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Enterprise M3 Towns Analysis

Final Report Part 1: Data Analysis and Town Classification

Prepared for Enterprise M3 LEP

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Executive Summary

- i. This study is presented in two parts: the first setting out data analysis and a classification of the towns; and the second setting out future growth opportunities. This report is the first part of the study and there is a separate report for the second part of the study.
- ii. The objectives of this study are twofold:
 - To develop a typology of the towns/settlements and the networks that link them together
 - To see a longitudinal analysis of each town's performance, to understand how they have grown
- iii. The typology of towns is informed by the characteristics of the towns and the functional networks that link them together. The longitudinal analysis can be considered in terms of both historic change and future growth opportunities. These four factors are considered below.

Functional relationships and networks

- iv. HJA has defined a number of functional economic market areas (FEMAs) in the Enterprise M3 area based on functional flow data that is available. This includes Travel to Work Areas (TTWAs), housing market areas, and commercial property market areas. The functional economic market areas in the Enterprise M3 area and the towns within them can be seen in the Figure below.

Figure ES1: Functional Economic Market Areas

| Functional economic market area | Towns | Local Authorities |
|--|---|---|
| Outer London/Northern Surrey | Cobham East & West Molesey Walton on Thames Weybridge Addlestone Chertsey Egham Ashford Shepperton Staines-upon-Thames Stanwell Sunbury Woking* | Elmbridge Elmbridge Elmbridge Elmbridge Runnymede Runnymede Runnymede Spelthorne Spelthorne Spelthorne Spelthorne Spelthorne Woking |
| Southern Surrey/Eastern Hampshire | Basingstoke Tadley Blackwater/Yateley Fleet Farnborough Aldershot Guildford Frimley Camberley | Basingstoke & Deane Basingstoke & Deane Hart Hart Rushmoor Rushmoor Guildford Surrey Heath Surrey Heath |

| Functional economic market area | Towns | Local Authorities |
|---------------------------------|---|--|
| | Farnham Godalming Haslemere Cranleigh Woking* | Waverley Waverley Waverley Waverley Woking |
| Northern Hampshire | Andover | Test Valley |
| Mid Hampshire | Borden/Lindford/Headley Petersfield Alton Winchester | East Hampshire East Hampshire East Hampshire Winchester |
| Southern Hampshire | Romsey Whiteley | Test Valley Winchester |

* Woking sits on the boundary between two FEMAs

Characteristics of the Towns

- v. This first section discusses the key messages on the characteristics of each town. These observations are based on the most recent data. Longitudinal change is discussed in a later section.

Population

- vi. The population of each town gives an indication of the importance of the town to the economy of the Enterprise M3 area.
- vii. There is only one town with a population greater than 100,000 – Basingstoke, which has a population of 110,000. A further four towns have a population of between 50,000 and 100,000 – Andover, Farnborough, Guildford and Woking. There are a further 18 towns with a population between 20,000 and 50,000; eight towns with a population of between 10,000 and 20,000; and two towns with a population of 10,000 and fewer.
- viii. Egham and Guildford have the largest working-age populations, at 70% of the total population each. Nine towns have a greater percentage of their population of working age than the UK, with a further town, Camberley, having the same percentage as the UK (63%). Twenty-three towns have a lower percentage of residents of working age than the UK. Cranleigh and Romsey have the lowest percentage of residents of working age, at 55%.
- ix. Romsey has the greatest percentage of older residents, with 28% of the population aged 65+. A further 17 towns have a greater percentage of their population aged 65+ than the UK (18%). Three towns have the same percentage as the UK, and 12 towns have a lower percentage of population aged 65+ than the UK. Guildford and Stanwell have the lowest percentage, with only 13% of the population aged 65+. This is in-keeping with the working age data, where Guildford has the largest percentage of the population of working age.

Role

- x. Most towns are reported as having a broad set of similar roles. These include: employment; residential (out-commuting); culture; tourism; retail; health; education; and general service centre.
- xi. Bordon/Lindford/Headley includes an Enterprise Zone.
- xii. Other data sets below help to identify those towns which are more focused on employment or residential – see numbers in employment, employment ratio, commuting flows, in-commuting ratio and out-commuting ratio.

Employment

- xiii. The amount of employment in each town gives an indication of the importance of the town to the economy of the Enterprise M3 LEP area.
- xiv. Basingstoke has the largest number of employees, 69,000, followed by Guildford with 58,000. Three towns have employment of between 30,000 and 50,000; five towns have employment between 20,000 and 30,000; nine towns have employment between 10,000 and 20,000; and 14 towns have employment of fewer than 10,000. Tadley has the smallest amount of employment, with 3,000.
- xv. High concentration of employment in sectors in the towns has been noted. A number of towns have a relatively high concentration of employment in Information & Communications, with Chertsey, Egham, Farnborough, Fleet, Godalming and Staines-upon-Thames and Woking all having a Location Quotient of more than 2.0 in this sector i.e. more than double the national average concentration of employment in this sector.
- xvi. A number of key clusters have been reported in the towns by the local authorities. In some towns, particular infrastructure or businesses are driving the development of clusters of economic activity e.g. the University of Southampton Science Park in Romsey or the film studios in Shepperton.

Productivity

- xvii. A productivity index has been calculated by HJA, based on the industrial structure of employment in each town and the relative productivity of that employment (i.e. GVA per worker). This does not give a robust figure for average GVA per worker, but it does give a relative view of the productivity of the business base in each town.
- xviii. Egham has the highest productivity score of all the towns within an index of 1.19, compared to the GB figure of 1.00. This is followed by Aldershot with 1.13, and Sunbury with 1.12. Seventeen towns have a productivity index greater than GB.
- xix. Sixteen towns have a productivity index lower than GB, with Winchester the lowest at 0.88.

Employment ratio

- xx. The employment ratio is calculated by HJA as the employment in the town divided by the population of the town. Whiteley has the highest ratio, of 1.93 i.e. almost twice as many people are employed in the town as live in the town. All other towns have a ratio of less than 1.0.
- xxi. Eighteen towns have an employment ratio greater than 0.46, which is the comparable figure for the UK. 14 towns have an employment ratio less than that of the UK.

JSA claimants

- xxii. One town, Basingstoke, has more than 500 claimants of Job Seekers Allowance (JSA). A further eight towns have more than 100 claimants. Cobham has the fewest, with only 20 JSA claimants.

Commuting flows

- xxiii. Data on in and out-flows of commuters is available from the 2011 Census. Each town has an in-flow and out-flow of commuters. 15 towns have a net in-flow of commuters i.e. in-commuting is greater than out-commuting, with Guildford having the greatest net in-flow of +13,900 (based on a total in-flow of 29,900 and an out-flow of 16,000). 18 towns have a net out-flow of commuters (i.e. out-commuting is greater than in-commuting), with Blackwater/Yateley having the greatest net out-flow of -5,400 (based on an in-flow of 4,300 and an out-flow of 9,700).
- xxiv. An in-commuting ratio has been calculated by HJA as in-commuting as a proportion of total employment in the town, to give an indication of the importance of in-commuting to the workforce of each town. Twenty-five towns have an in-commuting ratio greater than 0.5 i.e. more than half of the employees in the town commute in every day. Eight towns have an in-commuting ratio of less than 0.5.
- xxv. An out-commuting ratio has been calculated by HJA as the level of out-commuting as a percentage of the working age population of the town. This gives an indication of the importance of the town as a residential location for people who work elsewhere. This is the inverse of self-containment. Tadley has the highest out-commuting ratio, of 0.63. Fifteen towns have an out-commuting ratio greater than 0.5 i.e. half or more of the resident working -age population commutes out of the town for work every day. Eighteen towns have an out-commuting ratio of less than 0.5.

Qualifications

- xxvi. Data on qualifications at NVQ4+ (degree equivalent) has been gathered from the Annual Population Survey (2017). Data has been sourced directly from the APS and not all towns have a sufficiently large number of data points, so some results have been suppressed. Haslemere has the largest percentage of its residents qualified to NVQ4+. An additional eight towns have a higher percentage of their population qualified to NVQ4+ than the UK average. Two towns have less than 20% of their population qualified to NVQ4+ level. Data is unavailable for four towns.

Earnings

- xxvii. Data is available on the median gross annual pay of towns' residents (Annual Survey of Hours and Earnings, 2018). The available data is for total jobs i.e. both full- and part-time jobs. Eleven towns have residents with annual gross median earnings above the UK average. Alton has the highest median pay and Chertsey has the lowest with a difference of £9,500 between them.

House prices

- xxviii. Median house prices are available for each of the MSOAs that make up the towns but cannot be aggregated together to give a single value for each town. Therefore, the lowest and highest median MSOA value can be given for each town, or a single value for the towns that comprise only one MSOA. The latest ONS data gives a median house price for the whole Enterprise M3 LEP area of £385,000, although this is based on the old LEP definition which included the New Forest and excluded the southern portions of East Hampshire, Test Valley and Winchester.
- xxix. Nine towns have a lowest median house price that is greater than that for the LEP area i.e. are more expensive than the LEP median. Cobham is the most expensive town, with a median value of

£780,000. 24 towns have a lower minimum median than the LEP area i.e. are less expensive than the LEP area. Andover has the lowest median house price of £190,000.

Housing Affordability

- xxx. A housing affordability ratio has been calculated by dividing the lowest median house price in each town by the annual median gross earnings data of the town residents.
- xxxi. Cobham has the highest housing affordability ratio of 32, which is three times the comparable figure for England (10). Only two towns, Aldershot and Andover, have a ratio below that of England.

Businesses

- xxxii. Basingstoke has the largest number of business units, at 5,100. A further ten towns have more than 2,000 business units, and 16 towns have between 1,000 and 2,000 business units. Six towns have fewer than 1,000 business units, with Stanwell having the lowest figure of 500.

Business floorspace

- xxxiii. Basingstoke has the largest amount of office floorspace, with 390,000 sq m. Two other towns, Farnborough and Guildford, have more than 200,000 sq m. Four towns have between 100,000 sq m and 200,000 sq m, and 16 towns have less than 50,000 sq m of office floorspace. Stanwell has the least, with 500 sq m.
- xxxiv. Andover (720,000 sqm) and Basingstoke (670,000 sq m) have the greatest amount of industrial floorspace. 14 towns have between 100,000 sq m and 300,000 sq m. 12 towns have less than 50,000 sq m, with Cobham having the least, with 8,000 sq m.
- xxxv. Basingstoke (240,000 sq m) and Guildford (215,000 sq m) have the greatest amount of retail floorspace. Four more towns have between 100,000 sq m and 200,000 sq m. 22 towns have less than 50,000 sq m of retail floorspace, with Stanwell having the least at 1,900 sq m.

Business Improvement Districts

- xxxvi. Seven towns have Business Improvement Districts (BIDs). Two are considering or developing BIDs. 15 do not have a BID. Data has not been provided on nine towns.

Hospitals and Education

- xxxvii. Six towns have hospitals. Three towns (Farnham, Guildford and Winchester) have more than one university/higher education institute. A further seven towns have university/HEI campuses.

Historic change

- xxxviii. This section considers indicators of recent change in the towns.

Change in population

- xxxix. The percentage change in the population of each town shows the relative growth or decline of that town. Six towns – Addlestone, Andover, Cobham, Egham, Guildford and Stanwell – experienced population growth of more than 10% between 2011 and 2018.
- xl. The absolute change in the population of each town shows the contribution that each town is making to the overall population change in the Enterprise M3 area. Three towns – Andover, Basingstoke and Guildford – experienced population growth of more than 5,000 residents between 2011 and 2018.

- xli. Four towns – Blackwater/Yateley, Bordon/Lindford/Headley, Shepperton and Tadley – experienced a decline in population over the period between 2011 and 2018. Bordon/Lindford/Headley saw the greatest decline of -600 or -2%.

Change in employment

- xlvi. As with the change in population, it is helpful to consider both the percentage and absolute change in employment. Percentage change gives an indication of the relative growth (or decline) of each town, whilst absolute change shows the change in that town's contribution to the economy of the Enterprise M3 area.
- xlvi. Two towns – Basingstoke and Stanwell – have seen employment growth of more than 10% between 2015 and 2018 (n.b. this is different time period to that for the population change). Cobham also saw employment growth of 8% over this period. Fifteen towns experienced a decline in employment over this period, with three towns – Ashford Shepperton and Tadley – experiencing employment decline of more than 10%.
- xlii. The same data shows that five towns – Basingstoke, Egham, Farnborough, Guildford and Whiteley – experienced growth of more than 1,000 employees. The largest decline in employment was seen in Weybridge which lost nearly 2,000 employees over this period.

Change in employment structure

- xlii. Data on the change in the employment structure in each town is set out. A number of towns have seen significant changes in employment in terms of both increases and decreases. Basingstoke, Camberley, Farnborough, Guildford and Whiteley all saw an increase of at least 1,000 employees in at least one sector (Broad Industrial Group) between 2015 and 2018. Egham, Frimley and Woking saw increases in at least one sector of 1,000 employees, and a decrease of at least 1,000 in another sector. Andover saw a decline of at least 1,000 employees in one sector (Broad Industrial Group) over this period.

Change in business units

- xlii. As with the previous two indicators, it is helpful to consider both the percentage and absolute change in the number of business units in each town.
- xlii. Six towns – Cobham, Godalming, Romsey, Stanwell, Sunbury and Whiteley experienced growth of more than 10% in the number of business units in the town between 2016 and 2019. A further 19 towns saw some increase in the number of business units during this period.
- xlii. Looking at the absolute change in the number of business units, ten towns experienced a growth of more than 100 business units between 2016 and 2019, with Romsey seeing the largest growth, of 550 businesses.
- xlii. Eight towns experienced either no change or a decline in the number of business units between 2016 and 2019, with Shepperton experiencing both the highest percentage decline and numerical decline, with a loss of 19% or 240 business units.

Change in housing stock

- i. Data on the recent change in housing stock is available for some towns in the local authorities' monitoring reports. However, this is not available for all local authority areas, as some report housing completions on a district-wide basis and do not break it down any lower. Data is provided for some towns over a ten year period, whilst it is provided for a single year in other areas.

Classifying towns

- li. In order to understand which towns can contribute to the LIS, and how, we have identified towns that have distinctive functions. We have established which towns function as the main employment and population centres; which function primarily as employment locations; and which function primarily as residential and service centres. Furthermore, we have looked at longitudinal analysis to establish which towns show the strongest signs of economic growth and vitality.
- lii. We have looked for towns that stand out for three main reasons: they rank highly on indicators relative to other towns; they stand out as distinctive from the trend established across the towns; or they rank above a UK benchmark.

Employment and population centres

- liii. The towns that stand out as having a dual role as both an employment and population centre are Camberley, Egham, Frimley, Guildford and Winchester. A further twelve towns stand out on one of the categories used to classify towns as employment and population centres.

Employment centres

- liv. The towns that are notable in this category are: Andover, Basingstoke, Farnborough, Farnham, Guildford, Whiteley, Weybridge, and Woking. A further five towns stand out on at least two of the three indicators used to determine that a town is an employment centre.

Residential and service centres

- lv. Towns that stand out across all categories are Ashford, Farnborough, Romsey, and Whiteley. Six additional towns are notably in the distinctiveness category.

Economic vitality and growth

- lvi. Egham and Farnborough stand out across all indicators in this category. A further four towns are notable across two of the three categories

1 Introduction

- 1.0.1 Hardisty Jones Associates was appointed by Enterprise M3 LEP to undertake a study of 33 of the largest towns in the LEP area.

1.1 Context

- 1.1.1 Enterprise M3 LEP is preparing a Local Industrial Strategy (LIS). The purpose/role of a LIS is to promote productivity by setting out local priorities in cities, towns and rural areas that will help to drive up national productivity.
- 1.1.2 The Enterprise M3 area has relatively high GVA and productivity levels, and its economic geography is characterised by a series of towns rather than a large city or cities. The LEP is seeking to promote 'good growth' in the future, with a challenging economic growth target of 4% per year. To do this, the LEP needs to understand the health of the towns that make up much of the Enterprise M3 area; consider the inter-relationships between the towns; the viability of each individual settlement; and understand the contribution that the towns can make to the ambitious growth target.
- 1.1.3 Spatial development in the Enterprise M3 area is constrained, so there will be a strong emphasis on pushing productivity-led growth. This will be challenging and will need to be approached in an intelligent way, as levels of productivity are already high in the area. High productivity is more typically associated with cities rather than towns, so it is important to understand what is driving the currently high productivity in the Enterprise M3 area (e.g. the sectors that are strong in the local economy, and the relationships to places outside of the Enterprise M3 area), and enhance these factors. This understanding will help to shape future plans for growth and determine how best to support this through pushing productivity even higher.
- 1.1.4 The growth aspirations set out in the Strategic Economic Plan (SEP) for the Enterprise M3 area are based on:
- Encouraging growth and higher density development in towns throughout the Enterprise M3 area, and not just in the north-east
 - More growth in digital and other high value sectors
 - Attracting more 'young urban residents' aged 25 to 34, in particular through improved housing affordability
 - Improving the performance of the towns in the Enterprise M3 area, including more employment growth in the towns
 - Improving productivity, through addressing skills gaps
- 1.1.5 The SEP discusses the need to attract more 'Young Urban Residents' to enable future economic growth, but the challenge of high house prices and poor affordability means that many cannot afford to live here. This affects skill levels in the local workforce, which in-turn affects productivity and economic growth.
- 1.1.6 The SEP identifies the 'growth towns' of Guildford, Woking, Farnborough and Basingstoke; the 'step-up' towns of Staines-upon-Thames, Camberley, Whitehill & Borden, Aldershot and Andover; and the cathedral city of Winchester as particularly important places in the Enterprise M3 area.

- 1.1.7 A number of key sectors are identified in the SEP, in particular the high value sectors of Digital/Data, Defence/Aerospace, Satellite Technology, Business Services and Creative Industries

1.2 Objectives

- 1.2.1 The objectives of this project are to:

- Develop a typology of the towns/settlements and the networks that link them together
- See a longitudinal analysis of each town's performance, to understand how they have grown in the past

- 1.2.2 The medium-term viability of the settlements is not covered in the scope of this particular piece of work.

1.3 Approach

- 1.3.1 The approach to undertaking this work has comprised a number of stages:

- Project initiation, in which the objectives and approach were agreed by the project steering group
- Agreement of the list of 33 towns to be analysed, in consultation with the two County Councils and some of the District Councils
- Defining the functional economic market areas (FEMAs) in the EM3 area
- Data gathering and analysis of the 33 towns
- Consultations with the 13 District Councils in the EM3 area

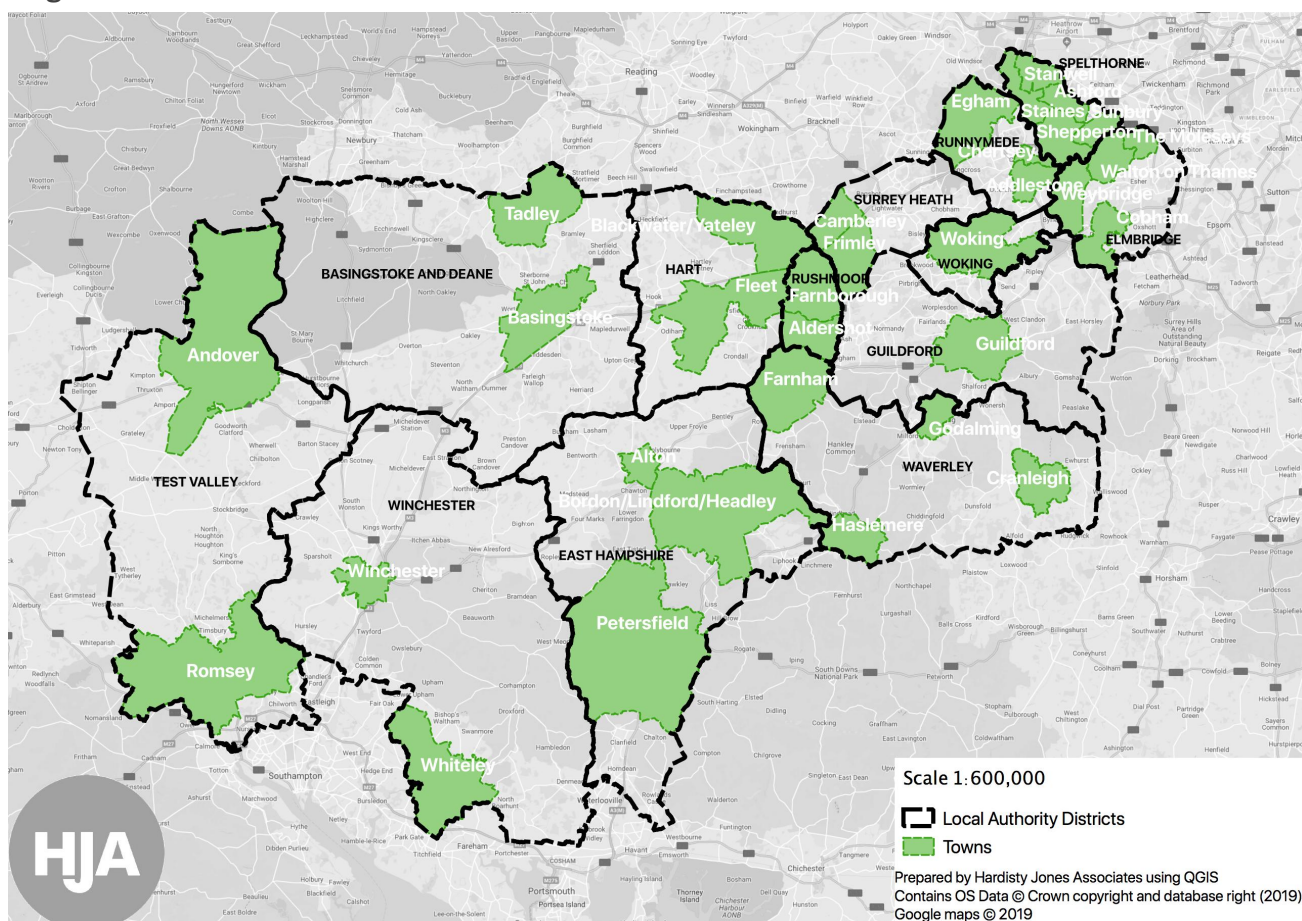
1.4 Defining the towns

- 1.4.1 The initial choice of 33 towns was undertaken by the Enterprise M3 LEP on a population basis. Towns with populations of 10,000 and more were chosen. The initial definitions were determined by Hampshire County Council on behalf of the LEP. These were then reviewed by Surrey County Council and then revised, with input from a number of District Councils. Some towns removed from the original list, but others added, so that an initial list of 33 towns became a final list of 33 towns.

- 1.4.2 The towns were defined on the geographical basis of Mid Layer Super Output Areas (MSOAs) because much Government/ONS data is available at the MSA level, and the boundaries of MSAs tend not to be modified frequently, but typically only once during a ten-year Census period. MSA boundaries have been used in preference to ward boundaries as these are modified more frequently, which makes the longitudinal analysis of data more difficult as the boundaries of towns may change.

- 1.4.3 The 33 towns can be seen in the figure below.

Figure 1.1: Location of the 33 Towns



1.5 Structure of this report

1.5.1 Part 1 of the report (set out in this document) is structured around the two main objectives of the study, namely a typology of the 33 towns that have been investigated, and a review of longitudinal change in the towns. A third section has been included, which considers the growth opportunities and prospects for the towns. The chapters that make up the rest of the report are:

- **Chapter 2** which sets out the functional market areas in the Enterprise M3 area. This moves beyond the characteristics of the towns and explores the functional relationships between towns
- **Chapter 3** which sets out the main characteristics of the towns based on the primary and secondary data that has been collected for the study. The towns can be sorted into types in various ways, using the variety of data sources
- **Chapter 4** which carries out longitudinal analysis of the towns, looking at changes in the characteristics over time
- **Chapter 5** sets out analysis on classifying towns in the Enterprise M3 area
- **Chapter 6** which draws together the findings from the preceding chapters and identifies areas for further research

1.5.2 Part 2 of the report (set out in a separate document) comprises:

- **Chapter 2** which considers information about the future growth opportunities for each town
- **Chapter 3** which sets out the conclusions from both parts of the study

- 1.5.3** There are 14 appendices to this report. Appendices 1 to 13 set out the data profile and consultation information for the towns in each of the 13 Districts in the Enterprise M3 area. Appendix 14 sets out the data used for the analysis of the functional economic market areas in the Enterprise M3 area.

