li>• Typical non-metropolitan demographic challenges, major housing market pressures and tensions, lack of major business clusters anchored by global players and a well-defined innovation eco-system</li> </ul>
<ul style="list-style-type: none"> <li>• Well-located between London and Southampton with strong connectivity to both and respective city regions</li> </ul>	<ul style="list-style-type: none"> <li>• High per capita CO2 emissions, very reliant on car-based transport within the district</li> </ul>
<ul style="list-style-type: none"> <li>• Seemingly not as vulnerable to pandemic, Brexit impacts and other potential shocks as many places</li> </ul>	<ul style="list-style-type: none"> <li>• Not particularly well-placed to command policy attention and prioritisation from Government and LEPs</li> </ul>
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> <li>• A strong stock of underlying assets and capabilities, together with considerable enthusiasm and opportunities for a green recovery, natural capital and social wellbeing approaches, and a refresh of existing plans &amp; strategies</li> </ul>	<ul style="list-style-type: none"> <li>• Potential national/regional post-lockdown economy reduces domestic demand, levels of private investment, whilst prescriptive requirements and low resourcing limit local freedoms, flexibilities and delivery capacity</li> </ul>

<ul style="list-style-type: none"> <li>• UK Green Recovery, LEPs focus on LCEGS, and H2050 processes provide opportunities to attract investment</li> </ul>	<ul style="list-style-type: none"> <li>• Risks of complacency and resistance to change may inhibit necessary decisive, radical delivery of change</li> </ul>
<ul style="list-style-type: none"> <li>• Strengthened anchor institution collaboration (including SDNPA) together with diverse SME business vitality could be purposeful and agile if communities can be empowered and buy-in to the vision and strategy</li> </ul>	<ul style="list-style-type: none"> <li>• Post-COVID trends significantly weaken city and town centres, business and community vitality, and increase social inequalities and exclusion for some groups</li> </ul>

The data review and any accompanying evidence-informed SWOT is also important in surfacing some of the underlying strategic choices framing the GEDS and other place-based strategic planning exercises for that matter. In the evolution from more orthodox to next generation economic development strategies, the balance of attention and prioritisation may shift along the dial or axis of a number of parameters. The figure below merits discussion as a ‘starter’ for shaping the GEDs.

Typical orthodox economic development strategies	Potential wider priorities for a 2020s GEDS
<ul style="list-style-type: none"> <li>• Strong focus on GVA, productivity and job numbers/employment – so very economic in character</li> </ul>	<ul style="list-style-type: none"> <li>• Much wider than economy – with major concerns on quality of life, wellbeing and environment/nature</li> </ul>
<ul style="list-style-type: none"> <li>• Prioritise knowledge and science-led innovation opportunities and assume ‘trickle-down/out’</li> </ul>	<ul style="list-style-type: none"> <li>• Sustainability, Inclusion, ‘good jobs’, and key workers/core industries, at centre of strategic principles/values</li> </ul>
<ul style="list-style-type: none"> <li>• Particularly in more successful areas, manage existing trends well</li> </ul>	<ul style="list-style-type: none"> <li>• Explicitly shift key trends (e.g to attract and retain young talent)</li> </ul>
<ul style="list-style-type: none"> <li>• Agglomeration and densification</li> </ul>	<ul style="list-style-type: none"> <li>• Polycentricity and space premiums</li> </ul>
<ul style="list-style-type: none"> <li>• Bounded, self-contained blueprints</li> </ul>	<ul style="list-style-type: none"> <li>• Outward-looking, flexible frameworks</li> </ul>

These types of strategic choices all have specific Winchester dimensions.

The fact that this is a 'Green' EDS is a statement that the Winchester GEDS is some way to the right of the orthodox/next generation choice in the first two rows. But the GEDS will still need to consider what Winchester wishes to be known for in the high value, knowledge economy and how far it wishes to close the gap with the economic pacesetters in EM3, Thames Valley or the London/Oxford/Cambridge 'golden triangle'.

The aging demographic challenge and housing market tensions are key issues in the third row. Policies to explicitly attract, retain and develop young, talented individuals and households, however, requires specific intervention strategies that may divert scarce resources from managing existing trends well and might cause tensions with incumbent more comfortable older communities.

The GEDS needs to be relevant in the different geographies and communities of the district – Winchester itself, the South of the district, market town and rural communities both within and outside the National Park. This differentiation, though, may raise issues and trade offs.

The fifth row of the table has a number of dimensions. At one level, there is the traditional issue of how far a GEDS is about localising development and change, and how far, for instance, it is about skilling residents to be successful in neighbouring economies and London. At another, though, it is about the uncertainties, predictable turbulence, and unpredictable 'unknowns' and future shocks of post-pandemic, post-Brexit Britain and how these might impact and shape Winchester's future. A GEDS needs to have a credible pipeline of 'shovel-ready' investments and policy propositions – but it also needs to be flexible and contingent, able to respond to rapid local and contextual changes.

None of them are binary. The key to the GEDS will be the judgements made as to where on these and other continuums Winchester wishes to position the GEDS going forward.

### Concluding remarks:

The desk-based research done at the start of the GEDS process has to be more than a collection of data. It needs to stimulate GEDS formulation co-creation by looking at the evidence afresh and surfacing the 'so-what?' questions.

This opening section and the accompanying detail seek to start those discussions with the WCC client, the reference group and other partners for progressing during the consultation and engagement phases.

The paper suggests Winchester is relatively well-placed for a credible and highly distinctive, green-based economic recovery and development strategy. The positive takeaways are that, despite very considerable challenges, Winchester does have those choices and opportunities to realise them. The intentions are to flesh those out and develop them during the next phases of GEDS formulation.

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# Introduction

The Green Economic Development Strategy will encompass a holistic range of aims and actions. The vision for Winchester will set out the balance between inclusive economic growth, carbon reduction and a just transition, quality of life and place, and the opportunities for existing and new business sectors to grow in Winchester.

The evidence base reviews a core package of indicators relating to each strand of the Green Economic Development Strategy. This builds the holistic picture needed, rather than deep investigation of just one strand in the way a pure economic profile or transport assessment may do. Additionally, such deep and detailed evidence as has been gathered by the Council as part of the Local Plan process, with important relevant findings, is also included in this report.

## Themes and indicators to inform the Green Economic Development Strategy

A selection of indicators has been identified to create a baseline of social, economic and environmental outcomes in a consistent way across the District and across a range of sub-District geographical scales.

These indicators are grouped by theme and summarised below (Table 1) and draw on publicly accessible information and datasets. The most up to date information has been used, and analysis undertaken at local authority level or lower where possible.

Table 1: Green Economic Development Strategy baseline themes and indicators

Theme	Indicators	Reason for including
Population	Working age population, 2019 Winchester District population age distribution, 2019 Working age population 2043 forecast Winchester District population age distribution 2043 forecast	Population indicators helps us understand labour supply, demand for housing and public services, and CO <sub>2</sub> emissions.
Society and wellbeing	Average earnings Index of Multiple Deprivation Public Health England data:	Society and wellbeing indicators help to provide a holistic view of the economic challenges and opportunities within Winchester, as part of the inclusive growth

		focus of the Green Economic Development Strategy.
Employment	Economic Activity Rate 2004-2020 Employment by broad industrial group, 2019 Employment specialisms, 2019 Out of District workflows	Economic activity and employment indicators help us to understand patterns of work to identify the types of jobs people are engaged in and where the district's employment strengths lie.
Business and Skills	Business births and deaths, 2020 Business Specialisms, 2019 People in employment with NVQ Level 4+ qualifications, 2004-2020 Employment by occupation level Digital Connectivity	Business and skills indicators help us to understand business activity and the skills profile of Winchester to identify where further support might be required to capitalise on opportunities in new and emerging sectors.
COVID-19 impact and response	Emergency grant funding Covid Job Retention Scheme by sector Jobs at risk occupation Google Covid-19 Community Mobility Maps	Understanding the impact and response to COVID-19 is essential for ensuring Winchester can facilitate a swift and robust green economic recovery from the pandemic.
Low carbon economy and the environment	Green jobs forecasts CO <sub>2</sub> emissions Green space Electric vehicle infrastructure Recycling rates	Low carbon economy and the environment indicators help us to understand the current level of green growth in Winchester and importantly identify areas where green growth can be accelerated, which will be central to meeting net zero targets in a way which benefits the economy and community.

## The baseline geographies

The baseline analysis is presented for the Winchester City Council District as a whole, and for three sub-geographies. For consistency, the Green Economic Development Strategy baseline uses the same three sub-geographies as the Council's previous economic profiling work (2017).

These sub-geographies, shown in the below map (Figure 2) are Winchester City, Market Towns & Rural, and Winchester South.



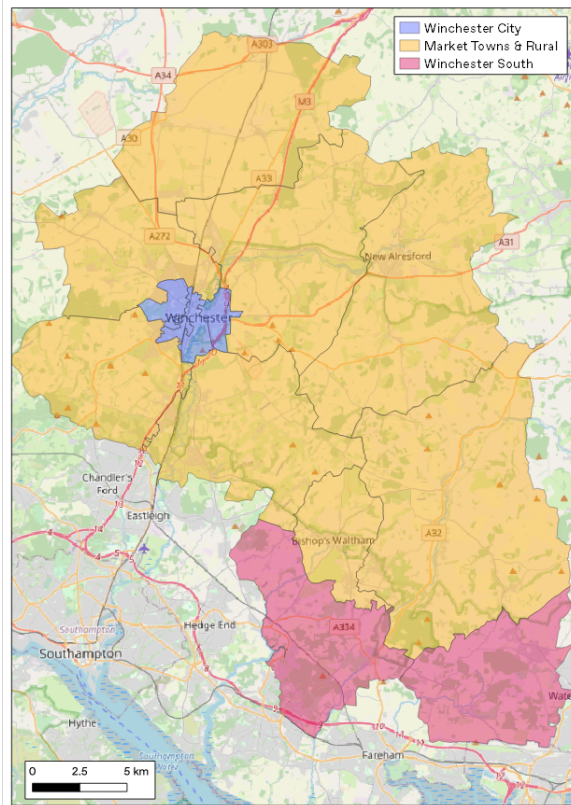


Figure 2: The three sub-geographies of Winchester District

Whilst these definitions are consistent with previous analysis undertaken by the Council, it must be noted that there are multiple options for creating these sub-geographies. These three areas are made up of different Middle Layer Super Output Areas (MSOAs), and in places one MSOA may include both suburban, market towns and rural areas.

There are therefore different ways for classifying the diverse areas of the district. For example, Whiteley and parts of the south of the district lie within the South Hampshire Built Up Area (BUA) and should be viewed in that context when considering the future of how and where people work, shop and access services.

The 2001 and 2011 Census also report data for the Winchester (BUA), which encompasses the historic city and neighbouring suburbs and edge-of-city developments. Similarly, the South Downs National Park (SDNP) could be treated as a separate area in its own right. However, due to the spatial level at which recent data is available the Winchester BUA and SDNP have not been used in this analysis to ensure that consistent and as up to date as possible data is used.

## Benchmarking and comparator analysis

The Winchester City Council District has been benchmarked against national and regional data for a selection of indicators to help show where the District sits in those contexts.



Winchester is also competing for inward investment with towns and cities around the country. The evidence base includes preliminary analysis to show how Winchester compare with a small number of other towns and cities , agreed with the Council (Table 2).

Table 2: Competitors

Competitor location	Reason for inclusion
Chelmsford	County town, similar relationship to London, university and health assets and capabilities
Cheltenham	Relatively affluent, knowledge-based town with strong culture, heritage and visitor economy, adjacent to rural areas including an Area of Outstanding Natural Beauty
Chichester	Near-neighbour, small university and county town with large rural and SDNP hinterland
Guildford	Major EM3 LEP urban centre on same transport corridors but with more developed innovation eco-system and LEP attention
Stratford-on-Avon	A non-Greater South East example with strong culture and visitor economy – town and rural, and relationship to metro-city-region

## A living evidence base

This evidence base is a point-in-time selection of datasets relevant to the Green Economic Development Strategy. During the process for creating the strategy, further evidence from stakeholders will also be taken on board and integrated.

Similarly, stakeholder engagement will be used to co-create a vision and programme of actions. As these emerge, a deeper exploration of the relevant datasets can be undertaken, and more dynamic and faster changing datasets can be updated.

Not all data used is available at a local authority or sub-geography level. In these instances, such as with the Employer Skills Survey or jobs at risk from COVID-19, county, regional or national level data has been modelled to a Winchester level based on the population and business demography of the district.

This evidence base is designed to inform the Green Economic Development Strategy rather than provide a detailed ‘state of Winchester’ database. Building on this evidence base and input from Winchester City Council and stakeholders, a ‘Green Economic Development Index’ of indicators and KPIs will be created for the final strategy. This

index will sit within the Strategy and will enable to the Council to track and report progress over time.

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# Winchester District

## Baseline

### Population

**Winchester's expanding but ageing population presents both challenges and opportunities for economic prosperity.**

Winchester's population is projected to experience above average growth over the medium term, with population growth forecast to exceed the South East and Hampshire averages and come in just below the England average out to 2043. This will continue to put pressure on demand for housing, public services such as Education and Health, and significantly, on CO<sub>2</sub> emissions.

However, Winchester's population growth is forecast to be driven by a significant increase in its over 65 population, and the district's working age population is forecast to shrink over the medium term. This will not only pose a threat to Winchester's ambitions for a prosperous and thriving economy as a result of a dwindling labour market, but will also increase demand for health and social care and have implications for the lies of housing and transport policy as Winchester will need to become more 'age-friendly'. It may, however, also create demand for new goods and services in response to the so-called 'grey pound'.

### Current population

Winchester has a population of 124,900, according to latest ONS data (2019) and has witnessed steady population growth since 2011 (earliest available data). Winchester's population has expanded by 7% over this period, recording faster growth than the England (6%), South East (6%), and Hampshire (5%) averages.

Despite being anchored by the city of Winchester's built-up area of 49,000 (almost 40% of total population) which represents a population density similar to Bristol's and within 20% of Southampton's, overall the district has the lowest population density in Hampshire (189 persons per square kilometre – even lower than New Forest) and third lowest in the whole of South East (after Chichester & West Oxfordshire). This can be explained by the fact that Winchester is the largest district spatially in Hampshire after New Forest, and (like New Forest), a significant part of the district (40%) is national park – in this case South Downs National Park (SDNP).

Winchester has a working age (16-64) population of 75,000, accounting for 60.1% of its total population. This is below the England (62.4%) and South East (61.2%) averages, but above the Hampshire average (59.9%).

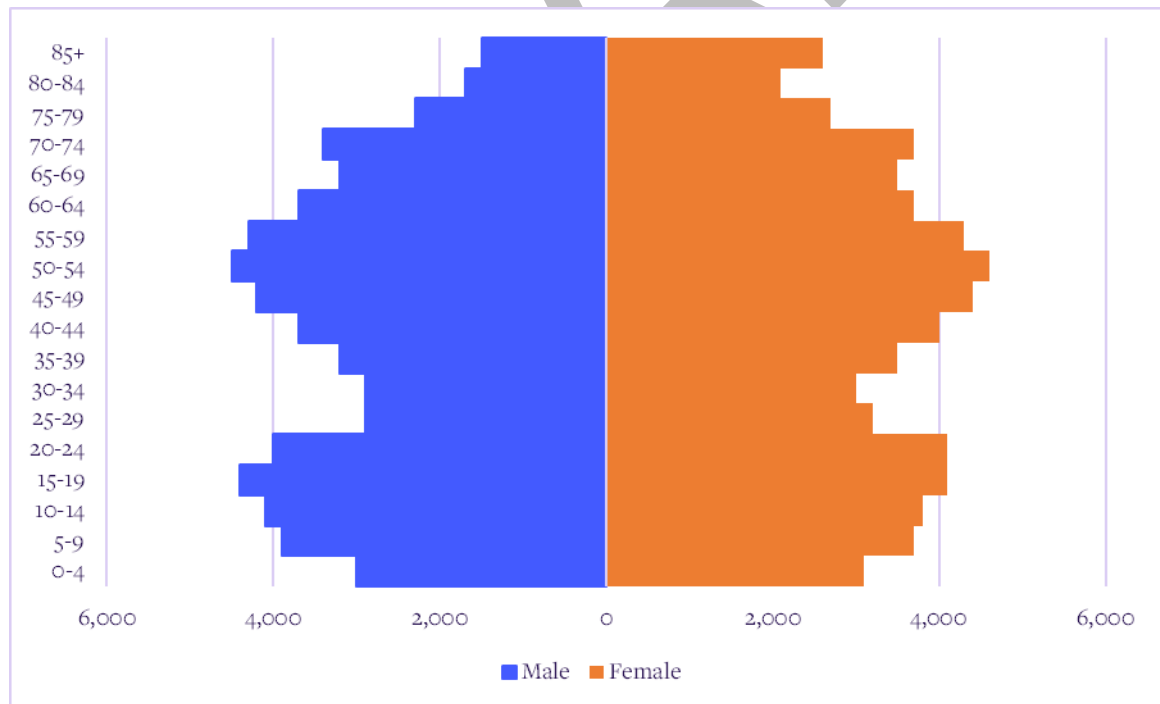
Table 3: Working age population, 2019

Area	Working age population	% of total population
England	35,116,600	62.4
South East	5,621,500	61.2
Hampshire	827,500	59.9
<b>Winchester</b>	<b>75,000</b>	<b>60.1</b>

Source: ONS, Population Estimates, 2019

In terms of age profile, Winchester has an hourglass-shaped population pyramid, with relatively large young (age 0-24) and old (aged 45+) populations, but a disproportionately small population aged 24-45. This suggests an outward migration of people following the completion of formal education with a corresponding inward migration of people once they reach the later stages of their careers. Winchester also has a large retirement-age population with 26,700 (21%) of the district's population aged 65+.

Figure 3: Winchester District population age distribution, 2019



Source: ONS, Population Estimates, 2019

## Population projections

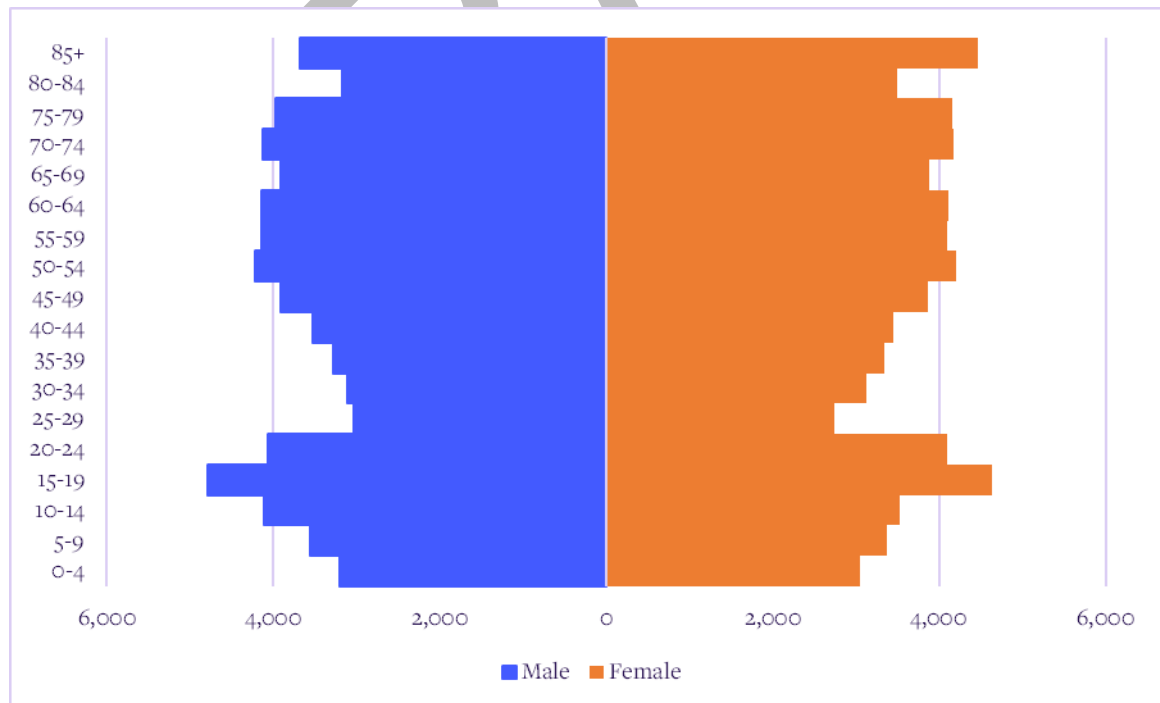
Winchester's population is forecast to grow by 9% to 135,700 by 2043. This projected population growth is below the England average of 10%, but above the South East (8%) and Hampshire (7%) averages.

