

DEMOS



EVERYDAY PLACES

CREATING STRONG
LOCATIONS TO SUPPORT
DAILY LIFE IN BRITAIN

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APRIL 2021

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FOREWORD

Covid-19 has driven major change to people's lives and global economies. Perceptions have been altered, and our ideas around what we need from our homes, work, and communities have been challenged. What is less clear is which dynamics are here to stay and which are temporary, becoming the new war-stories we tell our grandchildren of how we lived during an exceptional and unique time.

As business and government look to respond to these new challenges, and support the UK in Building Back Better, we will need to be increasingly creative. Regions need to evaluate how they successfully deliver 'place' through a new lens, meeting evolving social needs and the very real impacts of the climate crisis.

At Legal & General, we have practiced Inclusive Capitalism for well over a decade now, but we know that our long-held mission to 'level up' and 'building back better' has never been more important. The consequence of the pandemic has been more inequality and an increased probability of a K-shaped recovery. This has added new urgency. With the prospect of economic uncertainty, it is now imperative not just to set out a clear vision and policy framework, to support areas and sectors which could be left further behind, but also to deliver it for our towns and cities.

As one of the UK's leading financial services groups, stewarding over £1.2 trillion of society's pensions and savings, Legal & General is dedicated to playing our part in supporting the UK bounce back. As a business, we are investing to deliver positive social impact through some of the UK's most strategically important regeneration schemes, such as those in Cardiff, Sunderland, Newcastle, Oxford, and Salford. These are fast transforming and reshaping Britain's landscape; bringing jobs and housing back into the centre of cities and better utilising our existing infrastructure.

Good quality places that are intra- and inter-connected are critical to supporting the UK's economic position, fuelling future growth and making sure that it's inclusive. This research, which has surveyed over 20,000 people across the country, seeks to establish a clear people-centred benchmark

of local and national needs. It has looked at how to boost jobs, reinvigorate our retail sector, re-evaluate office requirements, re-think place-making, support growth businesses and digital infrastructure and tackle the ever-growing crises in housing and climate change. The findings show that major changes in daily routine have resulted in a new focus on local areas, with more people wanting to spend time and money in their locality. Long-term working from home remains popular and support for new local shops and local desk space is widespread. Lack of affordable housing remains a key issue.

Our built environments, especially in our great towns and cities, are complex, and over-simplification of changing needs and dynamics may amplify inequalities further. Our experience from investing £29 billion across the UK tells us that rapid progress will require a new approach that mobilises communities through partnerships between local government, universities, schools, health trusts, employers, and property developers. City and regional deals play an important role in fostering localism: levelling up cannot be organised top-down from Whitehall alone. Local communities need to be given the right powers and necessary funding to ensure that investment is being put to use where it is most required.

In the 1850s and 1860s, significant investments in the built environment dragged millions of people out of poverty. From railways, to the Manchester Ship Canal and the London sewerage system; these inventions changed the way we lived and propelled the UK into a global leadership position. We now have a once-in-a-life-time opportunity to do this again, taking advantage of the new urban and suburban landscape, changes in living and migration patterns and the opportunities around digital transformation which have accelerated overnight. With the roadmap set for our emergence from Covid-19, we are committed to playing our role in creating this economic and social resurgence. We trust that this research will provide valuable insights to help inform this vision.

Nigel Wilson
Chief Executive of Legal & General Group

EXECUTIVE SUMMARY

KEY FINDINGS

- Town and city suburbs have more in common with each other than town suburbs have with their centres, or city suburbs with city centres. Government should define expectations for suburban communities and task local councils to achieve them.
- Perception of the retail offer is strongly linked to people's sense of 'place'. The overriding purpose of business rates reform should be to align the local retail experience to what local residents say that they want.
- Feeling negative about 'place' is strongly linked to dissatisfaction with public transport, and lower engagement with work. Immediate policies are needed to help ensure some people do not feel 'stuck': we recommend that people on jobseekers benefits be automatically given free travel within a wide commuting area.
- When asked about the most urgent thing that needs improving in their local area, the most popular answer in urban areas is 'good local shops'; rural areas are more likely to cite transport. Overall, people feel that decent shops and access to fresh air and nature are the most important things to have in their location.

Our place satisfaction index uses polling and modelling to capture the mismatch between individual people's everyday priorities and requirements for their area, and their rating of what's actually on offer. On this measure we find that the index value at the end of 2020 was +26 for Britain as a whole, on a scale of -100 to +100.

