A Digital Winchester District Summary Report

Executive Summary

Since the onset of the COVID-19 pandemic, the need has grown to deliver robust digital services and capacity across the UK. The digital sphere is where we now work from home and stay in contact with friends and to kick-start family. As work gets underway to revive and rejuvenate our communities, and reinvigorate economic development, strengthening our digital infrastructure, and closing digital divides – both economic and social - are critical to success.

In the light of discussions around the current positioning of Winchester District's digital economy including access, infrastructure and skills, the council's Business Housing Policy Committee set up an informal scrutiny group (ISG) – the Digital Winchester District Task and Finish group in Autumn 2020.

The ISG recognised that the district's professional, technical and service-led economy thrives, and is dependent on, access to excellent digital infrastructure and a highly qualified, digitally literate workforce. Competition for people to build a strong market position is intense and has been amplified by the experience of Covid-19.

The Group set itself the challenge to:

1. Investigate (and define) the digital infrastructure available across the district.
2. Identify issues of poor and inadequate access.
3. Understand the types, impact of, digital inequalities.
4. Learn about the strengths in digital innovation around the district.
5. Explore the opportunities for new business – particularly supporting transformation of the economy to carbon neutrality.
6. Address public concerns around advancements in digital technologies.

The aim of the work was to create a think piece report and body of evidence that could be used by the council and stakeholders to inform decision making, support policy development and act as a data source to attract potential investment. The goal was to encourage in depth investigations around what could be done to meet the needs of the district.

The approach

Four challenges were set to structure the work alongside a series of challenge questions to provide focus to the work ahead.

The challenges are:

1. Infrastructure

- What are the gaps in digital provision and how can they be solved?
- What are the barriers to digital connectivity?
- What infrastructure provision will achieve greatest impact and benefit?

2. Access

- What are the varying level of experience of broadband and mobile services across the district?
- Do our various communities have equal access to broadband and mobile services?

3. Opportunity

- What new business and social opportunities can be achieved through fast reliable broadband and 5G technologies?
- How are opportunities constrained? What will help overcome these constraints?
- What are people trying to achieve digitally?

4. Future potential

- What technology and digital achievement could benefit the local economy and communities in the future, and which are not currently available within the district?
- How would solutions which are not currently available aid COVID-19 recovery?
- What considerations should be taken to future proof provision?

Winchester City Council's Economy team delivered three elements of work to answer the challenges set for a Digital Winchester District.

Firstly, a public consultation, which asked residents, businesses, community groups, organisations, and students to help them understand the ever-changing digital needs of the district.

Secondly, a call for evidence to gather relevant research and information from articles, published papers, documents and opinions to build up an evidence base for these challenges.

Thirdly, a virtual event on 23 November 2021. The 90-minute debate was attended by over 50 participants and gave businesses, residents, and experts a chance to have their say on the digital future of Winchester. The key challenges were debated, and a series of polls were held during the virtual event.

Combining the three parts of this project has now created more of an understanding of the digital experience of those within the district, as well as their digital needs and future potential.

The COVID-19 pandemic has highlighted the need for stronger connectivity, more reliable broadband and Wi-Fi and more widespread 5G coverage, due to the shift in the working population working from home.

Once the three strands of this project were finalised, the evidence was reviewed with the aim of exploring:

- What a digital Winchester means for the different communities of the Winchester district, including residents, businesses and community groups, organisations, students.
- The benefits of 5G to the city and district.
- The experience of digital connectivity during COVID-19.