2 Functional Economic Market Areas

- 2.0.1 This chapter defines the functional economic market areas (FEMAs) in the Enterprise M3 LEP area, to help to understand the functional relationships between towns.
- 2.0.2 It is important to start with a consideration of the location of the Enterprise M3 LEP area within the wider South East, to obtain a clearer view of the strategic drivers of the current and future economic growth of the area. Within the South East there will be a number of functional economic market areas (FEMAs), and a number of these will cover the Enterprise M3 area, but may not correspond exactly to its boundaries. It is important to understand how these FEMAs function, and their influence on different parts of the Enterprise M3 area. There are strong commuting flows to places outside the Enterprise M3 area including London, Southampton and Portsmouth, so these need to be considered. Having overlaid FEMAs on to the Enterprise M3 area, the relationship between FEMAs and the towns within them can be seen. This helps to understand the relationships and interactions between the towns in the Enterprise M3 area. Having considered the strategic economic geography, then the current status and recent growth of the towns can be considered, and this will make a lot more sense than starting from the individual towns and working upwards. This will also help to identify the relationships between the towns and their hinterlands.
- 2.0.3 Whilst no formal analysis has been undertaken to define the FEMAs in the Enterprise M3 area, there are several pieces of work that explore the functional relationships between towns in the Enterprise M3 area. These are discussed in more detail at section **Error! Reference source not found.**

2.1 Functional economic market areas

- 2.1.1 A functional economic market area (FEMA) is not constrained by administrative boundaries but reflects the way the economy works; the relationships between where people live and work, the scope of service market areas and catchments. Not only do FEMAs not necessarily map to administrative boundaries, they generally do not have hard and fast boundaries at all. Defining a FEMA is therefore not a precise science. It is about assessing the evidence and devising an area of best fit, appreciating that the boundaries are fuzzy. It is about seeking to appreciate where influence is stronger or weaker. It will also vary depending on the indicator that is being assessed e.g. travel to work or travel to learn.
- 2.1.2 The picture is also becoming ever more complex with the growth of internet based communications and transactions as well as improved transportation leading to global relationships, rather than local, sub-regional or national, as well as diverse patterns of physical activity across multiple locations (e.g. living, working, shopping and taking leisure in very different locations). It also represents a shift from transport infrastructure being a primary determinant, to an increasing role of other networks (e.g. digital telecommunications and knowledge networks).
- 2.1.3 There is no single way of defining FEMAs, and no definitive map of FEMAs, hence the need to undertake this task. Latest Planning Practice Guidance states that: *functional economic market areas can overlap several administrative areas so strategic policy-making authorities may have to carry out assessments of need on a cross-boundary basis with neighbouring authorities within*

their functional economic market area. Local Enterprise Partnerships (and county councils) can play a key role in this process¹.

2.1.4 Planning Practice Guidance suggests that the following can be taken into account when defining a functional economic market area²:

- Extent of any Local Enterprise Partnership within the area
- Travel to work areas
- Housing market area
- Flow of goods, services and information within the local economy
- Service market for consumers
- Administrative area
- Catchment areas of facilities providing cultural and social well-being
- Transport network

2.1.5 The definition of the FEMAs is a small part of this overall project, and there are limited resources available to undertake this task. The focus, therefore, has been on analysing the limited amount of data available on the functional economic drivers in and around the Enterprise M3 area i.e. flows of workers, residents and investment in commercial property.

2.2 Functional data

2.2.1 Within the scope and resources available for this project, we have focused on three functional datasets:

- Travel to Work Areas
- Housing market areas
- Commercial property market areas

Travel to work areas

2.2.2 The Travel to Work Areas (TTWAs) across the UK have been defined by Newcastle University and published by the Government's Office for National Statistics (ONS), using data for the 2011 Census of Population. A TTWA is an area in which *at least 75% of the area's resident workforce work in the area and at least 75% of the people who work in the area also live in the area*³.

2.2.3 The TTWAs that cover the Enterprise M3 area (in whole or in part) are:

- Andover
- Chichester (small part)
- Guildford & Aldershot
- Newbury
- Portsmouth (part)
- Reading (small part)

¹ <https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments#economic-need> Paragraph: 025
Reference ID: 2a-025-20190220 Revision date: 20 02 2019

² <https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments#economic-need> Paragraph: 019
Reference ID: 61-019-20190315 Revision date: 15 03 2019

³ <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/traveltoworkareaaanalysinggreatbritain/2016#definition-of-2011-ttwas>

- Slough & Heathrow (part)
- Southampton (part)

2.2.4 These can be seen in Appendix 14 of this paper.

Housing market areas

2.2.5 Strategic housing market areas were defined in work undertaken by DTZ on the strategic housing market areas in the South West and South East of England⁴. This identified a number of (unnamed) housing market areas, based on a top-down view of the larger area. Since this work was undertaken, most of the lower-tier local authorities have defined their own housing market areas from a bottom-up perspective, usually fitted to local authority boundaries. Some of these housing market areas include places that are outside the Enterprise M3 LEP area. These are:

- Runnymede and Spelthorne
- Hart, Rushmoor and Surrey Heath
- Guildford, Waverley and Woking
- Elmbridge, Epsom & Ewell, Mole Valley and the Royal Borough of Kingston upon Thames
- East Hampshire
- Basingstoke & Deane

2.2.6 Test Valley Borough Council's evidence base refers to the DTZ study, which defined Central Hampshire and New Forest as a strategic housing market area (Basingstoke & Deane, Winchester, New Forest, East Hampshire and Test Valley). Since this was published, East Hampshire and Basingstoke & Deane have declared themselves as separate housing market areas. A separate report has been carried out for Test Valley, so this is considered as a separate housing market area.

2.2.7 Winchester City Council's evidence base also refers to the same document, and the Central Hampshire and New Forest strategic housing market area. A separate report has been carried out for Winchester, so this is considered as a separate housing market area.

2.2.8 The map in Appendix 14 includes both the top-down strategic housing market areas, and the bottom-up housing market areas.

2.3 Commercial property market areas

2.3.1 Work on the commercial property market areas in the Enterprise M3 area has been undertaken by Regeneris for the Enterprise M3 LEP⁵. This covers both the office and industrial markets. Commercial property market areas are "*a set of geographies which broadly reflect the search areas of businesses in different parts of the LEP, and the locational criteria that influence these search areas*" (p.12)

2.3.2 The commercial property market areas defined by Regeneris are:

- Basingstoke & Andover
- Blackwater Valley
- East Hampshire

⁴ DTZ (2007) Central Hampshire and New Forest Strategic Housing Market Assessment based on previous work undertaken on the whole of the South and South East of England

⁵ Regeneris (2016) Enterprise M3 Commercial Property Market Study

- Guildford
- New Forest (no longer part of the Enterprise M3 LEP area)
- Upper M3
- Winchester
- Woking

2.3.3 These can be seen in Appendix 14 of this paper.

2.4 The Functional Economic Market Areas in EM3

2.4.1 GIS analysis has been undertaken to combine the three spatial-economic datasets discussed in the previous section. This has then been combined with a subjective review of the data and maps produced, recognising the ‘fuzzy’ nature of FEMA boundaries.

The functional economic market areas

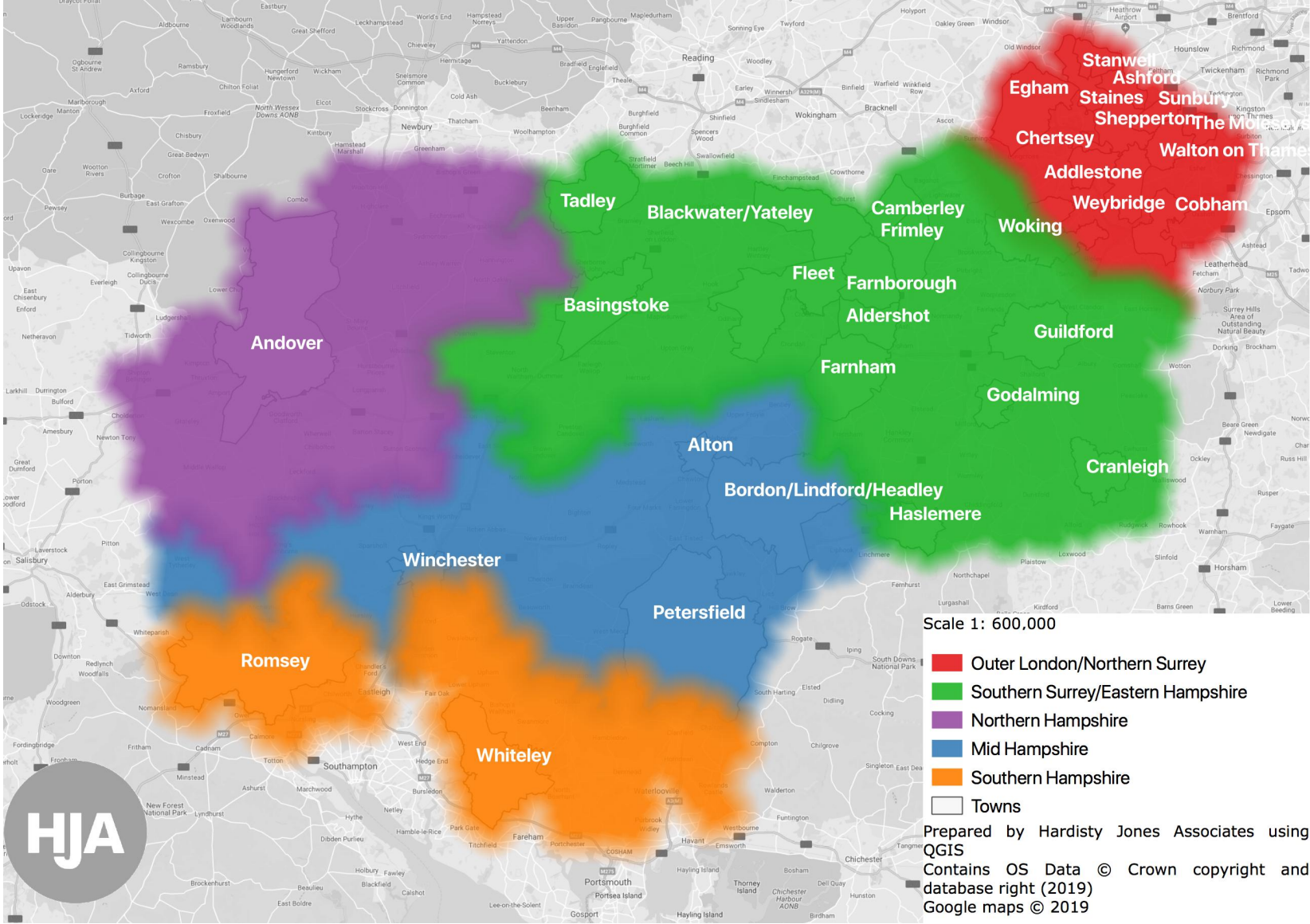
2.4.2 Through this analysis five FEMAs have been identified in the Enterprise M3 LEP area. These are:

- Outer London/Northern Surrey
- Southern Surrey/Eastern Hampshire
- Northern Hampshire
- Mid Hampshire
- Southern Hampshire

2.4.3 These can be seen in the map below.

2.4.4 It should be noted that the Northern Hampshire FEMA plays a key gateway role both east–west on the A303 corridor connecting Wiltshire with Basingstoke, and the M3 and north-south on the A34 corridor which connects the Thames Valley with Southampton and the South Hampshire sub region

Figure 2.1: Map of Functional Economic Market Areas



2.5 Towns and functional economic market areas

- 2.5.1 The purpose of defining the FEMAs is to help to understand the relationships between the towns in the Enterprise M3 LEP area. The following table sets out the towns in each of the FEMAs in the Enterprise M3 LEP area, so there should be some functional relationships between these towns.

Figure 2.2: Towns by Functional Economic Market Area

| Functional economic market area | Towns | Local Authorities |
|--|---|---|
| Outer London/Northern Surrey | Addlestone Ashford Chertsey Cobham East & West Molesey Egham Shepperton Staines-upon-Thames Stanwell Sunbury Walton-on-Thames Weybridge Woking* | Runnymede Spelthorne Runnymede Elmbridge Elmbridge Runnymede Spelthorne Spelthorne Spelthorne Spelthorne Elmbridge Elmbridge Woking |
| Southern Surrey/Eastern Hampshire | Aldershot Basingstoke Blackwater/Yateley Camberley Cranleigh Farnborough Farnham Fleet Frimley Godalming Guildford Haslemere Tadley Woking* | Rushmoor Basingstoke & Deane Hart Surrey Heath Waverley Rushmoor Waverley Hart Surrey Heath Waverley Guildford Waverley Basingstoke & Deane Woking |
| Northern Hampshire | Andover | Test Valley |
| Mid Hampshire | Alton Borden/Lindford/Headley Petersfield Winchester | East Hampshire East Hampshire East Hampshire Winchester |
| Southern Hampshire | Romsey Whiteley | Test Valley Winchester |

* Woking sits on the boundary between two FEMAs

3 Characteristics of the 33 Towns

3.0.1 This chapter sets out an overview of the data that has been collected on the 33 towns in the Enterprise M3 area. More detail on the data is set out in Appendices 1 to 13.

3.1 Population

3.1.1 Data is available on the total population for each town (ONS Population Estimates, 2019). Data is also available for change in population between 2011 and 2018, indexed against each District, the Enterprise M3 area and the LEP.

3.1.2 Data is also available on the age breakdown of the population, focusing on <16, 16 to 64 (working age), and 65+. Indexed against each District, the Enterprise M3 area and the LEP.

3.1.3 Previous work undertaken by Hampshire County Council categorised the towns according to population size. The categories are:

- 50,000+ = major town
- 30,000 – 50,000 = large town
- 20,000 – 30,000 = medium town
- 10,000 – 20,000 = small town

3.1.4 These categories remain valid for the purpose of grouping the towns. The figure below shows the groups of towns by size.

Figure 3.1: Towns by Population

| Town | Local Authority | Population, 2018 |
|-------------------------|---------------------|------------------|
| 50,000+ | | |
| Basingstoke | Basingstoke & Deane | 110,000 |
| Guildford | Guildford | 79,000 |
| Woking | Woking | 78,000 |
| Farnborough | Rushmoor | 58,000 |
| Andover | Test Valley | 57,000 |
| 30,000 - 50,000 | | |
| Farnham | Waverley | 41,000 |
| Fleet | Hart | 38,000 |
| Aldershot | Rushmoor | 37,000 |
| Winchester | Winchester | 36,000 |
| Egham | Runnymede | 36,000 |
| Romsey | Test Valley | 34,000 |
| Frimley | Surrey Heath | 32,000 |
| 20,000 - 30,000 | | |
| Walton-on-Thames | Elmbridge | 29,000 |
| Ashford | Spelthorne | 28,000 |
| Camberley | Surrey Heath | 27,000 |
| Blackwater/Yateley | Hart | 27,000 |
| Bordon/Lindford/Headley | East Hampshire | 26,000 |
| Staines-upon-Thames | Spelthorne | 23,000 |

| Town | Local Authority | Population, 2018 |
|-------------------------|---------------------|------------------|
| Godalming | Waverley | 23,000 |
| Addlestone | Runnymede | 22,000 |
| Weybridge | Elmbridge | 22,000 |
| Sunbury | Spelthorne | 22,000 |
| Petersfield | East Hampshire | 21,000 |
| Less than 20,000 | | |
| East & West Molesey | Elmbridge | 19,000 |
| Alton | East Hampshire | 17,000 |
| Tadley | Basingstoke & Deane | 15,000 |
| Stanwell | Spelthorne | 14,000 |
| Haslemere | Waverley | 13,000 |
| Shepperton | Spelthorne | 13,000 |
| Whiteley | Winchester | 12,000 |
| Cranleigh | Waverley | 11,000 |
| Cobham | Elmbridge | 10,000 |
| Chertsey | Runnymede | 8,000 |

Source: ONS Population Estimates, 2019

- 3.1.5 There is only one town with a population greater than 100,000 – Basingstoke, which has a population of 110,000. A further four towns have a population of between 50,000 and 100,000 – Guildford, Farnborough, Woking and Andover. There are a further 18 towns with a population between 20,000 and 50,000; eight towns with a population of between 10,000 and 20,000; and two towns with a population of 10,000 and fewer.

Population by age cohort

- 3.1.6 We are able to identify how many residents are of working age. We have compared this against the percentage of the population that is of working age in the UK (63%).

Figure 3.2: Working Age Population

| Town | Local Authority | % of population aged 16 to 64 |
|--|---------------------|-------------------------------|
| Working Age Population: Concentration greater than UK | | |
| Egham | Runnymede | 71% |
| Guildford | Guildford | 71% |
| Aldershot | Rushmoor | 67% |
| Winchester | Winchester | 66% |
| Basingstoke | Basingstoke & Deane | 65% |
| Farnborough | Rushmoor | 65% |
| Chertsey | Runnymede | 64% |
| Stanwell | Spelthorne | 64% |
| Staines-upon-Thames | Spelthorne | 64% |
| Working Age Population: Concentration equal to UK | | |
| Camberley | Surrey Heath | 63% |
| Working Age Population: Concentration less than UK | | |
| Woking | Woking | 62% |
| Addlestone | Runnymede | 62% |

| Town | Local Authority | % of population aged 16 to 64 |
|-------------------------|---------------------|-------------------------------|
| Andover | Test Valley | 62% |
| Ashford | Spelthorne | 62% |
| Whiteley | Winchester | 62% |
| Bordon/Lindford/Headley | East Hampshire | 61% |
| Walton-on-Thames | Elmbridge | 61% |
| Blackwater/Yateley | Hart | 61% |
| Frimley | Surrey Heath | 61% |
| East & West Molesey | Elmbridge | 60% |
| Godalming | Waverley | 60% |
| Tadley | Basingstoke & Deane | 60% |
| Fleet | Hart | 60% |
| Sunbury | Spelthorne | 60% |
| Weybridge | Elmbridge | 60% |
| Alton | East Hampshire | 59% |
| Farnham | Waverley | 59% |
| Cobham | Elmbridge | 59% |
| Shepperton | Spelthorne | 58% |
| Petersfield | East Hampshire | 58% |
| Haslemere | Waverley | 58% |
| Romsey | Test Valley | 55% |
| Cranleigh | Waverley | 55% |

Source: ONS Population Estimates, 2019

- 3.1.7 Guildford and Egham have the largest working age populations at 71% each. Nine towns have a greater percentage population of working age than the UK, with Camberley having the same percentage as the UK (63%). Twenty-three towns have a lower percentage of residents of working age than the UK. Cranleigh and Romsey have the lowest percentage of residents of working age, at 55%.
- 3.1.8 From the same dataset we can identify those towns which have a greater percentage of population aged 65+ i.e. older than the standard definition of working age. The UK equivalent is 18%.

Figure 3.3: Population Aged 65+

| Town | Local Authority | % of population aged 65+ |
|--|---------------------|--------------------------|
| 65+ Population: Concentration greater than UK | | |
| Romsey | Test Valley | 28% |
| Cranleigh | Waverley | 26% |
| Shepperton | Spelthorne | 25% |
| Petersfield | East Hampshire | 24% |
| Alton | East Hampshire | 23% |
| Tadley | Basingstoke & Deane | 22% |
| Haslemere | Waverley | 22% |
| Blackwater/Yateley | Hart | 21% |
| Farnham | Waverley | 21% |
| Bordon/Lindford/Headley | East Hampshire | 20% |

| Town | Local Authority | % of population aged 65+ |
|---|---------------------|--------------------------|
| Sunbury | Spelthorne | 20% |
| Fleet | Hart | 20% |
| Frimley | Surrey Heath | 19% |
| East & West Molesey | Elmbridge | 19% |
| Weybridge | Elmbridge | 19% |
| Cobham | Elmbridge | 19% |
| Whiteley | Winchester | 19% |
| Godalming | Waverley | 19% |
| 65+ Population: Concentration equal to UK | | |
| Ashford | Spelthorne | 18% |
| Camberley | Surrey Heath | 18% |
| Addlestone | Runnymede | 18% |
| 65+ Population: Concentration less than UK | | |
| Andover | Test Valley | 17% |
| Staines-upon-Thames | Spelthorne | 17% |
| Walton-on-Thames | Elmbridge | 16% |
| Winchester | Winchester | 16% |
| Chertsey | Runnymede | 16% |
| Woking | Woking | 16% |
| Farnborough | Rushmoor | 15% |
| Basingstoke | Basingstoke & Deane | 14% |
| Egham | Runnymede | 14% |
| Aldershot | Rushmoor | 14% |
| Stanwell | Spelthorne | 13% |
| Guildford | Guildford | 13% |

Source: ONS Population Estimates, 2019

- 3.1.9 Romsey has the greatest percentage of older residents, with 28% of the population aged 65+. A further 17 towns have a greater percentage of their population aged 65+ than the UK. Three towns have the same percentage as the UK, and 12 towns have a lower percentage of population aged 65+ than the UK. Guildford and Stanwell have the lowest percentage, with only 13% of the population aged 65+. This is in-keeping with the working age data, where Guildford has the largest percentage of the population of working age.

3.2 Role of the town

- 3.2.1 Local authority officers were consulted about the role of each of the towns.