Over this period, Winchester's working age population is forecast to shrink by 1% to 74,200 and while this is a slower decline than the Hampshire average (-2%), it contrasts with the positive growth projected across the South East (1%) and England (3%).

Most notably, Winchester's population growth to 2043 is forecast to be driven by a significant increase in its over 65 population, which is projected to expand by 46% to 39,000, which will account for 29% of the district's total population. This increase in retirement-age population largely mirrors projected growth rates for this cohort across national and regional benchmarks, although population growth of over 65s is forecast to be faster in Winchester than the England (42%), South East (44%), and Hampshire (40%) averages.

Positively for Winchester, the district's 16–24-year-old population is forecast to grow by 7% by 2043, outpacing the England (5%), South East (3%) and Hampshire (0%) averages. However, this is projected to be offset not only by the rapid growth in the over 65 population, but also by declines across other age cohorts. This is reflected in an ageing demographic profile, as depicted in Figure 4.

Figure 4: Winchester District population pyramid, 2043



Source: ONS, Population Estimates, 2019

## Society and wellbeing

Despite being among one of the least deprived areas in England, pockets of deprivation still exist within Winchester district, while pay disparities between those who work within and commute outside of Winchester persist. Meanwhile, although health indicators paint a portrait of a broadly healthy population, a high incidence of excess winter deaths highlights the need to address specific health challenges.

More than half of the district's LSOAs are within the 20% least deprived LSOAs in England, and none of them are within the 20% most deprived areas in England. However, pockets of deprivation nonetheless exist within the district for certain domains of deprivation including *Barriers to housing and services* and *Living environment*.

Median hourly workplace pay in Winchester is lower than median hourly resident pay, suggesting that a significant number of residents commute to higher paying jobs outside of the district. While this trend is common to the South East and Hampshire, the difference between workplace and resident pay was notably bigger in Winchester compared to regional and sub-regional benchmarks. That said, this gap has been narrowing over the past decade suggesting that pay has been rising more quickly within Winchester than in the surrounding employment areas.

Health indicators paint a portrait of a broadly healthy population. Life expectancy is higher in Winchester than the South East and England while inequality in life expectancy is lower, and Winchester also has higher rates of physical activity, a lower prevalence of childhood obesity, and a smaller proportion of children living in poverty. However, Winchester does have a high prevalence of excess winter deaths, which have most recently reached a rate more than double the England and South East averages.

### Indices of deprivation

According to the Ministry of Housing, Communities and Local Government (MHCLG)'s 2019 indices of multiple deprivation, none of Winchester's 68 LSOAs are within the 20% most deprived areas in England. Indeed, 25 of the district's LSOAs (37%) are within the 10% least deprived LSOAs in England, with an additional 11 (16%) within the 20% least deprived.

However, pockets of deprivation nonetheless exist within the district for certain domains of deprivation.

Two of Winchester’s LSOAs (3%) are within the 10% most deprived areas in England for *Education, skills, and training* (which measures the lack of attainment and skills in the local population) with an additional four LSOAs (6%) in the 20% most deprived.

One of Winchester’s LSOAs (11%) is within the 20% most deprived areas in England for *Crime* (which measures the risk of personal and material victimisation at local level).

Nine of Winchester’s LSOAs (13%) are within the 10% most deprived areas in England for *Barriers to housing and services* (which measures the physical and financial accessibility of housing and local services) with an additional six LSOAs (9%) in the 20% most deprived.

Seven of Winchester’s LSOAs (10%) are within the 10% most deprived areas in England for *Living environment* (which measures the quality of the local environment) with an additional two LSOAs (3%) in the 20% most deprived.

### Pay and wages

Median hourly workplace pay in Winchester was £16.65 in 2020, above the England (£15.54), South East (£15.95), and Hampshire (£15.47) averages. However, this was £2.27 (12%) lower than the median hourly resident pay, suggesting that a significant number of residents commute to higher paying jobs outside of the district. This trend is common to the South East and Hampshire, although the difference between workplace and resident pay was notably bigger in Winchester compared to regional and sub-regional benchmarks. For England as a whole, median hourly workplace pay is on average higher than median hourly residence pay.

However, this gap has been narrowing over the past decade in Winchester with median hourly workplace pay growth of 22% between 2010 and 2020 outpacing median hourly resident pay growth of 14% of the same period. Indeed, Winchester’s median hourly workplace pay growth matched the England average and was faster than the South East (20%) and Hampshire (21%) Averages between 2010 and 2020 while median hourly resident pay growth lagged the England (20%), South East (16%), and Hampshire (22%) averages. This suggests that pay has been rising more quickly within Winchester than in the surrounding employment areas.

Table 4: Median hourly pay

Area	Median hourly workplace pay	Median hourly resident pay	Difference	Median hourly workplace pay growth (2010-20)	Median hourly resident pay growth (2010-20)
England	£15.54	£15.30	£0.24	22%	20%
South East	£15.95	£16.29	-£0.34	20%	16%
Hampshire	£15.47	£16.57	-£1.10	21%	22%
<b>Winchester</b>	<b>£16.65</b>	<b>£18.92</b>	<b>-£2.27</b>	<b>22%</b>	<b>14%</b>

Source: ONS, Annual Survey of Hours and Earnings (ASHE), 2020

## Health outcomes and determinants

Public Health England publish a range of health indicators which give an overview of the wellbeing of a place and health outcomes of its population. Table 6 presents a small selection of these, which show that life expectancy is higher than the South East and England. Similarly, inequality in life expectancy is lower in Winchester.

Winchester also has higher rates of physical activity, a lower prevalence of childhood obesity and a smaller proportion of children living in poverty.

One of the few outcomes which is worse in Winchester is excess winter deaths, which have most recently reached a rate of 34.1% in 2018-19 compared to 14.3% in the Wider South East.

Table 5: Median hourly pay

Indicator	Winchester	South East	England
Life expectancy at birth (Female) (2017-19)	85.6	84.3	83.4
Life expectancy at birth (Male) (2017-19)	81.5	80.8	79.8
Female inequality in life expectancy at birth (years difference from lowest to highest)	4.6	6.1	7.6
Male inequality in life expectancy at birth	5.9	7.8	9.4
Percentage of physically active adults (2019-20)	75.8%	69.5%	66.4%
Prevalence of childhood obesity (Year 6) (2019-20)	11.2%	17.8%	21.0%
Children in low-income families (2016)	7.7%	12.9%	17.0%
Excess winter deaths (2018-19)	34.1%	14.3%	15.1%



## Employment

Measures of employment and economic activity in Winchester have are beginning to show signs of recovery, positioning the district to capitalise on its strengths in Retail, Professional, scientific, and technical, Accommodation and food services, Information and communication, and Business administration and Support services.

Even prior to the COVID-19 pandemic Winchester's economic activity and employment rates had been in decline while unemployment had been moving in the opposite direction. Measures of employment and economic activity have recently begun to show signs of recovery but remain below (and above in the case of unemployment) national, regional, and sub-regional benchmarks.

*Retail and Health* are Winchester's two largest employment sectors, and the district additionally is home to significant employment in *Professional, scientific, and technical, Accommodation and food services, Education, Information and communication, and Business administration and Support services*. Digging a little deeper into this, Winchester has important employment specialisms in *Manufacture of medical and dental instruments and supplies, Scientific research and development, Retail sale of other goods in specialised stores, and Market research and public opinion polling*.

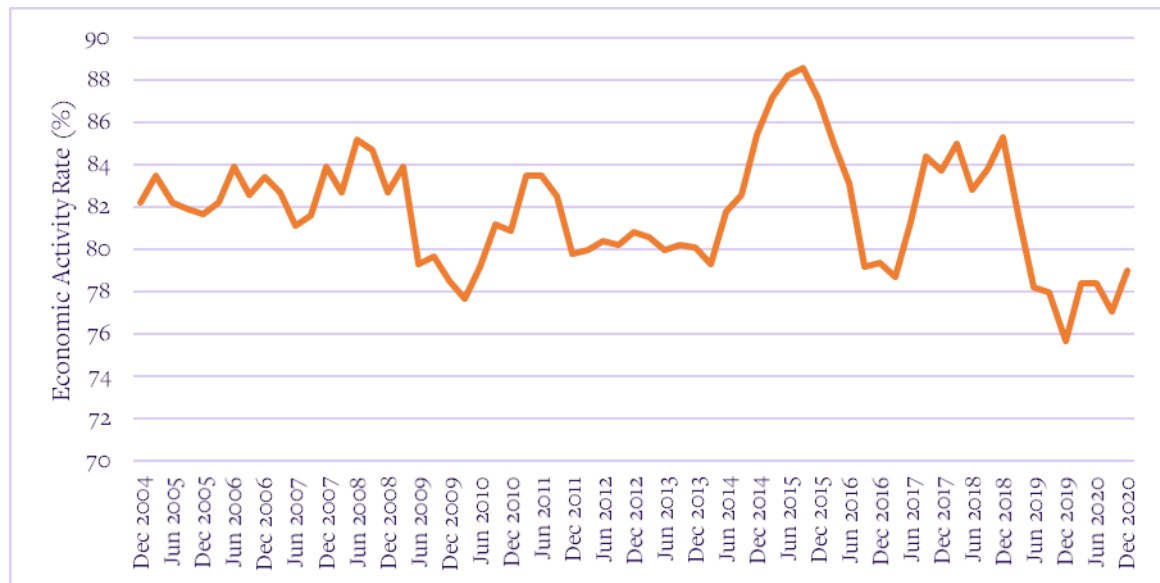
Although the average probability of job automation in Winchester has risen slightly in recent years, the district remains relatively well shielded from this threat to jobs. Risk is generally concentrated in the Low Risk (probability lower than 30%) category, although the proportion of jobs in Winchester at High Risk (probability greater than 70%) has seen a small but significant increase.

### Economic activity and employment

Having been in steady decline in recent years, measures of employment and economic activity among Winchester's working age population (16-64) have recently begun to show signs of recovery.

Winchester's economic activity rate – the proportion of the labour force who are either employed or actively seeking work – had declined from 85.3% in December 2018 to 75.7% in December 2019, but according to latest ONS Annual Population Survey data (December 2020) has since recovered to 79.0%. This is slightly below the England average of 79.5%, and below the average rate of 81.6% for the South East and 80.5% for Hampshire.

Figure 5: Economic Activity Rate



Source: ONS, Annual Population Survey, 2020

Meanwhile, unemployment had been steadily rising even prior to the COVID-19 pandemic, from 2.0% in March 2018 to 4.2% in December 2019. This subsequently rose to a nine-year high of 7.5% in June 2020 likely spurred by the introduction of lockdown restrictions. However, latest data have shown two consecutive quarters of declining unemployment, with Winchester’s unemployment rate falling to 5.0% in December 2020. This, however, remained above the England (4.8%), South East (4.0%), and Hampshire (3.7%) averages.

Largely mirroring unemployment trends, Winchester’s employment rate declined from 83.7% December 2017 to 72.1% in September 2020 before rising to 75.0% in December 2020. This too remains below the England (75.7%), South East (78.3%), and Hampshire (77.5%) averages.

### Out of district commuting

According to the 2011 Census (latest available data), 20,961 Winchester residents (49% of total employees) worked within the district with the remaining 22,071 residents commuting to work outside of the district.

Eastleigh was the place of work outside the district which accounted for the largest number of Winchester residents employing 3,034 people (7% of total employees), closely followed by Southampton where 2,923 (7%) of people worked.

Other significant places of work for Winchester residents included London (2,581 or 6%) and Portsmouth (2,098 or 5%) while Fareham, Basingstoke and Deane, and Test Valley also accounted for notable numbers of Winchester Residents.

Table 6: Location of place of work

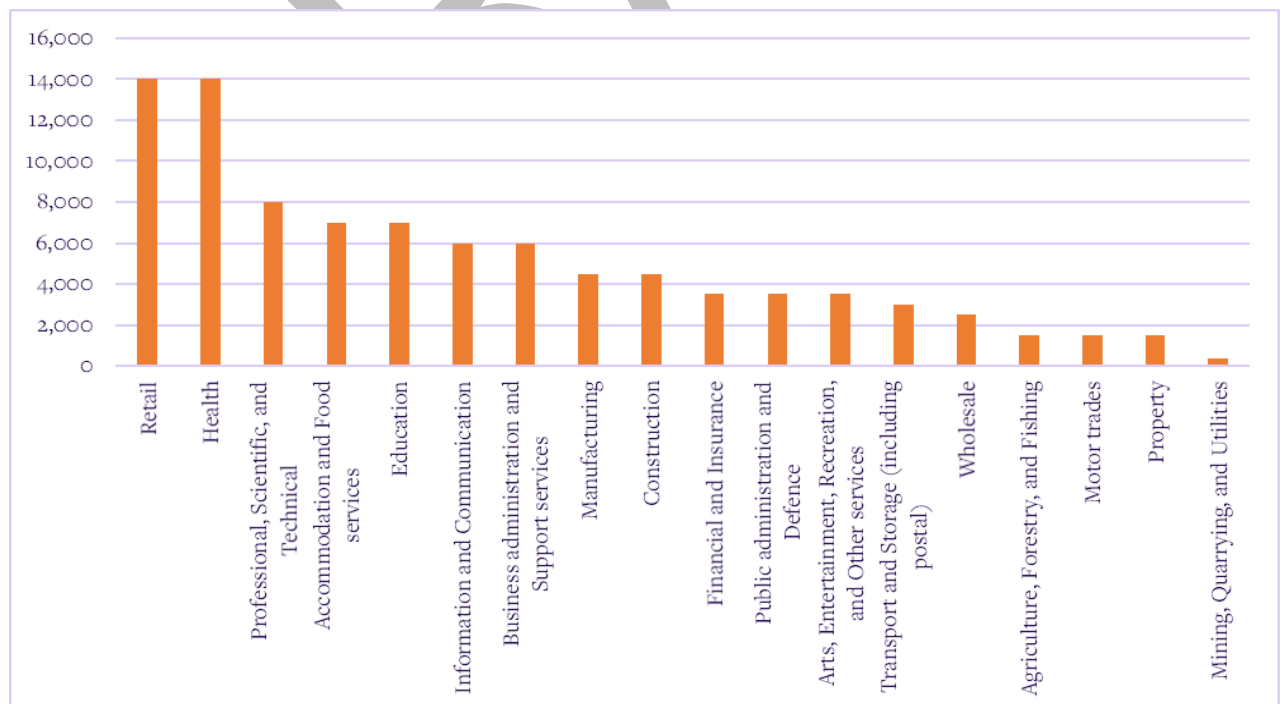
Area	Number of employees	Share of total
Winchester	20,961	49%
Eastleigh	3,034	7%
Southampton	2,923	7%
London	2,581	6%
Portsmouth	2,098	5%
Fareham	1,909	4%
Basingstoke and Deane	1,616	3%
Test Valley	1,556	2%

Source: Census, WU01UK - Location of usual residence and place of work, 2011

## Employment by sector and specialisms

Latest (2019) Business Register and Employment Survey (BRES) data from ONS identifies *Retail* and *Health* as Winchester’s largest employment sectors, each employing 14,000 people accounting for 15.4% of total employment. BRES data also identifies *Professional, scientific, and technical* (employing 8,000 or 8.8% of total employment), *Accommodation and food services* (7,000 or 7.7%), *Education* (7,000 or 7.7%), *Information and communication* (6,000 or 6.6%), and *Business administration and Support services* (6,000 or 6.6%) as significant employment sectors.

Figure 6: Employment by broad industrial group



Source: ONS, BRES, 2019

Analysis of latest BRES data identifies a number of employment specialisms in Winchester.

Location quotients relative to the England average suggest significant employment specialisms at the three-digit Standard Industrial Classification (SIC) code level in *Manufacture of medical and dental instruments and supplies, Scientific research and development, Retail sale of other goods in specialised stores, and Market research and public opinion polling.*

Table 7: Employment specialisms

Sector (3-digit SIC level)	Location Quotient
Manufacture of medical and dental instruments and supplies	9.0
Retail sale of other goods in specialised stores	4.2
Market research and public opinion polling	4.0
Other telecommunications activities	3.8
Research and experimental development on natural sciences and engineering	3.4
Manufacture of dairy products	3.0
Other social work activities without accommodation	2.6
Construction of roads and railways	2.5
Support activities for transportation	2.4
Veterinary activities	2.3
Libraries, archives, museums and other cultural activities	2.3

Source: ONS, BRES, 2019

The ONS calculates that the average probability of job automation in Winchester was 37.3% in 2017, up slightly from 36.8% in 2011. The proportion of jobs in Winchester at Low Risk (probability lower than 30%) of automation in 2017 was 42.7%, marking an increase from 39.7% in 2011. However, the proportion of jobs in Winchester at High Risk (probability greater than 70%) was 5.5% in 2017, an increase from 1.1% in 2011.

### Retail: An important sector for Winchester

With a location quotient of 1.7, Winchester has a recognised specialism in Retail. Moreover, the sector is Winchester's largest employment sector, employing 14,000 people and accounting for 15.4% of total employment, while the sector accounts for 13% of the district's business base.

The district's largest retail centre Winchester Town is a unique and thriving centre that boasts a good range of quality high street and independent retailers, but also a very strong

offer in food and beverage and other commercial leisure uses. The town centre's retail pitch is aimed at mid-market customers and above, reflecting a relatively affluent resident catchment

This offer is supported by a purpose-built, modern retail development in Whiteley, a strong independent retail and town centre offer in Bishop's Waltham, a good mix of retail and town centre uses catering for its local catchment in New Alresford, a localised retail offer largely supporting day to day shopping needs in addition to a notable number of small antiques and gifts outlets in Wickham, and local centres including Denmead, Kings Worthy, Oliver's Battery, Stockbridge Road/Andover Road, and Weeke which principally serve the day-to-day convenience retail needs of their immediate communities.

As part of Winchester's local plan evidence base, produced just as the COVID-19 disruption started, Lambert Smith Hampton forecast strong retail growth in Winchester with total convenience goods expenditure projected to increase in real terms by 12% (£62 million) by 2029 and by an additional 16% (£79 million) by 2036 and total comparison goods expenditure expected to grow by 39% (£331 million) by 2029 and an additional 23% (£270 million) by 2036.

However, Lambert Smith Hampton emphasise that there is a need to move away from high streets as solely retail-led locations to those that offer a wider range of retail, leisure, cultural, heritage, employment, tourist, and other amenities/attractions. This transition to more diverse uses that go "beyond retail" will need to be supported by a mix of new homes and apartments on the edge of and/or 'on top of' centres to help boost their 'captive' resident and working catchment populations in the most sustainable and commercially effective way.

The retail and leisure industries are dynamic and evolving sectors, but they are facing significant challenges and pressures from changes in the economy, policy, and consumer trends. It is clear, for example, that consumers are becoming increasingly selective in terms of where and how they spend their disposable income on retail goods and discretionary leisure. The growth in online shopping and at-home entertainment and activities, represents a further challenge for town centres and retail and leisure operators to attract customers.