Project objectives

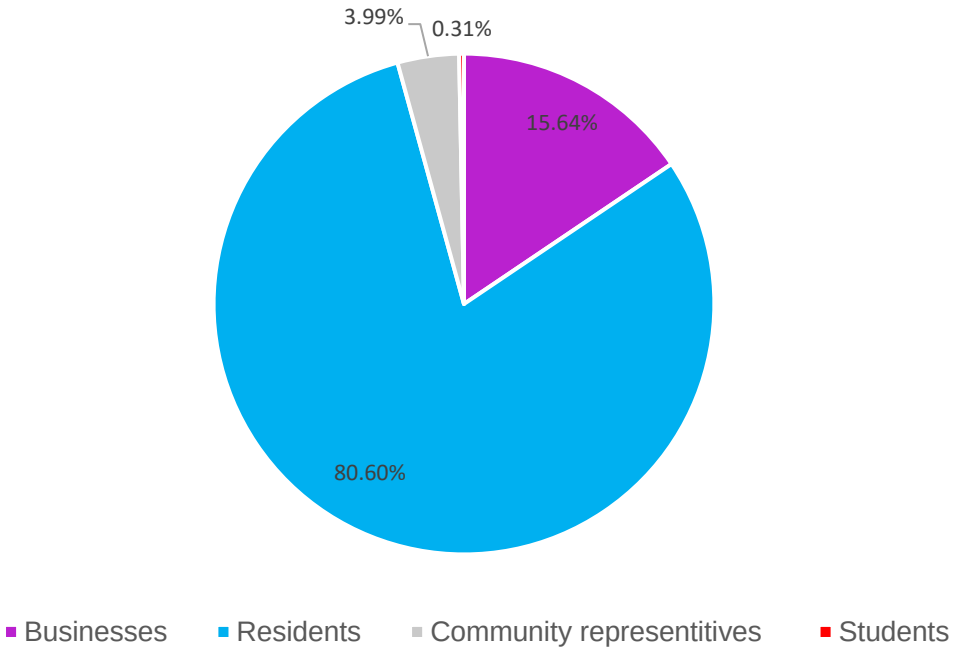
Public consultation	To understand the changing digital needs of residents, businesses, organisations, employers, innovators, and investors.
Call for evidence research	To collate research for an evidence library to understand what could be achieved and how other local authorities are moving forward
Online debate event	An online event which had expert speakers and local witnesses debating the key challenges outlined - https://youtu.be/7oTdeX3gOmY.

Digital Winchester Public Consultation

A public consultation was launched on 21 January 2021 and closed on 5 January 2022. It gained 326 responses from a mixture of businesses, community group representatives, students, and residents.

To address digital exclusion and reach those who might not be online or have the equipment to be online, we left hard copies of the survey at several different venues.

Digital Winchester Survey Responses



Out of the 326 respondents, 240 of them stated that they require reliable high-speed broadband to keep in contact with friends and family, 214 need it for internet banking and 205 require it for working from home pre/post the COVID-19 pandemic.

Only 35% (115) were satisfied with their broadband speed and 34% (110) were satisfied with the reliability.

7 respondents had 5G mobile coverage, 119 had access to 4G only mobile coverage. With 46 having 3G or less/limited coverage.

Summary and conclusion:

While there is a strong need for reliable high-speed broadband the rate of satisfaction with its provision is relatively low.

Work is needed to increase the quality of access, speed, and reliability of broadband across the district to fully support the digital economy of the Winchester district beyond the COVID-19 pandemic.

The full results of the survey can be found on the link below:

A Digital Winchester District full public con

Call for evidence – research

The call for evidence was published on 21 January 2021, inviting stakeholders, organisations, business, and the public to submit relevant research and information from articles, published papers, documents and opinions to build up an evidence base for these challenges.

Due to the low numbers of uploaded pieces of evidence, the Economy team carried out its own desk research.

Following the four challenges set out by the Task and Finish group at the beginning of the project, evidence has been collected to support each of them. The research that has been collected is a mixture of infrastructure facts, digital inclusion initiatives, 5G information, case studies, such as using street furniture to boost 5G, and projects that could enhance the future potential of the digital economy in Winchester.

The full evidence library can be found on the link below:

A Digital Winchester District - Evidence Lib

Summary and conclusion

There are a lot of case studies in the UK for potential solutions.

BT have numerous ongoing projects with both urban and rural areas.