Figure 3.4: Role of the Town

| Town | District | Role of the town |
|-------------|---------------------|---|
| Basingstoke | Basingstoke & Deane | Employment, leisure, culture, retail, health and education. High in-commuting |
| Tadley | Basingstoke & Deane | Local service centre. Some employment at AWE. Travel to Basingstoke for higher order services |

| Town | District | Role of the town |
|-------------------------|----------------|--|
| Alton | East Hampshire | Residential. Mixed-use. Employment. Out-commuting. Tourist attractions |
| Bordon/Lindford/Headley | East Hampshire | Significant construction employment. Enterprise Zone and Innovation Centre to be built. No sector focus. Intends to become self-contained town |
| Petersfield | East Hampshire | Market town with industrial and business parks. In- and out-commuting |
| Cobham | Elmbridge | Employment, residential, commuting, service centre, education, leisure, retail |
| East & West Molesey | Elmbridge | Employment, residential, commuting, service centre, education, leisure, retail |
| Walton-on-Thames | Elmbridge | Employment, residential, commuting, service centre, education, leisure, retail |
| Weybridge | Elmbridge | Employment (Brooklands Business Park), residential, commuting, service centre, education, leisure, retail |
| Guildford | Guildford | Employment, Retail, Residential, Leisure, Education, Commuting, Health |
| Blackwater/Yateley | Hart | Residential/commuting. Transport hub. Retail. Leisure (Restaurants, cafes, pubs). Employment |
| Fleet | Hart | Retail. Leisure (Restaurants, cafes, theatre, events). Employment. Service centre for administrative. Residential/commuting |
| Addlestone | Runnymede | Small service centre. Leisure |
| Chertsey | Runnymede | Leisure |
| Egham | Runnymede | Royal Holloway University. Close to Heathrow. Leisure |
| Aldershot | Rushmoor | Employment: small industrial businesses; gaming. In and out-commuting. Residential. Services.. Leisure. Town centre regeneration plans |
| Farnborough | Rushmoor | Residential. Out-commuting. Employment. Retail. Education |
| Ashford | Spelthorne | Retail. Commuting. Education |
| Shepperton | Spelthorne | Shepperton Studios, which has recently been given permission for expansion. Retail. Marina |
| Staines-upon-Thames | Spelthorne | Retail. Commerce. |
| Stanwell | Spelthorne | - |
| Sunbury | Spelthorne | Retail, commercial, small businesses |
| Camberley | Surrey Heath | Employment, leisure, retail |
| Frimley | Surrey Heath | Employment, residential, education, health, commuting, retail, services. |
| Andover | Test Valley | Employment. Commuting. Town centre/retail. |

| Town | District | Role of the town |
|------------|-------------|--|
| Romsey | Test Valley | Historic market town. Service centre. Out-commuting to Southampton, Eastleigh and Winchester |
| Cranleigh | Waverley | Picturesque place to stay. Dunsfold Park nearby – Top Gear and business park. Interesting businesses and opportunities. Lots of housing growth |
| Farnham | Waverley | Employment. Successful business parks. Health care- hospital and services. Educational establishments – numerous schools, sixth form college and University of the Creative Arts. Private schools nearby. Arts – Farnham maltings, Craft Study Centre, Farnham Pottery. Tourism – events, river Wey, North Downs Way, St Swithuns. Retail – 25% independent. |
| Godalming | Waverley | Out-commuting. Two mainline stations. High Street retail. Employment. Charterhouse School |
| Haslemere | Waverley | Nice, small market town. Commuting. Good retail offer. Hotels |
| Whiteley | Winchester | Wickham village is a retail and tourism centre. Shedfield is a village. Whiteley is a residential area, a retail centre and an industrial area. Segensworth is a business park and Business Improvement District |
| Winchester | Winchester | Employment. Education: University of Winchester and School of Art. Leisure and tourism, including food tourism. Retail. Public sector: HCC, prison, hospital, law courts |
| Woking | Woking | Employment. Residential. Retail. Hospitality |

Source: Local Authority consultations

3.3 Employment

- 3.3.1 Data is available on the total employment for each town from the Business Register and Employment Survey (2019). Data is also available for the change in employment between 2015 and 2018, indexed against each District, the Enterprise M3 area and the LEP.
- 3.3.2 Data is also available on employment by sector over the period 2015 to 2018 therefore allowing the calculation of location quotients for each sector in 2018.
- 3.3.3 Key clusters of economic activity have been identified from the consultations with local authority officers.

Figure 3.5: Employment and Key Sectors

| Town | Local Authority | Employment, 2018 | Sectors with LQ of 2.0 and above | Key clusters |
|---------------------------------------|---------------------|------------------|--|---|
| Employment greater than 50,000 | | | | |
| Basingstoke | Basingstoke & Deane | 69,000 | Wholesale Arts, Entertainment, Recreation & Other Services | Priority sectors are: Digital & ICT; Advanced Manufacturing; Professional, Financial & Business Services; and Chemicals & Pharmaceuticals. |
| Guildford | Guildford | 58,000 | None | Digital gaming, health research (human and veterinary), space technology |
| Employment greater than 30,000 | | | | |
| Woking | Woking | 39,000 | Information & Communication Arts, Entertainment, Recreation & Other Services | Oil and gas; financial and professional services; advanced engineering |
| Farnborough | Rushmoor | 34,000 | Information & Communication Professional, Scientific & Technical | Aerospace, advanced engineering, data and communications, gaming |
| Winchester | Winchester | 30,000 | Health | Technology businesses. Cluster of high quality restaurants = tourism |
| Employment greater than 20,000 | | | | |
| Egham | Runnymede | 28,000 | Mining, Quarrying & Utilities Information & Communication | Clustering of HQs |
| Andover | Test Valley | 27,000 | Wholesale Financial & Insurance | Manufacturing |
| Frimley | Surrey Heath | 24,000 | Professional, Scientific & Technical Health | Health, manufacturing and engineering |
| Whiteley | Winchester | 23,000 | Retail Financial & Insurance | n/a |
| Camberley | Surrey Heath | 21,000 | Business Administration & Support Services | Outside of Camberley there are large business HQ's and smaller businesses which trade successfully on an international scale. There are a couple |

| Town | Local Authority | Employment, 2018 | Sectors with LQ of 2.0 and above | Key clusters |
|---------------------------------------|-----------------|------------------|---|--|
| | | | | of business within the town who have international presence. |
| Employment greater than 10,000 | | | | |
| Farnham | Waverley | 19,000 | None | Retail, education, health care, leisure and professional services. Hotels. Sega, gaming company, looking to relocate to the town. Other IT companies in the local area, but not an established gaming cluster. Visitor economy is important. Linked to Farnborough International Exhibition Centre. IT/Health companies – may not be large enough to warrant a cluster |
| Weybridge | Elmbridge | 19,000 | Wholesale | Professional services |
| Aldershot | Rushmoor | 17,000 | Motor Trades Information & Communication Property | n/a |
| Romsey | Test Valley | 14,000 | None | University of Southampton Science Park hosts more than 100 businesses |
| Fleet | Hart | 13,000 | Construction Information & Communication | None |
| Staines-upon-Thames | Spelthorne | 12,000 | Information & Communication | None |
| Godalming | Waverley | 11,000 | Information & Communication | Education. International computer companies. Looking to encourage gaming. Few large employers |
| Petersfield | East Hampshire | 10,000 | Mining, Quarrying & Utilities | Pharmaceuticals, healthcare, engineering and manufacturing |
| Blackwater/Yateley | Hart | 10,000 | Accommodation & Food Services | None |

| Town | Local Authority | Employment, 2018 | Sectors with LQ of 2.0 and above | Key clusters |
|-------------------------------------|-----------------|------------------|--|--|
| Employment fewer than 10,000 | | | | |
| Sunbury | Spelthorne | 9,000 | Construction | High tech businesses on business parks. BP International Centre for Business and Technology. Warehousing related to Heathrow |
| Walton-on-Thames | Elmbridge | 9,000 | Motor Trades | Professional services |
| Alton | East Hampshire | 8,000 | Wholesale | Health, cosmetics, ICT, digital, advanced manufacturing, engineering |
| Ashford | Spelthorne | 8,000 | Mining, Quarrying & Utilities Transport & Storage | None |
| Bordon/Lindford/Headley | East Hampshire | 7,000 | Wholesale | None, although focus on space, satellite, high tech, digital, clean growth |
| Addlestone | Runnymede | 7,000 | Wholesale | N/a |
| Cobham | Elmbridge | 7,000 | Construction Property | Professional services |
| Chertsey | Runnymede | 6,000 | Construction Wholesale Information & Communication Professional, Scientific & Technical | N/a |
| East & West Molesey | Elmbridge | 5,000 | None | Professional services |
| Shepperton | Spelthorne | 5,000 | Information & Communication | Cluster of related businesses around the film studio |
| Haslemere | Waverley | 5,000 | None | Retail. Education. Health |
| Stanwell | Spelthorne | 4,000 | Mining, Quarrying & Utilities Transport & Storage | - |
| Cranleigh | Waverley | 4,000 | None | Retail. Public services. Health. Education. Professional services. |

| Town | Local Authority | Employment, 2018 | Sectors with LQ of 2.0 and above | Key clusters |
|--------|---------------------|------------------|----------------------------------|---|
| | | | | Dunsfold business park – potential future expansion |
| Tadley | Basingstoke & Deane | 3,000 | Construction Motor Trades | AWE |

Source: ONS Business Register and Employment Survey, 2019 and Local Authority consultations

- 3.3.4 Basingstoke has the largest number of employees, 69,000, followed by Guildford with 58,000. Three towns have employment of between 30,000 and 50,000; five towns have employment between 20,000 and 30,000; nine towns have employment between 10,000 and 20,000; and 14 towns have employment of fewer than 10,000. Tadley has the smallest amount of employment, with 3,000.
- 3.3.5 A number of key clusters have been reported by the local authorities. In some towns, particular infrastructure or businesses are driving the development of clusters e.g. the University of Southampton Science Park in Romsey or the film studios in Shepperton.

3.4 Productivity index

- 3.4.1 This has been calculated by HJA based on national figures for GVA per worker by sector applied to the workplace-based employment profile for the town, to create an *indicative* measure of overall GVA for the town. This is then compared to the same *indicative* measure for Great Britain. A value greater than 1.0 suggests higher productivity in the town than in GB

Figure 3.6: Productivity Index

| Town | District | Productivity index |
|-------------------------|---------------------|--------------------|
| Greater than 1.0 | | |
| Egham | Runnymede | 1.19 |
| Aldershot | Rushmoor | 1.13 |
| Sunbury | Spelthorne | 1.12 |
| Whiteley | Winchester | 1.11 |
| Farnborough | Rushmoor | 1.09 |
| Andover | Test Valley | 1.08 |
| Stanwell | Spelthorne | 1.06 |
| Ashford | Spelthorne | 1.05 |
| Fleet | Hart | 1.05 |
| Petersfield | East Hampshire | 1.05 |
| Chertsey | Runnymede | 1.04 |
| Woking | Woking | 1.04 |
| Alton | East Hampshire | 1.03 |
| Basingstoke | Basingstoke & Deane | 1.03 |
| Staines-upon-Thames | Spelthorne | 1.02 |
| Godalming | Waverley | 1.01 |
| Shepperton | Spelthorne | 1.01 |
| Less than 1.0 | | |
| Farnham | Waverley | 0.99 |
| Guildford | Guildford | 0.99 |
| Walton-on-Thames | Elmbridge | 0.99 |
| Bordon/Lindford/Headley | East Hampshire | 0.98 |
| Weybridge | Elmbridge | 0.98 |
| Addlestone | Runnymede | 0.97 |
| Camberley | Surrey Heath | 0.97 |
| Cobham | Elmbridge | 0.97 |
| Romsey | Test Valley | 0.96 |
| East & West Molesey | Elmbridge | 0.93 |
| Cranleigh | Waverley | 0.91 |
| Frimley | Surrey Heath | 0.91 |
| Blackwater/Yateley | Hart | 0.89 |
| Tadley | Basingstoke & Deane | 0.89 |
| Haslemere | Waverley | 0.88 |
| Winchester | Winchester | 0.88 |

Source: HJA calculation using data from ONS Business Register and Employment Survey, 2019

- 3.4.2 The productivity index has been calculated by HJA, based on the industrial structure of employment in each town and the relative productivity of that employment (GVA per worker). This does not give a robust figure for average GVA per worker, but it does give relative information on the productivity of each town.
- 3.4.3 Egham has the highest productivity of all the towns within an index of 1.19, compared to the UK figure of 1.00. This is followed by Aldershot with 1.13, and Sunbury with 1.12. Seventeen towns have a productivity index greater than GB
- 3.4.4 Sixteen towns have a productivity index lower than GB, with Winchester the lowest at 0.88.

3.5 Employment ratio

- 3.5.1 The employment ratio is calculated by HJA as the workplace-based employment in the town divided by the resident population of the town. The value for the UK calculated on the same basis is 0.46.

Figure 3.7: Employment Ratio

| Town | District | Employment ratio |
|---|---------------------|------------------|
| Employment ratio greater than 1.0 | | |
| Whiteley | Winchester | 1.93 |
| Employment ratio greater than 0.46 | | |
| Weybridge | Elmbridge | 0.84 |
| Winchester | Winchester | 0.84 |
| Egham | Runnymede | 0.80 |
| Chertsey | Runnymede | 0.78 |
| Camberley | Surrey Heath | 0.76 |
| Frimley | Surrey Heath | 0.74 |
| Guildford | Guildford | 0.73 |
| Cobham | Elmbridge | 0.64 |
| Basingstoke | Basingstoke & Deane | 0.62 |
| Farnborough | Rushmoor | 0.58 |
| Staines-upon-Thames | Spelthorne | 0.55 |
| Petersfield | East Hampshire | 0.50 |
| Woking | Woking | 0.50 |
| Alton | East Hampshire | 0.49 |
| Andover | Test Valley | 0.48 |
| Godalming | Waverley | 0.48 |
| Farnham | Waverley | 0.47 |
| Aldershot | Rushmoor | 0.47 |
| Employment ratio less than 0.46 | | |
| Sunbury | Spelthorne | 0.41 |
| Romsey | Test Valley | 0.40 |
| Shepperton | Spelthorne | 0.39 |
| Blackwater/Yateley | Hart | 0.38 |
| Haslemere | Waverley | 0.36 |
| Fleet | Hart | 0.34 |

| Town | District | Employment ratio |
|-------------------------|---------------------|------------------|
| Addlestone | Runnymede | 0.32 |
| Cranleigh | Waverley | 0.32 |
| Stanwell | Spelthorne | 0.31 |
| Walton-on-Thames | Elmbridge | 0.30 |
| Bordon/Lindford/Headley | East Hampshire | 0.28 |
| East & West Molesey | Elmbridge | 0.27 |
| Ashford | Spelthorne | 0.27 |
| Tadley | Basingstoke & Deane | 0.20 |

Source: HJA calculation using data from ONS Business Register and Employment Survey, 2019 and ONS Population Estimates, 2019

- 3.5.2 Whiteley has the highest ratio, of 1.93 i.e. almost twice as many people are employed in the town as live in the town. All other towns have a ratio of less than 1.0. Eighteen towns have an employment ratio greater than 0.46, which is the comparable figure for the UK. Fourteen towns have an employment ratio less than 0.46 i.e. less than the ratio for the UK.

3.6 Job Seekers Allowance (JSA) Claimants

- 3.6.1 JSA claimant data is available from the Jobseeker's Allowance with Rates and Proportions dataset (2017). More up to date data is available, but with the introduction of Universal Credit in some Districts within the Enterprise M3 area, data after this period would not be comparable across all towns.
- 3.6.2 The number of JSA claimants as a proportion of the working age resident population of each town has been calculated as this is the official measure used below the regional level and allows for a comparison with other areas sub regional areas. Data is available on the change in JSA claimants 2015 to 2017, indexed against each District, the Enterprise M3 area and the LEP.

Figure 3.8: JSA Claimants

| Town | Local Authority | JSA Claimants, 2017 | Proportion of Working Age Population, 2017 |
|----------------------------|---------------------|---------------------|--|
| Greater than 500 | | | |
| Basingstoke | Basingstoke & Deane | 590 | 0.80% |
| Between 100 and 500 | | | |
| Guildford | Guildford | 260 | 0.50% |
| Woking | Woking | 250 | 0.50% |
| Farnborough | Rushmoor | 220 | 0.60% |
| Andover | Test Valley | 180 | 0.50% |
| Aldershot | Rushmoor | 170 | 0.70% |
| Winchester | Winchester | 110 | 0.50% |
| Ashford | Spelthorne | 100 | 0.60% |
| Camberley | Surrey Heath | 100 | 0.60% |
| Fewer than 100 | | | |
| Farnham | Waverley | 100 | 0.60% |
| Egham | Runnymede | 90 | 0.40% |
| Walton-on-Thames | Elmbridge | 90 | 0.50% |

| Town | Local Authority | JSA Claimants, 2017 | Proportion of Working Age Population, 2017 |
|-------------------------|---------------------|---------------------|--|
| Staines-upon-Thames | Spelthorne | 90 | 0.60% |
| Stanwell | Spelthorne | 90 | 1.00% |
| Fleet | Hart | 80 | 0.40% |
| Sunbury | Spelthorne | 80 | 0.60% |
| Frimley | Surrey Heath | 80 | 0.40% |
| Addlestone | Runnymede | 70 | 0.50% |
| Weybridge | Elmbridge | 70 | 0.50% |
| Alton | East Hampshire | 70 | 0.70% |
| Bordon/Lindford/Headley | East Hampshire | 70 | 0.40% |
| Godalming | Waverley | 70 | 0.50% |
| Romsey | Test Valley | 60 | 0.30% |
| Petersfield | East Hampshire | 60 | 0.50% |
| Blackwater/Yateley | Hart | 60 | 0.30% |
| East & West Molesey | Elmbridge | 50 | 0.40% |
| Tadley | Basingstoke & Deane | 40 | 0.40% |
| Chertsey | Runnymede | 30 | 0.60% |
| Shepperton | Spelthorne | 30 | 0.40% |
| Haslemere | Waverley | 30 | 0.40% |
| Whiteley | Winchester | 20 | 0.30% |
| Cranleigh | Waverley | 20 | 0.30% |
| Cobham | Elmbridge | 20 | 0.30% |

Source: ONS Jobseeker's Allowance with Rates and Proportions, 2017

- 3.6.3 One town, Basingstoke, has more than 500 claimants of JSA. A further eight towns have more than 100 claimants. Whiteley, Cranleigh and Cobham have the fewest, with only 20 JSA claimants.

3.7 Commuting flows

- 3.7.1 Data on in-commuting, out-commuting, and therefore net flow is available from the Census (2011). While dated, this is the only dataset that provides granular detail on commuting flows.

Figure 3.9: Commuting Flows

| Town | Local Authority | In-commuting, 2011 | Out-commuting, 2011 | Net Inflow |
|--|---------------------|--------------------|---------------------|------------|
| Net inflow of commuters (inflow greater than outflow) | | | | |
| Guildford | Guildford | 29,900 | 16,000 | 13,900 |
| Winchester | Winchester | 19,700 | 6,700 | 13,100 |
| Whiteley | Winchester | 11,500 | 3,800 | 7,700 |
| Weybridge | Elmbridge | 13,700 | 6,700 | 6,900 |
| Basingstoke | Basingstoke & Deane | 25,900 | 19,300 | 6,500 |
| Egham | Runnymede | 14,100 | 8,900 | 5,200 |
| Camberley | Surrey Heath | 10,300 | 8,200 | 2,200 |

| Town | Local Authority | In-commuting, 2011 | Out-commuting, 2011 | Net Inflow |
|---|---------------------|--------------------|---------------------|------------|
| Chertsey | Runnymede | 4,700 | 2,900 | 1,800 |
| Frimley | Surrey Heath | 11,900 | 10,500 | 1,400 |
| Petersfield | East Hampshire | 5,900 | 4,600 | 1,300 |
| Cobham | Elmbridge | 3,500 | 2,500 | 1,100 |
| Andover | Test Valley | 9,600 | 9,100 | 500 |
| Staines-upon-Thames | Spelthorne | 8,600 | 8,100 | 500 |
| Farnborough | Rushmoor | 18,700 | 18,300 | 400 |
| Alton | East Hampshire | 4,400 | 4,400 | 40 |
| Net outflow of commuters (outflow greater than inflow) | | | | |
| Godalming | Waverley | 5,900 | 6,600 | -700 |
| Haslemere | Waverley | 2,700 | 3,400 | -700 |
| Cranleigh | Waverley | 1,800 | 2,600 | -800 |
| Farnham | Waverley | 9,300 | 10,400 | -1,100 |
| Shepperton | Spelthorne | 3,300 | 4,600 | -1,300 |
| Aldershot | Rushmoor | 10,400 | 11,900 | -1,500 |
| Sunbury | Spelthorne | 5,700 | 7,500 | -1,800 |
| Romsey | Test Valley | 7,200 | 9,200 | -2,000 |
| Addlestone | Runnymede | 5,000 | 7,300 | -2,300 |
| Ashford | Spelthorne | 7,500 | 10,700 | -3,100 |
| East & West Molesey | Elmbridge | 3,600 | 6,700 | -3,100 |
| Stanwell | Spelthorne | 1,800 | 5,100 | -3,300 |
| Woking | Woking | 18,000 | 21,500 | -3,500 |
| Bordon/Lindford/Headley | East Hampshire | 4,300 | 7,700 | -3,500 |
| Walton-on-Thames | Elmbridge | 6,200 | 9,900 | -3,700 |
| Tadley | Basingstoke & Deane | 1,500 | 5,700 | -4,200 |
| Fleet | Hart | 7,200 | 11,500 | -4,300 |
| Blackwater/Yateley | Hart | 4,300 | 9,700 | -5,400 |

Source: Census of Population, 2011

- 3.7.2 Guildford and Woking both have a net inflow of over 10,000 commuters, with a further nine towns receiving a net inflow of over 1,000 commuters. 15 towns have a net outflow of commuters above 1,000, with Blackwater/Yateley having the largest net outflow of 5,400.

In-commuting ratio

- 3.7.3 This has been calculated by HJA as the number of in-commuters as a proportion of total workplace-based employment in the town. The datasets used are from different time periods, so the results are indicative and should be treated with caution.

Figure 3.10: In-Commuting Ratio

| Town | District | In-commuting ratio |
|-------------------------------|---------------------|--------------------|
| Ratio greater than 0.5 | | |
| Ashford | Spelthorne | 0.99 |
| Weybridge | Elmbridge | 0.73 |
| Chertsey | Runnymede | 0.73 |
| Walton-on-Thames | Elmbridge | 0.73 |
| Addlestone | Runnymede | 0.70 |
| Staines-upon-Thames | Spelthorne | 0.69 |
| East & West Molesey | Elmbridge | 0.68 |
| Shepperton | Spelthorne | 0.67 |
| Winchester | Winchester | 0.65 |
| Sunbury | Spelthorne | 0.63 |
| Aldershot | Rushmoor | 0.60 |
| Bordon/Lindford/Headley | East Hampshire | 0.59 |
| Haslemere | Waverley | 0.58 |
| Petersfield | East Hampshire | 0.57 |
| Farnborough | Rushmoor | 0.55 |
| Fleet | Hart | 0.55 |
| Godalming | Waverley | 0.54 |
| Alton | East Hampshire | 0.53 |
| Romsey | Test Valley | 0.53 |
| Cobham | Elmbridge | 0.52 |
| Guildford | Guildford | 0.52 |
| Cranleigh | Waverley | 0.51 |
| Whiteley | Winchester | 0.51 |
| Camberley | Surrey Heath | 0.50 |
| Frimley | Surrey Heath | 0.50 |
| Ratio less than 0.5 | | |
| Tadley | Basingstoke & Deane | 0.50 |
| Egham | Runnymede | 0.50 |
| Farnham | Waverley | 0.49 |
| Woking | Woking | 0.47 |
| Blackwater/Yateley | Hart | 0.43 |
| Stanwell | Spelthorne | 0.41 |
| Basingstoke | Basingstoke & Deane | 0.38 |
| Andover | Test Valley | 0.35 |

Source: Census of Population, 2011 and ONS Business Register and Employment Survey, 2019

- 3.7.4 Twenty-five towns in total have an in-commuting ratio greater than 0.5 i.e. more than half of the employees in the town commute in every day. Eight towns have an in-commuting ratio of less than 0.5.

Out-commuting

- 3.7.5 This has been calculated by HJA as the number of out-commuters as a percentage of the working age resident population in the town. The datasets used are from different time periods, so the results are indicative and should be treated with caution.

Figure 3.11: Out-Commuting Ratio

| Town | District | Out-commuting ratio |
|-------------------------------|---------------------|---------------------|
| Ratio greater than 0.5 | | |
| Tadley | Basingstoke & Deane | 0.63 |
| Shepperton | Spelthorne | 0.62 |
| Ashford | Spelthorne | 0.61 |
| Blackwater/Yateley | Hart | 0.60 |
| Sunbury | Spelthorne | 0.58 |
| East & West Molesey | Elmbridge | 0.57 |
| Walton-on-Thames | Elmbridge | 0.57 |
| Stanwell | Spelthorne | 0.56 |
| Staines-upon-Thames | Spelthorne | 0.56 |
| Chertsey | Runnymede | 0.55 |
| Frimley | Surrey Heath | 0.54 |
| Addlestone | Runnymede | 0.53 |
| Whiteley | Winchester | 0.52 |
| Fleet | Hart | 0.51 |
| Weybridge | Elmbridge | 0.51 |
| Ratio less than 0.5 | | |
| Romsey | Test Valley | 0.49 |
| Farnborough | Rushmoor | 0.49 |
| Godalming | Waverley | 0.49 |
| Bordon/Lindford/Headley | East Hampshire | 0.48 |
| Camberley | Surrey Heath | 0.48 |
| Aldershot | Rushmoor | 0.48 |
| Haslemere | Waverley | 0.46 |
| Alton | East Hampshire | 0.44 |
| Woking | Woking | 0.44 |
| Farnham | Waverley | 0.43 |
| Cranleigh | Waverley | 0.42 |
| Cobham | Elmbridge | 0.41 |
| Petersfield | East Hampshire | 0.38 |
| Egham | Runnymede | 0.35 |
| Guildford | Guildford | 0.29 |
| Winchester | Winchester | 0.28 |
| Basingstoke | Basingstoke & Deane | 0.27 |
| Andover | Test Valley | 0.26 |

Source: Census of Population, 2011 and Population Estimates, 2019

- 3.7.6 Tadley has the highest out-commuting ratio, of 0.63. Fifteen towns have an out-commuting ratio greater than 0.5 i.e. half or more of the resident working -age population commutes out of the town for work every day. Eighteen towns have an out-commuting ration of less than 0.5.

