Hampshire 2050 Commission of Inquiry
Rural Strategic Theme
From Hampshire Rural Forum

The Hampshire Rural Forum (HRF) welcomes this opportunity to submit a response to the Hampshire 2050 Vision for the Future and would commend Hampshire County Council (HCC) in gathering views on how the council should respond to the challenges ahead especially at this juncture in our national history.

The Hampshire Rural Forum brings together organisations, groups and individuals with a concern for the economic prosperity and well-being of businesses and communities in rural Hampshire. Thereby enabling Hampshire's rural communities to become more visible, effective and sustainable socially, economically and environmentally.

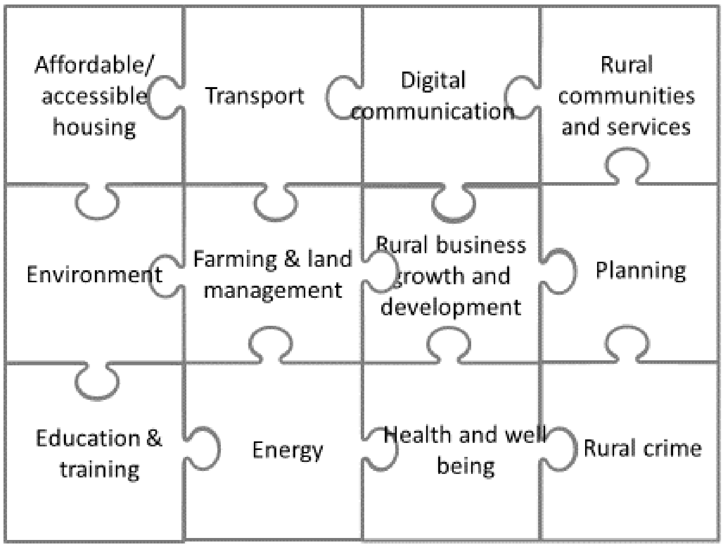
The HRF's objectives are

- Providing opportunities for raising awareness and understanding of rural issues
- Being a trusted source in providing evidence and responses for policy and decisions makers and other interested groups on rural matters impacting Hampshire
- Working collaboratively in finding solutions to identified challenges within rural Hampshire
- Promoting the importance and understanding of the inter-relationships between urban and rural areas
- Disseminating information and intelligence on rural and related matters to Forum members

The Forum was originally established in 2009 to act as an overarching advisory body for rural matters in Hampshire. As the Forum had not met for some years, in 2015 Councillor Humby, in his capacity as Hampshire County Council Lead Member for Rural Affairs, contacted organisations previously involved in the Forum to seek views on its potential re-establishment. As a consequence, there was felt need for the re-establishment of the Forum and an independent chair was elected in May 2016. Currently, Councillor Edward Heron sits on the Steering Group in his capacity as Executive Member Countryside and Rural Affairs, HCC. The Forum also has a seat on the DEFRA Rural and Farming Network which meets with ministers and civil servants.

Underpinning the HRF is the rural jigsaw which was an attempt to show the 'pieces' making up rural Hampshire and the interconnectivity between them. This representation may be a help to the Commissioners in gaining an appreciation of the different interests and dimensions making up rural Hampshire.

The rural jigsaw



The submission is structured around the three components of the Rural Theme:

- Rural environment
- Land-based sector and farming
- Rural communities

Although we would point out that rural has an important crossover with the other five themes of the Commission of Inquiry.

In summary, against the backcloth of the external operating environment we see the future role of HCC and partners as being one of:

- Committed collaborative working with the organisation, groups, businesses and communities within rural Hampshire

- Acting as an advocate for the rural voice both within and outside Hampshire

- Investing in its land-based and rural assets to provide exemplar models of environmental good practice together with providing a responsible and healthy countryside and environment for the benefit of rural dwellers and the wider society

- Providing services to support sustainable and accessible rural communities

- Demonstrating an understanding of the needs of rural in developing its strategic and operational thinking to ensure demonstrable 'rural proofing'.

Note: Some of the Forum's comments in this submission relate to functions and services that are not currently the direct responsibility of Hampshire County Council. These

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responsibilities may well change in the future as local authority functions and funding change over the long term. The need to reintroduce some form of strategic spatial planning at the regional and sub –regional scales is apparent, for example. Moreover, the County Council has an important role in influencing and working with others in government and the public, private and not-for-profit sectors to help shape and deliver policy and programmes over a wide range of sectors.

Submitted on behalf of the Hampshire Rural Forum

Michael Ridout
Chairman

Thursday 20, December 2018

Section 1: Rural environment

Hampshire has an environment that is exceptional in both its quality and diversity. Its mosaic of heathland, downs, coast, ancient woodlands, meadows and chalk rivers, and its historic sites, buildings and gardens, are major assets for the county which are highly valued by local residents and businesses and by visitors.

Many areas are covered by international, national and local designations (landscape, ecological and historic). However, the importance of the natural and historic environment extends far beyond these designated areas and sites.

The countryside provides extensive ecosystem services, including food, water and raw materials, water purification, air quality, flood prevention, soil formation, nutrient recycling, and health, well-being, recreation and inspiration. Beautiful landscapes, dark skies and tranquillity, are essential elements of well-being. It is vital that these ecosystem services are recognised for the benefits they provide to the population of Hampshire and that they are held in trust for future generations.

Integral to the character of Hampshire's natural environment is the way farming has shaped the landscape and its role in protecting, maintaining and enhancing habitats and biodiversity together with the provision of public access to the countryside.