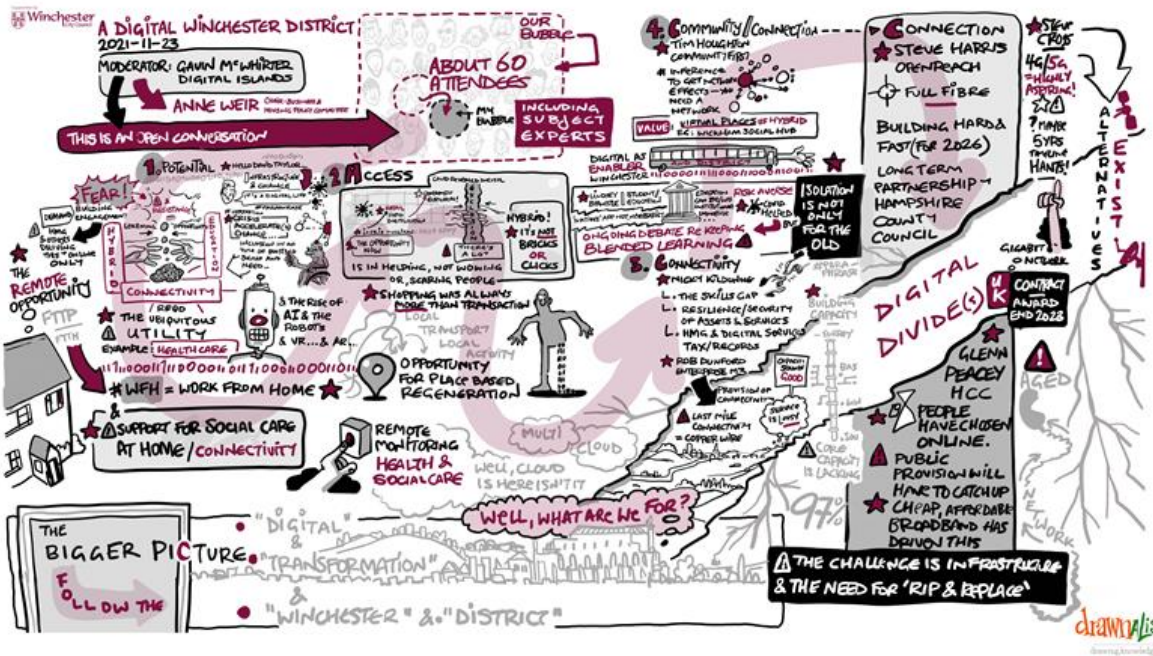
There are quick wins for 5G boosting, as well as the longer-term solutions to improve connectivity.

There are a lot of digital charities and organisations who are already working hard on decreasing the digital divide, including Digital Champions.

Examples of what other places are doing/trying to achieve:

- Use of street furniture to boost 5G roll out
- The University of Stirling is working with BT to ensure those in rural areas have access and connectivity just the same as their counterparts in urban areas. So, they can all equally enjoy the same educational opportunities.
- Bournemouth, Christchurch and Poole Council – Smart Place – Smart Place Topics – 5G in Bournemouth – Their plan to improve industry and logistics – Building a research and development consortium – Smart Place Pilot Cabinet Report
- The Welsh Government is bringing 5G mobile connectivity to support pilots across education, transport, tourism and farming in Blaenau Gwent and neighbouring Monmouthshire.

Virtual debate event



Credit: Matthew Buck at Drawnalism

The digital debate took place on 23 November 2021 at 5pm. The 90-minute debate was chaired by Gavin McWhirter from Digital Islands, who spoke to the strong line-up of experts, and encouraged attendee engagement, about the key challenges identified: digital infrastructure, access, opportunity, and future potential.

Expert name	Business/Organisation
Glenn Peacey	Hampshire Super-Fast Broadband
Jackie Mulligan, CEO	ShopAppy
Tim Houghton, CEO	Community First
Robert Dunford	Enterprise M3
Nicola Kildunne	Federation of Small Business
Stephen Cross	Geekabit
Rowlando Morgan	CEBR
Stephen Harris	BT Openreach
Lindsay Birtwhistle	University of Winchester
David Taylor, CEO	DNA6