The themes and items that are included in the index are practical and prosaic including, for example, supermarkets, parks, office premises, playgrounds and homes with gardens. A score of -100 equates to 'very bad' provision of the items people think are important and a score of +100 equates to 'very good' provision of these items.

The highest place satisfaction index scores are recorded in London, Scotland, the West Midlands and the North of England, driven by strong scores for the most popular themes of 'good local shops' and 'access to fresh air and nature'. Lower satisfaction with housing drives lower scores in the South of England.

More built-up areas in general perform better than more rural and remote areas, where transport is a particular problem. Across Britain, satisfaction is highest with internet access and the shopping offer, and lowest with housing, transport and 'premises to support jobs'.

People who voted 'Leave' in the 2016 referendum are more likely to feel that the local provision of the things they prioritise as important is nearer 'bad' than 'good'. Full constituency results are available at places.demos.co.uk

WHAT DO WE WANT FROM OUR LOCATION?

Drilling into more detailed subcategories shows we are a nation of supermarket shoppers - across the country we prioritise supermarkets over other types of shops; local independent shops are second, valued more highly than national chain stores. We like going out to local places to eat and drink - but not with younger children!

We love our local parks, and they are particularly valued in suburban areas. When thinking about exercise facilities, older people prefer swimming pools, younger people prefer gyms.

Crime prevention measures are prioritised above neighbourliness. Understandably, public transport is a particular necessity for those on lower incomes who are less likely to have access to a vehicle. Desk spaces for remote workers are most popular among younger adults, workers required to work from home during the pandemic and people with larger families.

SHOPS AS A SOURCE OF COMMUNITY PRIDE

Local shops are valued for a variety of reasons beyond just fulfilling people's own retail needs, and are treated as a kind of proxy for the overall socioeconomic health of a place.

There is widespread regret about the perceived decline of the high street as well as desire to see it revitalised in order to support local businesses, provide jobs, act as catalyst for wider regeneration and engender pride in place. A high street that is fit for purpose is defined as having a mix of shops in order to fulfil a variety of needs. People are not averse to some repurposing of empty shops from retail to offices and/or housing as long as it does not compromise the integrity of the high street.

Online shopping has become further entrenched during the pandemic and it may be that people's needs from physical shopping become less about the transactions and more about the experience.

IS SUBURBIA FIT FOR PURPOSE?

More than half (57%) of the total population lives in a suburban setting, be it as part of a town or a city. Suburbanites are slightly older than the national average, and were more likely to vote Leave in 2016 and Conservative in 2019. They are also less likely to have had their working patterns disrupted by the pandemic.

Suburban dwellers attach a high priority to parks and green spaces but are more critical about the provision of both than people living in urban centres. They are particularly likely to cite 'good local shops' as the issue that most needs improving in their local area, followed by transport and 'premises for jobs'. There is a strong demand for more affordable housing to buy in suburban areas in the South of England.

THE EVERYDAY NEEDS OF RURAL BRITAIN

The rural population is also older than the national average and the highest socioeconomic group (AB) is disproportionately represented. They greatly appreciate their access to fresh air and nature, regardless of income, although for those without a vehicle, transport and access to shops are top-of-mind. Unlike the rest of the country, they cite transport (not shops) as the thing that most urgently needs improving. People in rural areas also buck the national trend by ranking local independent shops more highly than supermarkets. For those with urgent housing needs, affordable homes feel in short supply.

UNDERSTANDING THE URBANITES

People living in urban centres are younger and are more likely to be from an ethnic minority than people living elsewhere, with a wider range of leisure interests and greater emphasis on activity. They are more likely to be in work and to value workspaces for entrepreneurs, local desk space and home offices.

There is unmet demand for better housing, both at the bottom and top of the market, and urbanites are more likely to have moved, or be considering moving, as a direct result of the pandemic. Car ownership is lower, cycling is a higher priority, and there is more desire for traffic-free zones than elsewhere in the country.

HOW TO REDUCE NEGATIVITY

The highest proportion of people with negative place satisfaction index scores - that is, those who rate the provision of items that are important to them as nearer 'bad' than 'good' - are to be found in Wales and the South and East of England. Generally, higher negativity according to our metric is found in less built-up areas.