However, Hampshire's countryside is experiencing major pressures such as climate change, sea-level rise, intensive agriculture and physical pressures on rural areas to provide land and infrastructure for new development, recreation, water, drainage, food and energy., trends which are likely to continue and even accelerate in the future. These have resulted in a substantial decline in biodiversity in recent times, affecting both individual species and the extent and quality of important habitats.

The diverse character of Hampshire is often seen in its physical appearance/features and it is imperative that the 2050 vision maintains the distinctiveness of Hampshire both in terms of its countryside and the environment. It is also noted that Hampshire's countryside and environment provides habitats for both flora and fauna. Targeted investment and policies are needed to encourage the recovery and restoration of nature, together with more larger and joined-up areas where wildlife can take precedence and recover.

As a consequence, the 2050 vision needs to set out a strategy for ensuring that these habitats are recognised and maintained for future generation (in particular, ensuring that those in the County estate are managed to encourage good ecological practice and sustainability).

The 2050 vision needs to set out the approach and strategy that will be developed by HCC to work collaboratively with landowners, and other (landowning) public/charitable organisations and trusts to ensure close working in providing protected in public areas for nature to thrive and the public to partake of the benefits of a healthy environment.

There is also need through the same collaborative approach to ensure that water resources are managed in respect of flood risk management, water quality, and availability of water resources for example, food production. Allied to this is providing clean air for people and the environment to exist.

People need green space and connectivity to the rights of way network close to where they live. Locally accessible areas of green space can be highly valued by communities, as are larger areas such as country parks and nature reserves. They can provide opportunities for informal recreation, improved health and well-being, the conservation of biodiversity, landscape, seascape and historical features, education, water resource management, links with the sustainable transport network and community involvement in management. The demand for local green space may well increase further in the future because of factors such as increased transport costs, more ‘staycations’, an aging population seeking local opportunities for informal, active recreation and micro food or fuel production.

More accessible, versatile and better-quality open space should be provided close to or within settlements to allow access by pedestrians, cyclists and public transport. This applies to rural as well as urban communities - for example, some villages have no access to the surrounding countryside because of gaps in the rights of way network. The County Council’s networks of country parks, nature reserves, other open spaces and rights of way are invaluable and should be retained and expanded, perhaps exploring new opportunities for partnership in their ownership and management.

Dedicated recreational greenspace is also crucial to take pressure away from vulnerable areas, particularly wildlife havens where recreation pressures such as dog-walking are causing unacceptable disturbance and damage to wildlife.

When planning for long-term changes to the settlement pattern, such as urban extensions and growth areas, plans should include schemes for positive interim uses and management of the surrounding countryside of a similar scale and timeframe to the development. The first phases of implementation of the fringe countryside plan need to be well in advance of development, such as restoration of habitats, major planting of woodlands and hedgerows or the creation of green infrastructure along a feature such as a river valley, which will eventually become part of the new development. Opportunities should also be considered in these areas for sustainable energy production, local produce, recreation, education, interpretation and other support for the local economy so that a productive landscape and viable businesses can be maintained, linked to the new urban areas and to the neighbouring rural communities.

The 2050 vision is opportune, considering the publication, earlier in the year, of HM Government’s “A Green Future: Our 25 Year Plan to Improve the Environment”, to ensure that future generations can benefit from the rich variety of Hampshire’s natural assets/capital. These assets, however, will need to be managed, protected and enhanced and this will only be achieved through an approach that recognises key stakeholders, such as land owners and farmers as providers and custodians of ‘public goods’ and wildlife and environmental charities. The responsibility of HCC and local authorities in managing their land-based assets and ensuring developments are sensitive to Hampshire’s natural environment and cultural heritage will also be crucial in ensuring an environmental legacy that is fit for 2050.

Section 2: Land-based sector and farming

Food production and consumer trends

The World Resources Report "Creating a sustainable food future A menu of solutions to feed nearly 10 billion people by 2050" (December 2018) identifies that "as the global population grows from 7 billion in 2010 to a projected 9.8 billion in 2050, and incomes grow across the developing world, overall food demand is on course to increase by more than 50 percent, and demand for animal-based foods by nearly 70 percent. Yet today, hundreds of millions of people remain hungry, agriculture already uses almost half of the world's vegetated land, and agriculture and related land-use change generate one-quarter of annual greenhouse gas (GHG) emissions". The report further identifies that to achieve the necessary global food production by 2050 there are three great "gaps" that need to be closed, these are:

- the food gap
- the land gap
- the GHG mitigation gap

In order to close these gaps there is a need to address the challenges of

- raising productivity through increasing the efficiency of natural resource use
- managing demand for food through reducing food loss and waste, shifting dietary patterns, limiting biofuel production
- linking agricultural intensification with natural ecosystems protection
- moderating ruminant meat consumption
- requiring production related climate mitigation
- moving forward technological innovation

These gaps and challenges are not only global ones but those facing UK agriculture and, in turn, Hampshire. The productivity and environmental challenges have also been reflected in the UK Industrial Strategy; the 25-year Environment Plan; and Clean Growth Strategy for a low carbon future.

Annex 1 provides an overview of the outlook for EU agricultural production 2018-2030. The predictions are made on the basis of a European Union of 28 member states (i.e. including the UK) in light of the ongoing negotiations relating to the U.K.'s exit from the EU.

Perhaps the key message is that, with the exception of poultry meat, the demand for meat within the EU will either remain similar and/or decline. Any growth will be in meeting export markets as the world population increases.

Underpinning future demand for agricultural products are the changes in consumer behaviour preference over recent years and in the future.

One notable trend in food consumption is the increasing emphasis on providing food in a convenient format which is seen to offer clear benefits for modern, busy lifestyles and reducing the time spent on buying, preparing and eating food. This is manifest in the availability of the rise in 'instant' or quick prepare foods; digital technologies enabling faster shopping; arising eating out and 'on the go' eating, and increased availability and variety of food.