3.8 Qualifications

- 3.8.1 Data is available for qualifications at NVQ4+ (National Vocational Qualification) level via secure access to the Annual Population Survey (2017). Not all towns have a sufficiently large number of data points and so some results have been suppressed.
- 3.8.2 The value for the UK is 31%.

Figure 3.12: Qualifications

| Town | District | % of people qualified to NVQ4% |
|----------------------------|---------------------|--------------------------------|
| Above the UK figure | | |
| Haslemere | Waverley | 52% |
| Sunbury | Spelthorne | 46% |
| Camberley | Surrey Heath | 46% |
| Weybridge | Elmbridge | 43% |
| East & West Molesey | Elmbridge | 41% |
| Winchester | Winchester | 41% |
| Woking | Woking | 40% |
| Petersfield | East Hampshire | 39% |
| Farnborough | Rushmoor | 38% |
| Godalming | Waverley | 37% |
| Whiteley | Winchester | 35% |
| Alton | East Hampshire | 35% |
| Cranleigh | Waverley | 34% |
| Farnham | Waverley | 33% |
| Guildford | Guildford | 33% |
| Frimley | Surrey Heath | 32% |
| Below the UK figure | | |
| Egham | Runnymede | 29% |
| Bordon/Lindford/Headley | East Hampshire | 29% |
| Addlestone | Runnymede | 29% |
| Ashford | Spelthorne | 29% |
| Staines-upon-Thames | Spelthorne | 28% |
| Romsey | Test Valley | 27% |
| Walton-on-Thames | Elmbridge | 26% |
| Andover | Test Valley | 25% |
| Tadley | Basingstoke & Deane | 25% |
| Blackwater/Yateley | Hart | 23% |
| Basingstoke | Basingstoke & Deane | 22% |
| Fleet | Hart | 19% |
| Aldershot | Rushmoor | 17% |

| Town | District | % of people qualified to NVQ4% |
|--------------------------|------------|--------------------------------|
| No Data Available | | |
| Chertsey | Runnymede | - |
| Cobham | Elmbridge | - |
| Shepperton | Spelthorne | - |
| Staines-upon-Thames | Spelthorne | - |

Source: Annual Population Survey, 2018

- 3.8.3 Haslemere has the largest percentage of its residents qualified to NVQ4+. An additional eight towns have a higher percentage of their population qualified to NVQ4+ than the UK average. Two towns have less than 20% of their population qualified to NVQ4+ level. Data is unavailable for four towns.

3.9 Earnings

- 3.9.1 Data is available on the median gross annual pay of town residents (Annual Survey of Hours and Earnings, 2018) via secure access. The data presented below is for total jobs i.e. both full and part time jobs.
- 3.9.2 The comparable value for the UK is £24,000.

Figure 3.13: Median Annual Gross Pay

| Town | District | Median Annual Gross Pay |
|-----------------------------|---------------------|-------------------------|
| Above the UK Average | | |
| Alton | East Hampshire | £27,600 |
| Sunbury | Spelthorne | £27,400 |
| Weybridge | Elmbridge | £26,900 |
| Cranleigh | Waverley | £26,200 |
| Whiteley | Winchester | £25,400 |
| Addlestone | Runnymede | £25,000 |
| Farnham | Waverley | £24,900 |
| Camberley | Surrey Heath | £24,800 |
| Frimley | Surrey Heath | £24,700 |
| Cobham | Elmbridge | £24,400 |
| Aldershot | Rushmoor | £24,200 |
| Below the UK Average | | |
| Fleet | Hart | £23,900 |
| Staines-upon-Thames | Spelthorne | £23,900 |
| Godalming | Waverley | £23,600 |
| Blackwater/Yateley | Hart | £23,100 |
| Romsey | Test Valley | £22,900 |
| Bordon/Lindford/Headley | East Hampshire | £22,500 |
| Winchester | Winchester | £22,400 |
| Farnborough | Rushmoor | £22,300 |
| Basingstoke | Basingstoke & Deane | £22,100 |
| Petersfield | East Hampshire | £22,000 |

| Town | District | Median Annual Gross Pay |
|---------------------|---------------------|-------------------------|
| Ashford | Spelthorne | £21,900 |
| Stanwell | Spelthorne | £21,600 |
| Tadley | Basingstoke & Deane | £21,100 |
| Guildford | Guildford | £21,100 |
| Woking | Woking | £20,800 |
| Haslemere | Waverley | £20,700 |
| Andover | Test Valley | £20,200 |
| Egham | Runnymede | £20,000 |
| Shepperton | Spelthorne | £19,800 |
| Walton-on-Thames | Elmbridge | £19,600 |
| East & West Molesey | Elmbridge | £19,600 |
| Chertsey | Runnymede | £18,100 |

Source: Annual Survey of Hours and Earnings, 2018

- 3.9.3 Eleven towns have residents with annual gross median earnings above the UK average. Alton has the highest median pay and Chertsey has the lowest with a difference of £9,500 between them.

3.10 House prices

- 3.10.1 Median house price data is available for each MSOA from 1995 to 2018 via the ONS House Price Statistics for Small Areas in England and Wales (2019) dataset. MSOA house prices cannot be aggregated to reflect towns, so the maximum and minimum median house prices from each town definition is presented. Median house prices are for all dwelling types.
- 3.10.2 N.b. data for the Enterprise M3 LEP only uses the old geographical definition of the LEP area, including the New Forest. The median value is £385,000.

Figure 3.14: Median House Prices, 2018

| Town | Local Authority | Minimum Median House Price | Maximum Median House Price |
|--|-----------------|----------------------------|----------------------------|
| Minimum median house price greater than LEP area median value | | | |
| Cobham | Elmbridge | £780,000 | £780,000 |
| Weybridge | Elmbridge | £490,000 | £590,000 |
| Sunbury | Spelthorne | £465,000 | £550,000 |
| East & West Molesey | Elmbridge | £415,000 | £745,000 |
| Shepperton | Spelthorne | £410,000 | £432,000 |
| Cranleigh | Waverley | £410,000 | £410,000 |
| Haslemere | Waverley | £401,000 | £500,000 |
| Godalming | Waverley | £400,000 | £499,000 |
| Winchester | Winchester | £385,000 | £559,000 |
| Minimum median house price less than LEP area median value | | | |
| Farnham | Waverley | £375,000 | £730,000 |
| Petersfield | East Hampshire | £371,000 | £500,000 |
| Walton-on-Thames | Elmbridge | £370,000 | £528,000 |
| Egham | Runnymede | £365,000 | £735,000 |

| Town | Local Authority | Minimum Median House Price | Maximum Median House Price |
|-------------------------|---------------------|----------------------------|----------------------------|
| Guildford | Guildford | £365,000 | £765,000 |
| Staines-upon-Thames | Spelthorne | £355,000 | £442,000 |
| Addlestone | Runnymede | £353,000 | £400,000 |
| Blackwater/Yateley | Hart | £350,000 | £394,000 |
| Fleet | Hart | £350,000 | £515,000 |
| Frimley | Surrey Heath | £350,000 | £448,000 |
| Ashford | Spelthorne | £342,000 | £393,000 |
| Chertsey | Runnymede | £340,000 | £340,000 |
| Stanwell | Spelthorne | £330,000 | £348,000 |
| Alton | East Hampshire | £320,000 | £325,000 |
| Woking | Woking | £320,000 | £660,000 |
| Tadley | Basingstoke & Deane | £310,000 | £365,000 |
| Whiteley | Winchester | £305,000 | £305,000 |
| Camberley | Surrey Heath | £300,000 | £550,000 |
| Romsey | Test Valley | £280,000 | £410,000 |
| Bordon/Lindford/Headley | East Hampshire | £260,000 | £578,000 |
| Farnborough | Rushmoor | £250,000 | £350,000 |
| Basingstoke | Basingstoke & Deane | £235,000 | £398,000 |
| Aldershot | Rushmoor | £223,000 | £329,000 |
| Andover | Test Valley | £190,000 | £285,000 |

Source: ONS House Price Statistics for Small Areas in England and Wales, 2019

*Some towns only cover one MSOA and therefore the maximum and minimum numbers are the same.

- 3.10.3 Nine towns have a lowest median house price that is greater than that for the LEP area i.e. are more expensive than the LEP median. Cobham is the most expensive town, with a median value of £780,000. 24 towns have a lower minimum median than the LEP area i.e. are less expensive than the LEP area. Andover has the lowest median house price of £190,000.

3.11 Housing Affordability

- 3.11.1 A housing affordability ratio has been calculated by dividing the lowest median house price in each town of each by the annual median gross earnings data of the town residents. This data is presented in sections 2.9 and 2.10 above.
- 3.11.2 The comparable value for the UK is unavailable. The comparable figure for England is 10.

Figure 3.15: Housing Affordability

| Town | District | Housing Affordability 2018 |
|-------------------------|---------------------|----------------------------|
| Above England | | |
| Cobham | Elmbridge | 32 |
| East & West Molesey | Elmbridge | 21 |
| Shepperton | Spelthorne | 21 |
| Haslemere | Waverley | 19 |
| Walton-on-Thames | Elmbridge | 19 |
| Chertsey | Runnymede | 19 |
| Egham | Runnymede | 18 |
| Weybridge | Elmbridge | 18 |
| Guildford | Guildford | 17 |
| Winchester | Winchester | 17 |
| Godalming | Waverley | 17 |
| Sunbury | Spelthorne | 17 |
| Petersfield | East Hampshire | 17 |
| Cranleigh | Waverley | 16 |
| Ashford | Spelthorne | 16 |
| Woking | Woking | 15 |
| Stanwell | Spelthorne | 15 |
| Blackwater/Yateley | Hart | 15 |
| Farnham | Waverley | 15 |
| Staines-upon-Thames | Spelthorne | 15 |
| Tadley | Basingstoke & Deane | 15 |
| Fleet | Hart | 15 |
| Frimley | Surrey Heath | 14 |
| Addlestone | Runnymede | 14 |
| Romsey | Test Valley | 12 |
| Camberley | Surrey Heath | 12 |
| Whiteley | Winchester | 12 |
| Alton | East Hampshire | 12 |
| Bordon/Lindford/Headley | East Hampshire | 12 |
| Farnborough | Rushmoor | 11 |
| Basingstoke | Basingstoke & Deane | 11 |
| Below England | | |
| Andover | Test Valley | 9 |
| Aldershot | Rushmoor | 9 |

Source: HJA calculation using data from Annual Survey of Hours and Earnings, 2018 and ONS House Price Statistics for Small Areas in England and Wales, 2019

- 3.11.3 Cobham has the highest housing affordability ratio of 32 which is three times the comparable figure for England. Only two towns, Andover and Aldershot, have a ratio below that of England.

3.12 Businesses

- 3.12.1 Data on the number of local business units is available from UK Business Counts (2019). This shows the change in the number of local business units between 2016 and 2019, indexed against each District, the Enterprise M3 area and the LEP. Data is also available on the number of local business units by broad industrial group 2016 to 2019.

Figure 3.16: Number of Business Units

| Town | Local Authority | Business Units, 2019 |
|--|---------------------|----------------------|
| More than 5,000 business units | | |
| Basingstoke | Basingstoke & Deane | 5,100 |
| More than 2,000 business units | | |
| Guildford | Guildford | 4,600 |
| Woking | Woking | 4,300 |
| Farnham | Waverley | 2,800 |
| Andover | Test Valley | 2,700 |
| Farnborough | Rushmoor | 2,700 |
| Romsey | Test Valley | 2,500 |
| Winchester | Winchester | 2,400 |
| Weybridge | Elmbridge | 2,300 |
| Fleet | Hart | 2,100 |
| Godalming | Waverley | 2,000 |
| More than 1,000 business units | | |
| Camberley | Surrey Heath | 1,900 |
| Egham | Runnymede | 1,900 |
| Walton-on-Thames | Elmbridge | 1,700 |
| Whiteley | Winchester | 1,700 |
| Frimley | Surrey Heath | 1,500 |
| Petersfield | East Hampshire | 1,500 |
| Aldershot | Rushmoor | 1,400 |
| Bordon/Lindford/Headley | East Hampshire | 1,400 |
| Staines-upon-Thames | Spelthorne | 1,400 |
| Ashford | Spelthorne | 1,300 |
| Blackwater/Yateley | Hart | 1,200 |
| East & West Molesey | Elmbridge | 1,200 |
| Addlestone | Runnymede | 1,100 |
| Sunbury | Spelthorne | 1,100 |
| Alton | East Hampshire | 1,000 |
| Shepperton | Spelthorne | 1,000 |
| Fewer than 1,000 business units | | |
| Cobham | Elmbridge | 900 |
| Haslemere | Waverley | 900 |
| Chertsey | Runnymede | 600 |
| Cranleigh | Waverley | 600 |
| Tadley | Basingstoke & Deane | 600 |
| Stanwell | Spelthorne | 500 |

- 3.12.2 Basingstoke has the largest number of business units, at 5,100. A further ten towns have more than 2,000 business units, and 16 towns have between 1,000 and 2,000 business units. Six towns have fewer than 1,000 business units, with Stanwell having the lowest figure of 500.

3.13 Business floorspace

- 3.13.1 Data on total business floorspace is available from the Valuation Office Agency (2019). Floorspace has been analysed by postcode areas and categorised into office, industrial and retail uses.

Office floorspace

Figure 3.17: Office Floorspace

| Town | Local Authority | Office floorspace (sq m) |
|-------------------------------|---------------------|--------------------------|
| More than 200,000 sq m | | |
| Basingstoke | Basingstoke & Deane | 390,100 |
| Farnborough | Rushmoor | 226,600 |
| Guildford | Guildford | 220,000 |
| More than 100,000 sq m | | |
| Woking | Woking | 174,700 |
| Whiteley | Winchester | 132,100 |
| Weybridge | Elmbridge | 131,700 |
| Winchester | Winchester | 102,900 |
| More than 50,000 sq m | | |
| Fleet | Hart | 93,500 |
| Egham | Runnymede | 90,200 |
| Camberley | Surrey Heath | 79,400 |
| Andover | Test Valley | 75,700 |
| Ashford | Spelthorne | 75,400 |
| Aldershot | Rushmoor | 56,200 |
| Addlestone | Runnymede | 55,900 |
| Farnham | Waverley | 52,500 |
| Staines-upon-Thames | Spelthorne | 52,000 |
| Petersfield | East Hampshire | 50,100 |
| Less than 50,000 sq m | | |
| Frimley | Surrey Heath | 49,800 |
| Godalming | Waverley | 42,100 |
| Chertsey | Runnymede | 38,600 |
| Romsey | Test Valley | 38,600 |
| Walton-on-Thames | Elmbridge | 33,700 |
| Alton | East Hampshire | 28,500 |
| Cobham | Elmbridge | 20,600 |
| Blackwater/Yateley | Hart | 16,800 |
| Sunbury | Spelthorne | 11,800 |
| Bordon/Lindford/Headley | East Hampshire | 11,700 |

| Town | Local Authority | Office floorspace (sq m) |
|---------------------|---------------------|--------------------------|
| East & West Molesey | Elmbridge | 10,700 |
| Haslemere | Waverley | 6,600 |
| Cranleigh | Waverley | 4,200 |
| Tadley | Basingstoke & Deane | 3,500 |
| Shepperton | Spelthorne | 2,600 |
| Stanwell | Spelthorne | 500 |

Source: Valuation Office Agency, 2019

- 3.13.2 Basingstoke has the largest amount of office floorspace, with 390,000 sq m. Two other towns, Farnborough and Guildford, have more than 200,000 sq m. Four towns have between 100,000 sq m and 200,000 sq m. 16 towns have less than 50,000 sq m of office floorspace. Stanwell has the least, with 500 sq m.

Industrial floorspace

Figure 3.18: Industrial Floorspace

| Town | Local Authority | Industrial Floorspace (sq m) |
|-------------------------------|---------------------|-------------------------------|
| More than 500,000 sq m | | |
| Andover | Test Valley | 719,800 |
| Basingstoke | Basingstoke & Deane | 670,500 |
| More than 100,000 sq m | | |
| Woking | Woking | 265,600 |
| Romsey | Test Valley | 198,400 |
| Camberley | Surrey Heath | 198,300 |
| Farnborough | Rushmoor | 194,300 |
| Guildford | Guildford | 192,400 |
| Bordon/Lindford/Headley | East Hampshire | 189,600 |
| Aldershot | Rushmoor | 159,100 |
| Weybridge | Elmbridge | 146,900 |
| Winchester | Winchester | 122,900 |
| Farnham | Waverley | 114,700 |
| Whiteley | Winchester | 111,100 |
| Alton | East Hampshire | 107,800 |
| Petersfield | East Hampshire | 106,000 |
| Egham | Runnymede | 102,300 |
| More than 50,000 sq m | | |
| Frimley | Surrey Heath | 92,300 |
| East & West Molesey | Elmbridge | 91,100 |
| Stanwell | Spelthorne | 64,000 |
| Ashford | Spelthorne | 57,500 |
| Walton-on-Thames | Elmbridge | 56,500 |
| Less than 50,000 sq m | | |
| Addlestone | Runnymede | 45,700 |
| Blackwater/Yateley | Hart | 43,000 |

| Town | Local Authority | Industrial Floorspace (sq m) |
|---------------------|---------------------|-------------------------------|
| Fleet | Hart | 41,800 |
| Staines-upon-Thames | Spelthorne | 36,900 |
| Cranleigh | Waverley | 33,600 |
| Chertsey | Runnymede | 27,800 |
| Sunbury | Spelthorne | 25,500 |
| Tadley | Basingstoke & Deane | 22,900 |
| Haslemere | Waverley | 20,100 |
| Godalming | Waverley | 19,400 |
| Shepperton | Spelthorne | 15,300 |
| Cobham | Elmbridge | 8,100 |

Source: Valuation Office Agency, 2019

- 3.13.3 Andover (720,000 sqm) and Basingstoke (670,000 sq m) have the greatest amount of industrial floorspace. 14 towns have between 100,000 sq m and 300,000 sq m. 12 towns have less than 50,000 sq m, with Cobham having the least, with 8,000 sq m.

Retail floorspace

Figure 3.19: Retail Floorspace

| Town | Local Authority | Retail Floorspace (sq m) |
|-------------------------------|---------------------|--------------------------|
| More than 200,000 sq m | | |
| Basingstoke | Basingstoke & Deane | 230,700 |
| Guildford | Guildford | 214,900 |
| More than 100,000 sq m | | |
| Woking | Woking | 142,100 |
| Farnborough | Rushmoor | 116,400 |
| Andover | Test Valley | 108,500 |
| Winchester | Winchester | 103,600 |
| More than 50,000 sq m | | |
| Camberley | Surrey Heath | 98,200 |
| Farnham | Waverley | 80,500 |
| Aldershot | Rushmoor | 78,000 |
| Weybridge | Elmbridge | 57,600 |
| Walton-on-Thames | Elmbridge | 56,500 |
| Less than 50,000 sq m | | |
| Whiteley | Winchester | 48,700 |
| Fleet | Hart | 47,400 |
| Staines-upon-Thames | Spelthorne | 42,500 |
| Romsey | Test Valley | 41,200 |
| Godalming | Waverley | 40,200 |
| Ashford | Spelthorne | 39,900 |
| Alton | East Hampshire | 37,600 |
| Addlestone | Runnymede | 35,000 |
| Petersfield | East Hampshire | 34,200 |

| Town | Local Authority | Retail Floorspace (sq m) |
|-------------------------|---------------------|--------------------------|
| Cranleigh | Waverley | 28,800 |
| Bordon/Lindford/Headley | East Hampshire | 28,600 |
| Egham | Runnymede | 25,600 |
| Cobham | Elmbridge | 25,600 |
| Haslemere | Waverley | 24,000 |
| East & West Molesey | Elmbridge | 20,400 |
| Blackwater/Yateley | Hart | 18,200 |
| Tadley | Basingstoke & Deane | 17,100 |
| Chertsey | Runnymede | 16,600 |
| Frimley | Surrey Heath | 14,100 |
| Sunbury | Spelthorne | 13,000 |
| Shepperton | Spelthorne | 10,200 |
| Stanwell | Spelthorne | 1,900 |

Source: Valuation Office Agency, 2019

- 3.13.4 Basingstoke (240,000 sq m) and Guildford (215,000 sq m) have the greatest amount of retail floorspace. Four more towns have between 100,000 sq m and 200,000 sq m. 22 towns have less than 50,000 sq m of retail floorspace, with Stanwell having the least at 1,900 sq m.

3.14 Business Improvement Districts

- 3.14.1 This data is collected from consultations with local authority officers.

Figure 3.20: Business Improvement Districts

| Town | District | Business Improvement District |
|----------------------------------|---------------------|--|
| Yes | | |
| Whiteley | Winchester | Yes. Segensworth BID is in its third term |
| Winchester | Winchester | Yes. 750 levy payers |
| Guildford | Guildford | Yes. 600 levy payers |
| Basingstoke | Basingstoke & Deane | Yes. 450 levy payers |
| Fleet | Hart | Yes |
| Staines-upon-Thames | Spelthorne | Yes |
| Camberley | Surrey Heath | Collectively Camberley is now in its second term and is a successful BID. They run events and business support across the town |
| Andover | Test Valley | Yes |
| No, but considering a BID | | |
| Cobham | Elmbridge | Exploring the possibility of a BID |
| Walton-on-Thames | Elmbridge | Currently developing a BID |
| Cranleigh | Waverley | Really keen to develop a BID as Parish Council not particularly active |

| Town | District | Business Improvement District |
|-------------------------|---------------------|--|
| Farnham | Waverley | Council has commissioned a feasibility study. Likely to be one in Farnham in the future. Chamber is supportive |
| Godalming | Waverley | Feasibility study work undertaken. Looking to develop a BID. Town Council is quite active |
| Haslemere | Waverley | Feasibility study work undertaken. Looking to develop a BID. |
| No BID | | |
| Weybridge | Elmbridge | No |
| Egham | Runnymede | No |
| Tadley | Basingstoke & Deane | No |
| Alton | East Hampshire | No |
| Bordon/Lindford/Headley | East Hampshire | No |
| Petersfield | East Hampshire | No |
| East & West Molesey | Elmbridge | No |
| Blackwater/Yateley | Hart | No |
| Aldershot | Rushmoor | No |
| Farnborough | Rushmoor | No |
| Ashford | Spelthorne | No |
| Shepperton | Spelthorne | No |
| Sunbury | Spelthorne | No |
| Frimley | Surrey Heath | No |
| Romsey | Test Valley | No |
| Woking | Woking | No |
| Don't know | | |
| Addlestone | Runnymede | n/a |
| Chertsey | Runnymede | n/a |
| Stanwell | Spelthorne | n/a |

Source: Local Authority consultations

- 3.14.2 Seven towns have Business Improvement Districts (BIDs). Six are considering or developing BIDs. Sixteen do not have a BID. Data has not been provided on three towns.