People with negative place satisfaction scores are more likely to prioritise crime prevention and improving the feel of the area. Affordable housing is also particularly important, suggesting they are having difficulty meeting basic needs. Almost by definition they are also more likely to be seeking to move (for reasons unrelated to the pandemic).

Poor transport is strongly linked to place negativity, suggesting some people may feel 'stuck' in places that are not meeting their needs. Negativity is partially linked to personal characteristics, including working status, but there is also a strong connection with place.

CONCLUSIONS

The place satisfaction index that lies at the heart of this research is a useful public policy experiment, producing results that pass the common sense test. It has also produced some additional insights - for example around people's relationship with the retail offering, the everyday lived experience of suburbia, and variables that affect a person's negative relationship with place - that were not previously central to the public policy debate. Our policy recommendations that arise from these results are listed on the next page.

LIST OF RECOMMENDATIONS

1. Our innovation of a subjective satisfaction index, measuring the difference between people's priorities and how they view provision, should be adopted across Government as a tool to gauge the relative priorities of competing priorities in specific geographic areas.
2. Government should launch a policy workstream specifically to consider whether the characteristics and quality of Britain's suburbs are fit for purpose in a new post-pandemic world. As part of this, Government should set out what facilities and amenities it expects should be easily available to all citizens in all types of urban areas. We would like to see a redefining of suburbs away from places where commuters return to, towards places where communities live and work.
3. Demos has previously argued that future housing developments should aim to build local communities at their core and that this should be reflected in planning guidance.¹ For existing residential areas we additionally suggest that local authorities consciously define and seek to create micro communities, drawing on the concept of the '15-minute neighbourhood'. As part of this, local authorities should be required to ensure that the facilities and amenities laid out by Government as part of our Recommendation 2 are available in all such communities.
4. The overriding aim of the forthcoming business rates reform should be to align the local retail experience to what residents in a particular area demonstrably say that they want. Local authorities should be given both the policy flexibility (local taxation and grants) and the incentives (a formal duty to consult, retaining a greater proportion of rates receipts for higher local satisfaction) to achieve this. The key is that local leaders should be able to demonstrate local support for change, and then have the tools to deliver it.
5. Greater investment in public transport is required in more remote areas. In addition, everyone eligible for jobseekers benefits, including Jobseekers Allowance, Employment Support Allowance, and the equivalent components of new Universal Credit, should automatically be granted a 'jobseekers travel pass' that gives free travel within a wide commuting area.

¹ Glover, B. Future Homes. Demos.2019. Available at: https://demos.co.uk/wp-content/uploads/2019/06/J460233_AXA-Demos_Future-of-UK-Housing-Report-FINAL_web.pdf [date accessed: 21 March 2021]

INTRODUCTION: A NEW WAY OF MEASURING PLACE

“There has been no serious politician in Britain in recent years capable of speaking effectively about the everyday, let alone capable of reflecting a deep concern with the rhythms of actual people’s ordinary lives...we need a public policy programme underpinned by a concern for the everyday”²

If we have learnt anything from our experience of the pandemic, it’s that our immediate location matters. With usual routines disrupted and mobility constrained, we have all been forced to consider afresh the area we live in, and how it measures up against the particular day-to-day needs and priorities of our own households.

It is with this thought in mind that, in late 2020, we set out to explore a different way of measuring people’s relationship with ‘place’. We put to one side the familiar socioeconomic measurements, refined over the last 70 years or so, that use the language of incomes, deprivation, regional house prices and - depending on your political framework - their subsequent link to class, levelling up and the Brexit referendum result.

We also deliberately did not try purely to quantify the softer measures of place, such as local pride, wellbeing, social cohesion or community strength. These have been admirably explored elsewhere in recent years and during the pandemic itself.³

Rather, this is an attempt to measure the extent to which people feel that their local area provides what it is that they personally consider to be most important in terms of their own practical requirements. We do this through the construction of a new ‘place satisfaction index’ that measures the collective mismatch - if any - between the facilities, amenities, and services people want to have nearby and their perception of the actual provision that is on offer.

In this way it enables data to be gathered not only on the relative importance of different types of investment in different types of location, but also seeks to help policymakers, regeneration and business leaders understand what the priorities for action are to ensure that as many people as possible get what they need from their ‘place’.