At the same time, it could be argued that convenience has come at a cost. This being manifest in the decrease in the consumers' connection to and through the food they eat. This, in turn, has led to a disconnect with primary food production which has been clouded in the increasingly complex, fragmented food production and retail processes. This disconnect also contributes to the increase in food waste and impact on the environment.

In addition, although there are those in the population who are drawn to food that has an assured provenance, many consumers are drawn to cheaper food and perhaps not concerned with the potential long-term health impacts from processed food consumption - particularly obesity and the cost associated with this. (Linked to this, is an emerging concern over 'hidden hunger' associated with the chronic lack of essential micronutrients in modern diets and lifestyles and the impact this may have on health.)

Annexe 2 provides a more detailed reflection on consumer trends.

Food waste

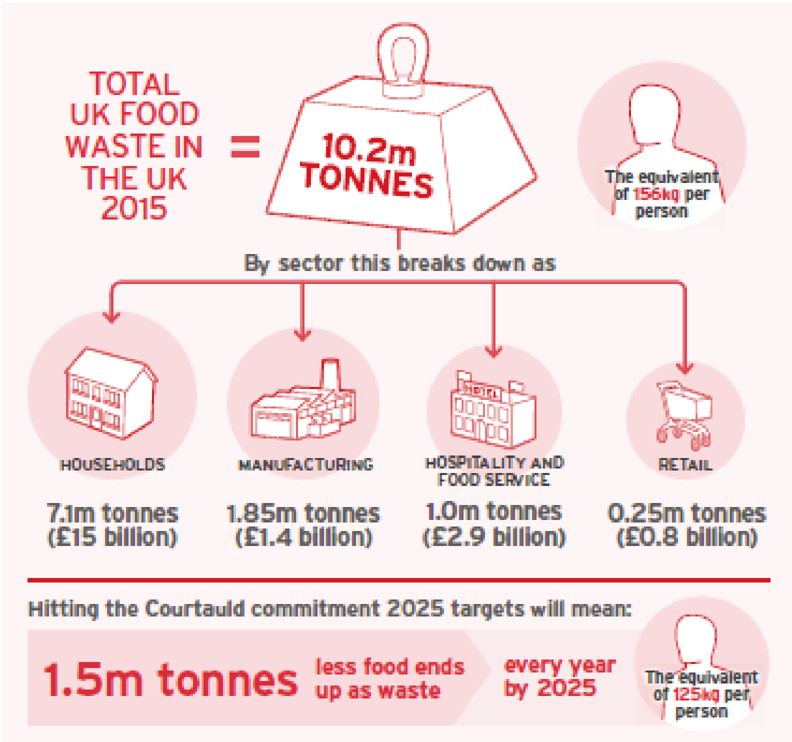
The rise of convenience food and the disconnect between consumers and primary producers has also been accompanied by an increase in food waste. The HM Government consultation (launched in December 2018) "Our waste, our resources: A strategy for England" highlights the seriousness of food waste both to our economy and the environment. The consultation identifies "Nobody likes to see good food go to waste. It's morally wrong, environmentally damaging, and costs money. In the UK alone, an estimated 10 million tonnes of food and drink are wasted annually after the farm gate, worth around £20 billion.

The environmental case is clear. If the total global annual emissions from food waste – some 3.3 billion tonnes – were released by a single country, that nation would be the world's third largest polluter behind China and the United States129. In the UK alone, the carbon footprint of food and drink consumed is estimated to be equivalent to one fifth of UK emissions130.

The UK has long recognised the need to tackle food waste, and is an international leader on the issue. Since 2007, we have approached the problem from numerous angles, including through a series of voluntary agreements that have reduced per capita food waste by 14%. The latest agreement, the Courtauld Commitment 2025, aims to reduce per capita UK food waste by a further 20%, between 2015 and 2025.

We are also fully committed to meeting the UN Sustainable Development Goal 12.3 target, which seeks to halve global food waste at consumer and retail levels by 2030. Together, these commitments support our broader ambitions to eliminate avoidable waste by 2050 and to work towards eliminating food waste to landfill by 2030."

The enormity of the situation is illustrated in the following diagram:



HCC, within its 2050 vision, has a key role and responsibility in stating its commitment to reducing food waste and being an exemplar in demonstrating approaches to reducing food waste. This can be achieved through its procurement policies and contracts with caterers and suppliers for sustainable, locally sourced nutritious and palatable food. They may indeed be challenges in moving this forward yet social responsibility and conscience demands action.

(Allied to this is also HCC being seen as a champion for sustainable practice recycling.)

Food and the environment

The NFU report (December 2018) “United by our environment, our food, our future” highlights the interrelationship between food production and responsible management of the environment. The concept of moving from direct support to paying for public goods is prominent in agricultural policy thinking. These public goods can be classified as ecosystem services and are defined as “the benefits provided by ecosystems that contribute to making human life both possible and worth living”.

The NFU have captured the interaction of food and the environment within the diagram on the title page of the report:

The components of this diagram and their interrelationship are those that should be understood as HCC determines its 2050 vision both in terms of their statutory responsibility and as managers of land and rural assets.