3.15 Hospitals

- 3.15.1 Note that Surrey has another hospital (St Peter's hospital) that falls just outside the towns of Addlestone and Chertsey as defined for this report. Similarly, Ashford hospital falls into neighbouring Stanwell using the town definitions as shown elsewhere in this report.

Figure 3.21: Towns with Hospitals

| Town | District | Hospital |
|-------------|---------------------|-------------------------------|
| Yes | | |
| Andover | Test Valley | Andover War Memorial |
| Basingstoke | Basingstoke & Deane | Basingstoke & North Hampshire |

| Town | District | Hospital |
|-------------------------|---------------------|--------------------------|
| Frimley | Surrey Heath | Frimley Park |
| Guildford | Guildford | Royal Surrey County |
| Stanwell | Spelthorne | Ashford |
| Winchester | Winchester | Royal Hampshire County |
| Fleet | Hart | Fleet Community Hospital |
| No | | |
| Addlestone | Runnymede | - |
| Aldershot | Rushmoor | - |
| Alton | East Hampshire | - |
| Ashford | Spelthorne | - |
| Blackwater/Yateley | Hart | - |
| Bordon/Lindford/Headley | East Hampshire | - |
| Camberley | Surrey Heath | - |
| Chertsey | Runnymede | - |
| Cobham | Elmbridge | - |
| Cranleigh | Waverley | - |
| East & West Molesey | Elmbridge | - |
| Egham | Runnymede | - |
| Farnborough | Rushmoor | - |
| Farnham | Waverley | - |
| Godalming | Waverley | - |
| Haslemere | Waverley | - |
| Petersfield | East Hampshire | - |
| Romsey | Test Valley | - |
| Shepperton | Spelthorne | - |
| Whiteley | Winchester | - |
| Staines-upon-Thames | Spelthorne | - |
| Sunbury | Spelthorne | - |
| Tadley | Basingstoke & Deane | - |
| Walton-on-Thames | Elmbridge | - |
| Weybridge | Elmbridge | - |
| Woking | Woking | - |

Source: <https://www.hampshirehospitals.nhs.uk> and <https://www.visitsurrey.com/visitor-information/medical-care/hospitals>

3.15.2 Six towns in the area have a significant hospital.

3.16 Education Assets

Figure 3.22: Universities and Higher Education Institutes

| Town | District | University/HEI |
|-------------------------|---------------------|--|
| More than one | | |
| Guildford | Guildford | The Academy of Contemporary Music Guildford College University of Surrey |
| Farnham | Waverley | Farnham College University for the Creative Arts |
| Winchester | Winchester | University of Winchester University of Southampton |
| One | | |
| Andover | Test Valley | Andover College |
| Ashford | Spelthorne | Brooklands College* |
| Basingstoke | Basingstoke & Deane | Basingstoke College of Technology |
| Egham | Runnymede | Royal Holloway |
| Farnborough | Rushmoor | Farnborough College of Technology |
| Weybridge | Elmbridge | Brooklands College* |
| None | | |
| Addlestone | Runnymede | - |
| Aldershot | Rushmoor | - |
| Alton | East Hampshire | - |
| Blackwater/Yateley | Hart | - |
| Bordon/Lindford/Headley | East Hampshire | - |
| Camberley | Surrey Heath | - |
| Chertsey | Runnymede | - |
| Cobham | Elmbridge | - |
| Cranleigh | Waverley | - |
| East & West Molesey | Elmbridge | - |
| Fleet | Hart | - |
| Frimley | Surrey Heath | - |
| Godalming | Waverley | - |
| Haslemere | Waverley | - |
| Petersfield | East Hampshire | - |
| Romsey | Test Valley | - |
| Shepperton | Spelthorne | - |
| Whiteley | Winchester | - |
| Staines-upon-Thames | Spelthorne | - |
| Stanwell | Spelthorne | - |
| Sunbury | Spelthorne | - |
| Tadley | Basingstoke & Deane | - |
| Walton-on-Thames | Elmbridge | - |
| Woking | Woking | - |

* Brooklands College has two campuses

- 3.16.1 Guildford has one college and two universities, with the University of Law falling just outside the town border. Farnham has a college and a university, and a further seven towns have either a college or university.

4 Longitudinal Analysis of the 33 Towns

- 4.0.1 This chapter sets out data on the longitudinal change in the towns over time. The time periods vary according to the availability of datasets at the MSOA level.

4.1 Change in population

- 4.1.1 Two measures of the change in population are considered – the percentage change in population and the absolute change in population. Both give an indication of the change in each town, but each can be used for a different purpose.
- 4.1.2 The percentage change in population provides an indication of the impact on an individual town, with six towns – Addlestone, Andover, Cobham, Egham, Guildford and Stanwell – seeing growth of more than +10% in population over this period. Four towns – Blackwater/Yateley, Tadley, Shepperton and Bordon/Lindford/Headley - have seen a decline in population over this period.
- 4.1.3 The absolute change in population gives a better indication that the change in a town is making to the overall growth of the Enterprise M3 area. Three towns – Guildford, Andover and Basingstoke – have seen population growth of more than +5,000 over the period.

Figure 4.1: Percentage Change in Population 2011 to 2018

| Town | District | % change in population, 2011 to 2018 |
|-----------------------------|---------------------|--------------------------------------|
| More than +10% | | |
| Andover | Test Valley | 14% |
| Guildford | Guildford | 12% |
| Addlestone | Runnymede | 12% |
| Egham | Runnymede | 11% |
| Stanwell | Spelthorne | 11% |
| Cobham | Elmbridge | 10% |
| Between +5% and +10% | | |
| Chertsey | Runnymede | 8% |
| Winchester | Winchester | 7% |
| Basingstoke | Basingstoke & Deane | 6% |
| Fleet | Hart | 6% |
| Whiteley | Winchester | 5% |
| Camberley | Surrey Heath | 5% |
| Romsey | Test Valley | 5% |
| Up to +5% | | |
| Cranleigh | Waverley | 4% |
| Walton-on-Thames | Elmbridge | 4% |
| Staines-upon-Thames | Spelthorne | 4% |
| Farnham | Waverley | 4% |
| Sunbury | Spelthorne | 3% |
| Godalming | Waverley | 3% |
| Alton | East Hampshire | 3% |
| Haslemere | Waverley | 3% |

| Town | District | % change in population, 2011 to 2018 |
|------------------------------|---------------------|---|
| Ashford | Spelthorne | 3% |
| Frimley | Surrey Heath | 2% |
| Petersfield | East Hampshire | 2% |
| Woking | Woking | 2% |
| Aldershot | Rushmoor | 2% |
| East & West Molesey | Elmbridge | 1% |
| Weybridge | Elmbridge | 1% |
| Farnborough | Rushmoor | 0% |
| Cranleigh | Waverley | 4% |
| Walton-on-Thames | Elmbridge | 4% |
| Decline in population | | |
| Blackwater/Yateley | Hart | -1% |
| Tadley | Basingstoke & Deane | -2% |
| Shepperton | Spelthorne | -2% |
| Bordon/Lindford/Headley | East Hampshire | -2% |

Source: ONS Population Estimates, 2019

Figure 4.2: Absolute Change in Population 2011 to 2018

| Town | District | Absolute change in population, 2011 to 2018 |
|----------------------------------|---------------------|---|
| More than +5,000 | | |
| Guildford | Guildford | 8,600 |
| Andover | Test Valley | 7,000 |
| Basingstoke | Basingstoke & Deane | 6,200 |
| Between +1,000 and +5,000 | | |
| Egham | Runnymede | 3,600 |
| Winchester | Winchester | 2,400 |
| Addlestone | Runnymede | 2,300 |
| Fleet | Hart | 2,100 |
| Romsey | Test Valley | 1,500 |
| Woking | Woking | 1,500 |
| Farnham | Waverley | 1,400 |
| Stanwell | Spelthorne | 1,400 |
| Camberley | Surrey Heath | 1,200 |
| Walton-on-Thames | Elmbridge | 1,200 |
| Cobham | Elmbridge | 1,000 |
| Up to +1,000 | | |
| Staines-upon-Thames | Spelthorne | 900 |
| Aldershot | Rushmoor | 700 |
| Ashford | Spelthorne | 700 |
| Frimley | Surrey Heath | 700 |
| Godalming | Waverley | 700 |

| Town | District | Absolute change in population, 2011 to 2018 |
|------------------------------|---------------------|---|
| Sunbury | Spelthorne | 700 |
| Chertsey | Runnymede | 600 |
| Whiteley | Winchester | 600 |
| Alton | East Hampshire | 500 |
| Cranleigh | Waverley | 500 |
| Petersfield | East Hampshire | 500 |
| Haslemere | Waverley | 400 |
| East & West Molesey | Elmbridge | 200 |
| Weybridge | Elmbridge | 200 |
| Farnborough | Rushmoor | 100 |
| Decline in population | | |
| Blackwater/Yateley | Hart | -200 |
| Shepperton | Spelthorne | -200 |
| Tadley | Basingstoke & Deane | -300 |
| Bordon/Lindford/Headley | East Hampshire | -600 |

Source: ONS Population Estimates, 2019

4.2 Change in employment

- 4.2.1 In common with the change in population, the change in employment can be considered in terms of both percentage change and absolute change.

Figure 4.3: Percentage Change in Employment, 2015 to 2018

| Town | District | % change in employment, 2015 to 2018 |
|---|---------------------|--------------------------------------|
| More than +10% | | |
| Stanwell | Spelthorne | 22% |
| Basingstoke | Basingstoke & Deane | 12% |
| Increase of between +5% and +10% | | |
| Whiteley | Winchester | 8% |
| Farnborough | Rushmoor | 7% |
| Guildford | Guildford | 7% |
| Romsey | Test Valley | 5% |
| Egham | Runnymede | 5% |
| Increase of up to 5% | | |
| Staines-upon-Thames | Spelthorne | 4% |
| Frimley | Surrey Heath | 4% |
| Cobham | Elmbridge | 2% |
| Blackwater/Yateley | Hart | 2% |
| Sunbury | Spelthorne | 2% |
| Farnham | Waverley | 1% |
| Camberley | Surrey Heath | 1% |
| Petersfield | East Hampshire | 0% |

| Town | District | % change in employment, 2015 to 2018 |
|----------------------------------|---------------------|--------------------------------------|
| Decline in employment | | |
| Woking | Woking | -2% |
| Godalming | Waverley | -2% |
| Winchester | Winchester | -4% |
| Bordon/Lindford/Headley | East Hampshire | -4% |
| Chertsey | Runnymede | -4% |
| East & West Molesey | Elmbridge | -4% |
| Andover | Test Valley | -5% |
| Cranleigh | Waverley | -6% |
| Alton | East Hampshire | -6% |
| Aldershot | Rushmoor | -7% |
| Fleet | Hart | -8% |
| Weybridge | Elmbridge | -9% |
| Addlestone | Runnymede | -9% |
| Haslemere | Waverley | -9% |
| Walton-on-Thames | Elmbridge | -9% |
| Decline of more than -10% | | |
| Tadley | Basingstoke & Deane | -10% |
| Shepperton | Spelthorne | -13% |
| Ashford | Spelthorne | -16% |

Source: ONS Business Register and Employment Survey, 2019

- 4.2.2 Two towns – Stanwell and Basingstoke – have seen employment growth of more than 10% between 2015 and 2018 (n.b. this is different time period to that for the population change). A further five towns saw an increase of between 5% and 10%. Fifteen towns experienced a decline in employment over this period, with three towns – Tadley, Shepperton and Ashford – experiencing employment decline of more than 10%.
- 4.2.3 The same data shows that five towns – Basingstoke, Guildford, Farnborough, Whiteley and Egham – experience growth of more than 1,000 employees. The largest decline in employment was seen in Weybridge which lost nearly 2,000 employees over this period.

Figure 4.4: Absolute Change in Employment, 2015 to 2018

| Town | District | Absolute change in employment, 2015 to 2018 |
|------------------------------|---------------------|---|
| More than +1,000 | | |
| Basingstoke | Basingstoke & Deane | 7,100 |
| Guildford | Guildford | 3,800 |
| Farnborough | Rushmoor | 2,300 |
| Whiteley | Winchester | 1,700 |
| Egham | Runnymede | 1,300 |
| Growth of up to 1,000 | | |
| Frimley | Surrey Heath | 800 |
| Stanwell | Spelthorne | 800 |

| Town | District | Absolute change in employment, 2015 to 2018 |
|------------------------------------|---------------------|---|
| Romsey | Test Valley | 700 |
| Staines-upon-Thames | Spelthorne | 500 |
| Blackwater/Yateley | Hart | 200 |
| Cobham | Elmbridge | 200 |
| Farnham | Waverley | 200 |
| Sunbury | Spelthorne | 200 |
| Camberley | Surrey Heath | 100 |
| Petersfield | East Hampshire | <100 |
| Decline in employment | | |
| Cranleigh | Waverley | -200 |
| East & West Molesey | Elmbridge | -200 |
| Bordon/Lindford/Headley | East Hampshire | -300 |
| Chertsey | Runnymede | -300 |
| Godalming | Waverley | -300 |
| Tadley | Basingstoke & Deane | -300 |
| Haslemere | Waverley | -500 |
| Alton | East Hampshire | -600 |
| Addlestone | Runnymede | -700 |
| Shepperton | Spelthorne | -700 |
| Woking | Woking | -700 |
| Walton-on-Thames | Elmbridge | -900 |
| Decline of more than -1,000 | | |
| Fleet | Hart | -1,100 |
| Winchester | Winchester | -1,100 |
| Aldershot | Rushmoor | -1,200 |
| Andover | Test Valley | -1,400 |
| Ashford | Spelthorne | -1,500 |
| Weybridge | Elmbridge | -1,800 |

Source: ONS Business Register and Employment Survey, 2019

Change in employment structure

- 4.2.4 Ten towns have seen a change in the number of people in employment in at least three broad industrial groups of 500 or more over the period between 2015 and 2018. Ten towns have seen a change in between one and two broad industrial groups and 13 towns have seen no large movements in employment.
- 4.2.5 Changes were most often seen in the Business Administration & Support Services and Professional, Scientific & Technical sectors. Both sectors had five towns with movements greater than 1,000 (three positive and two negative in both sectors).

Figure 4.5: Large Changes in Employment by Sector between 2015 and 2018

| Town | District | Sectors experiencing an absolute change in employment $\geq 1,000$ | Sectors experiencing an absolute change in employment ≥ 500 |
|--|---------------------|--|---|
| Change in three or more sectors | | | |
| Basingstoke | Basingstoke & Deane | Business Administration & Support Services (+1,500) Health (+1,000) Arts, Entertainment, Recreation & Other Services (+3,500) | Construction (+500) Transport & Storage (+750) Professional, Scientific & Technical (+500) Education (-500) |
| Guildford | Guildford | Professional, Scientific & Technical (+1,000) Education (+1,000) Health (+1,000) | Manufacturing (+500) Wholesale (+750) Information & Communication (+500) Arts, Entertainment, Recreation & Other Services (-500) |
| Egham | Runnymede | Mining, Quarrying & Utilities (-3,500) Information & Communication (+1,500) Business Administration & Support Services (+1,000) Education (1,500) | Financial & Insurance (+500) Arts, Entertainment, Recreation & Other Services (+500) |
| Frimley | Surrey Heath | Construction (+1,500) | Retail (+800) Information & Communication |

| Town | District | Sectors experiencing an absolute change in employment $\geq 1,000$ | Sectors experiencing an absolute change in employment ≥ 500 |
|-----------|-------------|---|--|
| | | Professional, Scientific & Technical (+1,000) Business Administration & Support Services (-2,500) Health (+1,000) | (-550) |
| Woking | Woking | Manufacturing (+1,000) Professional, Scientific & Technical (-1,000) | Retail (-500) Health (-500) |
| Aldershot | Rushmoor | | Information & Communication (-500) Professional, Scientific & Technical (+500) Business Administration & Support Services (-750) |
| Andover | Test Valley | Business Administration & Support Services (-1,250) | Manufacturing (+500) Retail (+500) |
| Fleet | Hart | | Construction (800) Accommodation & Food Services (-750) Information & Communication (-500) |

| Town | District | Sectors experiencing an absolute change in employment $\geq 1,000$ | Sectors experiencing an absolute change in employment ≥ 500 |
|------------------------------------|--------------|--|---|
| Whiteley | Winchester | Retail (+1,000) | Professional, Scientific & Technical (+500) Business Administration & Support Services (+500) |
| Winchester | Winchester | | Retail (-500) Professional, Scientific & Technical (+500) Arts, Entertainment, Recreation & Other Services (-500) |
| Change in up to two sectors | | | |
| Blackwater/Yateley | Hart | | Professional, Scientific & Technical (-600) Business Administration & Support Services (+950) |
| Camberley | Surrey Heath | Business Administration & Support Services (+1,000) | Information & Communication (-950) |
| Farnborough | Rushmoor | Professional, Scientific & Technical (+1,500) | Business Administration & Support Services (+500) |
| Staines-upon-Thames | Spelthorne | | Information & Communication (+500) Business Administration & Support Services (+750) |

| Town | District | Sectors experiencing an absolute change in employment $\geq 1,000$ | Sectors experiencing an absolute change in employment ≥ 500 |
|---|---------------------|--|--|
| Weybridge | Elmbridge | | Professional, Scientific & Technical (-1,000) Business Administration & Support Services (-500) |
| Cobham | Elmbridge | | Health (+550) |
| Farnham | Waverley | | Business Administration & Support Services (+500) |
| Godalming | Waverley | | Business Administration & Support Services (+500) |
| Romsey | Test Valley | | Professional, Scientific & Technical (+500) |
| Sunbury | Spelthorne | | Manufacturing (-500) |
| No significant change in any sectors | | | |
| Addlestone | Runnymede | - | - |
| Alton | East Hampshire | - | - |
| Ashford | Spelthorne | - | - |
| Bordon/Lindford/Headley | East Hampshire | - | - |
| Chertsey | Runnymede | - | - |
| Cranleigh | Waverley | - | - |
| East & West Molesey | Elmbridge | - | - |
| Haslemere | Waverley | - | - |
| Petersfield | East Hampshire | - | - |
| Shepperton | Spelthorne | - | - |
| Stanwell | Spelthorne | - | - |
| Tadley | Basingstoke & Deane | - | - |
| Walton-on-Thames | Elmbridge | - | - |

Source: ONS Business Register and Employment Survey, 2019

Change in business units

- lvii. Six towns – Cobham, Godalming, Romsey, Stanwell, Sunbury and Whiteley experienced growth of more than 10% in the number of business units in the town between 2016 and 2019. A further 19 towns saw some increase in the number of business units during this period. Romsey saw the largest increase in both the percentage and absolute number of businesses located in the town.
- lviii. Eight towns experienced either no change or a decline in the number of business units between 2016 and 2019, with Shepperton experiencing both the highest percentage decline and numerical decline, with a loss of 19% or 240 business units.

Figure 4.6: Percentage Change in Number of Business Units, 2016 to 2019

| Town | District | % change in business units, 2019 |
|---|---------------------|----------------------------------|
| More than +10% | | |
| Romsey | Test Valley | 28% |
| Whiteley | Winchester | 16% |
| Cobham | Elmbridge | 12% |
| Godalming | Waverley | 11% |
| Stanwell | Spelthorne | 11% |
| Sunbury | Spelthorne | 10% |
| Growth of +5% to +10% | | |
| Addlestone | Runnymede | 8% |
| Farnborough | Rushmoor | 7% |
| Weybridge | Elmbridge | 7% |
| Andover | Test Valley | 7% |
| Winchester | Winchester | 6% |
| Alton | East Hampshire | 5% |
| Egham | Runnymede | 5% |
| Basingstoke | Basingstoke & Deane | 5% |
| Petersfield | East Hampshire | 5% |
| Growth of up to +5% | | |
| Chertsey | Runnymede | 4% |
| Bordon/Lindford/Headley | East Hampshire | 3% |
| East & West Molesey | Elmbridge | 3% |
| Woking | Woking | 3% |
| Guildford | Guildford | 2% |
| Aldershot | Rushmoor | 2% |
| Farnham | Waverley | 1% |
| Fleet | Hart | 1% |
| Staines-upon-Thames | Spelthorne | 1% |
| Camberley | Surrey Heath | 0% |
| No change or decline in business units | | |
| Ashford | Spelthorne | 0% |
| Frimley | Surrey Heath | 0% |
| Walton-on-Thames | Elmbridge | 0% |
| Blackwater/Yateley | Hart | 0% |

| Town | District | % change in business units, 2019 |
|------------|---------------------|----------------------------------|
| Tadley | Basingstoke & Deane | -1% |
| Cranleigh | Waverley | -5% |
| Haslemere | Waverley | -6% |
| Shepperton | Spelthorne | -19% |

Source: UK Business Counts, 2019

Figure 4.7: Absolute Change in Number of Business Units, 2016 to 2019

| Town | District | Absolute change in business units, 2019 |
|---|---------------------|---|
| Growth of more than +100 | | |
| Romsey | Test Valley | 550 |
| Basingstoke | Basingstoke & Deane | 240 |
| Whiteley | Winchester | 240 |
| Godalming | Waverley | 210 |
| Farnborough | Rushmoor | 190 |
| Andover | Test Valley | 180 |
| Weybridge | Elmbridge | 150 |
| Winchester | Winchester | 130 |
| Woking | Woking | 110 |
| Sunbury | Spelthorne | 100 |
| Growth of up to 100 | | |
| Egham | Runnymede | 100 |
| Cobham | Elmbridge | 100 |
| Guildford | Guildford | 90 |
| Addlestone | Runnymede | 80 |
| Petersfield | East Hampshire | 70 |
| Alton | East Hampshire | 50 |
| Stanwell | Spelthorne | 50 |
| Bordon/Lindford/Headley | East Hampshire | 40 |
| East & West Molesey | Elmbridge | 40 |
| Farnham | Waverley | 30 |
| Aldershot | Rushmoor | 30 |
| Chertsey | Runnymede | 20 |
| Fleet | Hart | 20 |
| Staines-upon-Thames | Spelthorne | 10 |
| Camberley | Surrey Heath | 10 |
| No change or decline in number of business units | | |
| Ashford | Spelthorne | - |
| Frimley | Surrey Heath | - |
| Blackwater/Yateley | Hart | -10 |
| Tadley | Basingstoke & Deane | -10 |
| Walton-on-Thames | Elmbridge | -10 |
| Cranleigh | Waverley | -40 |

| Town | District | Absolute change in business units, 2019 |
|------------|------------|---|
| Haslemere | Waverley | -60 |
| Shepperton | Spelthorne | -240 |

Source: UK Business Counts, 2019

Change in housing stock

- 4.2.6 This data is collected from consultations with local authority officers and Local Authority Annual Monitoring Reports.