There are a couple of things to note from the outset about this overall type of approach. First, the rankings that we obtain within and between the different themes - shops, fresh air, places to go out, housing, transport and so on - are entirely subjective. The point of the exercise is an attempt to capture and aggregate people’s own priorities and consider

² Sears, M. Out of the Ordinary. How Everyday Life Inspired a Nation and How It Can Again. Harvard University Press. 2021. pp172-3.

³ Centre for Thriving Places. Thriving Places Index. 2020. Available at: <https://www.thrivingplacesindex.org/> [date accessed: 26/03/21];

Tanner, W. O’Shaughnessy, J. Krasniqi, F. Blagden, J. The State of Our Social Fabric. Onward. 2020. Available at: <https://www.ukonward.com/wp-content/uploads/2020/09/The-State-of-our-Social-Fabric.pdf> [date accessed: 26/03/21]; ONS. Well-being workstream. 2021. Available at: <https://www.ons.gov.uk/peoplepopulationandcommunity/wellbeing> [date accessed: 26/03/21]

the extent to which local provision is perceived - on average - to measure up against those priorities. It's the mismatch that is as important as the relative importance of the items.

Second, the data is only as interesting as the list of items that are plugged into the model in the first place. Our choice is primarily to focus on practical facilities and amenities that households would typically use as part of their everyday routines. In this respect, although we have tried to be exhaustive within each broad theme, a deliberate effort has been made to focus on items where there are real choices for delivery partners and policy makers, and a multitude of different ways in which solutions could be delivered.

For this reason the core 'top down' public services of health and education provision are out of scope (although a subcategory of 'easy access to public services' is an option within the theme of 'streets and community'). This omission is not a reflection of any discounting on our part of the importance of health and education to people where they live. Instead it is because, compared to other items at least, there is a broad acceptance of the role of central government to ensure provision of these services is fit for purpose and of a uniformly high quality regardless of location.

Instead this project is more interested in areas where local priorities may differ, and change can be delivered through partnership - be it developers with planning authorities, retailers with communities or elected politicians seeking funding for what they perceive to be the regeneration priorities of their areas.

In fact, one of the aims of our project is to help inform communities and Members of Parliament of the likely regeneration priorities of their constituents so that the bids to the £4bn 'levelling up' fund, and equivalent programmes for the devolved administrations, are as well targeted as possible to investments that will have the greatest impact on people's satisfaction with their local areas.⁴

At the same time as ranking people's priorities for their area, and exploring ways to quantify the mismatch between priorities and actual provision, we conducted a parallel workstream to explore how people's relationship with 'place' has been affected by the pandemic, how this varies across the country, how people will want to work and travel in future and what the implications are for the pace with

which different types of location will recover once the restrictions are lifted. This was published as a stand-alone output as part of our Renew Normal Commission in March 2021.⁵

Combined with our hope that it will be possible to repeat the place satisfaction index in future, our aim for both parts of the project is to ensure that, as we consider the wider implications of the Covid-19 crisis, the individuals and teams making decisions that affect local communities, as well as different segments of the labour market, are able to do so in the full knowledge of what the people affected say they need, and how those requirements change over time.

METHODS AND STAGES OF THE RESEARCH

Data collection

The project kicked off with a bespoke analysis of the large-scale qualitative dataset that we had collected as part of the initial phase of the Demos Renew Normal workstream, where around 12,000 people submitted their own experiences and observations of the first lockdown. In parallel, we conducted a brief literature review to help scope out the first drafts of our polling questionnaire, and the specific themes, and their subcategories, that we would be exploring. At the same time we experimented with different models for the construction of the index to ensure that it would give us the information that was required.

We then finalised the questionnaire and deployed the poll to just over 20,000 people across Britain over the course of December 2020, with the data weighted to be nationally representative according to standard demographic variables.

Our results therefore represent views in the run up to, and over, Christmas 2020, a time when the country was not experiencing a national lockdown and the immunisation process was just beginning but there were nevertheless significant Covid-19 restrictions in place.

Creation of the index

At the core of our research is a list of 35 items (sometimes referred to as subcategories) that all places have to a greater or lesser extent. It is a prosaic, everyday list including things such as supermarkets, parks, office premises, playgrounds and homes with gardens. These are grouped into eight broad themes - going out, shopping, fresh air and so on.