The rural economy

Newcastle University Centre for Rural Economy has identified “the countryside is a place we rely on to produce a large proportion of our food and other goods, both private and public, and where we go for pleasure and relaxation. Rural areas in England contribute over 250 billion a year directly to the economy. However, national and local policymakers may all too often hit rural communities and appropriately or leave them behind. Resourcing may seem unfair in its allocation between urban and rural, and services can fall short once the focus moves outside towns and cities. Assumptions are made about rural economies that focused too narrowly on agriculture and tourism and the ageing profile of the population is seen as a burden. These are issues that have long been with us, but the U.K.’s forthcoming exit from the EU could offer an unforeseen opportunity to rethink policy approaches”. The sentiments expressed are those that reflect the challenges of rural Hampshire and the need to ensure that rural understanding is embedded across all activities of HCC and, in particular, supporting the growth of the land-based and rural economy.

In its simplest, rural economy is made up of a number of, often interrelated, economies that can be represented as:

The visitor economy

The food & drink economy

The wood economy

The business (enterprise) economy

Community (social enterprise) economy

Crucial to the 2050 vision is HCC developing its understanding of the operation and interaction of these economies and the financial and non-financial benefits provided together with ensuring policies and decisions do not hinder or prevent rural prosperity. Allied to this, will be the mindset change needed by HCC to be seen as a facilitator and champion of the land-based and rural economy.

Central to this will be an enabling planning policy to encourage rural prosperity. This has been highlighted recently by the CLA in a report highlighting the limitations of current criteria used to conduct village sustainability assessments.

Further considerations

The following points are ones that should be considered within the 2050 vision:

Housing, planning, communities and workspace

This is, perhaps, expressed by the following Extract from the South-West Productivity Commission Report (2017)

"The lack of affordable housing in rural areas is a significant factor limiting growth of rural businesses. The planning system was identified as a barrier to the development of dispersed small-scale developments across rural areas that would enable rural communities to continue to be viable. Similarly, multiple issues, including planning were identified as barriers to the development of commercial properties and workspace". (Link to this is the provision of a digital infrastructure to allow those occupying business workspace to compete with their urban counterparts.)

Education

The importance of education cannot be overemphasised in providing the necessary numeracy, literacy and social skills in equipping citizens for tomorrow. The challenge is to make these accessible to those of school-age in rural environments and those who may have been failed by the education system and now wish to improve their life opportunities.

The value and importance of post-16 education and, in particular, that offered by the further education sector should not be overlooked in providing the vocational and business/management skills needed for the workforce to support the different facets of the rural economy. Ensuring that those, both young and older, within rural communities have access to these opportunities is vital.

In addition, the importance of education in developing the understanding of urban and rural dwellers regarding the environments in which they live and operate is an important challenge for the future to ensure understanding and harmony particularly in the use of the countryside for recreational and health benefits. This aspect could be reinforced further through the educational dimension of the countryside parks and centres (museums) within the influence of HCC.

Furthermore, there is an important role to be played by HCC promoting the value of locally produced produce and encouraging healthy lifestyles through the use of its assets together with highlighting the need not to take food for granted and avoiding unnecessary waste.

Technology, Broadband and Mobile Connectivity

There will be a continued need for ensuring a robust and effective digital infrastructure to ensure that land-based and rural businesses are able to improve their productivity through the use of technology (see further detail under Rural Communities below).

Science, technology, energy and innovation

Science and technology are key drivers in economic and social change. The challenge is to ensure that those operating in rural areas are able to harness the scientific and technical revolution otherwise economic inequalities will only widen.

Hampshire has a history of agricultural innovators; the challenge has always been disseminating innovative practice in order to improve business performance. Within the 2050 vision, perhaps there is a role for HCC to act as a facilitator in bringing together key players, such as the LEP, rural business organisations, and education, in developing a rural innovation strategy that also addresses the need for rural business management skills. HCC, as a major landowner, has a key role in demonstrating environmentally sensitive rural innovation.

The need to provide energy that is sympathetic to the environment is understood. There are examples of businesses within Hampshire seeking to harness renewable energy sources however these will not be fully realised until they are integrated into business and housing developments - a challenge for the 2050 vision

New entrants

HCC is to be commended for its commitment to its County farms. These provide a valuable opportunity for new entrants into farming. The challenge is to take this further so that it is not a step onto the farming ladder but part of a wider strategy to encourage the attraction and progression of new entrants into farming.

Waste crime

HM Government consultation (launched in December 2018) "Our waste, our resources: A strategy for England" notes that "waste crime damages the environment, causes distress to communities, and costs the taxpayer money to sort out the consequences. It significantly reduces resource efficiency, leading to an over-use of our natural capital, and cannot be allowed to undermine our ambition". This statement perhaps does not fully express the impact of fly tipping on landowners and their workforce.

HCC's commitment to partnership working and acting as a catalyst in addressing and combating the antisocial and illegal practice of fly tipping is to be commended. The 2050 vision needs to reinforce this commitment and set out the ambition for 'zero tolerance' of waste crime and associated activity.

Section 3: Rural Communities (including Housing)

Local knowledge is vital to develop and design appropriate (and where relevant, integrated) services and solutions to the challenges likely to be encountered between now and 2050. No one size fits all. A service should be tailored to local circumstances and take into account what is already in place in that location. The visioning exercise must not focus on meeting today's needs as the way to address future needs. It is unlikely that current solutions and ways of thinking will still be relevant when today's young people approach retirement in 2050.

A vision for 2050 is not going to be easy to achieve. Challenges going forward are likely to **continue** to include affordable housing; lack of investment in service; poor transport infrastructure and network; growing social isolation; rural youth exodus; poor variety of job opportunities; lack of broadband / mobile; lack of rural policy (rural being "invisible" and off "radar").