These trends are likely to have been significantly accelerated by the COVID-19 pandemic. The retail and commercial leisure markets are expected to have been badly impacted from the loss of custom during the period of lockdown, with many businesses that had closed during this period potentially not reopening. This is particularly likely to be the case within the comparison goods retail and food and beverage sectors where many operators were already struggling. As of May 2021, Google's COVID-19 community mobility maps show that travel for retail and leisure in Winchester remains around 30% below pre-pandemic levels.

How the impact will apply to Winchester District is still unknown, but Lambert Smith Hampton expect that strong centres such as Winchester Town will maintain demand from retailers and operators owing to its resident catchment and popularity as a visitor destination. That said, COVID-19 has now placed even greater onus on promoting the diversification town centres and allowing greater flexibility of uses. This could help centres to respond quickly to major economic impacts, but also evolving customer and market trends.

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## Business and Skills

**Winchester is home to a highly skilled workforce and a thriving business base, with significant opportunities for green growth.**

Latest data showed that Winchester had a higher number of business births per 10,000 working age population than the England, South East, and Hampshire average and despite being below recent trends, a strong net increase in businesses.

Broadly in line with national, regional, and sub-regional trends, the majority of businesses in Winchester are micro-sized, employing nine or fewer people. Support for small businesses therefore remains an important priority.

Largely reflecting the district's employment strengths, Winchester's *Professional, Scientific, and Technical* and *Retail* sectors have the largest number of businesses, accounting for around one third of total enterprises. In addition, there is also a significant number of *Construction* companies which are predominantly micro-sized. Engagement with these companies could provide an opportunity to reduce CO<sub>2</sub> emissions and generate green growth in this important sector.

Similarly, Winchester has significant business specialisms in *aquaculture, camping grounds, recreational vehicle parks and trailer parks, sea and coastal passenger water transport, and support services to forestry*, all of which present exciting opportunities to become national leaders in green growth.

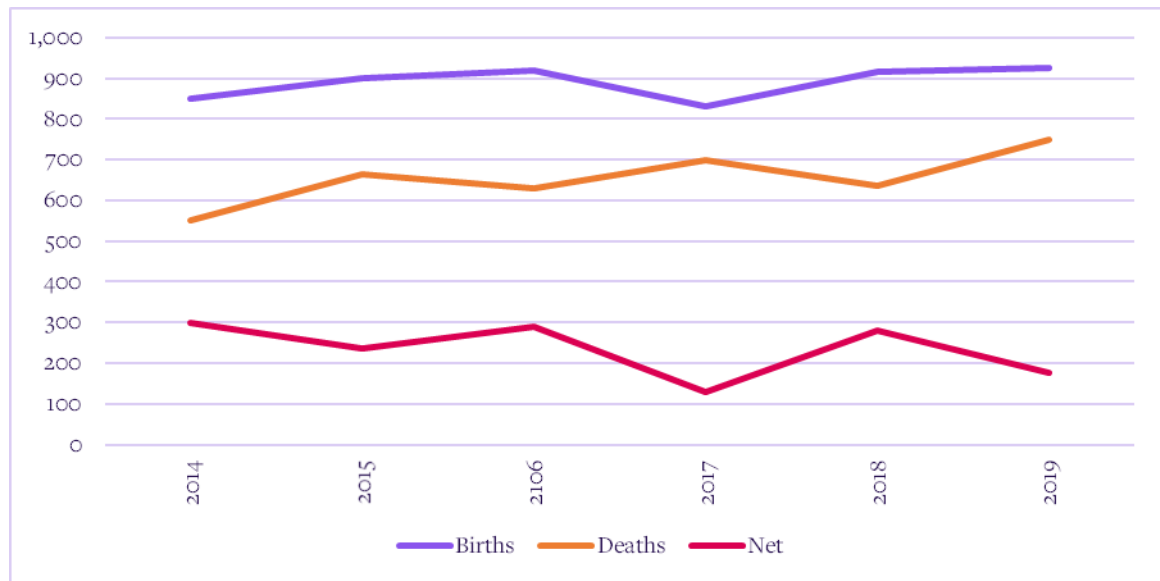
Winchester has a highly skilled workforce with an above average proportion of people with NVQ Level 4 qualifications or above and a below average proportion of people in employment with no qualifications. Moreover, approximately two-thirds that 66% of people in employment in Winchester are employed in high-skilled occupations while only 14% are employed in low-skilled occupations. However, data from the Department for Education's latest Employer Skills Survey suggest that employers may have difficulties recruiting *Associate professionals* and *Managers* in Winchester.

### Business births and deaths

According to latest available data from ONS there were 925 new businesses created in Winchester in 2019 equating to 123 business births per 10,000 working age population. This was a higher number of business births per 10,000 working age population than the England (100), South East (97), and Hampshire (96) average. Meanwhile there were 750 business deaths, resulting in a net increase of 175 businesses. This net increase, however, was below the five-year average, largely due to a higher-than-average number of business deaths.



Figure 7: Business births and deaths, 2020



Source: ONS, Business Demography, 2020

## Business size and sectors

Latest data (2020) from the Inter Departmental Business Register (IDBR) reveal that Winchester is home to 8,860 businesses, of which 7,310 (83%) are micro-sized (0-9 employees), 1,305 (15%) are small-sized (10-49 employees), 210 (2%) are medium-sized (50-249 employees), and 30 (0.3%) are large (250+ employees). This breakdown is broadly in line with England, South East, and Hampshire averages.

Table 8: Winchester business profile

Employment Size band	England	South East	Hampshire	Winchester
Micro (0 to 9)	85%	86%	85%	83%
Small (10 to 49)	12%	12%	12%	15%
Medium-sized (50 to 249)	3%	2%	2%	2%
Large (250+)	0.4%	0.3%	0.3%	0.3%

Source: ONS, Inter Departmental Business Register, 2020

According to latest available data from ONS (2019), Winchester had a business density (number of businesses per 10,000 working age population) of 1,142, higher than the England (752), South East (821), and Hampshire (836) averages.

Winchester's *Professional, Scientific, and Technical* sector has the largest number of businesses with 1,745, or 20% of the total business base, followed by *Retail* with 1,175 businesses or 13% and *Construction* with 880 or 10%.

Location quotients relative to the England average suggest significant business specialisms at the three-digit Standard Industrial Classification (SIC) code level in



*Aquaculture, Camping grounds, recreational vehicle parks and trailer parks, Sea and coastal passenger water transport, and Support services to forestry.*

Table 9: Business Specialisms

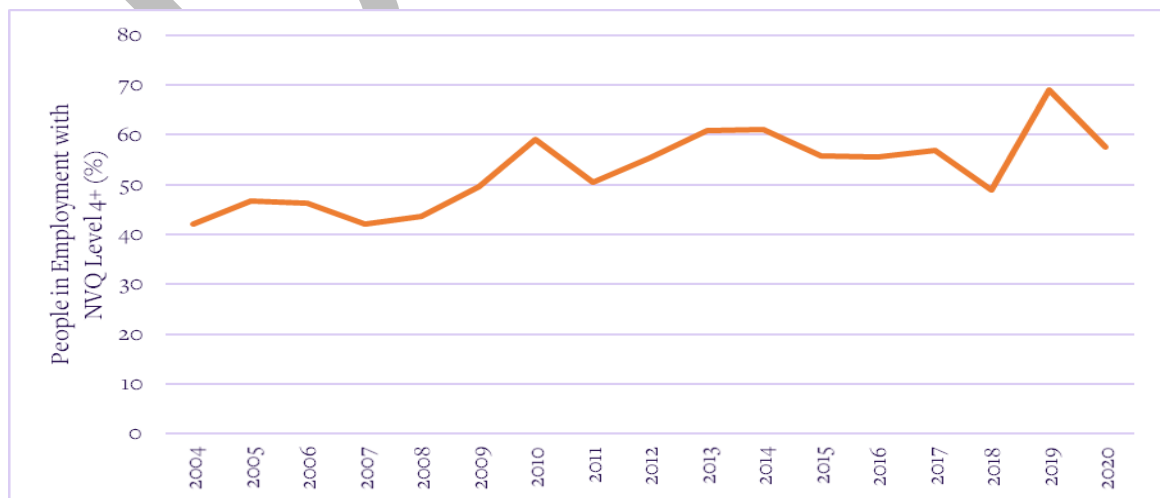
Sector (3-digit SIC level)	Location Quotient
Aquaculture	6.1
Camping grounds, recreational vehicle parks and trailer parks	5.1
Sea and coastal passenger water transport	3.6
Support services to forestry	3.4
Manufacture of prepared animal feeds	3.1
Retail sale of other goods in specialised stores	3.1
Manufacture of rubber products	2.8
Growing of perennial crops	2.8
Processing and preserving of fruit and vegetables	2.7
Plant propagation	2.5
Manufacture of dairy products	2.5

Source: ONS, IDBR, 2019

## Skills

Winchester has a highly skilled workforce. According to latest Annual Population Survey data, 57.5% of people in employment in Winchester had NVQ Level 4 qualifications or above in 2020, above the England (48.2%), South East (49.4%), and Hampshire (49.3%) averages. While this figure has fluctuated somewhat in recent years it has generally exhibited an upward trend since 2004.

Figure 8: People in employment with NVQ Level 4+ qualifications

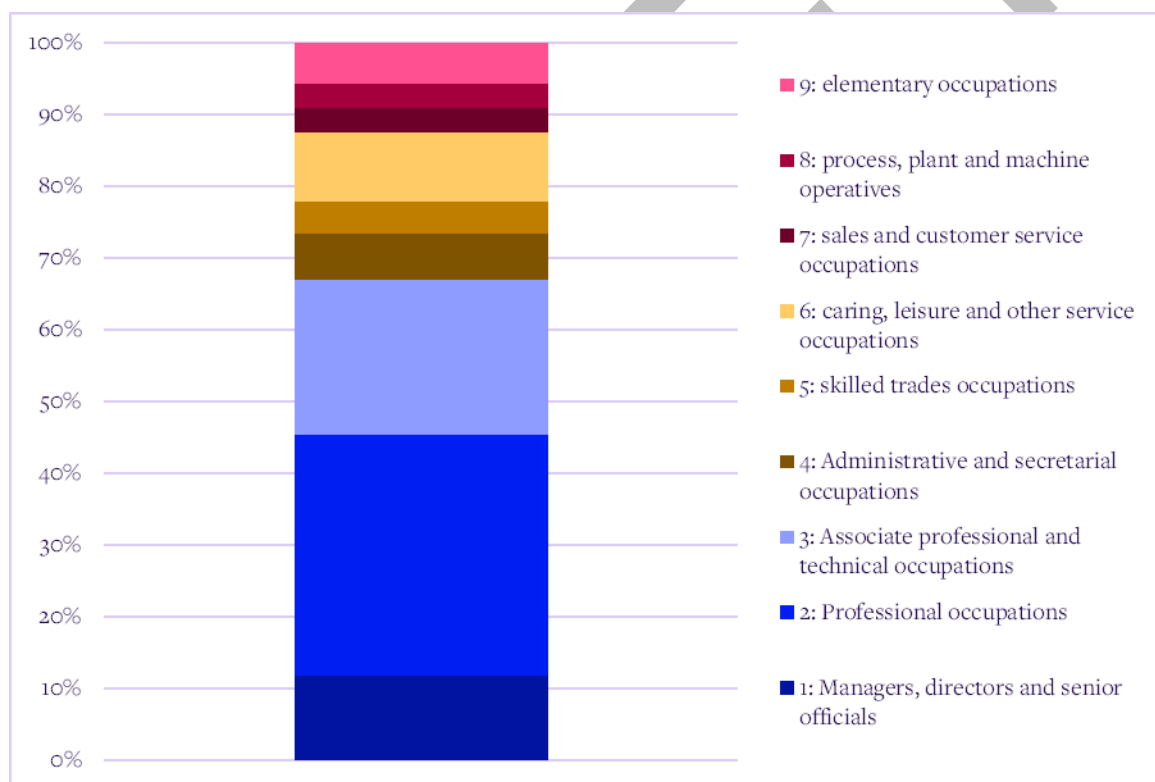


Source: ONS, Annual Population Survey, 2020

Unfortunately, data on people in employment in Winchester with no qualifications is sparse, but historically a very low proportion of Winchester’s workforce have no qualifications. Latest data is only available for 2017 when only 2.5% of people in employment in Winchester had no qualifications, and the lowest percentage on record is 7.4% when data was first published in 2004. Latest available data suggest that the proportion of people in employment in Winchester with no qualifications is below the England (3.5%) and South East (3.1%) averages but above the Hampshire average (1.6%).

Latest Annual Population Survey data shows that 66% of people in employment in Winchester are employed in high-skilled occupations<sup>1</sup> while 14% are employed in low-skilled occupations<sup>2</sup>.

Figure 9: Employment by occupation level



Source: ONS, Annual Population Survey, 2020

According to the Department for Education’s latest Employer Skills Survey (2019), the occupations with the highest incidence of hard to fill vacancies in Hampshire are *Skilled trades* (28%), *Associate professionals* (16%), *Caring, leisure and other staff* (15%), and

<sup>1</sup> Defined as Standard Occupational Classification (SOC) codes 1 (managers, directors, and senior officials), 2 (professional occupations), and 3 (associate professional and technical occupations)

<sup>2</sup> Defined as Standard Occupational Classification (SOC) codes 7 (sales and customer service occupations), 8 (process, plant, and machine operatives), and 9 (elementary occupations)

*Elementary staff* (15%). In particular *Skilled trades*, *Associate professionals*, and *Caring, leisure and other staff* appear to be difficult to fill in Hampshire with a higher incidence than the national average. Other occupations which are more challenging to fill in Hampshire than the national average include *Managers* and *Sales/customer service staff*.

Applying this to Winchester, the hardest vacancies to fill would appear to be *Associate professionals* and *Managers* as these account for significant shares of total employment within the district, have a high incidence of hard to fill vacancies, and have a higher incidence than the national average.

Table 10: Incidence of hard-to-fill vacancies by occupation (employer base)

Occupation	Incidence of hard to fill vacancies by occupation		Breakdown of all employees in Winchester District
	England	Hampshire	
Managers	4%	7%	12%
Professionals	15%	11%	33%
Associate professionals	14%	16%	21%
Administrative/clerical staff	8%	5%	6%
Skilled trades	24%	28%	4%
Caring, leisure and other services staff	14%	15%	9%
Sales/customer service staff	8%	11%	3%
Machine operatives	8%	7%	3%
Elementary staff	16%	15%	6%

Source: Department for Education, Employer Skills Survey, 2019

## Digital Connectivity

Latest data from Thinkbroadband (Q121) show that 93.2% of premises in Winchester district are covered by superfast broadband (over 30 Mbps) while 52.1% are covered by ultrafast broadband (over 100 Mbps) and 7.7% have access to full fibre (FTTP). This coverage is below the Hampshire average, with 96.6% of Hampshire covered by superfast broadband, 66.5% by ultrafast broadband, and 10.1% by FTTP.

The mean download speed in Winchester district is 50.0 Mbps while the median download speed is 33.2 Mbps, both of which are below that of Hampshire (57.4Mbps and 34.6 Mbps, respectively). Meanwhile, the mean upload speed in Winchester district is 8.4 Mbps, above the Hampshire average of 8.0 Mbps, while the median upload speed is 1.3 Mbps, below the Hampshire average of 2.3 Mbps.

Utilisation – defined as the mean download speed expressed as a percentage of the maximum mean speed in an area – is 16% in Winchester, above the Hampshire average of 14%.

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## COVID-19 impact and response

**Winchester has not escaped the economic impact of COVID-19, but has more resilience than Hampshire and the UK as a whole.**

Hospitality and arts and culture have been the most affected sectors in Winchester, with around a quarter of employees in these sectors furloughed, compared to less than one in of employees across Winchester's economy as a whole.

However, this is a more positive picture than in Hampshire, the South East and UK where furlough rates in the accommodation sector have reached over 40% and in the arts sector over 35%.

Therefore, Winchester's hospitality and arts and culture businesses and workforce should be in a relatively strong position as COVID-19 restrictions ease. This will partly be due to the extensive emergency grant funding made available to businesses.

Similarly, Winchester's relatively high-skilled employment base means the proportion of at-risk jobs has been lower, as have rates of furlough, during the pandemic than Hampshire, the South East and UK. As restrictions ease, this relatively secure workforce has potential to mean demand for retail, services, hospitality and leisure could rebound more quickly than other parts of the UK.

However, travel behaviour paints a mixed pattern of recovery. Public transport use is recovering faster than other parts of the UK, and travel for grocery shopping remains above the pre-pandemic baseline.

Travel for more general retail activity has increased since the easing of restrictions but is still 20-30% below the pre-pandemic baseline and travel to work still 26% lower. This could represent a permanent change in where and how people work and travel, or simply slow return to the pre-pandemic situation. As we progress with producing the Green Economic Development Strategy the Community Mobility Reports can be revisited to further assess the emerging picture.

### Business impact

A total of £48,188,363 of government Covid-19 related emergency grant funding has flowed through the city council to businesses as of mid-May 2021, benefiting 8,379 recipients<sup>3</sup>.

Funding programmes have included:

- Small Business Grants

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<sup>3</sup> The number of recipients is not equal to the number of businesses as businesses receive multiple grants. A breakdown by grant is not available.

- Retail Hospitality & Leisure Grant
- Business Rates Relief for the Retail, Hospitality & Leisure
- Local Authority Discretionary Grants
- Local Restrictions Support Grants
- Christmas support payment for wet led pubs
- Closed business lockdown payments
- Restart Grants
- Additional Restrictions Grants

According to latest HMRC data, the cumulative number of employments on furlough in Winchester as of 14 April 2021 was 18,600. This accounted for 8% of the Hampshire total, meaning that Winchester had a lower proportion of employments on furlough than might have been expected given that the district accounts for 14% of total Hampshire employment.

The sectors most affected by COVID-19 in terms of absolute numbers in Winchester have been Accommodation and food services (1,850 employments on furlough), Wholesale and retail; repair of motor vehicles (1,090), and Arts, entertainment, recreation & other services (860). In terms of shares of total employment, Accommodation and food services was once again the sector most impacted by COVID-19 with 26% of total employment having been furloughed, closely followed by Arts, entertainment, recreation & other services (25%). These were, however, lower than the England, South East, and Hampshire averages. Moreover, the total number of employments furloughed as a proportion of total employment in Winchester (8%) was lower than the England, South East, and Hampshire averages (all 13%), suggesting that employment in Winchester has perhaps been more resilient throughout the pandemic.

Table 11: Covid Job Retention Scheme by sector

Sector	England		South East		Hampshire		Winchester	
	Number	%	Number	%	Number	%	Number	%
Agriculture, forestry and fishing, Mining and quarrying, Energy production and supply & Water supply, sewerage and waste	25,460	4%	3,810	3%	590	4%	60	3%
Manufacturing	220,080	10%	26,250	9%	4,450	8%	270	6%
Construction	158,320	12%	26,070	11%	4,070	11%	240	5%
Wholesale and retail; repair of motor vehicles	663,740	16%	105,170	15%	14,940	14%	1,090	6%
Transportation and storage	146,400	11%	33,360	17%	4,130	17%	350	12%
Accommodation and food services	835,860	41%	131,130	40%	18,900	39%	1,850	26%
Information and communication, Financial and insurance & Real estate	159,730	6%	28,140	7%	3,830	6%	300	3%
Professional and scientific and technical	207,220	8%	36,060	9%	5,300	9%	540	7%
Administrative and support services	282,040	12%	46,660	13%	6,350	14%	530	9%
Education	121,280	5%	26,290	6%	3,690	7%	430	6%
Health and social work	124,240	4%	21,350	4%	3,510	5%	230	2%
Arts, entertainment, recreation & other services	419,140	33%	76,030	36%	11,480	37%	860	25%
Public administration and defence; social security, Households & Other	42,810	4%	6,490	5%	820	4%	90	3%
<b>TOTAL</b>	<b>3,406,320</b>	<b>13%</b>	<b>566,810</b>	<b>13%</b>	<b>82,060</b>	<b>13%</b>	<b>6,840</b>	<b>8%</b>

Source: HMRC (2021), BRES (2019), Urban Foresight calculation

Indeed, analysis of the impact of COVID-19 by occupation underscores Winchester’s relative resilience to the pandemic. ONS analysis has identified elementary (SOC code 9) and skilled trades (SOC code 5) occupations as the most likely to see their wages impacted because of the pandemic, based on their ability to work from home and whether or not they are a key worker.