⁴ Woodcock, A. Spending review: Labour denounces £4bn Levelling Up Fund for local projects as 'pork barrel politics'. Independent. 2021. Available at: <https://www.independent.co.uk/news/uk/politics/levelling-up-fund-pot-rishi-sunak-b1761672.html> [date accessed: 26/03/21]

⁵ Ussher, K. Rotik, M. Jeyabraba, M. Post Pandemic Places. Demos. 2021. Available at: <https://demos.co.uk/project/post-pandemic-places/> [date accessed: 26/03/21]

We used opinion polling to obtain a measure of the extent to which people's personal priorities for these various items are aligned with what they perceive to actually be on offer in their local area. For each person, their results were summarised on a scale from -100 to +100 where the lowest negative result indicated that the availability of the items that

the person views as most important is "very bad" and the highest positive result indicates that the availability of the items the person views as most important is "very good". The methodology used is summarised in Figure 1 with a full description in the Appendix.

CREATION OF THE INDEX

FIGURE 1
CREATION OF THE INDEX

9 RANKED THEMES

35 things found in most places, grouped by an overarching theme.

Housing	Jobs
Communities	Shopping
Going Out	Fresh Air
Exercise	Transport
Internet Access	

35 RANKED ITEMS

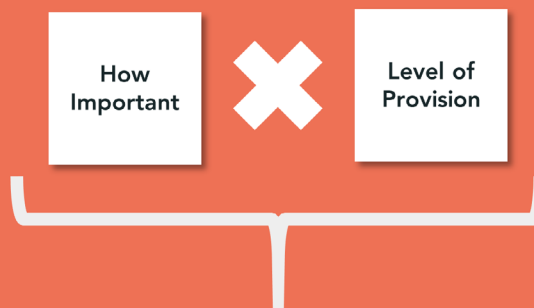
Within each theme, participants ranked the items by importance to them personally. Once ranked, participants were asked:

Do you think your local area does a good or bad job of providing them?



SATISFACTION INDEX BY THEME

Participants then ranked the 9 themes to create the final satisfaction index.



A fuller description is given in the Appendix.



By comparing the average index values between different population groups and locations we then explored how this sense of place satisfaction varies both geographically and according to standard demographic variables.

In terms of location, this was undertaken in four main ways. First we asked respondents to select their type of location from a list of: 'city centre', 'city (not in the centre)', 'town centre', 'town (not in the centre)' and 'rural/countryside village'; these location types then formed the backbone of our place-based analysis.

Second, for those who live in towns we used the first four digits of their postcode to categorise the type of town they live in according to Demos's existing town typology (hub-and-spoke, affluent, industrial, rural and coastal) and segmented results accordingly.⁶ Third, we looked at results by the nine English regions plus Scotland and Wales.

In some cases, depending on the sample size we can report against more than one of these location-based variables at the same time. For example, to identify people in living in towns in the North of England (sample size 2,600) or in rural areas in the south of England (sample size 1,168).

Finally, we used the statistical technique of multilevel regression with post stratification (MRP), that infers results by grouping people of similar demographic characteristics, to estimate the proportion of the population in each Westminster constituency whose priorities and perceptions meant that they had a negative place satisfaction index. That is, the proportion of the population who thought that the provision of those items they personally considered most important was nearer 'bad' than 'good'.

Stakeholder input via roundtables

Once the raw data were obtained we constructed the index and presented the headline results and interim poll findings at three roundtable seminars that were held in late January 2021, with attendees from academia, industry, NGOs and government including national civil servants and professionals working in local and regional development. We are very grateful to all those who gave freely of their time to help us place this project in context and provide useful feedback as to which themes would be most fruitful to explore in the next stage. We used these insights to help prioritise a more detailed analysis of the data, as well as the issues that were most useful to explore in more depth at the qualitative stage, and the structure of this final report.

Targeted qualitative insights

Finally, we conducted four focus groups over Zoom on 8-9th February 2021. Drawing on our preliminary analysis of the data, and the feedback from the roundtable seminars, we used these sessions to explore, in particular, themes around people's relationship with their local shops and the differing experiences of people who were more likely to have a negative overall view of their local place. We held two focus groups comprising people from towns in the north of England, and two from towns in the south of England. Within each location type, one group consisted of people who had been required to work from home because of the pandemic, and the other of people of working age but either out of work or with lower household incomes.