Villages often have the capacity to accommodate more development; indeed, they may need some modest growth and adaptation in housing, jobs and services for them to thrive as viable settlements. Overly restrictive planning policies that fossilise communities have a negative impact on economic prosperity, social cohesion and house price affordability. As Mark Taylor (2008 Taylor Review) noted "no place should be unsustainable". If a rural settlement is seen as being unsustainable, what will its future look like? (two possibilities cited by Taylor are a) an ageing population, high house prices, nobody of working age, no remaining services OR b) a run-down village with empty houses). The County Council should help promote and support self-sustaining communities that include live/work schemes and have access to a wide range of services within reasonable reach to reduce the need for travel.

However, all development and changes should respect the local character, scale and environment of the settlement and be guided both by strong design requirements and by community-led plans such as Neighbourhood Plans or other forms of community involvement. HCC should be sharing responsibility with communities for their future prosperity and wellbeing – both parties have roles and responsibilities in relation to building a viable future. This would not mean HCC renouncing responsibility but rather moving into an "enabling" role and developing new ways of cooperating with others. Over the next years it is likely that communities will need to start thinking themselves about the longer term. HCC could help them *to imagine their future* through locally-led planning alongside external stakeholders. The question to answer is how can we, together, make our rural places sustainable, resilient and thriving?

An important role for HCC would be to "manage" the transition from an attitude of dependency into a more (local) can-do position. If a service is withdrawn only those who are confident or who have the money will survive. The caveat is that with an ageing population there may be some resistance to change – HCC and partners could counter this by ensuring comprehensive education and lifelong learning opportunities. This can be used to inspire or provide people with the confidence and ability to take advantage of the changing landscape over the next 30 years.

Keeping young people in rural areas will require the "right mix" of affordable housing, services, education and training, affordable transport and meaningful employment as well as a genuine involvement in decision-making (see also Education).

Market Towns and Village Centres

Key components of rural prosperity and well-being in Hampshire are the 'market towns' - not just historic small towns but also other towns and large villages which act as focal points for the surrounding countryside. These diverse settlements have vital roles as attractive economic, social and service centres for retailing, employment, training, education, health, leisure and community facilities as well as for housing.

If they are to continue to serve rural communities, their capacity to adapt to a rapidly changing environment and rural economy needs to be developed with public and private sector investment and support. A diverse economic base is very important which also helps support the wider rural economy, as well as modest housing development (through new and brownfield sites and renewal) which reinforces the town's distinctive character and role.

Individuality is the key to their success, particularly a strong historic character in many cases. Strategies for growth and investment need to reinforce and build on their inherent strengths, such as developing niche roles in tourism, local food and the arts. It is important that growth is carefully managed so that it does not 'swamp' the town and damage its distinctive character, which would in turn harm its appeal as a commercial retail and business centre, an attractive residential location and visitor destination.

Good accessibility is crucial to the role of market towns as hubs, and Hampshire County Council has an important role to play in developing green transport strategies and traffic management which meet the needs of both the towns and their hinterlands. The Council can also assist in improving the role of the town centre as a service and education hub by guaranteeing the delivery of its own services there.

Community and social needs

Community and social needs in 2050 may be partially met through the better use of under-used facilities, mobile and joint services, co-location and digital and information technology.

Facilities

Meeting places in rural areas are usually the village / community hall or a church building. Given time and the right level of support these could develop their role as true local hubs with multiple functions – space for delivering services, running activities to combat loneliness and address isolation issues, helping to bring about mental wellbeing, supporting older people to live independent lives for longer. Over the next 30 years HCC should continue to invest (both financially and through other forms of support) in the volunteer committees who manage the facilities. Community hubs are likely to be located in larger villages or market towns (see Market Towns and Larger Villages).

The decline in village facilities (discussed as long ago as the early 1980s) is marked as the facilities continue to migrate up the settlement hierarchy, and out of centre stores and internet shopping increasingly provide what consumers want. Anecdotal evidence following a study that Action Hampshire undertook into the impact of social isolation on health and wellbeing highlighted the changing nature of some villages – away from "community" and a move towards dormitory status. As a result traditional informal support networks are beginning to disappear. This development not only discriminates against those without transport or who are not internet savvy but will inevitably exacerbate concerns about loneliness and mental ill health.

Transport and Accessibility

Transport and accessibility is crucial in sustaining rural businesses/economies and communities, particularly in providing young people opportunities to accessible rural employment, apprenticeships and education.

In the future, some community buildings could transform themselves into Rural Transport Hubs. These could operate as intersections accessed on foot, by bicycle or by car where travellers can link into public transport networks and then continue their journey. There will continue be a need for some sort of transport. Residents in rural Hampshire will always require the means to "get out and about" for different reasons. Ensuring access will deliver wider benefits such as social interaction and helping older people to remain independent for longer (see Market Towns and Village Centres).

Any hub, however, whether it is for multi-use purposes or as a transport intersection point, will only succeed with local community support. Whatever the future might be in terms of transport (electric cars? driverless cars? a very different highways infrastructure in 2050) HCC, as a lead partner on transport, must continue to ensure people in rural areas still have the access that they want or require.

HCC is best placed to lead and coordinate the way forward given its involvement in different forms of transport including that for education and social care. Partnerships with other organisations and operators need to adopt a more consistent and long-term approach as well as looking at how future services can be tailored to local circumstances. Currently there is a patchwork of different types of transport – school and patient for example – which other people cannot use. Going forward HCC could encourage a more holistic view of transport and access to ensure a better coordinated network (eg by joining up with patient and school transport programmes). Partners should pool resources and include rural communities in planning, designing and providing rural transport services especially as some of the solutions may be based on self-help.

The majority of innovation around transport is currently confined to more urban locations but could car clubs, bike hire schemes and on-demand transport work in a rural location?