At the start of the pandemic, Winchester had 3,900 people employed in elementary occupations and 5,000 employed in skilled trades, which accounted for 6.6% and 8.5%, respectively, of total employment, which were below the England, South East, and Hampshire averages. Moreover, using ONS estimates of job vulnerability it is estimated that at the start of the pandemic, 32% of Winchester’s total employment were categorised as being at high risk, compared to 36% for England, 34% for the South East, and 35% for Hampshire.

### Travel behaviour

Google COVID-19 Community Mobility Reports provide an indication of how travel behaviour has changed during the pandemic. The data provides a day-by-day tracker of journeys made to six types of destination since the start of 2021, and how these compare to a pre-pandemic baseline in 2020 (Table 12).

Travel for retail and recreation remains 30% lower in Winchester compared to pre-pandemic. The full time series (Figure 10) clearly shows a recovery in retail and recreation activity following the easing of lockdown restrictions with a step-change in the number of journeys from April 12<sup>th</sup> onwards. In fact, the most recent six days are the closest to the pre-pandemic average number of journeys for retail and recreation.

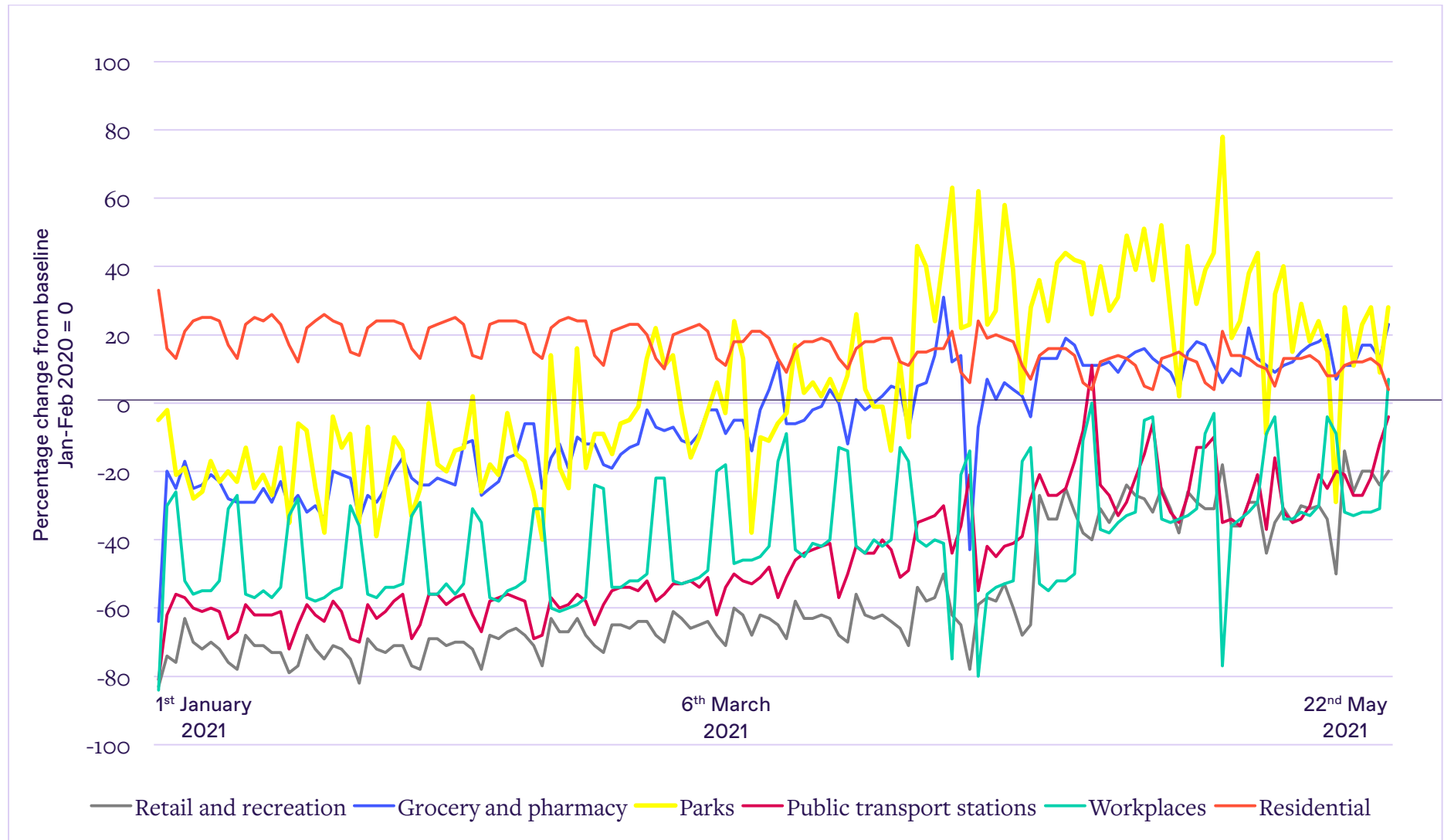
Table 12 also suggests that more journeys are being made for grocery and pharmacy shopping in Winchester than the UK as a whole, which could be an indication of a preference for physical rather than online shopping.

Table 12: Google COVID-19 Community Mobility Report for May 22<sup>nd</sup>, 2021

Journey destination	May average compared to 2020 baseline (% change)	
	UK	Winchester District
Retail and recreation	-27	-30
Groceries and pharmacy	2	14
Parks	36	25
Public transport stations	-39	-25
Workplaces	-27	-26
Residential	9	11



Figure 10: Google COVID-19 Community Mobility Report for Winchester District



## Low carbon economy and the environment

**Winchester has an opportunity to grow its low carbon economy and with a need for over 1,100 new jobs by 2030.**

As the UK transitions to a net zero economy, Winchester will need 1,861 green jobs in low carbon heat, power, transport and services with over 1,100 of these set to be created by 1,123.

The Green Economic Development Strategy will not just focus on how Winchester can capture its fair share of green jobs, but explore how it can exceed this and attract jobs which would otherwise be located elsewhere.

Winchester's environmental challenges can act as a catalyst for innovation and green job creation. Whilst the District's CO<sub>2</sub> emissions fell by almost a third between 2005 and 2018, CO<sub>2</sub> emissions per head of population are still higher than the Hampshire, South East and UK average. Transport emissions are the biggest contributor to the districts carbon footprint, with relatively small decreases over time and addressing these should be seen as a priority in order to deliver the 14% annual reductions in CO<sub>2</sub> emissions recommended by the Tyndall Centre.

The energy mix across the South of England is dominated by gas, which forms 60% of energy supply. As a result, the carbon intensity (CO<sub>2</sub> emissions per unit of energy) of the South of England's national grid is higher than the South East and South West where gas makes up 30% and 23% of supply. Winchester can play an important role by attracting investment in the infrastructure and jobs needed to decarbonise the region's energy supply.

Recycling rates in Winchester are comparatively low, with 38.1% of household waste sent for recycling, composting or re-use, compared to 47.6% across the South East and 43.8% across England. This sees Winchester ranked 234 out of 341 local authority areas, which again should be seen as an opportunity for job creation in green jobs.

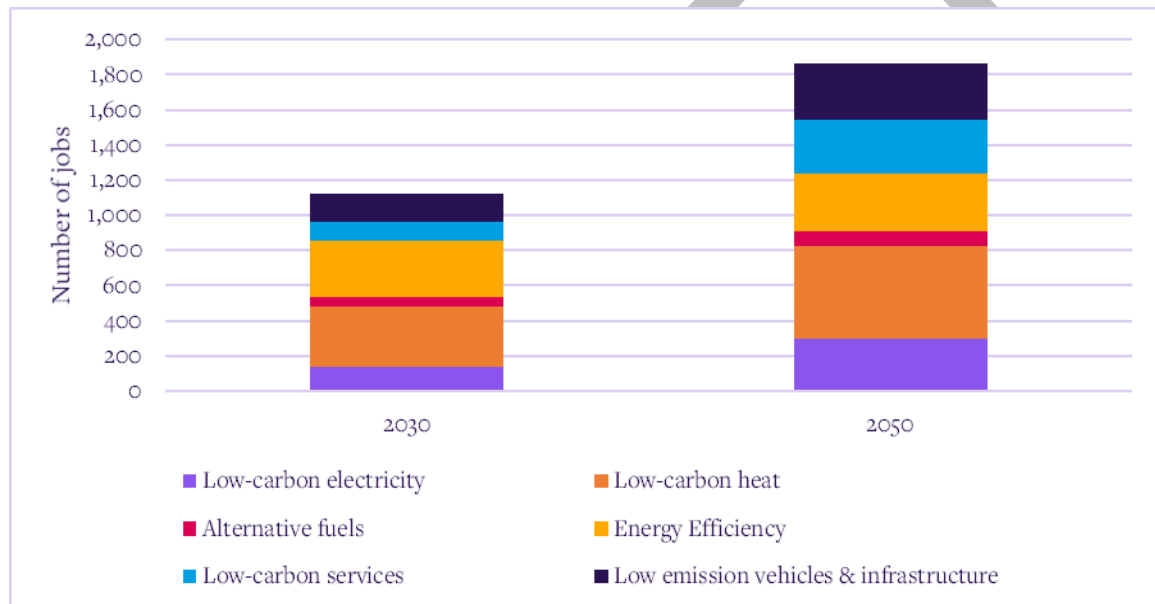
The role of green space is important to consider. Winchester has extensive green space in rural areas and the National Park. These can yield large environmental benefits through absorbing carbon and increasing biodiversity. Rural areas and the National Park also provide access to green space for Winchester's citizens. However, compared to England and the South East, people have further to travel to access their nearest green spaces Winchester, which are also smaller than the national average. The role and perceptions of urban green space in Winchester will be further explored during stakeholder engagement.

## Green Jobs

The Local Government Association (LGA) has estimated that Winchester will require a total of 1,123 green jobs by 2030 and an additional 783 (bringing the total to 1,861) by 2050 in order for England to achieve a net zero economy.

The LGA estimates that in 2030 Winchester will require 133 jobs in low-carbon electricity, 346 jobs in low-carbon heat, 55 jobs in alternative fuels, 317 jobs in energy efficiency, 108 jobs in low-carbon services, and 163 jobs in low emission vehicles and infrastructure. Over the next 20 years, the largest growth in jobs will be required in low-carbon services (181% growth), low-carbon electricity (125% growth), and low emission vehicles and infrastructure (95% growth). A significant number of additional jobs (175) will also be required in low-carbon heat.

Figure 11: Required green jobs in Winchester by sector



Source: LGA, Local green jobs - accelerating a sustainable economic recovery, 2020

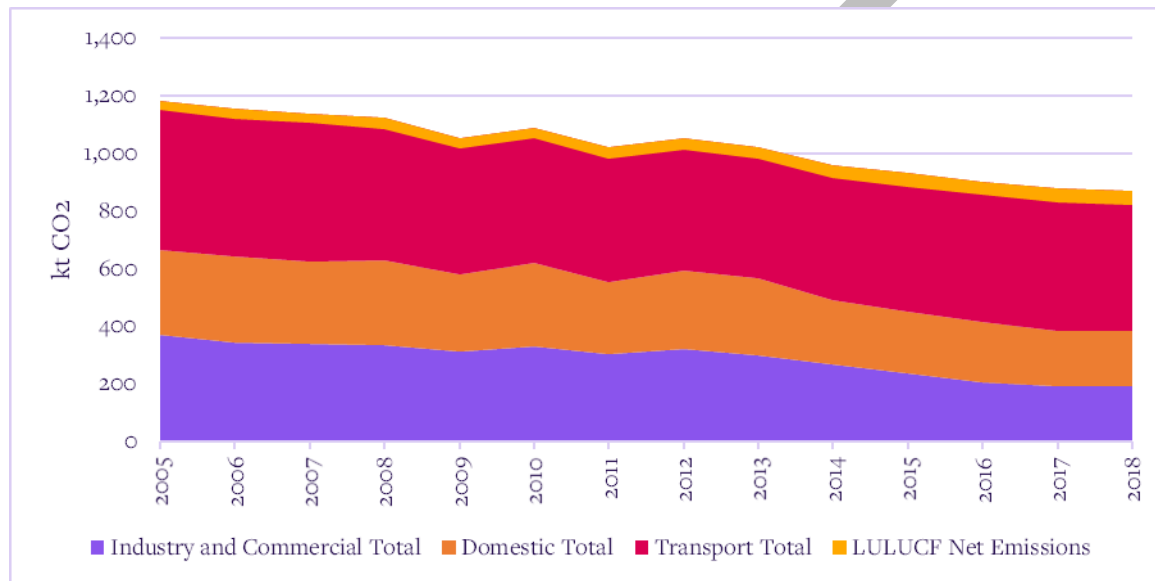
Latest Department for Transport (DfT) data on electric vehicle (EV) charging devices show that as of April 2021, Winchester has a total of 67 public charging devices of which 17 are rapid charging devices. This equates to 54 charging devices per 100,000 population. The LGA data show that expanding this network will be one source of green job creation.

## CO<sub>2</sub> Emissions

Latest data from the Department for Business, Energy & Industrial Strategy (BEIS) reveal that per capita CO<sub>2</sub> emissions in Winchester were 6.6 tonnes in 2018, above the England (5.0), South East (4.7), and Hampshire (4.9) averages. In terms of CO<sub>2</sub> emissions per km<sup>2</sup>, however, Winchester performs much better. Winchester's emissions of 1.2kt/km<sup>2</sup> was below the England (2.1), South East (2.2), and Hampshire (1.8) averages.

Between 2005 and 2018 (latest available data), Winchester has seen total CO<sub>2</sub> emissions fall by 29%, from 1,149.8kt CO<sub>2</sub> to 818.8kt CO<sub>2</sub>. This has been largely driven by substantial declines in Industry and commercial emissions, which fell by 176.4kt CO<sub>2</sub> (48%) over this period, and Domestic emissions, which fell by 103.8kt CO<sub>2</sub> (35%). CO<sub>2</sub> emissions were also boosted by a 64% increase in Land Use, Land Use Change, and Forestry (LULUCF) net emissions, which removed 19.2kt CO<sub>2</sub> in greenhouse gas emissions between 2005 and 2018.

Figure 12: Local Authority territorial CO<sub>2</sub> emissions estimates



Source: Department for Business, Energy & Industrial Strategy, UK local and regional CO<sub>2</sub> emissions, 2020

Although Transport emissions fell during the 2005 to 2018 period, declines in this sector significantly lagged the progress witnessed across other areas. Transport emissions declined by a relatively small 31.8kt CO<sub>2</sub> (6%) between 2005 and 2018 and remain the largest contributor to Winchester’s total CO<sub>2</sub> emissions accounting for 484.1kt CO<sub>2</sub> or 59% of total CO<sub>2</sub> emissions.

A recent report from the University of Manchester and Tyndall Centre<sup>4</sup> concludes that for Winchester to make its fair contribution to delivering the Paris Agreement’s commitment to staying “well below 2°C and pursuing 1.5°C” global temperature rise, then an immediate and rapid programme of decarbonisation is needed. At 2017 CO<sub>2</sub> emission levels, Winchester will exceed the recommended budget available within 6 years from 2020. To stay within the recommended carbon budget Winchester will, from 2020 onwards, need to achieve average mitigation rates of CO<sub>2</sub> from energy of around -13.9% per year. This will require that Winchester rapidly transitions away from unabated fossil fuel use.

<sup>4</sup> <https://carbonbudget.manchester.ac.uk/reports/Eo7000094/>

## Green Space

Latest Ordnance Survey (OS) data on access to garden space (April 2020) identifies total private outdoor space across houses and flats in Winchester of 26.6 million m<sup>2</sup>. A total 86% of addresses have access to private outdoor space (91% of houses and 65% of flats) with an average size of 648m<sup>2</sup>.

Table 13: Private outdoor space

Area	Private outdoor space total area (m2)	Percentage of addresses with private outdoor space	Average size of private outdoor space (m2)
England	6,172,433,138	88%	326
South East	1,309,961,682	89%	427
Hampshire	233,554,167	89%	326
Winchester	26,602,389	86%	648

Source: Ordnance Survey, Private Outdoor Space Data, 2020

This proportion of addresses with access to private outdoor space in Winchester is below the England (88%), South East (88%), and Hampshire (89%) averages, but the average size of private outdoor space is bigger, with an average size of 326m<sup>2</sup> across England, 427m<sup>2</sup> across the South East, and 326m<sup>2</sup> across Hampshire.

Meanwhile, the average distance to the nearest park, public garden, or playing field in Winchester is 465m, with an average size of 29,543m<sup>2</sup>. This is further than the average distance to the nearest park, public garden, or playing field in England (385m) and the South East (394m), while the average size is also smaller than the England (94,586m<sup>2</sup>) and South East (96,680m<sup>2</sup>) averages.

In Winchester there is an average of 3.3 parks, public gardens, or playing fields within 1,000m radius with an average combined size of 101,456m<sup>2</sup>. This is once again smaller than the England and South East averages, with an average of 4.4 parks, public gardens, or playing fields within 1,000m radius across England and 3.9 across the South East, while the average combined size in England and the South East is 379,882m<sup>2</sup> and 360,773m<sup>2</sup>, respectively.

Table 14: Access to public green space

Area	Average distance to nearest Park, Public Garden, or Playing Field (m)	Average size of nearest Park, Public Garden, or Playing Field (m <sup>2</sup> )	Average number of Parks, Public Gardens, or Playing Fields within 1,000 m radius	Average combined size of Parks, Public Gardens, or Playing Fields within 1,000 m radius (m <sup>2</sup> )
Winchester	465	29,543	3.3	101,456

England	385	94,586	4.4	379,882
South East	394	96,680	3.9	360,773

Source: Ordnance Survey, Access to Public Green Space, 2020

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# Winchester Sub-Areas

## Baseline

Winchester City has a young population, a quarter of the District's businesses, and nearly a third of the District's population.

South Winchester is home to less than 20% of the district's population but is growing at a rate close to double that of the rest of the district. This area also has the most incidences of relative deprivation.

Market Towns and Rural Areas account for 54% the District's population, which is growing more slowly than the other areas, and 47% of the District's business.

Businesses with fewer than 10 employees make up almost 90% of all businesses in South Winchester and Market Towns and Rural Areas, and 80% in Winchester City. The sectoral mix of employment varies across the three areas.

Winchester City is home 34% of the business base, 80% of which is made up of micro-businesses (0-9 employees). The City has a broader business base in terms of size, with South Winchester and Market Towns and Rural Areas having a higher proportion of micro-businesses. Winchester City has the highest proportion of medium sized businesses (3%) and large employers (0.4%). Large employers (250+ employees) make up 0.1% or less of businesses in South Winchester and Market Towns and Rural Areas.

In Winchester City, 30% of employees work in health and social work and a further 12% in education demonstrating the importance of anchor institutions in the City. In South Winchester, retail formed 36% of pre-pandemic employment. These jobs are amongst the most at risk from COVID-19, and the emerging picture of where and how people work, and shop will be considered during the Green Economic Development Strategy.

Market Towns and Rural Areas do not have a such a dominant sector, with the most significant proportion of employment being Information and communication with 13% of jobs.