We used the working from home groups to explore how this forced change of working location had affected people's sense of place. We chose to conduct sessions with people out of work or with lower household incomes because the preliminary results suggested these groups were most likely to have a negative perception of their location, and we wanted to explore what this felt like. We chose participants in towns (and where possible, on the outskirts of towns) because of the policy interest in regeneration towns, and the link it gave to the towns typology that was used to analyse the polling. We separated North and South England because of the differences in place satisfaction index scores between the two parts of the country that had emerged from the polling.

Finalisation

The final analysis and write-up took place over February and March 2021 and, in addition to the two published reports, our more detailed regional and constituency-level results are also made available on a dedicated microsite via the Demos website: places.demos.co.uk

In the next chapter we explore the main index and place priority results for Britain as a whole; subsequent chapters then explore how priorities vary according to location and demography.

⁶ Glover, B. Carr, H. Smith, J. Brown, S.P. The Future of Towns. 2020. Demos. Available at: <https://demos.co.uk/project/the-future-of-towns> [date accessed: 09/02/21]

CHAPTER 1

THE HEADLINE VIEW

As of December 2020, the weighted average place satisfaction index value for the entire population of Great Britain was +26 on a scale of -100 to +100. Our interpretation of this score is that, on average, people think the provision of those facilities and amenities that are most important to them are somewhere between 'neither good or bad' (zero) and 'good' (+50).⁷

Provision is most in line with people's priorities for internet access and the shopping offer, and least for housing, premises to support jobs, and transport.

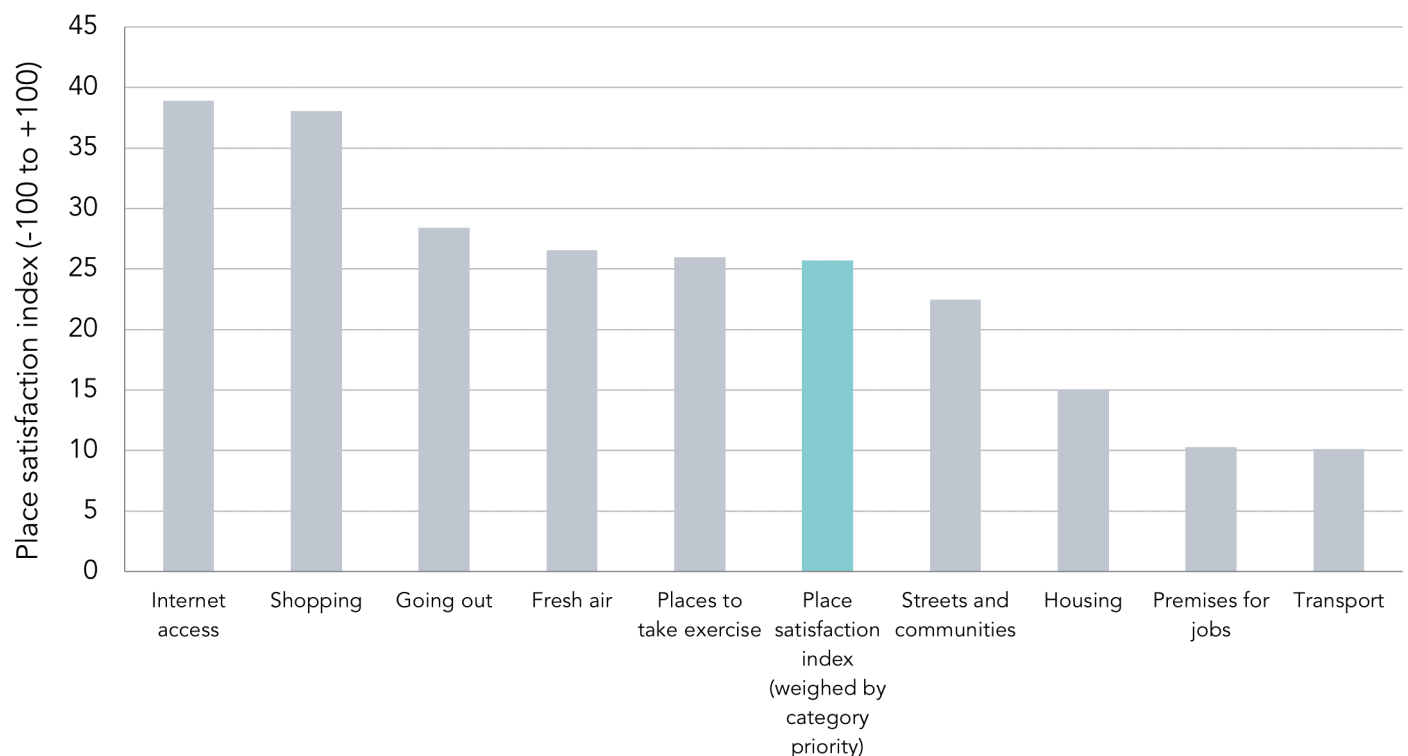
THE NORTH DOES BETTER THAN THE SOUTH

Aside from London, the headline index value broadly decreases moving from North to South, although the differences are slight, with the highest satisfaction scores recorded in Scotland, and lowest in the South of England and Wales (Chart 2).