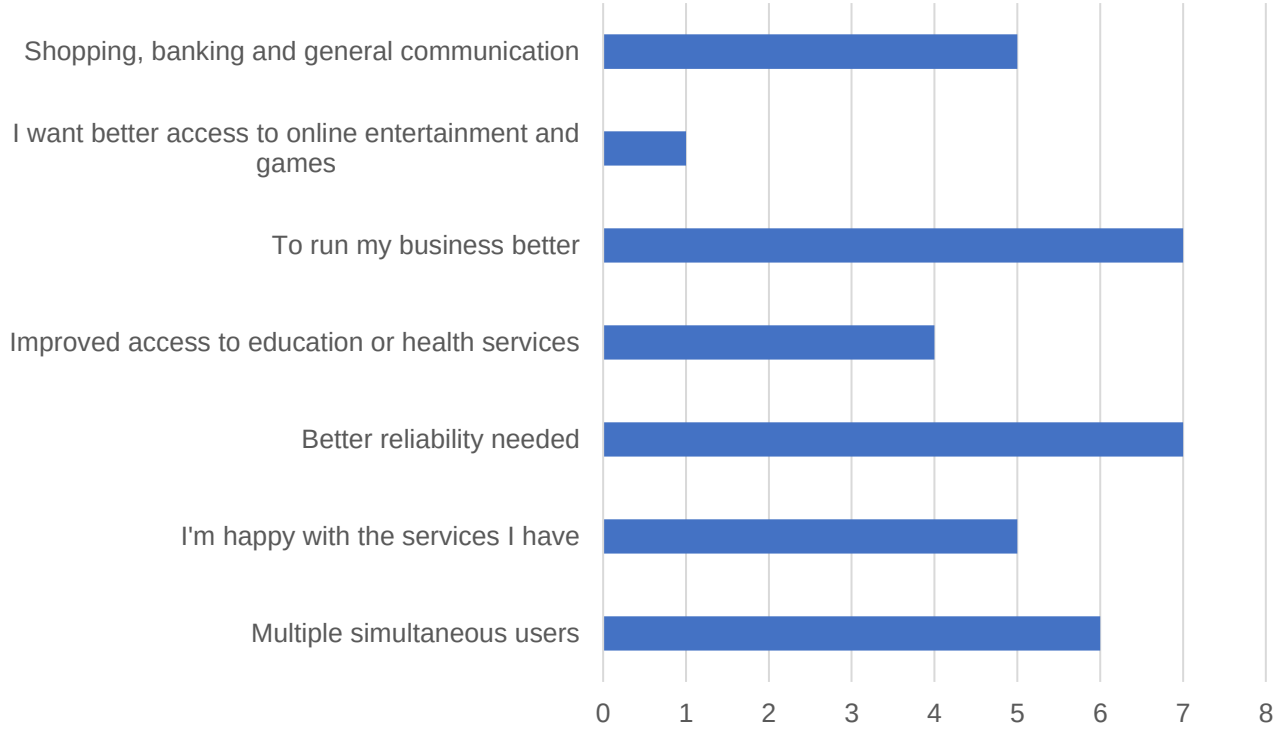
The discussion looked at the challenges as tools to drive the debate amongst the 50+ attendees. Providing the experts, the opportunity to hear first-hand where the issues, challenges and opportunities are within the Winchester district.

The conversation sparked extensive, lively, and open discussion which covered multiple digital topics including:

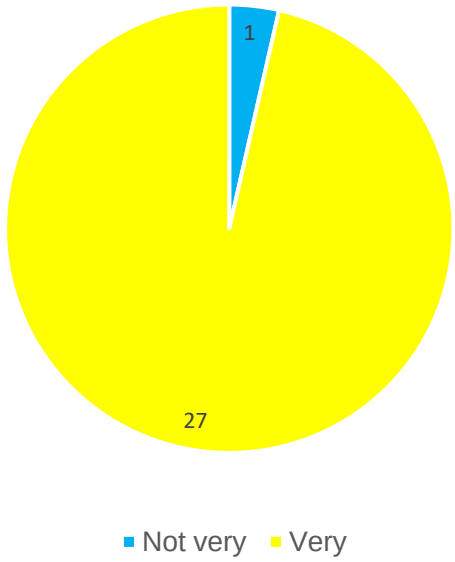
- Hard infrastructure questions, including whether it is all about fibre broadband or a mix and what that might look like.
- The opportunity horizons we need to be thinking about in relation to the local economy and what is important to us.
- The implications for jobs and how people will work after the COVID-19 pandemic.
- The future potential, particularly around the areas like health and social care, education, and learning.
- The issue around access and inclusivity, which touches us all and covered the opportunities to build skills that digital connectivity can bring.