Figure 4.8: Change in Housing Stock

| Town | District | Change in housing stock |
|-------------------------|---------------------|---|
| Basingstoke | Basingstoke & Deane | Borough-wide completion of 544 homes p.a. between 2011 and 2018, mostly in and around the town. Local Plan target of 850 p.a. to 2029 |
| Tadley | Basingstoke & Deane | See above. No specific data for Tadley |
| Alton | East Hampshire | N/a (District figures available) |
| Bordon/Lindford/Headley | East Hampshire | N/a (District figures available) |
| Petersfield | East Hampshire | N/a (District figures available) |
| Cobham | Elmbridge | 74 homes delivered in 2017/18 (Cobham, Oxshott, Stoke D'Abernon, Downside) |
| East & West Molesey | Elmbridge | 20 homes delivered in 2017/18 |
| Walton-on-Thames | Elmbridge | 17 homes delivered in 2017/18 |
| Weybridge | Elmbridge | 11 homes delivered in 2017/18 |
| Guildford | Guildford | Borough-wide completion of 205 homes p.a. between 2008 and 2018 |
| Blackwater/Yateley | Hart | 61 in 2017/18 (Blackwater & Hawley and Yateley) |
| Fleet | Hart | 145 in 2017/18 |
| Addlestone | Runnymede | N/a (District figures available) |
| Chertsey | Runnymede | N/a (District figures available) |
| Egham | Runnymede | N/a (District figures available) |
| Aldershot | Rushmoor | 339 in 2017/18 and 162 in 2018/19 |
| Farnborough | Rushmoor | 111 in 2017/18 and 141 in 2018/19 |
| Ashford | Spelthorne | No significant development in the last 10 years |
| Shepperton | Spelthorne | No significant development in the last 10 years |
| Staines-upon-Thames | Spelthorne | No significant development in the last 10 years |
| Stanwell | Spelthorne | N/a |
| Sunbury | Spelthorne | Piecemeal small-scale completions. Some PDR in former office buildings |
| Camberley | Surrey Heath | N/a (District figures available) |

| Town | District | Change in housing stock |
|------------|--------------|--|
| Frimley | Surrey Heath | N/a (District figures available) |
| Andover | Test Valley | 448 homes p.a. between 2009 and 2017 |
| Romsey | Test Valley | 132 homes p.a. between 2009 and 2017 |
| Cranleigh | Waverley | N/a (District figures available) |
| Farnham | Waverley | N/a (District figures available) |
| Godalming | Waverley | N/a (District figures available) |
| Haslemere | Waverley | N/a (District figures available) |
| Whiteley | Winchester | N/a (District figures available) |
| Winchester | Winchester | N/a (District figures available) |
| Woking | Woking | 263 dwellings p.a. between 2011 and 2019 for the District as a whole |

Source: Local Authority Consultations and Annual Monitoring Reports

5 Classifying Towns

5.0.1 To ascertain the role that each town plays in the wider context of the Enterprise M3 area it is necessary to understand their functionality. To this end, we have used the data described in Chapters 2 to 4 to classify the towns as:

- Joint employment and population centres
- Primarily employment centres
- Primarily residential and service centres

5.0.2 We have also examined the change over time for some indicators to identifying those towns with high levels of economic vitality. To do this we have looked at towns that stand out for three main reasons; they rank highly on indicators relative to other towns, they stand out as distinctive from the trend established across the towns, or they rank above a UK benchmark. The methodology used to define each of these is set out below.

Characteristic Indicators

5.0.3 This analysis involves identifying the towns that rank highly across a number of indicators such as employment or population. This was done by looking at each indicator in turn and listing the towns in rank order. Towns were then colour-coded according to their rank, with dark red for the highest ranked towns, through lighter red, lighter blue, to dark blue for the lowest ranked towns.

5.0.4 Following the colour-coding of each indicator, towns that ranked in the top 18 of all towns across most of the indicators were identified.

Distinctiveness Indicators

5.0.5 A number of indicators have been plotted against each other on a series of scatter graphs. A best-fit line has then been inserted. The correlation between indicators has been calculated to give an indication of how much variability is expected around the best fit line. Those towns that are notably above the expected line are identified.

Benchmark Indicators

5.0.6 Where appropriate, town performance is compared to UK figures for the same indicator. Towns that rank higher than comparable national figures are noted.

5.1 Towns that are both employment and population centres

5.1.1 To examine which towns play a dual role as employment and population centres we have examined population and employment data.

Characteristic Indicators

5.1.2 The indicators used to identify the highest-ranking towns are:

- Resident population
- Employment in the town

Figure 5.1: Population and Employment Indicators

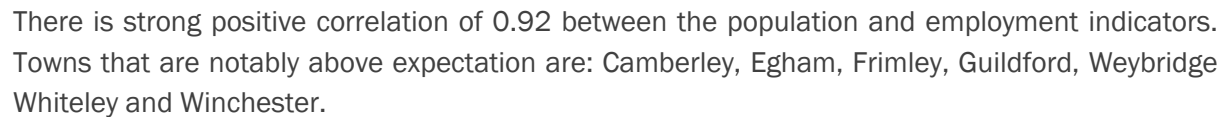
| Town | District | FEMA | Total Resident Pop 2018 | Employment |
|-------------------------|---------------------|--|-------------------------|------------|
| Alton | East Hampshire | Mid Hampshire | 17,000 | 8,000 |
| Bordon/Lindford/Headley | East Hampshire | Mid Hampshire | 26,000 | 7,000 |
| Petersfield | East Hampshire | Mid Hampshire | 21,000 | 10,000 |
| Winchester | Winchester | Mid Hampshire | 36,000 | 30,000 |
| Andover | Test Valley | Northern Hampshire | 57,000 | 27,000 |
| Addlestone | Runnymede | Outer London/Northern Surrey | 22,000 | 7,000 |
| Ashford | Spelthorne | Outer London/Northern Surrey | 28,000 | 8,000 |
| Chertsey | Runnymede | Outer London/Northern Surrey | 8,000 | 6,000 |
| Cobham | Elmbridge | Outer London/Northern Surrey | 10,000 | 7,000 |
| East & West Molesey | Elmbridge | Outer London/Northern Surrey | 19,000 | 5,000 |
| Egham | Runnymede | Outer London/Northern Surrey | 36,000 | 28,000 |
| Shepperton | Spelthorne | Outer London/Northern Surrey | 13,000 | 5,000 |
| Staines-upon-Thames | Spelthorne | Outer London/Northern Surrey | 23,000 | 12,000 |
| Stanwell | Spelthorne | Outer London/Northern Surrey | 14,000 | 4,000 |
| Sunbury | Spelthorne | Outer London/Northern Surrey | 22,000 | 9,000 |
| Walton-on-Thames | Elmbridge | Outer London/Northern Surrey | 29,000 | 9,000 |
| Weybridge | Elmbridge | Outer London/Northern Surrey | 22,000 | 19,000 |
| Woking | Woking | Outer London/Northern Surrey and Southern Surrey/Eastern Hampshire | 78,000 | 39,000 |
| Romsey | Test Valley | Southern Hampshire | 34,000 | 14,000 |
| Whiteley | Winchester | Southern Hampshire | 12,000 | 23,000 |
| Aldershot | Rushmoor | Southern Surrey/Eastern Hampshire | 37,000 | 17,000 |
| Basingstoke | Basingstoke & Deane | Southern Surrey/Eastern Hampshire | 110,000 | 69,000 |
| Blackwater/Yateley | Hart | Southern Surrey/Eastern Hampshire | 27,000 | 10,000 |
| Camberley | Surrey Heath | Southern Surrey/Eastern Hampshire | 27,000 | 21,000 |
| Cranleigh | Waverley | Southern Surrey/Eastern Hampshire | 11,000 | 4,000 |
| Farnborough | Rushmoor | Southern Surrey/Eastern Hampshire | 58,000 | 34,000 |
| Farnham | Waverley | Southern Surrey/Eastern Hampshire | 41,000 | 19,000 |
| Fleet | Hart | Southern Surrey/Eastern Hampshire | 38,000 | 13,000 |
| Frimley | Surrey Heath | Southern Surrey/Eastern Hampshire | 32,000 | 24,000 |
| Godalming | Waverley | Southern Surrey/Eastern Hampshire | 23,000 | 11,000 |
| Guildford | Guildford | Southern Surrey/Eastern Hampshire | 79,000 | 58,000 |
| Haslemere | Waverley | Southern Surrey/Eastern Hampshire | 13,000 | 5,000 |
| Tadley | Basingstoke & Deane | Southern Surrey/Eastern Hampshire | 15,000 | 3,000 |

Towns are colour-coded according to their rank, with dark red for the highest ranked towns, through lighter red, lighter blue, to dark blue for the lowest ranked towns.

5.1.3 Towns that score in the top 18 on both indicators are Aldershot, Andover, Basingstoke, Blackwater/Yateley, Camberley, Egham, Farnborough, Farnham, Fleet, Frimley, Godalming, Guildford, Romsey, Winchester and Woking.

The following indicators have been plotted against each other:

- ### Figure 5.2: Population and Employment



For these indicators there are no relevant UK benchmarks

The towns that stand out as having a dual role as both an employment and population centre are Camberley, Egham, Frimley, Guildford and Winchester. A further twelve towns stand out on one of the categories used to classify towns as employment and population centres.

| FEMA | Towns Scoring Highly on Characteristic Indicators | Distinctive Towns | Towns Performing Better than Benchmark |
|------------------------------|---|-------------------|--|
| Mid Hampshire | Winchester | Winchester | n/a |
| Northern Hampshire | Andover | | n/a |
| Outer London/Northern Surrey | Egham | Egham | n/a |
| | Woking | Weybridge | |
| Southern Hampshire | Romsey | | n/a |

| FEMA | Towns Scoring Highly on Characteristic Indicators | Distinctive Towns | Towns Performing Better than Benchmark |
|-----------------------------------|---|---|--|
| | | Whiteley | |
| Southern Surrey/Eastern Hampshire | Aldershot Basingstoke Blackwater/Yateley Camberley Farnborough Farnham Fleet Frimley Godalming Guildford | Camberley Frimley Guildford | n/a |

5.2 Towns that are primarily employment centres

Characteristic Indicators

5.2.1 The indicators ranked for the towns are:

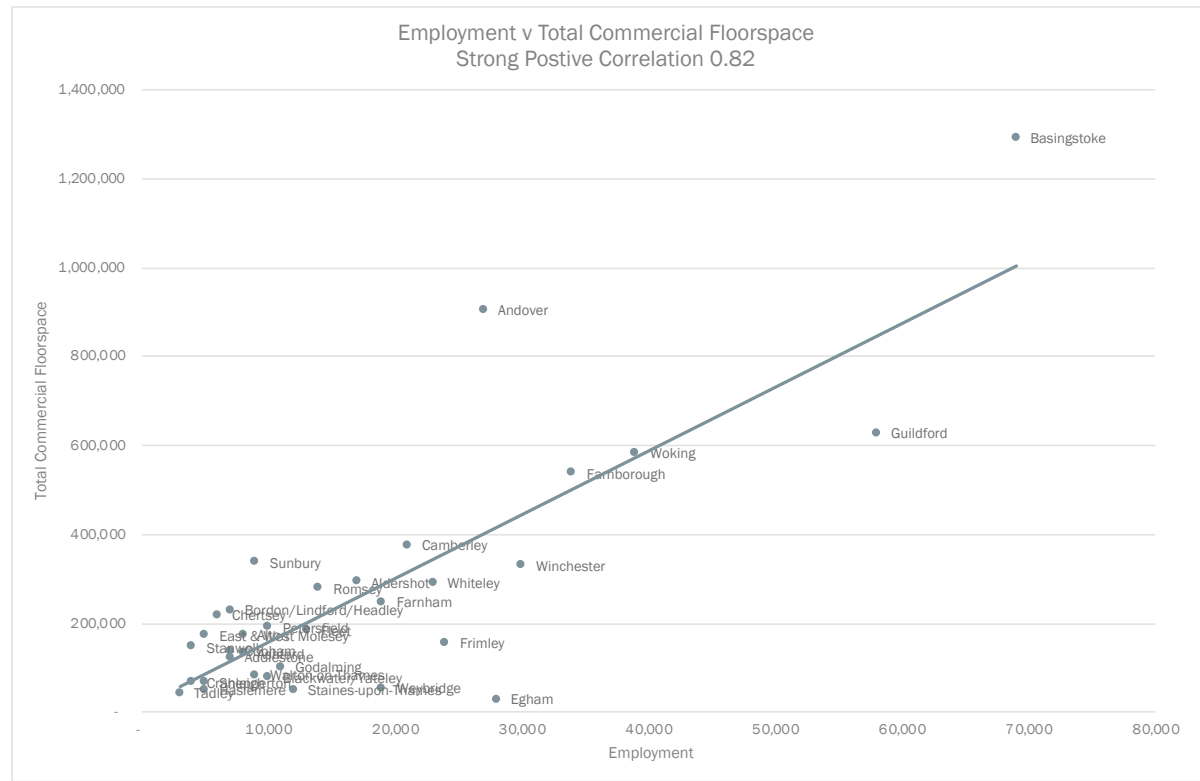
- Employment
- Employment ratio
- Commuter in-flow
- In-commuting ratio
- Office floorspace
- Industrial floorspace
- Retail floorspace

Figure 5.4: Employment Indicators

| Town | District | FEMA | Employment | Employment ratio | Commuter Inflow | In-commuting ratio | Office | Industrial | Retail Floorspace |
|-------------------------|---------------------|--|------------|------------------|-----------------|--------------------|---------|------------|-------------------|
| Alton | East Hampshire | Mid Hampshire | 8,000 | 0.49 | 4,400 | 0.55 | 28,500 | 107,800 | 37,600 |
| Bordon/Lindford/Headley | East Hampshire | Mid Hampshire | 7,000 | 0.28 | 4,300 | 0.61 | 11,700 | 189,600 | 28,600 |
| Petersfield | East Hampshire | Mid Hampshire | 10,000 | 0.50 | 5,900 | 0.59 | 50,100 | 106,000 | 34,200 |
| Winchester | Winchester | Mid Hampshire | 30,000 | 0.84 | 19,700 | 0.66 | 102,900 | 122,900 | 103,600 |
| Andover | Test Valley | Northern Hampshire | 27,000 | 0.48 | 9,600 | 0.36 | 75,700 | 719,800 | 108,500 |
| Addlestone | Runnymede | Outer London/Northern Surrey | 7,000 | 0.32 | 5,000 | 0.71 | 55,900 | 45,700 | 35,000 |
| Ashford | Spelthorne | Outer London/Northern Surrey | 8,000 | 0.27 | 7,500 | 0.94 | 75,400 | 57,500 | 39,900 |
| Chertsey | Runnymede | Outer London/Northern Surrey | 6,000 | 0.78 | 4,700 | 0.78 | 38,600 | 27,800 | 16,600 |
| Cobham | Elmbridge | Outer London/Northern Surrey | 7,000 | 0.64 | 3,500 | 0.50 | 20,600 | 8,100 | 25,600 |
| East & West Molesey | Elmbridge | Outer London/Northern Surrey | 5,000 | 0.27 | 3,600 | 0.72 | 10,700 | 91,100 | 20,400 |
| Egham | Runnymede | Outer London/Northern Surrey | 28,000 | 0.80 | 14,100 | 0.50 | 90,200 | 102,300 | 25,600 |
| Shepperton | Spelthorne | Outer London/Northern Surrey | 5,000 | 0.39 | 3,300 | 0.66 | 2,600 | 15,300 | 10,200 |
| Staines-upon-Thames | Spelthorne | Outer London/Northern Surrey | 12,000 | 0.55 | 8,600 | 0.72 | 52,000 | 36,900 | 42,500 |
| Stanwell | Spelthorne | Outer London/Northern Surrey | 4,000 | 0.31 | 1,800 | 0.45 | 500 | 64,000 | 1,900 |
| Sunbury | Spelthorne | Outer London/Northern Surrey | 9,000 | 0.41 | 5,700 | 0.63 | 11,800 | 25,500 | 13,000 |
| Walton-on-Thames | Elmbridge | Outer London/Northern Surrey | 9,000 | 0.30 | 6,200 | 0.69 | 33,700 | 56,500 | 56,500 |
| Weybridge | Elmbridge | Outer London/Northern Surrey | 19,000 | 0.84 | 13,700 | 0.72 | 131,700 | 146,900 | 57,600 |
| Woking | Woking | Outer London/Northern Surrey and Southern Surrey/Eastern Hampshire | 39,000 | 0.50 | 18,000 | 0.46 | 174,700 | 265,600 | 142,100 |
| Romsey | Test Valley | Southern Hampshire | 14,000 | 0.40 | 7,200 | 0.51 | 38,600 | 198,400 | 41,200 |
| Whiteley | Winchester | Southern Hampshire | 23,000 | 1.93 | 11,500 | 0.50 | 132,100 | 111,100 | 48,700 |
| Aldershot | Rushmoor | Southern Surrey/Eastern Hampshire | 17,000 | 0.47 | 10,400 | 0.61 | 56,200 | 159,100 | 78,000 |
| Basingstoke | Basingstoke & Deane | Southern Surrey/Eastern Hampshire | 69,000 | 0.62 | 25,900 | 0.38 | 390,100 | 670,500 | 230,700 |
| Blackwater/Yateley | Hart | Southern Surrey/Eastern Hampshire | 10,000 | 0.38 | 4,300 | 0.43 | 16,800 | 43,000 | 18,200 |
| Camberley | Surrey Heath | Southern Surrey/Eastern Hampshire | 21,000 | 0.76 | 10,300 | 0.49 | 79,400 | 198,300 | 98,200 |
| Cranleigh | Waverley | Southern Surrey/Eastern Hampshire | 4,000 | 0.32 | 1,800 | 0.45 | 4,200 | 33,600 | 28,800 |
| Farnborough | Rushmoor | Southern Surrey/Eastern Hampshire | 34,000 | 0.58 | 18,700 | 0.55 | 226,600 | 194,300 | 116,400 |
| Farnham | Waverley | Southern Surrey/Eastern Hampshire | 19,000 | 0.47 | 9,300 | 0.49 | 52,500 | 114,700 | 80,500 |
| Fleet | Hart | Southern Surrey/Eastern Hampshire | 13,000 | 0.34 | 7,200 | 0.55 | 93,500 | 41,800 | 47,400 |
| Frimley | Surrey Heath | Southern Surrey/Eastern Hampshire | 24,000 | 0.74 | 11,900 | 0.50 | 49,800 | 92,300 | 14,100 |
| Godalming | Waverley | Southern Surrey/Eastern Hampshire | 11,000 | 0.48 | 5,900 | 0.54 | 42,100 | 19,400 | 40,200 |
| Guildford | Guildford | Southern Surrey/Eastern Hampshire | 58,000 | 0.73 | 29,900 | 0.52 | 220,000 | 192,400 | 214,900 |
| Haslemere | Waverley | Southern Surrey/Eastern Hampshire | 5,000 | 0.36 | 2,700 | 0.54 | 6,600 | 20,100 | 24,000 |
| Tadley | Basingstoke & Deane | Southern Surrey/Eastern Hampshire | 3,000 | 0.20 | 1,500 | 0.50 | 3,500 | 22,900 | 17,100 |

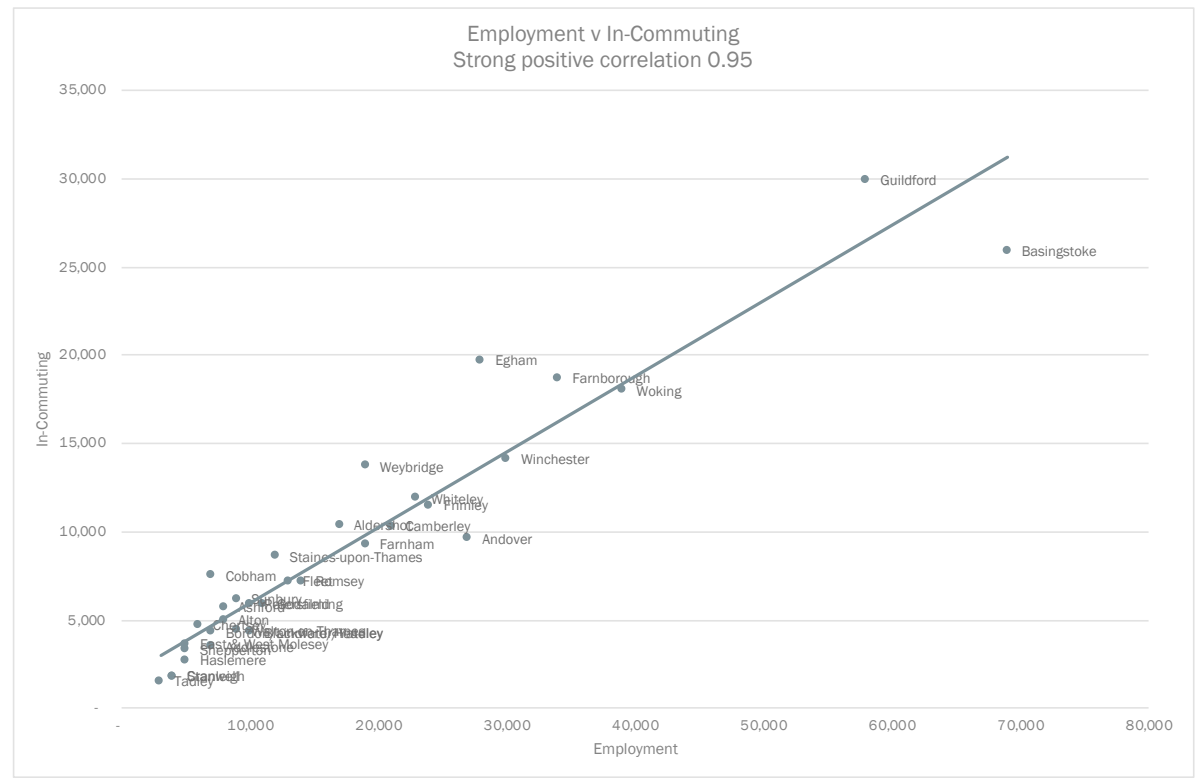
Towns are colour-coded according to their rank, with dark red for the highest ranked towns, through lighter red, lighter blue, to dark blue for the lowest ranked towns.

Figure 5.6: Employment and Total Commercial Floorspace



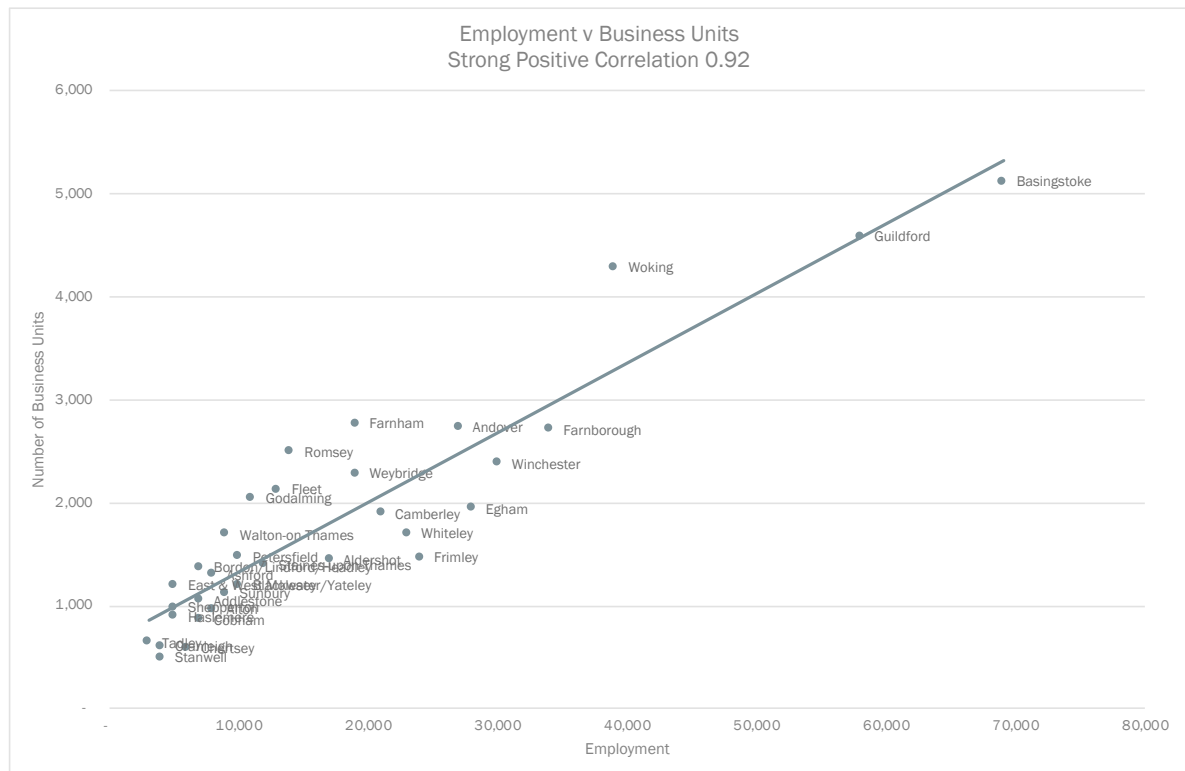
5.2.5 There is a strong positive correlation of 0.82 between the indicators. Towns that are notably above expectation are Andover and Basingstoke.