Winchester City is home to 26% of the District's business population, with a much larger proportion of 15-24-year-olds than the rest of the district – a result of the University. The much smaller population of residents aged 25+ shows that despite

having better graduate retention than Southampton and Portsmouth, the City still loses people in this age-range. In contrast, Market Towns and Rural Areas have the highest proportion of population aged 60 and above.

The low proportion of graduates and graduate-aged residents in the labour market, means more needs to be done to retain graduates and attract those from elsewhere. This is a necessity if the opportunities for growing both existing and emerging sectors are to be realised. Whilst increasing levels of working from home means Winchester can position itself as a quality place for graduates and young professionals to base themselves, the cost of housing is a barrier to Winchester's competitiveness.

In terms of population growth, the South of Winchester is growing at a rate almost double that of the District as a whole. This has implications for housing development and transport infrastructure, and it must be recognised that as part of the Southampton Built Up Area, a high proportion of residents here will work outside of the Winchester District.

Relative deprivation is low across the District with no areas in the 20% most deprived in the country. However, there are pockets of certain types of deprivation. In South Winchester, 11% of lower super output areas (LSOAs) are within the 10% most deprived areas in England for 'barriers to housing and services' (which measures the physical and financial accessibility of housing and local services) and 13% in Rural Areas and Market Towns. In Winchester City, 10% of LSOAs are within the 10% most deprived areas in England for 'education, skills, and training' and an additional 14% in the 20% most deprived.

The implications for an inclusive Green Economic Development Strategy are clear. Skills and training opportunities should continue to be enhanced to ensure inclusive growth and a more affordable cost of living (relative to incomes) will contribute to a just transition whilst also making the District a more competitive location for people to live and work.





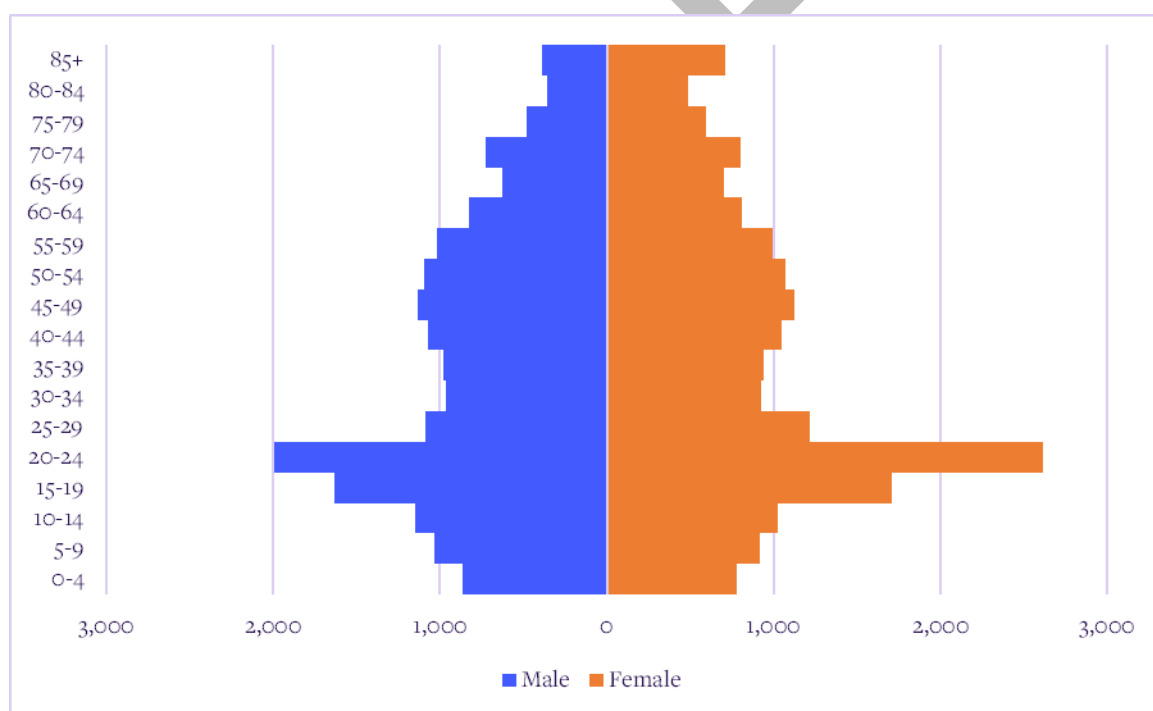
## Winchester City

The Winchester City Sub-area covers most of the city of Winchester including the city centre which is dominated by public sector and retail employment and businesses, as well as four industrial/business parks (Bar End, St Martins, Winnall and Wykeham).

According to latest population estimates from ONS (2019), the population of the Winchester City sub-area is 35,900, accounting for approximately 28% of the district's total population. The sub-area has seen steady population growth since 2011 (earliest available data) with the population increasing by 7% over this period, in line with the wider district's population growth.

Winchester City has a relatively young population, with a large concentration of people aged 15-25 in contrast to the wider district. This is likely explained by the presence of the university. Correspondingly, Winchester City also has a significant working age population of 24,250 (68% of the total population).

Figure 14: Winchester City population pyramid, 2019



Source: ONS, Population Estimates, 2019

None of Winchester City's 21 LSOAs are within the 20% most deprived areas in England. Indeed, 4 of the sub-area's LSOAs (19%) are within the 10% least deprived LSOAs in England, with an additional 6 (29%) within the 20% least deprived.

However, the majority of the district's *Education, skills, and training* deprivation (which measures the lack of attainment and skills in the local population) is concentrated in Winchester City with two of Winchester City's LSOAs (10%) within the 10% most

deprived areas in England for *Education, skills, and training* and an additional three LSOAs (14%) in the 20% most deprived.

Winchester City is also home to the district’s only LSOA which falls within the 20% most deprived areas in England for *Crime* (which measures the risk of personal and material victimisation at local level).

Meanwhile, one of Winchester’s LSOAs (5%) are within the 10% most deprived areas in England for *Barriers to housing and services* (which measures the physical and financial accessibility of housing and local services) with an additional two LSOAs (10%) in the 20% most deprived.

Latest IDBR data (2020) identify 2,335 businesses in Winchester City, accounting for 26% of the district’s business base. Of these, 1,900 (81%) are micro-sized (0-9 employees), 355 (15%) are small-sized (10-49 employees), 70 (3%) are medium-sized (50-249 employees), and 10 (0.4%) are large (250+ employees).

Table 15: Winchester sub-area business profile

Employment Size band	Winchester	Winchester Town	South Winchester	Market Towns and Rural Area
Micro (0 to 9)	83%	83%	81%	88%
Small (10 to 49)	15%	15%	15%	10%
Medium-sized (50 to 249)	2%	2%	3%	1%
Large (250+)	0.3%	0.3%	0.4%	0.0%

Source: ONS, Inter Departmental Business Register, 2020

According to latest BRES data (2019), Winchester City is the district’s largest employment centre, with a total of 30,215 people in employment within the sub-area. The largest employment sector in Winchester City is *Human health and social work activities* which employs 9,175 people or 30% of total employment. This is likely explained by the presence of the Royal Hampshire County Hospital.

Other significant employment sectors in Winchester City include:

- *Education* (3,750 people or 12% of total employment)
- *Wholesale and retail trade; repair of motor vehicles and motorcycles* (3,050 or 10%)
- *Professional, scientific and technical activities* (2,825 or 9%)
- *Public administration and defence; compulsory social security* (2,825 or 9%)
- *Accommodation and food service activities* (2,700 or 9%)

Location quotients relative to the England average suggest employment specialisms in *Public administration and defence; compulsory social security* (LQ of 2.4) and *Human health and social work activities* (LQ of 2.4).

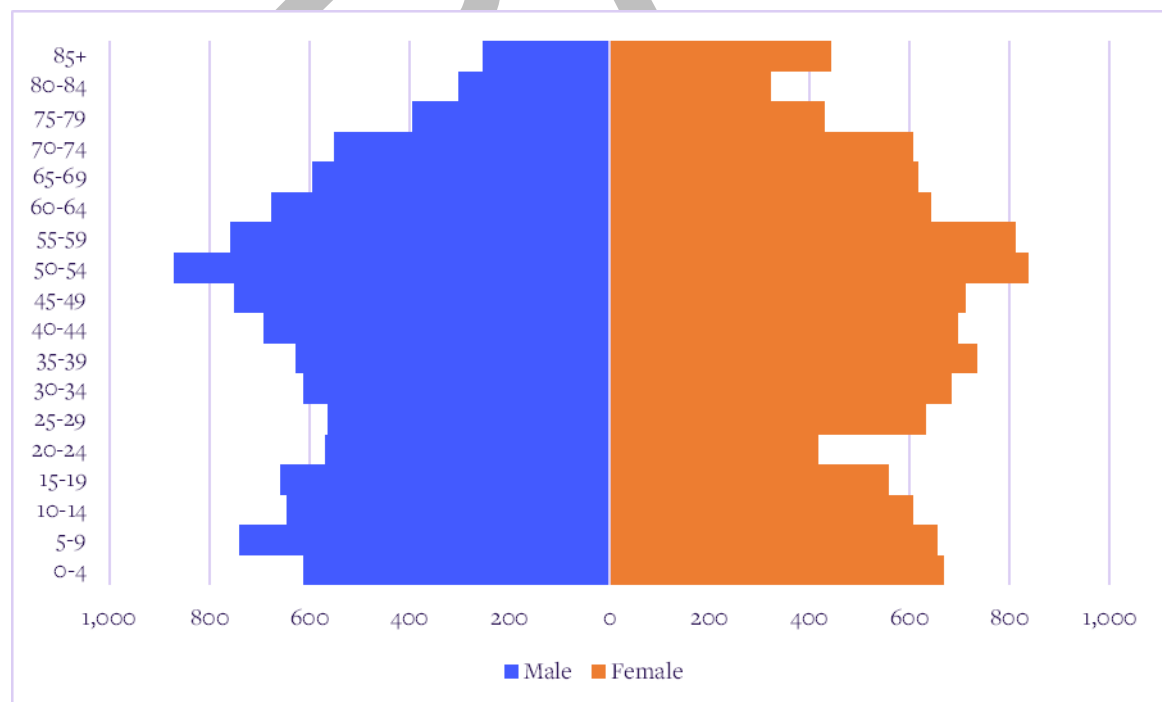
## South Winchester

The South Winchester-area borders the M27 corridor and falls mostly within the Solent LEP. The sub-area has two market towns (Denmead and Wickham), the former home to a small business park. To the west and adjacent to Lock’s Heath is the large Solent Business Park, Whiteley Village shopping centre and south of the M27, the Segensworth North business park. These three closely connected sites form the main employment centres in the sub-area.

The population of South Winchester is 22,000, accounting for approximately 18% of the district’s total population. The sub-area has experienced strong population growth since 2011 (earliest available data) with the population increasing by 13% over this period, almost twice as fast as the wider district’s population growth.

South Winchester’ hourglass-shaped population pyramid largely mirrors the wider Winchester district with a relatively large young (age 0-24) and old (aged 45+) populations, but a disproportionately small population aged 24-45. Correspondingly, South Winchester also has a working age population of 13,500 (62% of the total population).

Figure 15: South Winchester population pyramid, 2019



Source: ONS, Population Estimates, 2019

Within the context of Winchester district, South Winchester is the relatively most deprived sub-area. However, none of South Winchester's 9 LSOAs are within the 20% most deprived areas in England and 2 of the sub-area's LSOAs (19%) are within the 10% least deprived LSOAs in England.

Three of South Winchester' LSOAs (11%) are within the 10% most deprived areas in England for *Barriers to housing and services* (which measures the physical and financial accessibility of housing and local services) with an additional one LSOA (11%) in the 20% most deprived.

Moreover, one of South Winchester' LSOAs (11%) are within the 20% most deprived areas in England for *Education, skills, and training* (which measures the lack of attainment and skills in the local population) while one (11%) is also within the 20% most deprived areas in England for *Living environment* (which measures the quality of the local environment).

Latest IDBR data (2020) identify 2,375 businesses in South Winchester, accounting for 27% of the district's business base. Of these, 1,735 (88%) are micro-sized (0-9 employees), 555 (10%) are small-sized (10-49 employees), 70 (1%) are medium-sized (50-249 employees), and 10 (less than 0.1%) are large (250+ employees).

Table 16: Winchester sub-area business profile

Employment Size band	Winchester	Winchester Town	South Winchester	Market Towns and Rural Area
Micro (0 to 9)	83%	83%	81%	88%
Small (10 to 49)	15%	15%	15%	10%
Medium-sized (50 to 249)	2%	2%	3%	1%
Large (250+)	0.3%	0.3%	0.4%	0.0%

Source: ONS, Inter Departmental Business Register, 2020

According to latest BRES data (2019), total employment within South Winchester is 30,980. The largest employment sector in South Winchester is *Wholesale and retail trade; repair of motor vehicles and motorcycles* which employs 11,225 people or 36% of total employment.

Other significant employment sectors in South Winchester include:

- *Professional, scientific and technical activities* (3,250 people or 10% of total employment)
- *Administrative and support service activities* (2,625 or 8%)
- *Financial and insurance activities* (2,600 or 8%)
- *Manufacturing* (2,200 or 7%)

Location quotients relative to the England average suggest employment specialisms in *Wholesale and retail trade; repair of motor vehicles and motorcycles* (LQ of 2.4) and *Financial and insurance activities* (LQ of 2.4).

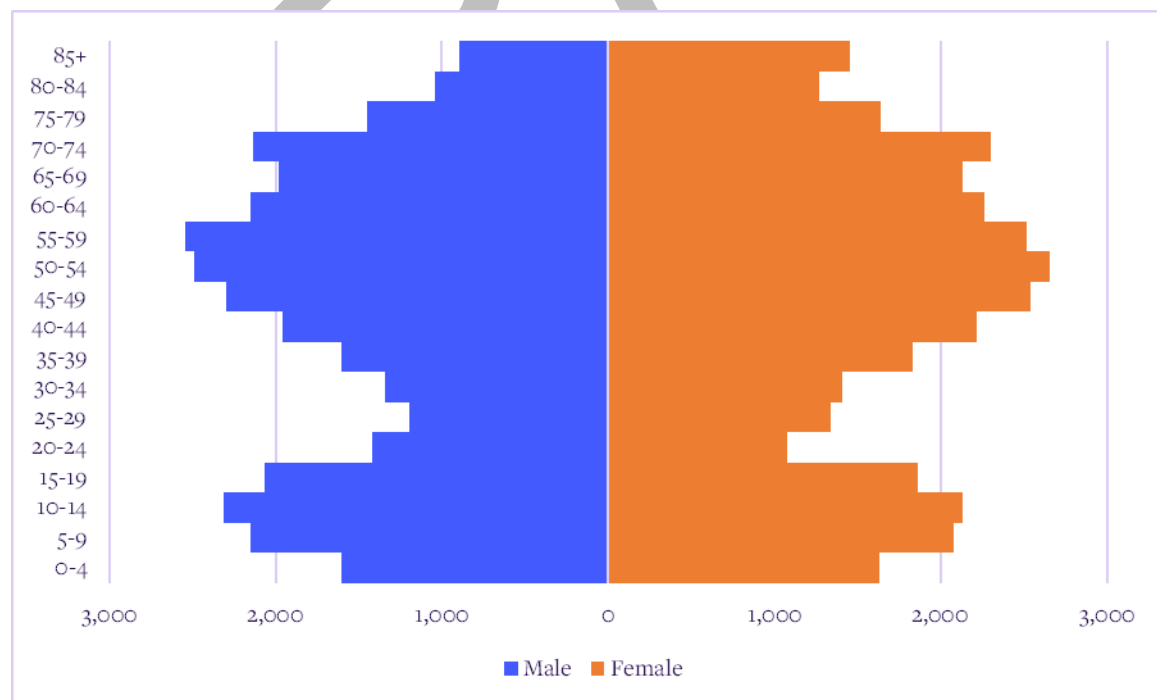
## Market Towns and Rural Areas

The Market Towns and Rural Areas sub-area is the largest in terms of area. It covers rural Winchester and a number of market towns as well as the western edge of the South Downs National Park and a number of smaller industry/business parks in Bishop’s Waltham, Kings Worthy and New Alresford (New Farm & New Dean).

With a population of 67,000, the Market Towns and Rural Areas accounts for 54% of Winchester district’s total population. However, while the sub-area has seen steady population growth since 2011 (earliest available data), population growth has lagged behind the district average growing by 5% over this period.

Similar to the wider Winchester district and South Winchester, the Market Towns and Rural Areas has an hourglass-shaped population pyramid. However, the sub-area has a larger ageing population than either of these two comparators with 16,300 people (or 24% of the total population) aged 65+. Accordingly, the Market Towns and Rural Areas has a relatively smaller proportion of its population of working age (58%) although with a working age population of 38,800, the sub-area is home to the largest absolute working age population in the district.

Figure 16: Market Towns and Rural Areas population pyramid, 2019



Source: ONS, Population Estimates, 2019



Within the context of Winchester district, the Market Towns and Rural Area is the least deprived sub-area. None of MRTA's 38 LSOAs are within the 20% most deprived areas in England, while 19 of the sub-area's LSOAs (50%) are within the 10% least deprived LSOAs in England and an additional 5 (13%) within the 20% least deprived.

That said, the Market Towns and Rural Area is responsible for the majority of the district's *Barriers to housing and services* deprivation (which measures the physical and financial accessibility of housing and local services) and its *Living environment* deprivation (which measures the quality of the local environment).

Five of the Market Towns and Rural Area's LSOAs (13%) are within the 10% most deprived areas in England for *Barriers to housing and services* with an additional three LSOAs (8%) in the 20% most deprived. Further, seven of the Market Towns and Rural Area's LSOAs (10%) are within the 10% most deprived areas in England for *Living environment* (which measures the quality of the local environment) with an additional one LSOAs (3%) in the 20% most deprived.

The Market Towns and Rural Areas sub-area accounts for the largest number of businesses in the district with a total of 4,145 or 47% of the business base. Of these, 3,675 (89%) are micro-sized (0-9 employees), 395 (10%) are small-sized (10-49 employees), 60 (1%) are medium-sized (50-249 employees), and 5 (less than 0.1%) are large (250+ employees).

Table 17: Winchester sub-area business profile

Employment Size band	Winchester	Winchester Town	South Winchester	Market Towns and Rural Area
Micro (0 to 9)	83%	83%	81%	<b>88%</b>
Small (10 to 49)	15%	15%	15%	<b>10%</b>
Medium-sized (50 to 249)	2%	2%	3%	<b>1%</b>
Large (250+)	0.3%	0.3%	0.4%	<b>0.0%</b>

Source: ONS, Inter Departmental Business Register, 2020

According to latest BRES data (2019), total employment within the Market Towns and Rural Areas is 27,120. The largest employment sector in the Market Towns and Rural Areas is *Information and communication* which employs 3,470 people or 13 % of total employment, closely followed by *Wholesale and retail trade; repair of motor vehicles and motorcycles* which employs 3,300 people or 12% of total employment.

Other significant employment sectors in the Market Towns and Rural Areas include:

- *Human health and social work activities* (3,050 people or 11% of total employment)
- *Education* (2,750 or 10%)

- *Professional, scientific and technical activities* (2,450 or 9%)
- *Accommodation and food service activities* (2,325 or 9%)
- *Construction* (2,275 or 8%)
- *Administrative and support service activities* (2,030 or 7%)

Location quotients relative to the England average suggest an employment specialism in *Information and communication* (LQ of 2.9)

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# Strategic policy context

The Green Economic Development Strategy is not happening in isolation. It needs to align, complement or build on existing local and regional plans.

To help contextualise the Green Economic Development Strategy, a review of local policy has been undertaken focusing on themes which the strategy is likely to focus on. This section includes a summary of key policies in each theme. Before these summaries, we consider the key elements from regional policy and strategy.

## Regional Policy Context

The **EM3 Local Industrial Strategy (LIS)** notes that the economy and the area are at or near to a crossroads. There are major strengths but also signs of stress which need to be addressed.