A series of polls were held during the debate, both on Slido and in the chat function. *Please note, not all attendees took part in these.*

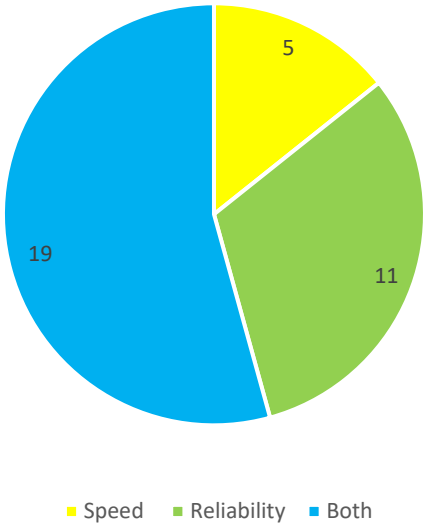
Poll 1: **Why do you want faster, more reliable digital connectivity?**



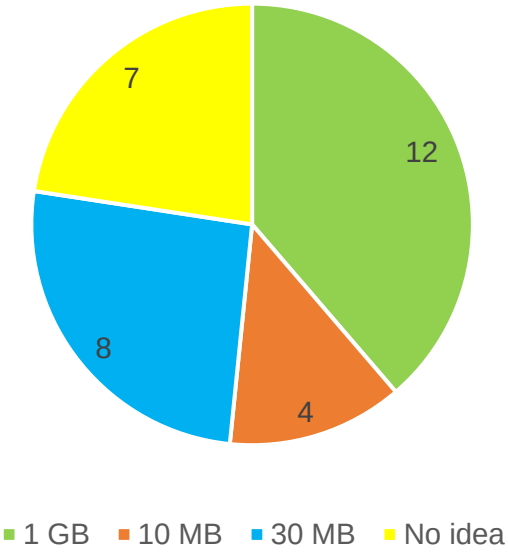
Poll 2: **How important is fast, reliable digital connectivity to your life?**



Poll 3: **Which is more important to you, speed or reliabiity?**



Poll 4: **How fast is fast enough for your digital needs?**



As well as the polls held on Slido, we also included three chat questions, to steer the comment box. These were:

1: If you have a mobile signal/broadband issue, who would you approach for a solution?

2: Do you think Winchester District's digital connectivity needs to be improved?

3: Are you satisfied with your mobile signal/internet data at home/work?

These aided the discussion in the comment box throughout the event and the full comment discussion can be seen on the link below:


A Digital Winchester District - Virtual Deba

Some of key messages that were highlighted from experts and attendees of the online debate:

Infrastructure

- Rather than focusing on if we need it, we need to establish how quickly can we get ubiquitous fast access to superfast broadband and 5G coverage.

- Enterprise M3 outlined their plans to address the data from Department for Digital, Culture, Media & Sport which shows that only 26% of England benefits from capable connectivity (1000mbps/second), well behind many other countries such as Sweden which has 75%. We heard how their digital strategy illustrated the connectivity challenges in rural locations, despite superfast broadband being available locally. The development of the digital spine, currently planned to come down as far as Basingstoke will deliver 1 GB fibre-spine to premises that cannot access broadband. This will encourage the private sector to build off the spine to increase connectivity for more people.

- Openreach investing of £15bn in the network supporting over 31m homes over the last decade with full fibre as the immediate priority for Openreach to guarantee speed and reliability. A further £15bn to reach 25million homes by 2026 is planned to include £6m to support those in the toughest to connect locations.

- In terms of Winchester, with Hampshire County Council, 5,000 homes have been upgraded to date with a further 9000 planned. This will include 4 rural locations for exchanges within the district.

- Hampshire County Council, superfast broadband explained they are to commit that 80-85% of population in Hampshire is planned to be able to access 1GB connectivity by 2025. We were reminded that the UK is the world's largest spender online of retail sales per head and the third largest globally in terms of online spend for the economy just behind US and Japan.

Access

- There is a clear digital divide both in terms of geography and demographically. A project that supported 1300 digitally isolated to get online saw 30% of the over 70s forming part of that digital isolation.

- The Federation of Small Business reported that 26% of business owners felt the limitations of their digital skills were holding back the development of their business.

Opportunity

- Digital is emerging as the fifth industrial revolution along with the need for people, process, and technology to achieve digital success.

- Two thirds of consumers are now shopping online and 60-70% of high street businesses, because of the pandemic, have developed an online presence verses 30% pre pandemic. The high street must therefore be visible in an online world with “clicks driving to bricks” – online presence driving physical and virtual footfall with a seamless connectivity between on and offline enabling consumers to effectively choose the channel that is right for them. The narrative that the high street is dead must be challenged as this is what consumers are being led to believe.