Figure 5.7: Employment and In-Commuting



5.2.6 There is a strong positive correlation of 0.95 between the indicators. Towns that are notably above expectation are: Egham, Guildford and Weybridge.

Figure 5.8: Employment and Business Units



- 5.2.7 There is a strong positive correlation of 0.92 between the indicators. Towns that are notably above expectation are: Farnham, Romsey and Woking.

Benchmark indicators

- 5.2.8 The employment ratio is 0.46 in the UK. The towns with a ratio higher than this are shown in Figure 5.9.

Summary

- 5.2.9 The towns that are notable in this category are: Andover, Basingstoke, Farnborough, Farnham, Guildford, Whiteley, Weybridge, and Woking. A further five towns stand out on at least two of the three indicators used to determine that a town is an employment centre.

Figure 5.9: Employment Centres

| FEMA | Towns Scoring Highly on Characteristic Indicators | Distinctive Towns Above Expectation | Towns Performing Better than Benchmark |
|------------------------------|---|-------------------------------------|--|
| Mid Hampshire | Winchester | | Alton Petersfield Winchester |
| Northern Hampshire | Andover | Andover | Andover |
| Outer London/Northern Surrey | | Egham | Cobham Chertsey Egham |

| FEMA | Towns Scoring Highly on Characteristic Indicators | Distinctive Towns Above Expectation | Towns Performing Better than Benchmark |
|-----------------------------------|--|--|--|
| | Staines-upon-Thames Weybridge | Stanwell Weybridge | Staines-upon-Thames Weybridge |
| Southern Hampshire | Whiteley | Romsey Whiteley | Whiteley |
| Southern Surrey/Eastern Hampshire | Aldershot Basingstoke Camberley Farnborough Farnham Guildford Woking | Basingstoke Farnham Fleet Guildford Woking | Aldershot Basingstoke Camberley Farnborough Farnham Frimley Godalming Guildford Woking |

5.3 Towns that are primarily residential and service centres

Characteristic Indicators

5.3.1 The indicators used for identifying the highest-ranking towns are:

- Residential population
- Commuter outflow
- Out-commuting ratio
- Retail floorspace
- Minimum house price

Figure 5.10: Residential and Service Centre Indicators

| Town | District | FEMA | Total Resident Pop 2018 | Commuter Outflow | Out-commuting ratio | Retail Floorspace | Minimum MSOA Median House Price |
|-------------------------|---------------------|--|-------------------------|------------------|---------------------|-------------------|---------------------------------|
| Alton | East Hampshire | Mid Hampshire | 17,000 | 4,400 | 0.44 | 37,600 | £ 320,000 |
| Bordon/Lindford/Headley | East Hampshire | Mid Hampshire | 26,000 | 7,700 | 0.48 | 28,600 | £ 260,000 |
| Petersfield | East Hampshire | Mid Hampshire | 21,000 | 4,600 | 0.38 | 34,200 | £ 371,000 |
| Winchester | Winchester | Mid Hampshire | 36,000 | 6,700 | 0.28 | 103,600 | £ 385,000 |
| Andover | Test Valley | Northern Hampshire | 57,000 | 9,100 | 0.26 | 108,500 | £ 190,000 |
| Addlestone | Runnymede | Outer London/Northern Surrey | 22,000 | 7,300 | 0.52 | 35,000 | £ 353,000 |
| Ashford | Spelthorne | Outer London/Northern Surrey | 28,000 | 10,700 | 0.59 | 39,900 | £ 342,000 |
| Chertsey | Runnymede | Outer London/Northern Surrey | 8,000 | 2,900 | 0.58 | 16,600 | £ 340,000 |
| Cobham | Elmbridge | Outer London/Northern Surrey | 10,000 | 2,500 | 0.42 | 25,600 | £ 780,000 |
| East & West Molesey | Elmbridge | Outer London/Northern Surrey | 19,000 | 6,700 | 0.56 | 20,400 | £ 415,000 |
| Egham | Runnymede | Outer London/Northern Surrey | 36,000 | 8,900 | 0.36 | 25,600 | £ 365,000 |
| Shepperton | Spelthorne | Outer London/Northern Surrey | 13,000 | 4,600 | 0.66 | 10,200 | £ 410,000 |
| Staines-upon-Thames | Spelthorne | Outer London/Northern Surrey | 23,000 | 8,100 | 0.58 | 42,500 | £ 355,000 |
| Stanwell | Spelthorne | Outer London/Northern Surrey | 14,000 | 5,100 | 0.57 | 1,900 | £ 330,000 |
| Sunbury | Spelthorne | Outer London/Northern Surrey | 22,000 | 7,500 | 0.58 | 13,000 | £ 465,000 |
| Walton-on-Thames | Elmbridge | Outer London/Northern Surrey | 29,000 | 9,900 | 0.58 | 56,500 | £ 370,000 |
| Weybridge | Elmbridge | Outer London/Northern Surrey | 22,000 | 6,700 | 0.52 | 57,600 | £ 490,000 |
| Woking | Woking | Outer London/Northern Surrey and Southern Surrey/Eastern Hampshire | 78,000 | 21,500 | 0.44 | 142,100 | £ 320,000 |
| Romsey | Test Valley | Southern Hampshire | 34,000 | 9,200 | 0.48 | 41,200 | £ 280,000 |
| Whiteley | Winchester | Southern Hampshire | 12,000 | 3,800 | 0.54 | 48,700 | £ 305,000 |
| Aldershot | Rushmoor | Southern Surrey/Eastern Hampshire | 37,000 | 11,900 | 0.48 | 78,000 | £ 223,000 |
| Basingstoke | Basingstoke & Deane | Southern Surrey/Eastern Hampshire | 110,000 | 19,300 | 0.27 | 230,700 | £ 235,000 |
| Blackwater/Yateley | Hart | Southern Surrey/Eastern Hampshire | 27,000 | 9,700 | 0.61 | 18,200 | £ 350,000 |
| Camberley | Surrey Heath | Southern Surrey/Eastern Hampshire | 27,000 | 8,200 | 0.48 | 98,200 | £ 300,000 |
| Cranleigh | Waverley | Southern Surrey/Eastern Hampshire | 11,000 | 2,600 | 0.43 | 28,800 | £ 410,000 |
| Farnborough | Rushmoor | Southern Surrey/Eastern Hampshire | 58,000 | 18,300 | 0.49 | 116,400 | £ 250,000 |
| Farnham | Waverley | Southern Surrey/Eastern Hampshire | 41,000 | 10,400 | 0.43 | 80,500 | £ 375,000 |
| Fleet | Hart | Southern Surrey/Eastern Hampshire | 38,000 | 11,500 | 0.50 | 47,400 | £ 350,000 |
| Frimley | Surrey Heath | Southern Surrey/Eastern Hampshire | 32,000 | 10,500 | 0.55 | 14,100 | £ 350,000 |
| Godalming | Waverley | Southern Surrey/Eastern Hampshire | 23,000 | 6,600 | 0.47 | 40,200 | £ 399,950 |
| Guildford | Guildford | Southern Surrey/Eastern Hampshire | 79,000 | 16,000 | 0.29 | 214,900 | £ 364,950 |
| Haslemere | Waverley | Southern Surrey/Eastern Hampshire | 13,000 | 3,400 | 0.49 | 24,000 | £ 401,000 |
| Tadley | Basingstoke & Deane | Southern Surrey/Eastern Hampshire | 15,000 | 5,700 | 0.63 | 17,100 | £ 310,000 |

Towns (above) are colour-coded according to their rank, with dark red for the highest ranked towns, through lighter red, lighter blue, to dark blue for the lowest ranked towns.

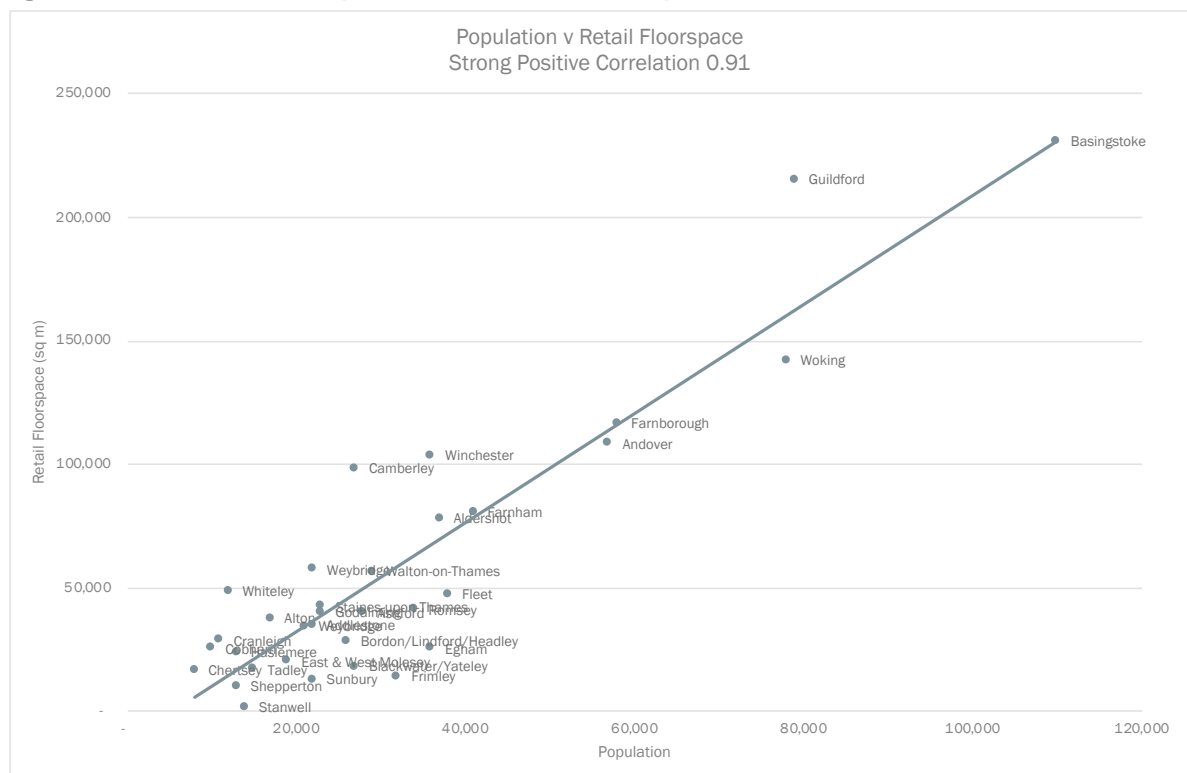
- 5.3.2 Towns that score highly on at least four out of the five indicators are Ashford, Farnborough, Fleet, Romsey, Whiteley.

Distinctiveness indicators

- 5.3.3 The following indicators have been plotted against each other:

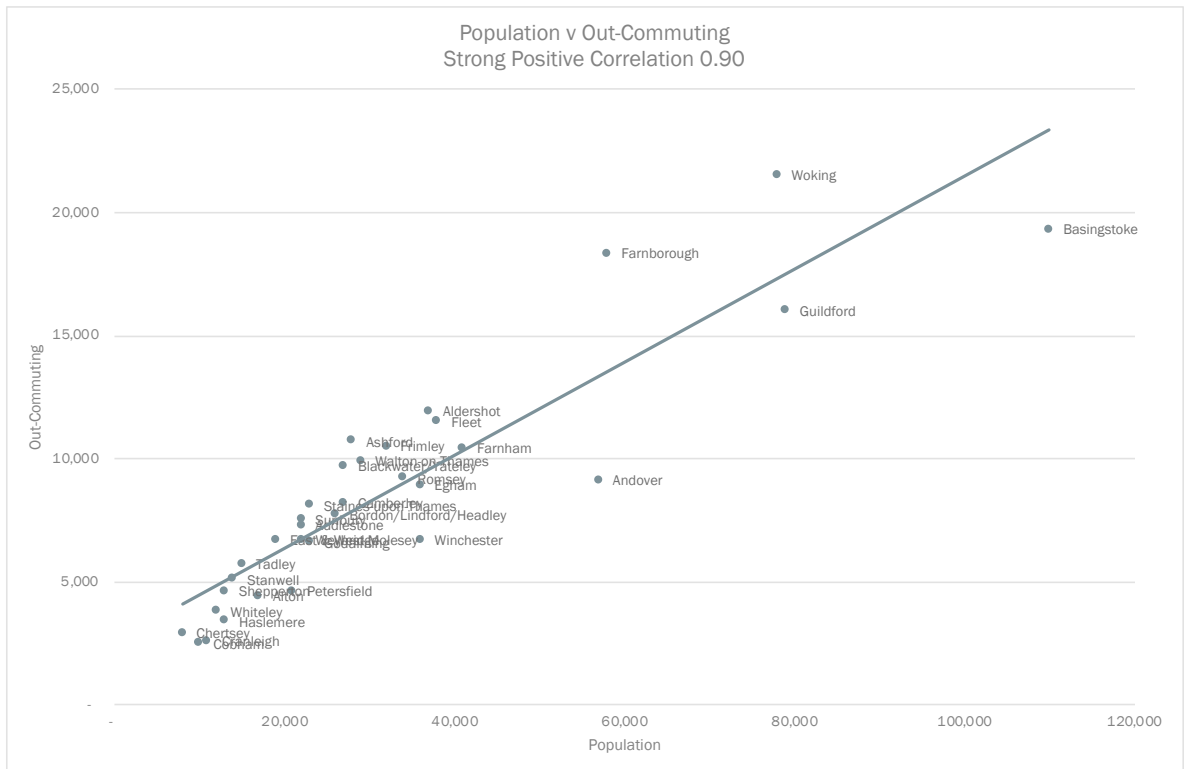
- Population v retail floorspace
- Population v out-commuting
- Percentage of working age population v house price

Figure 5.11: Residential Population and Retail Floorspace



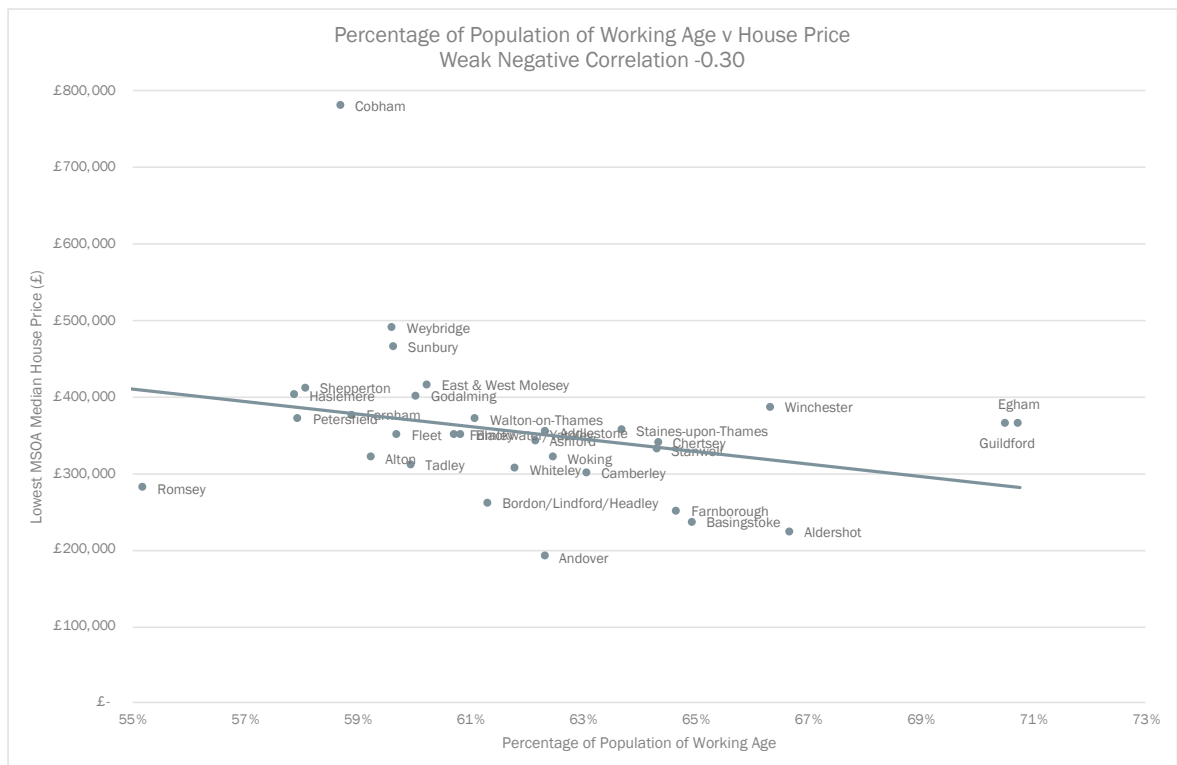
- 5.3.4 There is a strong positive correlation of 0.91 between the indicators. Towns that are notably above expectation are: Camberley, Guildford, Whiteley and Winchester.

Figure 5.12: Residential Population and Out-Commuting



5.3.5 There is a strong positive correlation of 0.90 between the indicators. Towns that are notably above expectation are: Aldershot, Ashford, Farnborough and Woking.

Figure 5.13: Working Age Population and House Prices



5.3.6 There is a weak negative correlation of -0.32 between the indicators. Towns that are notably below expectation are Andover and Romsey.

Benchmark indicators

5.3.7 For these indicators there are no relevant UK benchmarks

Summary

5.3.8 Towns that stand out across all categories are Ashford, Farnborough, Romsey, and Whiteley. Six additional towns are notably in the distinctiveness category.

Figure 5.14: Residential and Service Centres

| FEMA | Towns Scoring Highly on Characteristic Indicators | Distinctive Towns Above Expectation | Towns Performing Better than Benchmark |
|-----------------------------------|---|--|--|
| Mid Hampshire | | Winchester | n/a |
| Northern Hampshire | | Andover | n/a |
| Outer London/Northern Surrey | Ashford | Ashford | n/a |
| Southern Hampshire | Romsey Whiteley | Romsey Whiteley | n/a |
| Southern Surrey/Eastern Hampshire | Farnborough Fleet | Aldershot Camberley Farnborough Guildford Woking | n/a |

5.4 Change and Economic Vitality

Characteristic Indicators

5.4.1 The indicators used for ranking the towns are:

- Percentage of population of working age
- Change in employment
- Percentage change in employment
- Employment ratio
- Productivity index
- Percentage change in business units

Figure 5.15: Indicators of Vitality and Change

| Town | District | FEMA | % of Population Aged 16-64 | Change in Employment | % change in Employment | Employment ratio | Productivity index | % change in Business Units |
|-------------------------|---------------------|--|----------------------------|----------------------|------------------------|------------------|--------------------|----------------------------|
| Alton | East Hampshire | Mid Hampshire | 59% | (600) | -6% | 0.49 | 1.03 | 5% |
| Bordon/Lindford/Headley | East Hampshire | Mid Hampshire | 61% | (300) | -4% | 0.28 | 0.98 | 3% |
| Petersfield | East Hampshire | Mid Hampshire | 58% | - | 0% | 0.50 | 1.05 | 5% |
| Winchester | Winchester | Mid Hampshire | 66% | (1,100) | -4% | 0.84 | 0.88 | 6% |
| Andover | Test Valley | Northern Hampshire | 62% | (1,400) | -5% | 0.48 | 1.08 | 7% |
| Addlestone | Runnymede | Outer London/Northern Surrey | 62% | (700) | -9% | 0.32 | 0.97 | 8% |
| Ashford | Spelthorne | Outer London/Northern Surrey | 62% | (1,500) | -16% | 0.27 | 1.05 | 0% |
| Chertsey | Runnymede | Outer London/Northern Surrey | 64% | (300) | -4% | 0.78 | 1.04 | 4% |
| Cobham | Elmbridge | Outer London/Northern Surrey | 59% | 200 | 2% | 0.64 | 0.97 | 12% |
| East & West Molesey | Elmbridge | Outer London/Northern Surrey | 60% | (200) | -4% | 0.27 | 0.93 | 3% |
| Egham | Runnymede | Outer London/Northern Surrey | 71% | 1,300 | 5% | 0.80 | 1.19 | 5% |
| Shepperton | Spelthorne | Outer London/Northern Surrey | 58% | (700) | -13% | 0.39 | 1.01 | -19% |
| Staines-upon-Thames | Spelthorne | Outer London/Northern Surrey | 64% | 500 | 4% | 0.55 | 1.02 | 1% |
| Stanwell | Spelthorne | Outer London/Northern Surrey | 64% | 800 | 22% | 0.31 | 1.06 | 11% |
| Sunbury | Spelthorne | Outer London/Northern Surrey | 60% | 200 | 2% | 0.41 | 1.12 | 10% |
| Walton-on-Thames | Elmbridge | Outer London/Northern Surrey | 61% | (900) | -9% | 0.30 | 0.99 | 0% |
| Weybridge | Elmbridge | Outer London/Northern Surrey | 60% | (1,800) | -9% | 0.84 | 0.98 | 7% |
| Woking | Woking | Outer London/Northern Surrey and Southern Surrey/Eastern Hampshire | 62% | (700) | -2% | 0.50 | 1.04 | 3% |
| Romsey | Test Valley | Southern Hampshire | 55% | 700 | 5% | 0.40 | 0.96 | 28% |
| Whiteley | Winchester | Southern Hampshire | 62% | 1,700 | 8% | 1.93 | 1.11 | 16% |
| Aldershot | Rushmoor | Southern Surrey/Eastern Hampshire | 67% | (1,200) | -7% | 0.47 | 1.13 | 2% |
| Basingstoke | Basingstoke & Deane | Southern Surrey/Eastern Hampshire | 65% | 7,100 | 12% | 0.62 | 1.03 | 5% |
| Blackwater/Yateley | Hart | Southern Surrey/Eastern Hampshire | 61% | 200 | 2% | 0.38 | 0.89 | 0% |
| Camberley | Surrey Heath | Southern Surrey/Eastern Hampshire | 63% | 100 | 1% | 0.76 | 0.97 | 0% |
| Cranleigh | Waverley | Southern Surrey/Eastern Hampshire | 55% | (200) | -6% | 0.32 | 0.91 | -5% |
| Farnborough | Rushmoor | Southern Surrey/Eastern Hampshire | 65% | 2,300 | 7% | 0.58 | 1.09 | 7% |
| Farnham | Waverley | Southern Surrey/Eastern Hampshire | 59% | 200 | 1% | 0.47 | 0.99 | 1% |
| Fleet | Hart | Southern Surrey/Eastern Hampshire | 60% | (1,100) | -8% | 0.34 | 1.05 | 1% |
| Frimley | Surrey Heath | Southern Surrey/Eastern Hampshire | 61% | 800 | 4% | 0.74 | 0.91 | 0% |
| Godalming | Waverley | Southern Surrey/Eastern Hampshire | 60% | (300) | -2% | 0.48 | 1.01 | 11% |
| Guildford | Guildford | Southern Surrey/Eastern Hampshire | 71% | 3,800 | 7% | 0.73 | 0.99 | 2% |
| Haslemere | Waverley | Southern Surrey/Eastern Hampshire | 58% | (500) | -9% | 0.36 | 0.88 | -6% |
| Tadley | Basingstoke & Deane | Southern Surrey/Eastern Hampshire | 60% | (300) | -10% | 0.20 | 0.89 | -1% |

Towns are colour-coded according to their rank, with dark red for the highest ranked towns, through lighter red, lighter blue, to dark blue for the lowest ranked towns.