The EM3 economy is much more diverse than most other areas of the UK and much of it is complex, knowledge based, and high value add. Exports of services by value are the highest of any LEP area outside London. However, over the last few years there has been a marked loss of jobs across much of the area and in some of the frontier sectors that are most significant for the economy. The area remains a powerhouse of business led R&D, innovation, and commercialisation with plans to unlock even more value. In principle this makes the economy more resilient, adaptable, and capable of diversification from existing strengths. As a peri-urban polycentric area within London's gravitational pull, EM3 is comprised of a large number of longstanding small and medium sized settlements which are heavily constrained but provide much of the productive capacity in the area which needs to be used as effectively as possible. Employment is very high; the skills base is very strong and economic inactivity is very low but a major part of the economy supports a largely affluent but increasingly elderly resident population. Infrastructure deficits limit EM3's potential: the area exhibits the 'cost of success'. Investment, particularly on infrastructure, has lagged behind growth in population and in the size of the economy.

Within this context, the LIS identifies eight strategic priorities for the area which can be split between two main purposes:

1. **Supporting the success of our businesses** in exporting, innovating and as employers which are fundamental to growth and productivity and which are likely to need primarily additional revenue support:
  - **Science, Innovation and Enterprise** – Stimulating more innovation and greater commercialisation of knowledge in our leading sectors to increase output from the most productive businesses, to promote diversification from these strengths

– including from the low carbon sector of the economy - and to spread the opportunities to other sectors.

- **People and Skills** – meeting business needs, promoting a better skilled, supported and healthier workforce and being an attractive and competitive area for prospective employees.
  - **Exports** – a major success story for the area but with plenty of scope to increase the number of businesses engaged in exporting and to support the growth of businesses that are already involved.
2. **Supporting the EM3 area as a great location in which to do business** through primarily additional capital investment:
- **Digital Connectivity** – a step change in connectivity which will address poor mobile and broadband connectivity in parts of the area; meet business needs for speed and capacity in transferring data which is crucial for some frontier sectors; and open up opportunities for implementing smart systems and for transforming public services.
  - **Clean Growth and Natural Capital** – articulating the full potential of the area to meet its needs for utility services like energy in a way that is fully consistent with clean growth and the role of natural capital in shaping future economic growth.
  - **Towns** – supporting their future vitality and viability and ensuring that the productive capacity that they offer is fully utilised through collaborative place shaping.
  - **Smart Mobility** – better, cleaner and more efficient connections between businesses and their staff, supply chains and markets to enhance productivity and new approaches to mobility.

A central theme of both the LIS and other core regional policy is climate change and green growth.

The LIS provides insight into the Enterprise M3 LEP Low Carbon Environmental Goods and Services (LCEGS) sector.

The total EM3 economy is worth £54.3bn, making the LCEGS 33.5% of the economy. The whole LCEGS sector (core and non-core activities) in the EM3 LEP is proportionally larger than for other LEPs in the UK. This is because the EM3 LEP is exceptionally strong in midchain activities. In fact, the LCEGS sector as a proportion of the economy of the EM3 LEP is 17.2% higher than the UK average across LEPs (excluding London). The LCEGS sector core activities account for only 8.5% of the total EM3 economy.

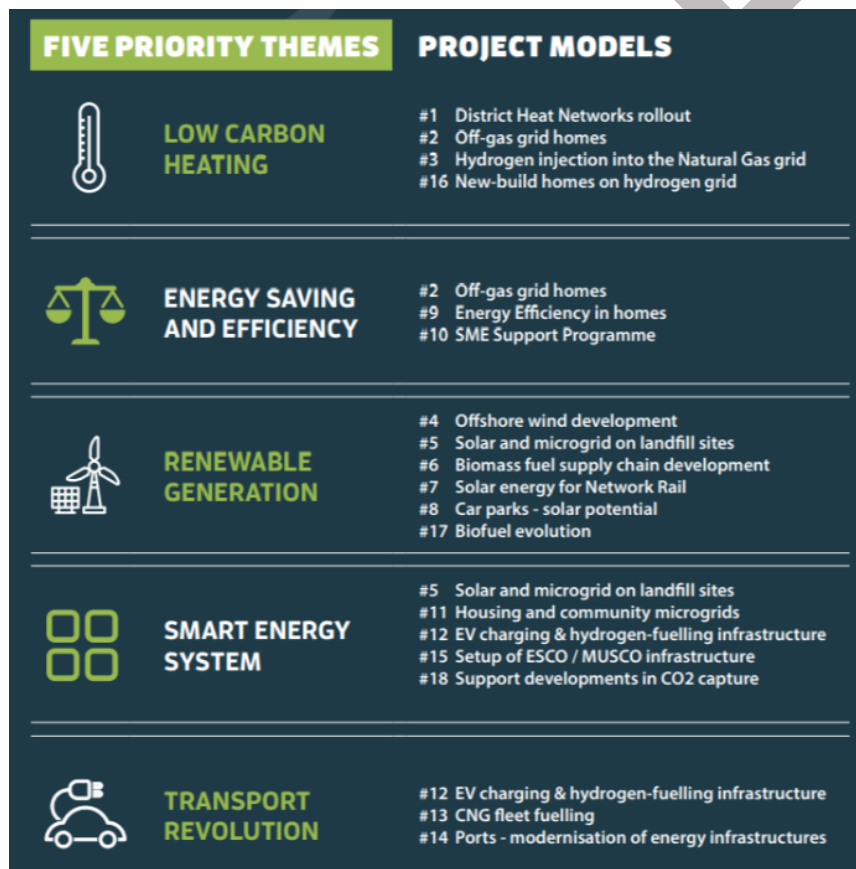
The LIS reports that the sector had total sales in 2017/18 of £18.2bn of which £4.6bn (25%) were sales of core activities with the remaining £13.7bn (75%) for non-core, midstream activities. In total, inclusive of all activities and services which are relevant to the LCEGS

sector and its chain of supply, the sector had over 7,100 companies and over 126,800 employees, split between 26% core and 74% non-core for both the number of companies and number of employees at the sector level. This split highlights how the LCEGS sector is embedded in other areas of the economy.

The LCEGS sector consists of three Level 1 sub-sectors: Low Carbon, Renewable Energy and Environmental. The Low Carbon sub-sector is by far the largest sub-sector, with sales of £8.8bn (48%). Renewable Energy had sales of £6.3bn (34%), with Environmental sales being £3.1bn (18%).

Complementary to this, the **Energy South2East Local Energy Strategy** has been developed to enable the Coast to Capital, Enterprise M3, and South East Local Enterprise Partnerships (LEPs) to achieve clean growth in energy across the power, heat and transport sectors out to 2050. This sets out a shared vision for energy in the tri-LEP region "to become a leader for sustainable energy production within the UK, powering innovative, decarbonised, and clean economic growth."

Figure 17: Priority Themes and Project Models from the Local Energy Strategy Action Plan



Source: C2C, EM3, and SELEP, Local Energy Strategy, 2020

The Local Energy Strategy (LES) has two main goals. The tri-LEP region will:

- play a leading role in the UK's decarbonisation efforts by making targeted interventions to reduce emissions in the electricity, heat, and transport sectors

- foster 'clean growth' by supporting public and private sector investments in novel low carbon technologies to take advantage of the opportunities presented by the emerging low carbon economy

To achieve these, the LES has identified five Priority Themes and a number of project models, as summarized in Figure 17.

The accompanying **Energy South2East Local Energy Strategy Action Plan** provides a clear pathway for delivering the Energy Strategy to achieve the Strategy's vision. If the Action Plan is delivered in line with the recommended Project Models, by 2032 the tri-LEP region will have:

- Secured investment in the region of £14.755 billion in commercially and technically viable projects that deliver healthy returns to stakeholders;
- Delivered a reduction in CO<sub>2</sub> emissions across the electricity, heat and transport sectors of 13,615 kT CO<sub>2</sub>e;
- Transitioned 47,455 GWh of energy from polluting, high carbon generation sources to clean energy sources; and Created or secured 75,652 jobs across the tri-LEP area.

Similarly, recognising the changing climate as the biggest threat, the **Vision for Hampshire 2050 Commission of Inquiry** emphasises that a well-adapted and resilient Hampshire will be essential to ensure that Hampshire's economy, environment, and society continues to thrive and prosper. In support of this vision, the **Commissioner's Report** identifies the following drivers of change and attendant policy priorities:

- **Changing Climate:** Develop and promote a focus on embedding climate resilience and mitigation across key policies and sectors, working with communities across Hampshire.
- **Changing Environment:** Develop and promote a focus on sustaining and enhancing Hampshire's environment to strengthen Hampshire's economy and society.
- **Changing Economy:** Maintain a focus on fostering a knowledge-based and sustainable Hampshire economy, working closely with businesses and relevant agencies in Hampshire including our universities.
- **Changing Population and Society:** Maintain a focus on promoting the evolution and development of communities that support equity, connectivity, diversity, sustainability and resilience.
- **Changing Technology:** Prioritise a focus on opportunities offered by technology to enhance business and economy, public services, social infrastructure and connectivity; that complement rather than compromise human relationships and quality of life.

The **Commissioner's Report** further makes a series of detailed recommendations to deliver on these priorities and policies.

## Local Policy Context

Over 60 policy and strategy documents have been reviewed, and summarised in Appendix I. To help contextualise the Green Economic Development Strategy, these influences and drivers have been grouped by themes which the strategy is likely to focus on. This section includes a summary of key policies in each theme.

There are seven themes: economy, net zero and green growth, transport and infrastructure, housing, natural environment, social, inequality and levelling up, and skills and jobs.

### Economy

Building on the previous **Winchester District Economic Strategy (2010-20)** and current **Winchester District Local Plan**, one of the key areas of focus of the emerging **Local Plan 2038** is creating a vibrant economy.

Winchester District has historically had a strong economy with low unemployment. Winchester City centre is a vibrant retail and commercial centre, with a growing leisure and tourism economy, and large numbers of people are employed in major office areas, in particular around Winchester City and in the southern part of the district around the M27 at Whiteley.

It has been recognised that the District's economy is built on five key sectors: Public administration and business services, Land based industries, Tourism and recreation, Knowledge and creative industries, and Retail. Existing policies therefore focus on promoting these strengths, building on the creative and knowledge-based industries that exist, whilst developing the agricultural, tourism and cultural assets of the district's historic towns and villages and valued landscapes.

To achieve the district's vision for a prosperous local economy, existing strategies aim to ensure that there are a range of sites and premises available to meet changing business needs and that adequate infrastructure is available, including the provision of communications technology and sustainable transport links. By doing this, Winchester seeks to attract new businesses and enterprises, increase opportunities for high quality, well-paid employment across the district, and encourage more younger people choose to live and work in the district.

It is the ambition for the district's city, market towns, and rural communities to recover well and have a compelling, competitive visitor offer, maximising the

economic opportunities offered by the designation of the South Downs National Park, utilising its tourism, recreation, and cultural opportunities whilst supporting its purposes.

At the heart of Winchester's economic strategy lies a shift to a greener, more sustainable economy, as stated in the current **Winchester District Local Plan**. The **Local Plan 2038** seeks to develop this idea further by encouraging the development and adoption of energy efficiency and renewable energy technologies and enabling their take-up by new and existing businesses, through the creation and promotion of a low carbon economy.

## Net Zero and Green Growth

In June 2019 Winchester City Council declared a 'Climate Emergency' and committed to making the activities of Winchester City Council carbon neutral by 2024, and the district of Winchester carbon neutral by 2030, taking into account both production and consumption emissions. This overarching ambition is a central theme which runs through all local plans and strategies.

At the heart of Winchester's net zero ambitions lies the **Carbon Neutrality Action Plan** which sets out how the council aims to achieve its carbon neutrality targets. The Plan sets carbon reduction targets across three priority areas:

- Transport: 1,500 tonnes CO<sub>2</sub>e through council operations and 287,000 tonnes CO<sub>2</sub>e district emissions
- Energy: 1,780 tonnes CO<sub>2</sub>e through council operations and 172,000 tonnes CO<sub>2</sub>e district emissions overall.
- Property and housing: 420 tonnes CO<sub>2</sub>e through council operations and 193,000 tonnes CO<sub>2</sub>e district emissions overall.

The Plan subsequently outlines ten priority actions to help address nearly all of the council's carbon emissions by 2024 and contribute to reducing emissions district wide by 2030. These actions are:

- Deliver key studies in 2020 to take forward the City of Winchester Movement Strategy which have a focus on achieving carbon emission reduction.
- Develop an expanded network of EV charging points across the district – starting with up to 46 points on the council's own estate by 2024, adding to existing provision and working with partners to identify where more



are needed.

- Develop additional Park & Ride facilities to increase capacity starting with the Vaultex site with at least 130 new car park spaces in 2020.
- Source 100% of all electricity purchased by the council from renewable sources by 2021.
- Build or invest in large scale renewable generation project(s), e.g. solar farms, heat pumps, solar-battery car ports, anaerobic digester, wind farm.
- Develop a council led pilot Passivhaus housing scheme in Micheldever by 2021.
- Invest an additional £1m per annum on energy and water efficiency measures to council housing stock.
- Bring forward the Local Plan update with an emphasis on low carbon housing development by 2021.
- Develop a programme of rewilding starting with planting at least 100 trees annually on council land.
- In collaboration with partners and landowners, identify up to 100 hectares of land to support additional tree planting and/or creation of grassland / wetland habitat / rewilding.

In line with this, the current **Council Plan (2020-25)** identifies addressing the climate emergency as one of its five priorities, reiterating the targets set in the Carbon Neutrality Action Plan, the current **Winchester District Local Plan** includes a number of core policies aimed at meeting the challenge of climate change, while consultation documents for the **Local Plan 2038** have set carbon neutrality as the overarching objective of the updated plan, and proposed a set of environmental objectives to meet this.

## Transport and Infrastructure

Winchester City Council recognises that a whole systems approach is required to make significant improvements to the sustainability and effectiveness of transport and wider infrastructure. As such, the Council is a member of the Transport for South Hampshire and Isle of Wight (TfSHIoW) as some of WCC's administrative boundaries fall within the Transport area's remit.

The authorities of Hampshire, Southampton, and Portsmouth have combined efforts and produced a joint transport strategy to 2031, the **South Hampshire Joint**

**Strategy Local Transport Plan.** Their vision is to work together to deliver 14 key policies to create a “resilient, cost effective, fully-integrated sub-regional transport network, enabling economic growth whilst protecting and enhancing health, quality of life and environment.”

The Local Strategy encompasses key themes in transport and infrastructure for the covered area. Key themes include improving safety, adjusting to reduce budgets and constraining expenditure, improving critical infrastructure, widening travel choices, and reducing the environmental impact of transport.

### Transport and Regional Integration

**Hampshire Local Transport Plan 2011-2031** encompasses specific areas within Winchester, which also overlap with the **Winchester City Access Plan**. These form the backbone of Winchester’s transport policies, and ensure integration with surrounding areas. This includes provisions for both public and private transportation.

Key to the transport vision for the city is the need to sustain growth through well-planned infrastructure, rather than prioritising economic growth without investing in the infrastructure required to support a healthy economy that works for everyone. It is recognised that the regional economy must be supported by a safe and efficient road and rail network.

Integrating travel networks with surrounding areas will support those who travel to and from Winchester for work, commuting either by road or rail. In this way, an efficient, reliable, and safe transport network will help the entire regional economy grow.

### Community & Wellbeing

Winchester City Council acknowledges the link between a healthy community and excellent infrastructure provision for active travel. Correspondingly, the **City of Winchester Movement Strategy** seeks to boost wellbeing while improving the quality of life in Winchester by reduced air and noise pollution and easing traffic congestion. The Strategy places active travel at the centre, laying out plans to reduce reliance on private vehicles in Winchester by improving infrastructure for cycling and walking.

In addition, it supports the vision of a 15-minute city. The 15-minute city concept is based on the premise that inhabitants can reach most of the services they require, leisure, culture, and hospitality venues, and green spaces on foot or by bike. It therefore minimises the need to travel by road, in particular by private car. In turn,



this helps alleviate road congestion while improving air quality and supports healthier lifestyles of inhabitants.

### **Electric Vehicles**

The promotion of low-carbon vehicles is central to the aims and objectives of Winchester's Local Plan and South Hampshire Joint Transport Strategy. This forms part of WCC's response to the climate emergency and supports the Council Plan (2020-25) in creating a greener district by combining low carbon travel options with modes of active travel. This follows a study commissioned by WCC and conducted by Horizon Power & Energy which identifies the need to create 57 new charging bays with 46 chargers by 2023.

### **Infrastructure**

Accessibility, particularly access to green spaces and supporting the diverse needs of local communities who live and work in Winchester and surrounding areas is central to infrastructure plans. Infrastructure requirements are referenced in the [Winchester District Infrastructure Delivery Plan \(IDP\)](#) which, in addition to transport, also includes the following themes:

- Education
- Water Management (networks, supply, and waste)
- Climate mitigation and resilience
- Health and social care
- Connectivity
- Energy and utilities.

The IDP outlines findings from an evidence base gathered from quantitative and qualitative data for 11 areas specifically. The core challenges identified are recurring themes across many, if not all, of the 11 areas. This includes a lack of accessibility to green space and infrastructure, including parks, allotments, and play areas for children; as well as the need to tackle congested roads that are over-capacity, lack of public parking, and inadequate healthcare facilities.

In addition to micro-scale interventions at local level, there are also pan-regional infrastructure projects in the pipeline. This includes the Broadband Hampshire Superfast, delivered by HCC to address the challenge of poor connectivity, especially in rural areas. It also includes the Smart Motorway proposal for the M3, delivered by Highways England.

## Housing

Winchester City Council faces the dual challenge of supporting a growing population while facing a shortage of affordable housing. This is coupled with the need to decarbonise all areas of its operations by 2030. Meeting these challenges requires a series of interventions in the housing sector, within the sustainable development principles outlined in the National Planning Policy Framework.

**Winchester District Local Plan** provides the spatial vision for Winchester. It reflects the need to preserve Winchester's distinct local features and its cultural and historical heritage, while recognising that the needs of a diverse community and vibrant economy must be supported with suitable social and physical infrastructure. The Local Plan balances these social and economic needs with a requirement to protect and conserve the surrounding natural environment, particularly the environmentally sensitive areas of natural beauty.

The Local Plan is divided into three distinct geographical areas, each with their own sets of priorities. It encompasses the urban core, the County Town of Winchester, semi-rural areas on the southern fringes such as Waterlooville and Whiteley and communities in South Hampshire, and rural market towns and villages, including those that lie in the South Downs National Park.

### Community and Placemaking

The **Winchester District Housing Strategy** (2017/18 – 2022/2023) outlines a vision for housing in Winchester “to support the creation of cohesive communities, helping everyone in the District to have a high-quality housing to meet their needs.” Key target beneficiary groups are highlighted in the Strategy as those least able to have a say in their housing circumstances.

The aims of the strategy are to increase both the scale and the quality of affordable housing. This seeks to mitigate the effects of a challenging housing market for young and vulnerable people in particular and reduce the shortfall of affordable housing.

A critical factor underlying the need to build more, and better housing is the requirement to ensure that any new housing that is delivered is energy efficient. The twin aim of increasing the quantity and quality of housing supply with the need to implement measures to decarbonise the housing sector forms one of five key priorities of the Winchester Council Plan 2020-25.

### Low Carbon Housing

The housing sector is considered by Winchester City Council as central to achieving carbon neutrality. As such, the **Carbon Neutrality Action Plan** places an

emphasis on low carbon housing. This includes both retrofitting and additional investment to improve the efficiency of domestic water and energy systems, as well as a new Passivhaus pilot scheme led by the Council.

### Key Recommendations

Iceni Projects have developed a series of 15 key recommendations designed to meet the twin challenge of improving the quality and sustainable supply of affordable homes in line with social and economic developments while preserving the natural landscape and cultural heritage of the Winchester area.