Rural areas, even those in Hampshire, are diverse and will benefit from local solutions. However, their capacity to act is uneven. People cannot be left on their own to deliver self-help initiatives. A County Council that has adopted an "enabling" role can look at how it can provide capacity building and support so that **all** communities have the confidence to start addressing their own priorities.

Technology, Broadband and Mobile Connectivity

There will be a continued need for ensuring a robust and effective digital infrastructure to ensure that land-based and rural businesses are able to improve their productivity through the use of technology. This will be evident in the use of technology to allow precision in the use of resources and the benefit to the environment; engaging with the knowledge economy; reaping the benefits of the Internet of things and agri-metrics, and at an operational level, for example, being able to accept bank cards to carry out digital transactions within rural businesses.

The role played by HCC in moving the digital economy forward is noted however the challenge ahead is to continue the journey and ensure sufficient and accessible digital infrastructure for 2050 and beyond. Given how much technology has changed and impacted on lives over the last 30 years, it is impossible to predict what will happen over the next 30 years. HCC's vision has to be open to new technological advances and how they can be used to benefit rural businesses and communities in the future.

Digital possibilities could deliver e-cars; e-buses; e-charging points; access to remote e-services by 2050. The benefits of this are huge – it could attract new businesses and help existing ones to grow; connect people locally and further afield; facilitate remote working; improve business access to customers and suppliers; provide medical services from a central hub.

This does come with a caveat. Technology should be seen as a management aid **not** a replacement tool. Complete reliance on technology could increase division and polarisation. There will be those who require training and ongoing support to benefit. Undoubtedly there will also continue to be a need for offline opportunities and connections. As people age, they may experience cognitive decline, which could lead to digital exclusion if technology cannot cope with the change.

One question that may need to be addressed is whether the increasing use of the internet and social media will exacerbate loneliness and isolation in the future as today's young people age? (www.centreformentalhealth.org.uk/sites/default/files/2018-09/CentreforMentalHealth_Briefing_53_Social_Media.pdf

Social and Community Businesses

Social and Community Business could be one way to address some of the challenges that we know will lie ahead. (a good example is community based land reform in Scotland – community ownership through community trusts that are pursuing collective visions of their future). To bring about change, though, these businesses, particularly when they are setting up, will need investment either financial or other forms of support. These new business models are moving away from dependency towards income generation and more sustainable outcomes. This movement requires sufficient spaces for people and organisations to come together to discuss and develop their own responses to their challenges (see Facilities).

Currently many young people, with vision and entrepreneurial spirit, are establishing their own businesses and returning profits into their communities – a trend to encourage over the next few years as one way to address the challenges society is facing.

Community businesses take a community into greater self-sufficiency and affordability utilising the skills and abilities already there. However there will be communities that do not have the confidence or the capability to take this on – they will need support and capacity building, either directly through the County Council and partners or through a third party such as a local support organisation. Without this support, these communities could be left behind.

By 2050 rural communities, with the right support and encouragement, could be delivering their own services. These businesses would also provide local employment opportunities and keep money circulating in the local economy. HCC and partners could take the lead on promoting new business models and the benefits they can bring. As there is no one size fits all, rural residents and communities will need to be aware of the different options available so they can make their own informed decisions about the best way to meet their own priorities.

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Volunteering

Raising the state pension retirement age (predicted to be 70 by 2050) could mean that people have less time in later years to volunteer and be able to deliver the informal care that is a part of the rural community. As has already been reported, there is anecdotal evidence that the informal networks are beginning to fragment (the result of having children at a later age, working longer, looking after elderly relations, more people commuting out for work and leisure purposes) there is a consequent reduction in mutual aid and social capital.

The 2017 ONS survey has highlighted changes in the nature of volunteering (less hours; the appeal of short term opportunities so young people can gain experience or for their CVs; difficulties recruiting committed individuals who are there for the long haul). Such trends need to be taken into account if HCC and partners are proposing that volunteers will take on a greater role in service delivery as budgets reduce.

Community and social businesses bring a different slant to volunteering by offering a range of opportunities (paid and voluntary). They are locally rooted, they benefit the community both financially and also through the delivery of a service or activity that addresses an identified priority and they involve people in shaping the direction of the business (see Social and Community Business). There is an important role for HCC to encourage and support the work that is already taking place to enable rural communities to deliver their own solutions.

Social Care

As far as it is possible to predict it is likely that financial challenges will continue to require the re-routing of funding from other sources to adult social care. Going forward this should be addressed more widely, rather than silo planning, so that any decisions about the delivery of social care take into account other agendas including those of prevention and of housing.

The increasing concentration of elderly people in rural areas probably reflects that this generation is better placed to afford the high house prices. However, this leads to an unsustainable cost of care which in turn reflects wage costs, difficulty in recruiting (post-Brexit) and falling council budgets for adult care. Digital technology, Artificial Intelligence, remote care and the internet may provide part of the solution but self-management will probably be the exception rather than the rule – certainly in the foreseeable future. A major challenge over the next 32 years will be providing the appropriate social care required by this ageing rural population. Time and again we hear about the importance people place on face-to-face contact in order to overcome loneliness, isolation and mental health issues – and this is unlikely to change in 2050.

Although the evidence would suggest that people in rural areas live longer, the older old (and presumably their numbers will increase) are more likely to have complex health issues, become frailer and require high level care. If the public subsidy continues to be restricted the burden for the not for profit sector will increase (see Volunteering).

Housing

Rural communities need a broad range of housing tenures, types and prices to support a thriving mixed community where people can live and work close by. Young people are often particularly affected by high rural house prices and many have to move away or are part of the ‘hidden homeless’, sharing homes with relatives or ‘sofa-surfing’.