- We heard how the education sector were initially reticent to harness the opportunities around e-learning but now the COVID-19 pandemic has brought about a revolution in this area for education. The discussion now is around if this will become legacy in terms of ways of delivering education into the future.

- The need for businesses to have a digital plan to harness the opportunities of a transformational journey.

Future Potential

- The Centre of Economics & Business Research said that digital change could generate an extra £76bn in UK GDP by 2025 and £236bn by 2040, demonstrating 6.5% growth. Regional economies could benefit up to £33bn as workers re-locate and spend disposable income in areas with best digital connectivity.

- A need to be clear on what the end goal looks like and how we are going to leverage technology in the next 5 – 10 years.

Coverage and Investment

There is 97% availability of superfast affordable broadband across the county. The Winchester district falls slightly below the county coverage, with 94% having access to superfast affordable broadband. The real challenge is the remotely located 6% that don’t have access to this, double the overall county position. Often access is available locally, but to provide the 6% with access requires a significant upgrade to networks that already serve many more users adequately. The cost of this is often not commercially viable, which is where government is stepping in. The Hampshire superfast programme has updated 110,000 properties in this circumstance over the last 8 years. About half of these properties have opted for the 1GB connectivity which gives a sense of appetite. There is more to do, and the government has committed to 1GB of connectivity to everybody by 2032 with an allocation of £5bn funding to deliver this ambition. The first procurement to fill the gap between the

commercial sector provision and the overall requirement has started. For Hampshire we are in priority group of Phase 1B starting in February 2022 for procurement with a contract being awarded by the end of 2022 and delivery to commence in early 2023. Supplier/s are yet to be determined as part of the procurement process. It is suggested that it will take around 5 years for this to benefit the Winchester district.

The virtual digital debate has been uploaded to YouTube, here. The recording has also been uploaded to our A Digital Winchester District webpage, here.

Summary and conclusions
EM3 LEP and Hampshire County Council are investing in infrastructure
Need to focus on ubiquitous access
Need to address digital skills and digital exclusion
Greater opportunity to exploit and deploy digital services exits in business, education, and health sectors.
Digital change has the potential to significantly contribute to the economy if there is a clear plan and end goal.

Digital Winchester District Task and Finish Group Findings

A Digital Winchester District has evidenced a very significant demand for fast and reliable broadband and for 5G mobile coverage. The public consultation which indicated that only 7 (out of 326 respondents) have 5G mobile coverage whereas 96.43% of the attendees in the digital debate stated that fast and reliable digital connectivity was very important for them, suggests there is a considerable way to go to achieve full digital inclusion.

The call for evidence research Indicates that this has been an ongoing challenge since the world became digitally reliant. It's vital that the challenges are explored further and those who could improve these services are supported.

Modern day life is increasingly turning to digital technologies to revitalise and support communities. Technology has the potential to bring value to everyone, regardless of their age, religion, career, disability, or location. However, without inclusive digital growth, those that most need this support could be left behind. Universal connectivity and access to digital skills are critical.

There is a need to continue to support and benefit from the growth of the digital economy, however all must be given the same opportunity by reducing and ultimately eliminating the digital divide and inequality.

The debate heard that there is significant investment into improving the digital infrastructure at national and local levels. As district we must ensure the case is made to secure this investment for our communities.

Conclusions

While there is a strong need for reliable high-speed broadband the rate of satisfaction with its provision is relatively low.

Increasing the quality of access, speed, and reliability of broadband in the district is essential to fully support the digital economy of the Winchester district beyond the COVID-19 pandemic.

EM3 LEP and Hampshire County Council are investing in infrastructure -Winchester needs to ensure it benefits proportionately.

There's a need to focus on ubiquitous access

A priority should be addressing digital skills and digital exclusion

Realise the potential of opportunities to exploit and deploy digital services exits in business, education, and health sectors.

Digital change has the potential to significantly contribute to the economy with a clear plan and end goal – what this means for Winchester.

There are a lot of case studies in the UK for potential solutions.

BT have numerous ongoing projects with both urban and rural areas.

There are quick wins for 5G boosting, as well as the longer-term solutions to improve connectivity.

There are a lot of digital charities and organisations who are already working hard on decreasing the digital divide, including Digital Champions.