This clearly sets out the need for the Council to develop a flexible planning policy, which allows for development of a Homes for All strategy while delivering a mixture of affordable, sustainable housing to meet the diverse needs of end users without impacting on the surrounding environment.

The recommendations will support Winchester City Council in meeting its housing objectives, which include:

- Provision of 12,500 new homes across the District by 2031.
- Provision for 4,000 new homes in Winchester City to meet diverse community needs.
- Two new sustainable neighbourhoods created in South Hampshire Urban Areas totalling around 6,000 new homes.
- Support 2,500 new homes in Rural and Market Town areas, while conserving the natural environment of the South Downs National Park;
- Reducing carbon from district emissions in the housing sector by 193,000 tonnes CO<sub>2</sub>.

## Natural Environment

Providing a High-Quality Environment is one of the key strategic outcomes of the [Winchester District Local Plan](#). This is aligned to the [Hampshire 2050 Commissioner's Report](#) which recognises that the natural landscape and areas of natural beauty in the Hampshire region are valuable assets that must be protected at all costs.

The natural environment is not only a site of natural beauty which gives Winchester and the wider Hampshire region its distinctive characteristics and cultural heritage, but it is also an important source of economic prosperity, critical

to mitigating the impact of climate change, and vital for the wellbeing and public health of the local communities.

### **Environment and the economy**

Open spaces are required to mitigate the impact of urbanisation, and as such the Local Planning Authority has outlined green spaces which must be protected and cannot be further developed. Any new developments must be in line with the context and setting of the natural landscape and heritage.

While economic growth is certainly important to support a dynamic and growing community, Winchester City Council understands that growth must be sustainable and in balance with the natural environment.

As such, tackling traffic congestion and improving air quality is a key aim for Winchester. While a well-maintained road network is crucial for supporting jobs and linking Winchester with surrounding towns and villages, traffic congestion is detrimental to both the natural environment and the health and wellbeing of those who live and work in the town. The [Air Quality Action Plan 2017](#) sets out measures for improving air quality, such as introducing new park and ride schemes to ease congestion in the town, and reducing the emissions Council-owned fleet, public transport vehicles and lorries in the city centre by 2020.

The strategic vision is to focus on stimulating economic growth by investing in measures to protect and improve the natural environment, as opposed to focusing on economic development and managing the environmental consequences afterwards.

### **Climate change and biodiversity**

Winchester City Council recognises that the natural environment has as important role to play in both resilience and mitigation. Effective management of the natural landscape can help protect communities from extreme weather events by working with natural landscape assets to mitigate these risks (for example, water management systems to manage flood risk). It can also support the move to net neutrality by, for example, significant re-wilding, restoring ecosystems by protecting biodiversity, and mass planting of trees, which directly neutralise atmospheric carbon.

Management of the natural environment is considered a key path to ensuring climate change resilience and as such, protecting the natural environment is a key concern of the Local Planning Authority in Winchester. This involves managing water systems properly to ensure sustainability of supply and optimising water efficiency, as well as safeguarding from contamination and mitigating flood risk.

**Winchester City Council Biodiversity Plan 2021** provides a strategic focus on restoring the biodiversity lost as a result of climate change and urbanisation. This forms a key component of the Carbon Neutrality Action Plan and will help strive toward achieving carbon neutrality.

### **Public health and wellbeing**

Being outside and having access to green spaces is a vital element to the mental and physical health and wellbeing of the local community. Green infrastructure in which to run, walk, and cycle helps foster a feeling of belonging to an area, and strengthens local community resilience. This is recognised by the emphasis Winchester's Council Plan has placed on the links between public health and wellbeing and carbon neutrality. It highlights the role the community can play in reducing carbon emissions if they are granted access to green and blue infrastructure in which they can lead healthy, active lifestyles and opt for sustainable travel options.

Key environmental targets for Winchester City Council include:

- Planting 100 trees annually on Council land
- Restoring key biodiversity over a 5-year period
- Maintaining a network of wildlife corridors and a total of 11 green open spaces ("Settlement gaps")
- Increasing the number of green infrastructure assets such as play parks and recreations areas
- Increasing number of wildflower meadows and "rewilding" Council land.

To support the main aims of:

- Winchester City Council to be carbon neutral by 2024
- Winchester District to be carbon neutral by 2030.

## **Social, Inequality, and Levelling Up**

The current **Council Plan (2020-25)** identifies living well as one of its five priorities, outlining a vision for all residents to live healthy and fulfilled lives and, recognising that its residents are living longer, to ensure the district offers the right mix of facilities to support good physical and mental health for all ages and abilities.

To ensure that its living well priority is met, the Plan sets out the following ambitions:

- Reduced health inequalities

- A wide range of physical and cultural activities for all ages and abilities
- Increased opportunities for active travel
- A wider diversity of residents and businesses involved in ensuring that our services work for all, especially for residents who need more help to live well
- Attractive and well-used public facilities and green spaces with space for relaxation and play

Meanwhile, consultation documents for the [Local Plan 2038](#) have proposed a number of wider social objectives:

- Achieve a transport system that is balanced and is focused on sustainable transport modes that provides everyone with a real choice whilst supporting walking and cycling and tackles in and out commuting
- Provide and broaden the choice of homes to meet the identified need of our communities and to support long term economic growth
- Develop a built environment that is focused more on people than private cars and respects and responds to local character so that we create communities and places where people want to live, work, study and play
- Promote active participation that supports an individual's right to participate in the activities and relationships of everyday life as independently as possible and support those individuals that are not able to do this
- Aim to create communities that are focused on green spaces, reduces health inequalities and creates a healthy environment in the district by having good access to services, schools and facilities within walking distance
- Protect and enhance open space and community facilities as spaces for social engagement and community building/ empowering neighbourhoods; ensure new developments provide spaces for social interaction and the building of new community networks
- Support the district's role as a thriving centre for education which integrates with the resident population

## Skills & Jobs

Skills policy for Winchester is determined at the Local Enterprise Partnership (LEP) level, led by Enterprise M3 (EM3). The LEP's [Skills Action Plan & Local Skills Report 2020/21](#) identifies four strategic priorities for skills:

Priority 1: Use economic data to build business resilience, address skills gaps and match skills supply to employer demand

Priority 2: Enable EM3 residents to identify their skills strengths and needs

Priority 3: Work with employer and education partners to identify skills needs in key high growth EM3 industries and emerging sectors

Priority 4: To stimulate education and training providers to meet skills needs now and as they evolve.

The Skills Action Plan & Local Skills Report additionally identifies three ambitious priority projects for the EM3 area which the EM3 Skills Advisory Panel will progress as a main focus of their work:

- Establish a local digital skills partnership
- Become a national centre for skills for sustainable construction
- Launch EM3 apprenticeship and skills hub as a specialist in technical skills for emerging low carbon industries

These prioritise accelerating and expanding education and training in:

- High level digital skills for workers in an increasingly digital economy and specialist roles
- The sustainable buildings construction industry
- Technical jobs in emerging low carbon sectors



# Comparator analysis

Winchester compares well to competitors, outperforming on some indicators, lagging on others and being in the middle-ground on most. Action to keep ahead where Winchester is doing well and to catch-up where it is not should be a focus of the Green Economic Development Strategy.

Working age population is proportionally smaller than three of the competitors, most notably Guildford. Winchester's population is forecast to grow faster than most competitors and from an economic development perspective, ensuring this growing population is of working age will be important. Currently, projections suggest the opposite with working age population set to fall and 65+ population set to increase significantly. This will pose a challenge to business growth, and action to make Winchester a more competitive location for younger workers will continue to make it more attractive to business investment.

Economic activity is lowest, and unemployment highest amongst the competitors. Whilst regarded as a negative, it does demonstrate that with the right training there is a ready labour market to fill new jobs.

Workplace and resident pay are higher than all competitors aside from Guildford. Average resident pay is higher than workplace pay, indicating a cohort of population who live in Winchester and access higher paid jobs elsewhere. All of the competitors apart from Chichester have average resident earnings higher than average local wages, however Winchester's is the second largest gap despite faster growth in local workplace wages since 2010. To close this gap further, the Green Economic Development Strategy should focus on attracting higher paid jobs, and increase productivity and wages in lower paid ones.

Winchester performs best on business density and business start-ups per head of population, and broadly the same as competitors in terms of start-ups as a proportion of all businesses. Action to improve graduate retention and make the District more attractive for graduates and entrepreneurs to move would be needed to boost start-up rates. Winchester also has slightly lower coverage of superfast broadband than all but one competitor, and relatively low average download speed, which are also important factors in business start-up decisions.

Each of the competitors studied have a 2030 target for reaching net zero across their economy and community, apart from Guildford which only has a focus on the Council's own operations. Proposed initiatives in Winchester are broadly the same as the



competitors, which net zero hubs and citizen assemblies being the only clear examples of activity elsewhere which is not proposed by Winchester. The co-creation of the Green Economic Development Strategy with businesses and communities could be seen as the first step of building a citizen assembly.

## The comparators

The Winchester City Council District has been benchmarked against national and regional data for a selection of indicators to help show where the District sits in those contexts.

Winchester is also competing for inward investment with towns and cities around the country. The evidence base includes preliminary analysis to show how Winchester compare with a small number of other towns and cities, agreed with the Council (Table 18 Table 2).

Table 18: Competitors

Competitor location	Reason for inclusion
Chelmsford	County town, similar relationship to London, university and health assets and capabilities
Cheltenham	Relatively affluent, knowledge-based town with strong culture, heritage and visitor economy, adjacent to rural areas including an Area of Outstanding Natural Beauty
Chichester	Near-neighbour, small university and county town with large rural and SDNP hinterland
Guildford	Major EM3 LEP urban centre on same transport corridors but with more developed innovation eco-system and LEP attention
Stratford-on-Avon	A non-Greater South East example with strong culture and visitor economy – town and rural, and relationship to metro-city-region

## Population

Latest ONS data (2019) reveal that Winchester’s working age population (aged 16-64) accounts for 60.1% of its total population, which is higher than Chichester and Stratford-on-Avon, but below Chelmsford, Cheltenham, and Guildford. In terms of absolute numbers, however, Winchester has a larger working age population than Cheltenham and Chichester, but smaller than Chelmsford and Guildford, while it has a similar sized working aged population and Stratford-on-Avon.

Table 19: Working age population, 2019

Area	Working age population	% of total population
<b>Winchester</b>	<b>75,000</b>	<b>60.1</b>
Chelmsford	110,000	61.6
Cheltenham	72,800	62.6
Chichester	67,900	56.0
Guildford	98,000	65.8
Stratford-on-Avon	75,200	57.8

Source: ONS, Population Estimates, 2019

Winchester's population is forecast to grow by 9% to 2043, which is faster than Cheltenham and Guildford, but slower than Chelmsford, Chichester, and Stratford-on-Avon. Over this period, Winchester's working age population is projected to decline by 1%, less than the 5% and 2% falls anticipated in Guildford and Cheltenham, respectively and on a par with Chichester, but in stark contrast to the increases in working age population projected in Chelmsford (9%) and Stratford-on-Avon (18%).

Population growth across all six districts is forecast to be driven by strong growth in the over 65 population. Winchester's over 65 population is projected to grow by 46% to 2043, slower than Chichester and Stratford-on-Avon, but faster than Chelmsford, Cheltenham, Chichester, and Guildford.

## Economic Activity

Winchester's economic activity rate of 79.0% is the lowest rate among selected competitors, while its employment rate of 75.0% is above only Chichester (74.0%). Meanwhile, Winchester's unemployment rate of 5.0% is the highest rate among selected competitors.

Table 20: Economic Activity

Area	Economic activity rate (aged 16-64, %)	Employment rate (aged 16-64, %)	Unemployment rate (aged 16-64, %)
<b>Winchester</b>	<b>79.0</b>	<b>75.0</b>	<b>5.0</b>
Chelmsford	83.1	80.8	2.8
Cheltenham	79.5	78.0	1.9
Chichester	74.9	74.0	2.7*
Guildford	84.9	82.4	3.0
Stratford-on-Avon	84.6	81.9	3.2

Source: ONS, Annual Population Survey data, December 2020; \*March 2020

With the exception of Guildford, both median hourly workplace pay and median hourly resident pay was higher in Winchester than all selected competitors in 2020.

Median hourly workplace pay was lower than median hourly resident pay across all selected competitors apart from Chichester, suggesting a general trend of residents commuting to higher paying jobs outside of their district. Of those competitors which exhibited this trend, Winchester had the second largest absolute difference between median hourly workplace pay and median hourly resident pay, once again behind Guildford, although in terms of relative difference, Winchester matched Chelmsford.

Median hourly workplace pay grew faster in Winchester than in Chelmsford, Guildford, and Stratford-on-Avon, but lagged Cheltenham and Chichester. Meanwhile, median hourly resident pay in Winchester grew faster than only Chichester.

Table 21: Median hourly pay

Area	Median hourly workplace pay	Median hourly resident pay	Difference	Median hourly workplace pay growth (2010-20)	Median hourly resident pay growth (2010-20)
<b>Winchester</b>	<b>£16.65</b>	<b>£18.92</b>	<b>-£2.27</b>	<b>22%</b>	<b>14%</b>
Chelmsford	£14.69	£16.67	-£1.98	12%	16%
Cheltenham	£15.66	£16.49	-£0.83	28%	21%
Chichester	£14.88	£12.99	£1.89	31%	11%
Guildford	£17.37	£21.11	-£3.74	19%	28%
Stratford-on-Avon	£13.94	£15.56	-£1.62	14%	19%

Source: ONS, Annual Survey of Hours and Earnings (ASHE), 2020

## Skills

According to latest Annual Population Survey data, 57.5% of people in employment in Winchester had NVQ Level 4 qualifications or above in 2020, which compares favourably to selected competitors. The proportion of people in employment in Winchester with NVQ Level 4 qualifications or above is higher than Chelmsford, Chichester, and Stratford-on-Avon, although below Cheltenham and Guildford.

Table 22: Skills breakdown

Area	% in employment with NVQ4+ (aged 16-64)	% in employment with no qualifications (NVQ) (aged 16-64)
<b>Winchester</b>	<b>57.5</b>	<b>2.5</b>
Chelmsford	41.8	3.7
Cheltenham	62.1	2.4
Chichester	44.5	4.9
Guildford	64.4	2.4
Stratford-on-Avon	51.9	3.8

Similarly, Winchester generally performs well with regards to the proportion of people in employment no qualifications in comparison to selected competitors. The proportion of people in employment in Winchester with no qualifications is lower than Chelmsford, Chichester, and Stratford-on-Avon, although above Cheltenham and Guildford.

## Businesses

According to latest available data from ONS (2019), Winchester had a higher business density (number of businesses per 10,000 working age population) than all selected competitors. In absolute terms, Winchester also had the second highest (925) number of business births behind Chelmsford (1,095). Winchester additionally had the highest number of net business births (births minus deaths) among selected competitors.

Table 23: Business counts, births, deaths, and density

Area	Business Count	Business Density	Births	Births per 10,000 working age population	Deaths	Net
<b>Winchester</b>	<b>8,565</b>	<b>1,142</b>	<b>925</b>	<b>123</b>	<b>750</b>	<b>175</b>
Chelmsford	9,135	830	1,095	100	980	115
Cheltenham	5,995	823	680	93	635	45
Chichester	6,950	1,024	645	95	655	-10
Guildford	8,335	851	895	91	880	15
Stratford-on-Avon	8,520	1,133	765	102	775	-10

Source: ONS, Business Demography, 2020

Winchester performs well for start-ups compared to selected competitors. The Centre for Entrepreneurs ranked Winchester (138<sup>th</sup> out of 379 local authorities or 106<sup>th</sup> out of 347 local authorities excluding London) second among selected competitors behind only Chelmsford (113<sup>th</sup> or 81<sup>st</sup>), and first per capita.

Table 24: Business Start-up Index rankings

	2020 Rank	2020 Rank (excl. London)	2020 Per capita rank	2020 Per capita rank (excl. London)
<b>Winchester</b>	<b>138</b>	<b>106</b>	<b>72</b>	<b>43</b>
Chelmsford	113	81	118	86
Cheltenham	199	167	146	114
Chichester	202	170	175	143
Guildford	165	133	160	128
Stratford-on-Avon	177	145	136	104

Source: Centre for Entrepreneurs, Business Startup Index, 2020

## CO<sub>2</sub> Emissions

Latest data from the Department for Business, Energy & Industrial Strategy (BEIS) reveal that per capita CO<sub>2</sub> emissions in Winchester were 6.6 tonnes in 2018, higher than all selected competitors except for Stratford-on-Avon. In terms of CO<sub>2</sub> emissions per km<sup>2</sup>, however, Winchester performs much better with Winchester's emissions of 1.2kt/km<sup>2</sup> only bettered by Chichester (0.8) and Stratford-on-Avon (1.0) among selected competitors.

Table 25: CO<sub>2</sub> emissions

	Industry and Commercial Total	Domestic Total	Transport Total	LULUCF Net Emissions	Grand Total	Per Capita Emissions (t)	Emissions per km <sup>2</sup> (kt)
<b>Winchester</b>	<b>191.2</b>	<b>192.5</b>	<b>484.1</b>	<b>-49.1</b>	<b>818.8</b>	<b>6.6</b>	<b>1.2</b>
Chelmsford	194.9	256.6	414.3	-16.8	848.9	4.8	2.5
Cheltenham	143.6	168.2	90.4	-0.6	401.6	3.4	8.6
Chichester	256.7	206.2	306.6	-126.1	643.4	5.3	0.8
Guildford	162.3	225.4	423.3	-57.5	753.5	5.1	2.8
Stratford-on-Avon	238.3	216.3	575.8	-8.3	1,022.0	8.0	1.0

Source: Department for Business, Energy & Industrial Strategy, UK local and regional CO<sub>2</sub> emissions, 2020

One way in which Winchester can reduce carbon emissions will be with more uptake of electric vehicles, which will need a comprehensive vehicle charging network. Winchester's 67 public charging devices for electric vehicles account for 11% of the total public charging devices across Hampshire and is the fourth highest number of charging devices behind New Forest, Portsmouth, and Southampton. Meanwhile, Winchester has the second highest number of public rapid charging devices behind Hart with its 17 public rapid charging devices accounting for 14% of the county's total. Significantly, Winchester has the largest number of charging devices per 100,000 population in Hampshire.

Winchester also performs well in terms of EV charging infrastructure among selected competitors with the second highest number of public charging devices, public rapid charging devices and charging devices per 100,000 population behind only Stratford-on-Avon in each category.

Table 26: Competitor EV charging infrastructure

Area	Total public charging devices	Total public rapid charging devices	Charging devices per 100,000 population
<b>Winchester</b>	<b>67</b>	<b>17</b>	<b>54</b>
Cheltenham	36	7	31
Chelmsford	36	16	20

Chichester	47	9	39
Guildford	52	4	35
Stratford-on-Avon	71	31	55

Source: Department for Transport, Electric vehicle charging device statistics, April 2021

## Digital Connectivity

With 93.2% of premises in Winchester having access by superfast broadband (over 30 Mbps), broadband coverage in Winchester is the lowest coverage among all but one (Chichester) of selected competitors. Similarly, Winchester's 52.1% ultrafast broadband (over 100Mbps) coverage is below Chelmsford, Cheltenham, and Guildford (although ahead of Chichester and Stratford-on-Avon). Winchester has full fibre (FTTP) coverage of 7.7%, once again above only Cheltenham and Guildford among selected competitors.

Median and mean download speeds in Winchester are above only that of Chichester in terms of median speeds and Chichester and Stratford-on-Avon in terms of mean speeds. Median upload speeds in Winchester are the lowest among selected competitors, while mean upload speeds are slower than Chelmsford, Cheltenham, and Guildford, but above Chichester and Stratford-on-Avon.