New homes must include a high proportion that are affordable by people who have strong local connections. Without these homes, it is difficult for young and older people to remain in the village, families to grow and remain in the same area and businesses to find a local labour force. Research has shown that those moving into affordable rural properties tend to work more locally and help to maintain services there by allowing them to remain open. Many also become involved in community work and volunteering, and may help to support other family members living locally.

It is often difficult to bring forward land for affordable housing in Hampshire's villages. Changes in national policy and funding have had a significant impact on delivery, and the County Council (through partnerships like the Hampshire Alliance for Rural affordable Housing – HARAH) should continue to make representations to address these problems. There is a significant role for HCC to continue to support HARAH and to champion rural affordable housing.

Again working through partnerships like HARAH, the County Council could help secure a higher proportion of affordable housing and other community benefits from "Section 106" legal agreements with developers of market-led sites in villages.

One specific blockage to delivery in Hampshire has been identified as the reluctance of landowners to release their land for rural exception site development. Greater flexibility by local planning authorities and incentives for landowners to release exception sites should be explored, such as gaining a rental income from the homes or providing landowners with nomination rights (for employees and family members) for a proportion of the dwellings.

Community-led housing is an option that should be encouraged and is already being developed in several parts of Hampshire. Local people are involved throughout the process of deciding on the most appropriate approach for their community and controlling the delivery of the scheme. Routes to delivery include community land trusts, co-housing, co-operatives, self-help and self-build schemes.

Older residents often welcome the opportunity to move locally to a smaller home or to some form of supported accommodation or co-housing in the place where they can stay in familiar surroundings and are close to family and friends. This in turn releases stock for others to move into the community. More supported housing in villages and effective support services for old people living independently could help achieve this. Co-housing helps to address other issues by promoting social interaction and keeping older people active, healthy and engaged.

Fuel poverty is an issue in Hampshire's rural areas that affects the health and quality of life of vulnerable people. A high proportion of rural housing stock is old with low energy efficiency compared with that of urban areas. Higher fuel costs are also a major problem as many rural areas have no access to cheaper fuels such as mains gas, and rely on heating oil and electricity. Hampshire County Council could seek to influence Government and energy suppliers to establish new programmes for retrofitting older homes to improve their energy efficiency and help bring people out of fuel poverty.

Further considerations

The following points are ones that should be considered within the 2050 vision:

HCC and partners must recognise the extra costs of service delivery in rural areas. This is exacerbated by the challenge of tackling social exclusion where it is not geographically concentrated (there are a few individuals experiencing social deprivation in most rural communities) – poverty, deprivation and exclusion are well hidden but just as real as in a more visible environment. Unless addressed, there will continue to be increasing polarisation in rural communities.

The constant requirement for not for profit organisations to 'bid' for small amounts of funding from various sources means that they have less staff resources to deliver their primary functions. A guarantee of at least medium term support and core funding is needed for key services and organisations in rural areas. Organisations in the not for profit sector need a degree of certainty to allow them to plan ahead. Rural projects often have longer lead-in times compared with those in urban areas (such as affordable housing).

Over the next few years, if HCC moves towards adopting a genuine empowerment and enabling role, rural residents will be able to deliver their own solutions in partnership. However, this will require behavioural change for the County Council and for rural residents. Leading up to 2050, those living and working in rural Hampshire need encouragement and support so they can help themselves in imaginative and innovative ways.

Annex 1

EU agricultural outlook 2018-2030: Changing consumer choices shaping agricultural markets

Many drivers will influence the agricultural markets over the next decade in the EU and beyond. The report takes into account the impact of consumers' behaviours on those markets. For instance, the consumer and citizen will become more conscious of their food, its sourcing, and its impact on the environment and climate change. For producers this will result in higher production costs but will also be an opportunity to differentiate their products, adding value while reducing negative climatic and environmental impact. This will be reflected in alternative production systems, such as local, organic or other certified products being increasingly in demand.

Projections for arable crops:

For the sugar sector, health initiatives and consumer preferences will lead to a decline in EU consumption by 5%. By 2030, the EU sugar production is expected to reach 19.3 million t, in comparison with 18.6 million t in 2018.

Concerning the cereal market, production is expected to continue growing, and reach 325 million t by 2030 (compared to 284 million t for 2018). This growth will be driven by an increase in industrial use of cereals, a small rise in feed demand and export prospects.

As for oilseeds, no further growth is expected in the rapeseed crop area due to the opportunities and limits of biofuel policy after 2020. In addition, demand for protein crops will continue to be strong for feed as well as for human consumption. The supportive policy environment will facilitate that, and further drive production growth. However, protein crops only represent 1.4% of total crop area, limiting its overall growth.

Projections for milk and dairy products:

Over the outlook period, population and income growth will drive higher consumption of dairy products and global import demand. By 2030, the EU could supply close to 35% of the global demand, with a focus on value-added products (organic, geographical indications, etc.).

EU exports of dairy products are expected to grow on average by around 330,000 t of milk equivalent per year. As for the EU market, close to 900,000 t of additional milk per year would be needed to satisfy its growth for traditional dairy products, which is mainly cheese. The EU milk production should experience a modest increase over 2018-2030, at 0.8% per year on average.

Meat projections:

By 2030, the EU meat market will be influenced by changes in consumer preferences, export potential, profitability, and for beef, changes in the dairy sector. Overall EU meat consumption will decline, going from 69.3kg per capita in 2018 to 68.6 kg in 2030.