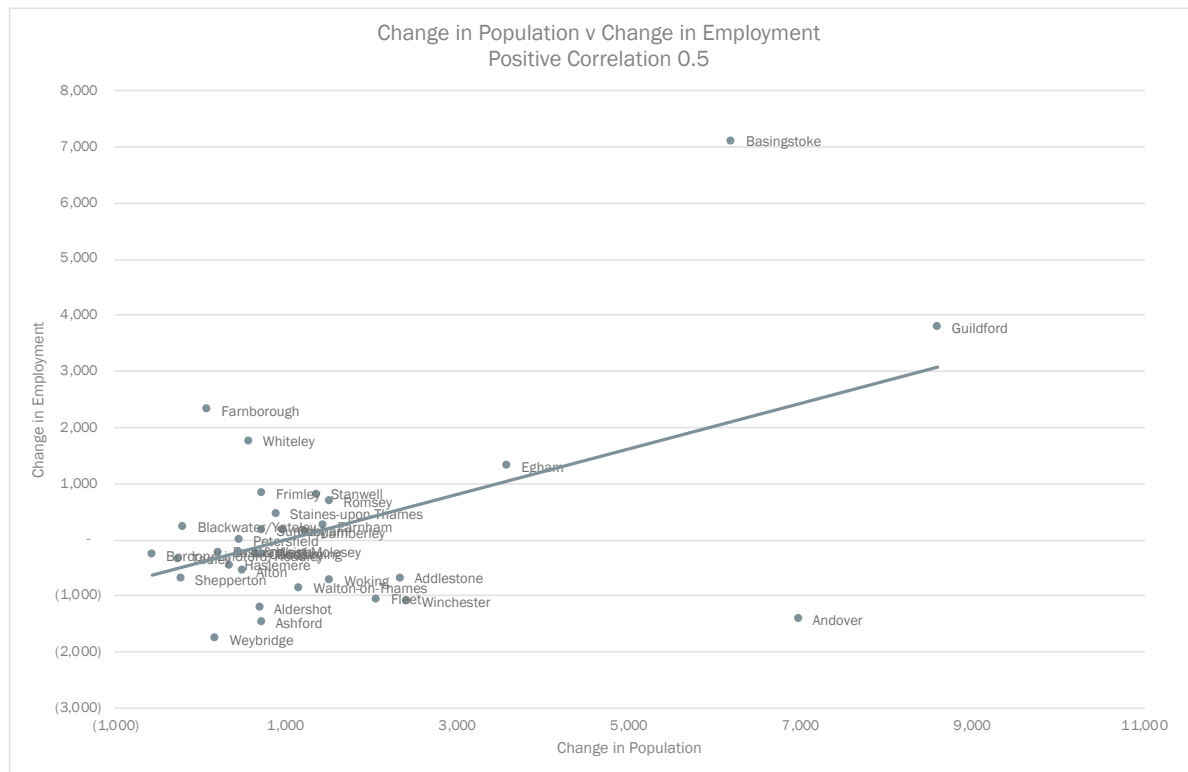
5.4.2 Towns that score highly on at least five out of the six indicators are Basingstoke, Egham, Farnborough, Petersfield, Staines-upon-Thames, Stanwell and Whiteley.

Distinctiveness indicators

5.4.3 The following indicators have been plotted against each other:

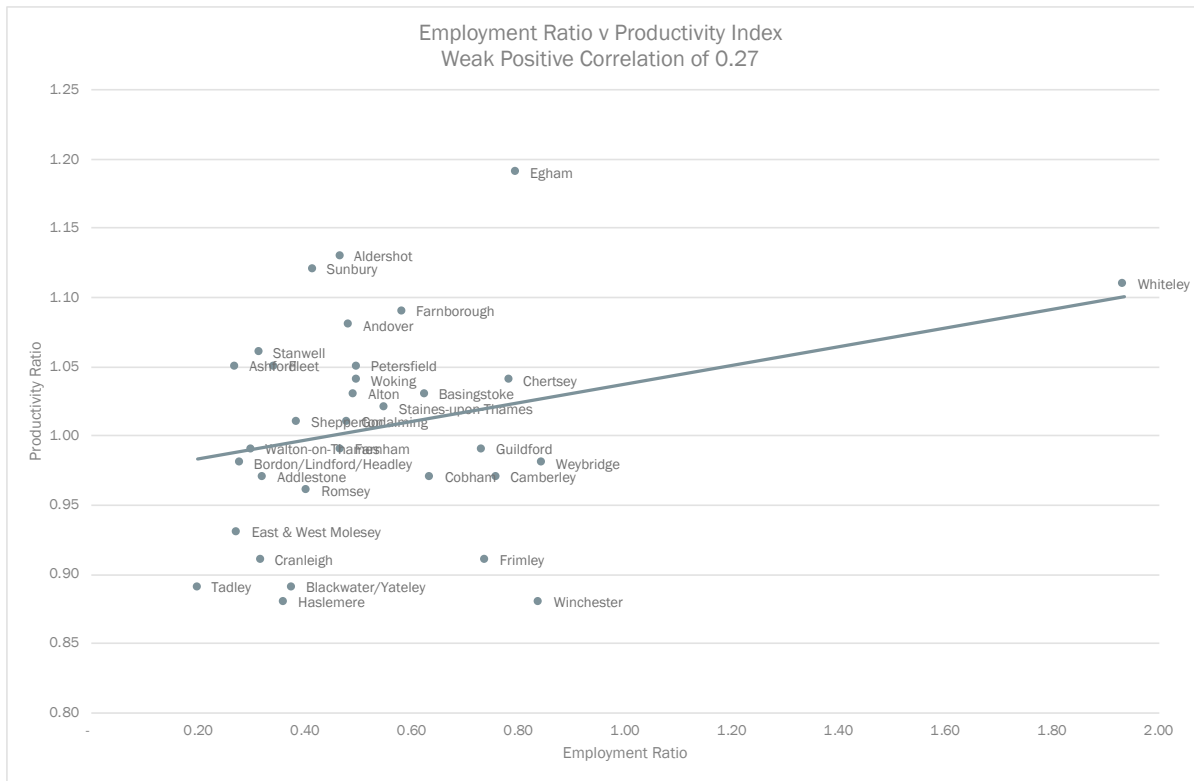
- Change in population v change in employment
- Employment ratio v productivity index
- Change in employment v productivity index

Figure 5.16: Change in Population and Change in Employment



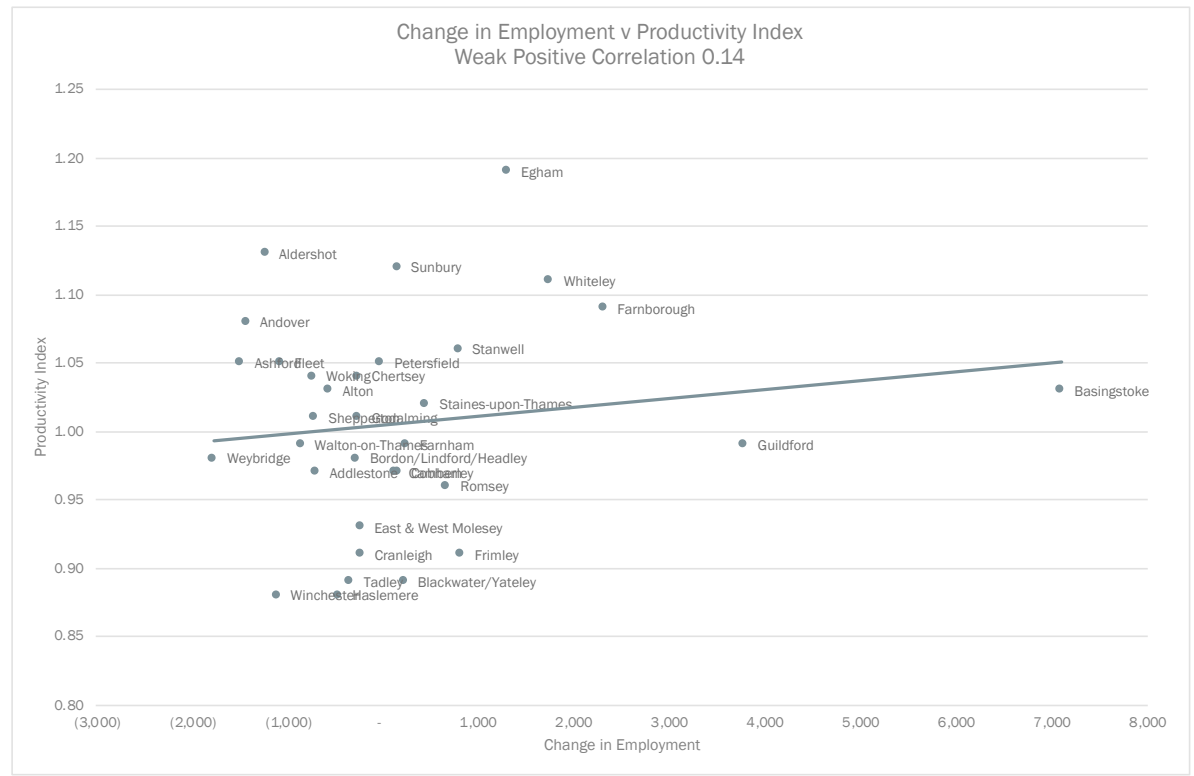
5.4.4 There is a positive correlation of 0.5 between the indicators. Towns that are notably above expectation are Basingstoke, Farnborough and Whiteley.

Figure 5.17: Employment Ratio and Productivity Index



5.4.5 There is a weak positive correlation of 0.27 between the indicators. Towns that are notably above expectation are: Aldershot, Egham and Sunbury.

Figure 5.18: Change in Employment and Productivity Index



5.4.6 There is a weak positive correlation of 0.14 between the indicators. Towns that are notably above expectation are: Aldershot, Sunbury and Egham.

Benchmark indicators

- 5.4.7 The percentage of the population that is of working age in the UK is 63%. The towns with a percentage higher than this are shown in Figure 5.19.

Summary

- 5.4.8 Egham and Farnborough stand out across all indicators in this category. A further four towns are notable across two of the three categories.

Figure 5.19: Towns Displaying Economic Vitality

| FEMA | Towns Scoring Highly on Characteristic Indicators | Distinctive Towns Above Expectation | Towns Performing Better than Benchmark |
|-----------------------------------|---|---|--|
| Mid Hampshire | Petersfield | | Winchester |
| Northern Hampshire | | | |
| Outer London/Northern Surrey | Egham Staines-upon-Thames Stanwell | Egham Sunbury | Chertsey Egham Staines-upon-Thames Stanwell |
| Southern Hampshire | Whiteley | Whiteley | |
| Southern Surrey/Eastern Hampshire | Basingstoke Farnborough | Aldershot Basingstoke Farnborough | Aldershot Camberley Farnborough Guildford |

5.5 Summary of classifications

Figure 5.20: Summary of classifications

| Population and employment centres | Employment centres | Residential and service centres | Economic vitality |
|-----------------------------------|------------------------------------|---------------------------------|----------------------|
| | Aldershot Andover | | Aldershot |
| Camberley | Basingstoke Camberley Cobham | Ashford | Basingstoke |
| Egham | Egham Farnborough Farnham | Farnborough | Egham Farnborough |
| Frimley | | | |
| Guildford | Godalming Guildford | | |

| Population and employment centres | Employment centres | Residential and service centres | Economic vitality |
|-----------------------------------|---|---------------------------------|---------------------------------|
| Winchester | Staines-upon-Thames | Romsey | Staines-upon-Thames Stanwell |
| | Weybridge Whiteley Winchester Woking | Whiteley | Whiteley |

5.6 Selected town profiles

- 5.6.1 These towns have been identified as distinctive in the analysis above, and are not Growth Towns identified in the Enterprise M3 Strategic Economic Plan.

Figure 5.21: Selected Town Profiles

| Town | Data Distinctiveness | Pen Portrait |
|-----------------------------|---|--|
| Aldershot, Rushmoor | <u>Employment</u> Ranks highly on employment;; commuter in-flow; in-commuting ratio; office, industrial and retail floorspace. Employment ratio is greater than UK <u>Economic vitality</u> Ranks highly on % of population aged 16 to 64; productivity index. | An established employment centre, including a growing digital and gaming sector, linked to other towns such as Guildford. Also has roles in services, education, retail and leisure. Redevelopment plans for town centre to reduce and improve the quality of retail floorspace, attract alternative uses and provide substantial residential development. The Wellesley Urban Extension will grow from the current 426 occupied dwellings to 3,850 dwellings. |
| Andover, Test Valley | <u>Employment</u> Ranks highly on employment; employment ratio; commuter in-flow; office, industrial and retail floorspace. Employment ratio is greater than UK | A relatively self-contained employment centre, but developing more links to other areas, including those outside the EM3 area (e.g. Wiltshire and West Berkshire). A range of major employers in defence, health, banking/finance, manufacturing and distribution. Town centre regeneration is a high priority to improve quality and vibrancy, and a masterplan is being prepared. |
| Ashford, Spelthorne | <u>Residential and services</u> | Proximity to Heathrow airport influences the area. There is a limited retail offering with no major anchor |

| Town | Data Distinctiveness | Pen Portrait |
|--------------------------------|---|--|
| | Ranks highly on population; out-commuting ratio; retail floorspace; house prices | supermarket. Construction of an additional 350 homes in the area will drive population growth in the town. Is seeking to join the London Underground network, which could attract more people to live and work in the town. |
| Camberley, Surrey Heath | <u>Employment and population</u> Ranks highly on resident population and employment <u>Employment</u> Ranks highly on employment; employment ratio; commuter in-flow; office, industrial and retail floorspace. Employment ratio is greater than UK | An employment, leisure and retail centre which benefits from funding to help facilitate town centre regeneration projects. Large business HQs located around Camberley. Significant current and proposed residential developments. |
| Egham, Runnymede | <u>Employment and population</u> Ranks highly on resident population and employment <u>Employment</u> Ranks highly on employment; employment ratio; commuter in-flow; office and industrial floorspace. Employment ratio is greater than UK <u>Vitality and growth</u> Ranks highly on % of population aged 16 to 64; change in employment; % change in employment; employment ratio; productivity index; % change in business units % of population aged 16 to 64 is greater than UK | Royal Holloway University is located here, but there are some tensions related to student housing. Dynamic economy. Large employers in the Causeway. Close to Heathrow. Expansion of Heathrow offers both opportunities and threats. |
| Farnham, Waverley | <u>Employment</u> Ranks highly on employment; employment ratio; commuter in-flow; office, industrial and retail floorspace. Employment ratio is greater than UK | Farnham is the largest business area in the District. The town has an arts/cultural/visitor focus and is a designated Craft Town. There is an inflow of lower skilled workers and an outflow of higher skilled workers. There is a high level of home-working in the area. The town is a likely location for a future Business Improvement District. |
| Frimley, Surrey Heath | <u>Employment and population</u> | Frimley is closely aligned with Camberley, and the towns form part of |

| Town | Data Distinctiveness | Pen Portrait |
|--|---|---|
| | Ranks highly on resident population and employment | a continuous urban area. Hospital is a significant employer. Health, manufacturing and engineering are strong local sectors. Low levels of industrial vacancies, and a compact District Centre with a limited range of local shops and services. High quality of life and skilled population. |
| Romsey, Test Valley | <u>Residential and services</u> Ranks highly on population; out-commuting ratio; retail floorspace; house prices | Historic market town serving a wider area. Fully integrated into the South Hampshire sub-region. University of Southampton Science Park is located here, with more than 100 technology businesses. |
| Staines-upon-Thames, Spelthorne | <u>Employment</u> Ranks highly on employment; employment ratio; commuter in-flow; in-commuting ratio; office and retail floorspace Employment ratio is greater than UK <u>Vitality and growth</u> Ranks highly on % of population aged 16 to 64; change in employment; % change in employment; employment ratio; productivity index % of population aged 16 to 64 is greater than UK | Staines upon Thames is a retail centre for Spelthorne. Concentration of technology companies. Close to Heathrow Airport, but public transport links are not good for commuting. Significant amount of PDR seeing commercial premises converted to residential. A masterplan is being prepared for the town, and there are plans to improve the public transport links to Heathrow. Potential for more leisure accommodation linked to Heathrow. |
| Weybridge, Elmbridge | <u>Employment</u> Ranks highly on employment; employment ratio; commuter in-flow; in-commuting ratio; office, industrial and retail floorspace Employment ratio is greater than UK | Brooklands Business Park is a major employment location. Potential for intensification and growth in employment. Strong professional services sector in the town. Significant future economic growth potential. Traffic congestion is a serious threat. |
| Whiteley, Winchester | <u>Employment</u> Ranks highly on employment; employment ratio; commuter in-flow; office, industrial and retail floorspace. Employment ratio is greater than UK <u>Residential and services</u> | A significant employment centre which includes Segensworth Business Park, Solent Business Park and Whiteley Shopping Village. Attracts significant in-commuting, but also has out-commuting. Significant employment growth potential. |

| Town | Data Distinctiveness | Pen Portrait |
|-------------------------------|--|--|
| | <p>Ranks highly on commuter out-flow; out-commuting ratio; retail floorspace; house prices</p> <p><u>Vitality and growth</u> Ranks highly on % of population aged 16 to 64; change in employment; % change in employment; employment ratio; productivity index; % change in business units</p> | |
| Winchester, Winchester | <p><u>Employment and population</u> Ranks highly on population and employment</p> <p><u>Employment</u> Ranks highly on employment; employment ratio; commuter in-flow; in-commuting ratio; office, industrial and retail floorspace Employment ratio is greater than UK</p> | <p>Centre for public sector employment, including local authorities, universities/HEIs, hospital and courts. Leisure, tourism and retail are also strong sectors. Major technology employers located close to the town. Employment centre for a wider area. Significant residential developments taking place around the town.</p> |

6 Conclusions

- 6.0.1 The overall objective of this report has been to gather data on the towns of the Enterprise M3 area, including data on longitudinal change, to create a typology of towns which can be used to inform the preparation of the Local Industrial Strategy.

6.1 Functional relationships

- 6.1.1 An initial way of sorting the towns has been through the definition of functional economic market areas within the Enterprise M3 area, that is areas which are functionally consistent. This has done using functional data on travel-to-work, housing market areas and commercial property market areas. Towns within these areas would be expected to have stronger functional relationships with each other than with towns outside each FEMA.
- 6.1.2 Towns can be classified by the functional economic market area that they are within i.e. Outer London/Northern Surrey, Southern Surrey/Eastern Hampshire, Northern Hampshire, Mid Hampshire and Southern Hampshire. The boundaries are not precise and will vary if different individual functions are considered.
- 6.1.3 However, the functional economic market areas are helpful when considering the geography of historic and future growth throughout the EM3 area, which is itself a coherent economic area.

6.2 Characteristics and change over time

- 6.2.1 In this research we have looked at many characteristics of the towns and how some of them have changed over time, including primary and secondary data. The main datasets are based on the size and characteristics of the resident population; the size and characteristics of workplace-based employment including sectoral structure; commuting between places in the Enterprise M3 area; business floorspace; some measures of workforce and employment quality such as the productivity index, wages and qualifications; and the role of each town. In terms of service provision e.g. of retail, hospitals or higher education.
- 6.2.2 The work also looks at dynamism in terms of recent change in population, employment and other indicators, noting that as well as growth, some towns have seen a decline in population and workforce, and sometimes both.
- 6.2.3 Combining and comparing data to develop a typology of towns
- 6.2.4 We have considered the datasets and considered them in order to highlight towns which are distinctive as:
- Both population and employment centres
 - Towns which play a strong role in employment terms
 - Towns which play a strong role as residential and service centres
 - Towns which emerge as economically vibrant places, experiencing growth
- 6.2.5 There are some towns which feature in a number of these categories: Aldershot, Basingstoke, Camberley, Egham, Farnborough, Guildford, Staines-upon-Thames, Whiteley and Winchester. In addition, seven towns are highlighted in one of the above categories: Andover, Ashford, Farnham, Frimley, Romsey, Weybridge and Woking.

6.3 Role in supporting future growth

6.3.1 This analysis builds on the typology of towns which has already been defined for the SEP, and es this. The SEP defines:

- Growth towns – Basingstoke, Farnborough, Guildford and Woking. These are large towns which play an important role in the LEP economy and will continue to accommodate growth in the future
- Step-up towns – Aldershot, Andover, Bordon/Lindley/Headley, Camberley and Staines-upon-Thames. These towns are considered to have as-yet untapped growth potential

6.3.2 The distinctive towns emerging from this analysis include most of the above (with the exception of Bordon/Lindley/Headley which has been defined as a step-up town because of its potential rather than its historic and current potential). However, eight additional distinctive towns are identified in addition to the growth and step-up towns. These are set out in the figure below.

Figure 6.1: Distinctive Towns

| Growth Towns | Step-Up Towns | Other Distinctive Towns |
|--------------|-------------------------|-------------------------|
| Basingstoke | Aldershot | Ashford |
| Farnborough | Andover | Egham |
| Guildford | Bordon/Lindford/Headley | Farnham |
| Woking | Camberley | Frimley |
| | Staines-upon-Thames | Romsey |
| | | Whiteley |
| | | Weybridge |
| | | Winchester |

6.3.3 However, most of the 33 towns considered in this study have a role to play in the future growth of the Enterprise M3 area, which is summarised in the figure below.

Figure 6.2: Contribution to Future Growth

| Town | Potential contribution to SEP and LIS |
|-------------------------|---|
| Basingstoke | Employment in high value sectors. Enterprise and innovation in digital and 5G |
| Tadley | No major change |
| Alton | New employment sites. Potential for advanced manufacturing and engineering |
| Bordon/Lindford/Headley | 3,500 new homes. 5,000 new jobs, especially in digital, space and clean growth |
| Petersfield | No major change |
| Cobham | Potential growth in SEP key sectors. Attractive to FDI |
| East & West Molesey | Potential growth in SEP key sectors. Redevelopment of existing employment areas |
| Walton-on-Thames | Potential growth in SEP key sectors |
| Weybridge | Potential growth in SEP key sectors. Intensification of existing employment sites |
| Guildford | Scale-up businesses in SEP key sectors |

| Town | Potential contribution to SEP and LIS |
|---------------------|--|
| Blackwater/Yateley | Potential benefit from Crossrail 2. Potential regeneration of town centre |
| Fleet | Opportunity to regenerate parts of the town centre, but no major change in the town. New garden settlement will look to Fleet for services. |
| Addlestone | Some mixed-use development and improved retail offer |
| Chertsey | No major change |
| Egham | Potential mixed-use development |
| Aldershot | Major regeneration of Town Centre. Potential growth in digital and gaming sector and development of football ground including hotel development |
| Farnborough | Major regeneration of town centre. Potential growth in aerospace, digital, ICT and conferences |
| Ashford | No major change |
| Shepperton | Potential development of Shepperton Studios |
| Staines-upon-Thames | Town centre masterplan. Light rail link to Heathrow. Growth in tourism and accommodation |
| Sunbury | Potential growth in high-tech businesses |
| Camberley | Mixed-use town centre regeneration developments. Forecasted growth in the professional, scientific and technical activities, construction and civil engineering, and digital sectors |
| Frimley | Forecasted growth in the human health, medical technology, aerospace, and professional, scientific and technical activities sectors |
| Andover | Potential regeneration of town centre and cultural quarter and housing/employment growth |
| Romsey | Further growth of Science Park |
| Cranleigh | Small businesses, especially in creative and IT at Dunsfold Park |
| Farnham | Arts and cultural focus. Improved cultural and visitor economy |
| Godalming | Potential for growth in gaming sector |
| Haslemere | No major change |
| Whiteley | Increased employment in existing businesses. Potential development of new sites |
| Winchester | Potential growth in professional services, digital, creative and tourism |
| Woking | Potential growth in knowledge businesses and R&D |