Utilisation – defined as the mean download speed expressed as a percentage of the maximum mean speed in an area – of 16% in Winchester, however, is below only Chichester (and level with Guildford) among selected competitors.

Table 27: Broadband coverage

Area	Superfast (% of premises)	Ultrafast (% of premises)	FTTP (% of premises)
<b>Winchester</b>	<b>93.2%</b>	<b>52.1%</b>	<b>7.7%</b>
Chelmsford	97.1%	66.4%	39.4%
Cheltenham	99.5%	81.0%	1.7%
Chichester	91.6%	22.8%	19.5%
Guildford	97.8%	72.8%	4.0%
Stratford-on-Avon	95.1%	45.0%	18.9%

Source: Thinkbroadband, Broadband Coverage and Speeds for UK Local Authorities and Regions, Q121

Table 28: Broadband speed coverage

Area	Download speed (Mbps)		Upload speed (Mbps)		Utilisation (%)
	Median	Mean	Median	Mean	
<b>Winchester</b>	<b>33.2</b>	<b>50.0</b>	<b>1.3</b>	<b>8.4</b>	<b>16%</b>
Chelmsford	33.5	62.8	3.1	8.5	12%

Cheltenham	36.9	56.8	4.0	8.5	15%
Chichester	31.2	42.7	1.6	6.7	18%
Guildford	38.2	63.4	3.6	8.5	16%
Stratford-on-Avon	34.9	44.6	2.8	7.9	14%

## How comparators are working towards net zero carbon targets

### UK best practice case study: Bristol

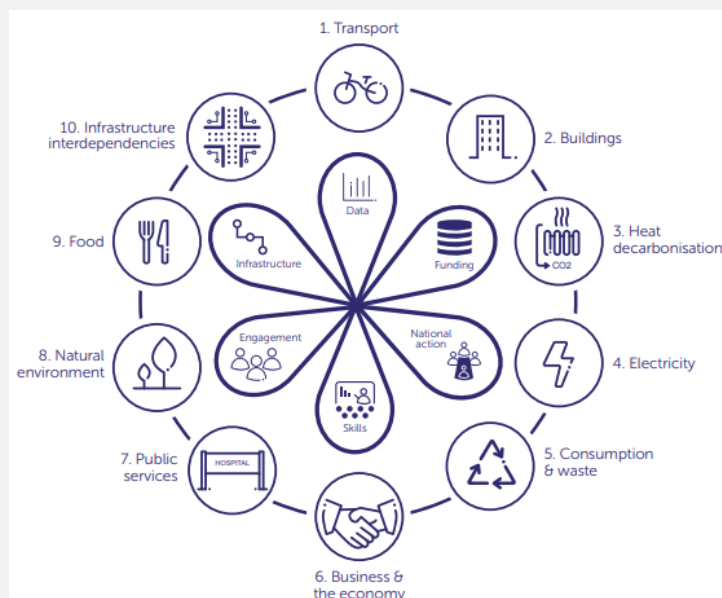
Like Winchester, Bristol has a 2030 target to reach net zero across the city having been the first in the UK to declare a climate emergency. The Bristol One City Plan builds on several years of national and international leadership, including being announced as European Green Capital in 2015, the only UK city to do so. The Plan is a collaborative call to action which sets out the 2030 vision and initiatives to achieve that goal. Like the Winchester Green Economic Development Strategy, the One City Plan has an *“ambition to become a fair, healthy and sustainable city. A city of hope and aspiration, where everyone can share in its success.”*

The One City Plan uses a framework of 10 interrelated themes, which include the key elements of Green Economic Development.

1. Transport: switching to significantly more walking, cycling and zero carbon public transport modes; converting the remaining vehicles to zero carbon fuels; transforming freight, aviation and shipping

2. Buildings: retrofitting and building them to become carbon neutral and resilient to a changing climate, calling on central government to develop a supportive planning framework to deliver this

3. Heat decarbonisation: implementing a carbon neutral energy method for heating and hot water. This is one of



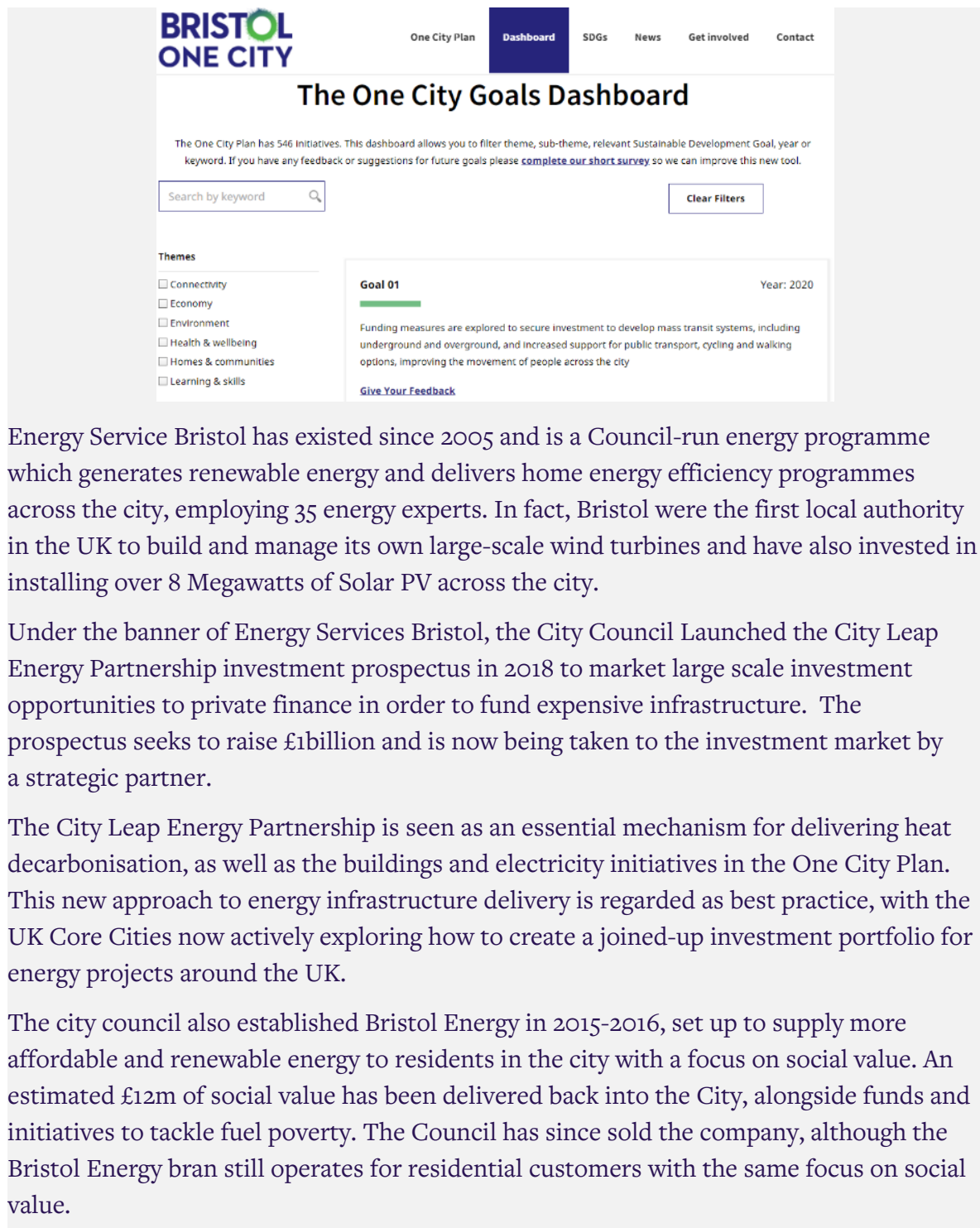


the areas that will be supported by City Leap Energy Partnership, a radical new approach to delivering energy infrastructure in Bristol

4. Electricity: make our electricity use as smart and flexible as possible (to support electricity decarbonisation nationally), maximise local renewable energy generation and increase system resilience
5. Consumption and waste: responsible buying of goods and services, alongside zero carbon from waste management
6. Business and the economy: Bristol businesses move to be carbon neutral and climate resilient, capturing job opportunities for all through the transition
7. Public, voluntary, community and social enterprise services: carbon neutral public and VCSE services and supply chains that are also prepared for future climate conditions and hazards Bristol One City Climate Strategy A strategy for a carbon neutral, climate resilient Bristol by 2030 5 Executive summary
8. Natural environment: restoring, protecting and enhancing these spaces and wildlife within them as the climate continues to change
9. Food: a resilient supply chain, with food and drink produced locally, sustainably and moving to a more plant-based diet
10. Infrastructure interdependencies: collaboration in running vital services to the city such as water, transport, waste, ICT and energy to improve their climate resilience and embed carbon neutrality across different systems

Bristol was the first UK City to report against the UN Sustainable Development Goals, gaining international recognition alongside cities like New York and Madrid. The City uses an online dashboard to report to show how the One City sustainability plan is delivering against the SDGs. Bristol also features in a handbook for using SDGs published by the EU, an approach which has since been adopted by London and a number of towns and cities around the UK. This could be one option for Winchester to track and report success of the Green Economic Development Strategy in future years.





Energy Service Bristol has existed since 2005 and is a Council-run energy programme which generates renewable energy and delivers home energy efficiency programmes across the city, employing 35 energy experts. In fact, Bristol were the first local authority in the UK to build and manage its own large-scale wind turbines and have also invested in installing over 8 Megawatts of Solar PV across the city.

Under the banner of Energy Services Bristol, the City Council Launched the City Leap Energy Partnership investment prospectus in 2018 to market large scale investment opportunities to private finance in order to fund expensive infrastructure. The prospectus seeks to raise £1billion and is now being taken to the investment market by a strategic partner.

The City Leap Energy Partnership is seen as an essential mechanism for delivering heat decarbonisation, as well as the buildings and electricity initiatives in the One City Plan. This new approach to energy infrastructure delivery is regarded as best practice, with the UK Core Cities now actively exploring how to create a joined-up investment portfolio for energy projects around the UK.

The city council also established Bristol Energy in 2015-2016, set up to supply more affordable and renewable energy to residents in the city with a focus on social value. An estimated £12m of social value has been delivered back into the City, alongside funds and initiatives to tackle fuel poverty. The Council has since sold the company, although the Bristol Energy bran still operates for residential customers with the same focus on social value.

## Winchester

In June 2019 Winchester City Council declared a ‘Climate Emergency’ and committed to making the activities of Winchester City Council carbon neutral by 2024, and the district of Winchester carbon neutral by 2030.

Winchester's Carbon Neutrality Action Plan sets out how the council aims to achieve its carbon neutrality targets. The Plan sets carbon reduction targets across three priority areas:

- Transport: 1,500 tonnes CO<sub>2</sub>e through council operations and 287,000 tonnes CO<sub>2</sub>e through district emissions
- Energy: 1,780 tonnes CO<sub>2</sub>e through council operations and 172,000 tonnes CO<sub>2</sub>e through district emissions.
- Property and housing: 420 tonnes CO<sub>2</sub>e through council operations and 193,000 tonnes CO<sub>2</sub>e district emissions overall.

The Plan outlines ten priority actions to help address nearly all of the council's carbon emissions by 2024 and contribute to reducing emissions district wide by 2030:

- Deliver key studies in 2020 to take forward the City of Winchester Movement Strategy which have a focus on achieving carbon emission reduction;
- Develop an expanded network of EV charging points across the district – starting with up to 46 points on the council's own estate by 2024, adding to existing provision and working with partners to identify where more are needed.
- Develop additional Park & Ride facilities to increase capacity starting with the Vaultex site with at least 130 new car park spaces in 2020;
- Source 100% of all electricity purchased by the council from renewable sources by 2021;
- Build or invest in large scale renewable generation project(s), e.g. solar farms, heat pumps, solar-battery car ports, anaerobic digester, wind farm;
- Develop a council led pilot Passivhaus housing scheme in Micheldever by 2021;
- Invest an additional £1m per annum on energy and water efficiency measures to council housing stock;
- Bring forward the Local Plan update with an emphasis on low carbon housing development by 2021;
- Develop a programme of rewilding starting with planting at least 100 trees annually on council land.

## Chelmsford

The City and District of Chelmsford declared a climate and ecological emergency (C&EE) in July 2019. This led to a pledge to decarbonise all activities to net zero by 2030.

Net zero target activities in Chelmsford are focused on the following macro areas as immediate priorities:

- Reducing carbon emissions;
- Lowering energy consumption;
- Reducing waste and pollution;
- Improving air quality;
- Greening Chelmsford;
- Increasing biodiversity; and
- Encouraging sustainable travel choices.

The key aim is achieving 100% low carbon energy across the Chelmsford area by 2030, supported by a range of Council-led partnerships, programmes and monitoring.

## Cheltenham

Cheltenham Borough Council declared a climate emergency in 2019 and a commitment to carbon neutrality for both the Council and the Borough by 2030.

Interventions for the wider Borough range across activities including leadership, community engagement, shifting to green energy, transport, and built environment.

The starting point will be co-creation activities with the community, including appointing “Climate Champions” to support grassroots level initiatives to reduce and eliminate carbon emissions. So far this has also included developing the Cheltenham Standard, which is a benchmark for low-carbon living. “Lead by Example” is a programme of demonstration pilots to support adoption of low carbon initiatives.

Other policy initiatives include the launch of the Cheltenham Green Deal, which supports communities who require carbon reduction initiatives but are unable to afford associated capital costs and expenses.

It also includes Smart Cheltenham, which is a vision for low-carbon living for those in West Cheltenham, Zero Carbon Hubs which are mobility initiatives promoting zero carbon green passenger transport and active mobility. Cheltenham Energy was also launched by the Council, who provide zero emission energy locally.

## Chichester

In July 2019, Chichester District Council declared a climate emergency and pledged a commitment to achieve net zero carbon by 2050, in line with the UK Government’s national target. The Council also has pledged an area-wide target of 10% reduction of carbon emissions year-on-year from 2019 until 2025.

Chichester District Council developed a Climate Emergency Detailed Action Plan which outlines how the Council will reduce its own emissions, and how it can work with other initiatives and actors in the district to reach the target for the area as a whole.

The main themes for the area as a whole include:

- Social housing, where Chichester District Council will seek funding from Homes England to secure funding to deliver low carbon social housing.
- Mobility and Transport, including the Local Cycling and Walking Infrastructure Plan, Local Transport Improvement Plan and Sustainable Transport Package.
- Air Quality Action Plan which includes policies for Electric Vehicle adoption and increased charging infrastructure, including for taxi fleet in the area.
- Nature-based solutions including wildlife corridors, mass tree planting (Trees Outside Woodlands project), rewilding spaces and creating new green spaces, restoring wetland habitats.
- Renewable energy generation projects overseen by a working group to progress larger-scale community renewable energy project.

Identified actions include Establishing Working Groups, where partner organisations can support each other and the Council with recommendations, behavioural change campaigns and a Citizen's Assembly to be established in 2021 to bring together members of the public selected to represent the demographic profile of Chichester District.

## Guildford

Guildford published a High-Level Action Plan in September 2020 to support the Council to achieve net zero carbon by 2030. However, as yet there are no coordinated plans or specific targets in place to tackle carbon emissions in the wider community, which account for 98% of Guildford's carbon emissions.

While the Council has not put in place formal plans to achieve net zero carbon in the wider community, there are third sector initiatives such as Zero Carbon Guildford working to implement their own grassroots initiatives in the community to reduce carbon and mitigate the impact of climate change.

## Stratford-on-Avon

Stratford-on-Avon also declared a climate emergency in July 2019. The Council pledged to reach a target of net carbon neutrality in the Stratford area by 2030. Its aim was to achieve this using a combination of

Strategies and policies to achieve this are segmented into 5 workstreams. The first 4 are related to reducing the carbon emissions of the Council's own activities, and the fifth is more complex and related to reducing carbon emissions from the wider Stratford area.

The workstreams are as follows:

- 1. Operational Programme:** These are “quick wins” and focus on areas for which the Council has direct responsibility and can control carbon emissions. This includes the Council’s estates and includes initiative such as moving to an EV fleet, using green energy sources, and energy efficiency measures in Council buildings.
- 2. Community Leader and Partnerships:** This focuses on achieving carbon reductions through working with other partners and facilitating joint initiatives.
- 3. Central Government:** This involves lobbying and working with Central Government to improve and expand on local powers to achieve carbon emission reduction targets within a timescale quicker than that committed by the UK Government.
- 4. Adaption:** This focuses on adaption and mitigation measures and is largely focused on larger infrastructure projects and securing investment.
- 5. Carbon Neutral District by 2030:** This workstream include initiatives to achieve carbon neutrality in the wider area by 2030. It is more ambitious and far reaching than national targets, which seek to achieve net zero greenhouse gases by 2050.

#### Best practice case study: Lahti: European Green Capital 2021

Lahti is a [model city](#) in terms of adopting a whole systems approach to carbon neutrality and successfully using new technologies to support this. As a nation, Finland has a target to reach net-zero by 2035, ahead of the European target of 2050. Within Finland, Lahti is on track to reaching net-zero by 2025. This case study presents a flavour of the actions and investments Lahti is pursuing which can inform Green Economic Development around the world.

Lahti is championing a bottom-up and top-down approach, across all sectors of the economy. From a bottom-up, or individual household level, behavioural approaches are both enforced and encouraged. These support the fundamental changes in lifestyle needed to reduce the carbon footprint at an individual level. This is balanced with the recognition that industry is the main source of carbon emissions and where the main responsibility lies in terms of global carbon reduction efforts.

The below examples illustrate some of the green initiatives that have led to Lahti’s position as European Green Capital 2021.

- In the [hospitality sector](#), hotels and restaurants meeting defined standards are awarded a “[Green Key](#)” which is a global-level certification for hospitality sector establishments meeting high standards of environmental requirements.
- In the [construction sector](#), Lahti is developing a net-zero construction hub which will be used as a research facility for developing net zero buildings and pilot programmes.

- In **manufacturing**, Lahti is Finland's Cleantech centre of excellence. Cleantech employs around 5,000 people (Lahti's population is 120,000). It has particular strengths in circular economy, having introduced a roadmap in 2017 towards achieving a full circular economy. For example, at Kujala, a district of Lahti, there is a waste treatment plant that is pioneering waste symbiosis as part of the [Smart and Clean Lahti](#) plan. This is at the heart of the circular economy. The plant takes waste materials from all over Finland and creates energy from landfill, which is used to at the Hartwall bottling plant and beverage factory as well as generating electricity at the Lahti Energy Ltd. Company. Landfill is also used to produce ash for the construction sector, biogas used for biofuels in public and private transport, fertiliser for the agriculture sector, and scrap metal, paper, and asphalt which is re-purposed for building materials and construction of city infrastructure.
- Lahti is home to several **green energy** generation initiatives. In 2019 a number bio plant was opened which generates 100% renewable energy. The forestry sector is important to Finland's national economy as a whole and also constitutes a significant portion of Lahti's economy. A new biomass burning site, fuelled by by-products from the forestry sector and woodchips supplies most residential properties in Lahti with electricity and district heating.
- In the **food and drink production sector**, Lahti has seen the benefits of clustering activities. For example, Finland's major beverage producer, Hartwall, has partnered with an energy company to create a bioethanol plant which uses waste products (grain from the brewery and distillation by-products) to produce bio-based green fuels for vehicles. Similarly, Fazer, Finland's leading confectionary company, has partnered with companies from the agricultural sector to produce sweetener from oat hulls.





Urban  
Foresight

® Urban Foresight Ltd: 31 32

The Catalyst, Newcastle Helix  
Newcastle upon Tyne, NE4 5TG  
United Kingdom  
+44 (0)191 814 2210

[urbanforesight.org](http://urbanforesight.org)

Flour Mill, 34 Commercial Street,  
Dundee, DD1 3EJ  
United Kingdom  
+44(0)138 549 946

@UrbanForesight