EU beef production is estimated at 8.2 million t in 2018. However, production is expected to then decrease, influenced by a smaller herd, low profitability and declining demand. As for sheep and goat meat, thanks to improved returns for producers, maintenance of coupled support and sustained domestic demand, production will increase during 2018-2030, reaching 950,000 t in 2030, compared to 903,000 t in 2018.

EU consumption of pork will decrease from 32.5 kg per capita in 2018 to 31.7 kg in 2030. This decline will be compensated by higher exports, with world import demand that will continue to grow at a rate of 0.7% per year during 2018-2030. Poultry is the only meat that will see a strong increase in EU production and consumption. By 2030, EU production should reach 15.5 million t, compared with 14.2 million t in 2018. Global demand will also be growing, supporting an increase in EU exports.

Projections for environmental aspects:

Results from the market outlook have also been taken into account to analyse their impact on certain climate and environmental indicators. For instance, changes in the livestock sector will be a major factor for emissions. Therefore, the projected decrease in EU livestock numbers by 2030 will contribute to a decrease in emissions. However higher crop production and manure application will lead to an increase. This will result in greenhouse gas emissions staying at the same level than in 2012, while ammonia emissions will decrease by 9%.

As for nitrogen, projected nitrogen losses to water in the EU will be 8% lower than in 2012. In relation to plant biodiversity, results in potential plant species in the EU between 2012 and 2018 do not change much, with an increase of 2% of potential plant species.

[Caveat: Since the negotiations on the UK's exit from the EU are ongoing, the projections are made on basis of a European Union of 28 Member States, i.e. including the UK, for the full duration of the outlook period. The new Common Agricultural Policy (CAP) proposals have also not been taken into consideration, as they are still under discussion in Council and Parliament.]

https://ec.europa.eu/info/news/eu-agricultural-outlook-2018-2030-changing-consumer-choices-shaping-agricultural-markets-2018-dec-06_en

Annex 2

Grant Thornton: Emerging trends in the food and beverage sector (February 2018)

Convenience:

British consumers are increasingly time poor, as longer working hours and an always-on culture have become commonplace. While not new, this has driven a constantly evolving demand for convenience and 'food-on-the-go.'

As a result, food shopping habits have changed, with many consumers now preferring to do either standalone daily shops, or using them to top up a bigger weekly shop. The benefit of this is that they can adapt consumption to their lifestyle, whilst reducing the likelihood of food going to waste. However, for F&B manufacturers, this has required the development of new products, often in more convenient, easier to cook portions.

The emphasis on matching consumption to lifestyle has also led to a blurring of lines between meal times and snacks, with consumers increasingly seeking snacks that can be eaten on the go. Breakfast is the mealtime where this trend is most prevalent, with the global 'on the go breakfast' market forecast to grow by 46% by 2026, primarily driven by western consumers.

The rise of healthy snacks:

Healthy snacking, in particular, has been fuelled in part by the rise of bloggers and social media influencers who focus on diet, nutrition and wellbeing. Consumers now expect more from their snacks, requiring them to provide a range of health benefits, from increasing energy and strength to promoting regular sleep patterns.

This draws upon a preference towards products that promote 'wellness' rather than weight management. Mainstream consumers are becoming less motivated by dieting and counting calories. For many consumers, products that claim to build strength and provide a better sense of wellbeing now resonate far better than those which claim to be low-calorie. Special K is one business that has had to completely transition their branding away from weight-loss to wellbeing and empowerment.

Another area of the snacks sector is the rising popularity of 'raw' products. Such foods avoid affecting their ingredients' nutritional value through the manufacturing process to maintain their purest form. Snack brands like Nakd are tapping into this trend by highlighting 'raw cacao' and other natural ingredients on the packaging of their products.

Priorities other than price:

While increasingly time-poor and looking for convenient food and drink choices, consumers are also wary of ensure they choose brands that match their values.

Because of this, many firms are making their ethical and environmental values more visible. When tea and supplement company Pukka Herbs was bought by Unilever in 2017, they continually stressed their commitment to organic, sustainable products to reassure dedicated customers. Meanwhile, brands including HUEL, Divine Chocolate and Origin Coffee have all benefited from wearing their purpose proudly on their sleeves.

For manufacturers and grocers alike, the pressure now isn't to just have an ethical end product on the shelf, but to ensure these standards are met throughout the manufacturing process and product lifecycle as well. The introduction of the Modern Slavery Act and the plastic bag levy have gone some way to ensure greater transparency and responsibility within the supply chain. Meanwhile, consumer awareness has been raised by the popularity of programmes such as Blue Planet II, which gave a very tangible portrayal of the impact of sea plastic on the environment. With attention now turning to the impact of disposable coffee cups, plastic straws and food packaging, the challenge for F&B companies in 2018 will be to ensure that packaging becomes more environmentally friendly without compromising the quality and safety of the product.

Flexibility without fuss:

Modern consumers are looking towards plant-based nutrition as a lifestyle choice as opposed to being driven by a specific diet. Alongside the growing demand for alternative sources of protein, the rise of social media and a growing awareness of the impact of meat production on the environment have driven this trend. Celebrities such as Jamie Oliver advocating 'meat-free Monday', is a great example of this. While mainstream consumers may not adopt a meat-free diet on a full time or permanent basis, they are aware of the impact of their choices and are keen to turn to plant-based foods where it fits into their lifestyle. As a result of this demand, there is a current boom in the number of products hitting the shelves being labelled as suitable for vegan diets.

Meat substitute brand Quorn has felt the benefit of the rise in those embracing the concept of 'flexitarianism'. Sales at the company rose 19% in 2017 as more shoppers turn to their products to cook meat-free meals.

https://www.grantthornton.co.uk/insights/emerging-trends-in-the-food-and-beverage-sector/

Sources of information

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