This means that, excluding London, there is a greater mismatch in the South of the country as compared to the North between what people say they want from the facilities and amenities on offer in their areas and how they perceive that provision in reality.

CHART 1

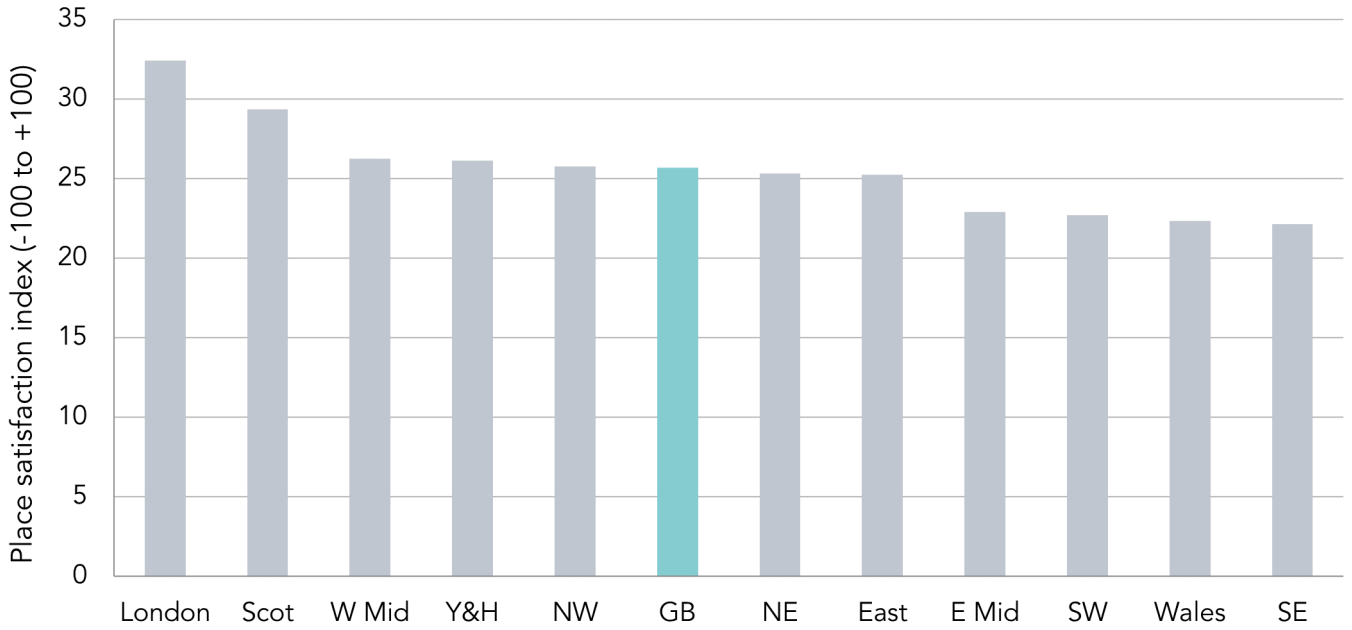
AVERAGE PLACE SATISFACTION INDICES BY THEME: ALL GB



⁷ A score of +100 would be obtained if everyone thought the provision of their personal priorities was 'very good' and -100 if they thought they were 'very bad'.

CHART 2

AVERAGE PLACE SATISFACTION INDEX: BY REGION



The driving factors for these differences are relatively lower satisfaction with transport and shopping in the South of England and Wales. The North of England and Scotland perform better on these measures and also on housing. London scores better on all measures apart from housing and fresh air, while Scotland, Wales and the South West of England perform particularly strongly in the 'fresh air' category.

ACCESS TO GOOD LOCAL SHOPS AND FRESH AIR AND NATURE ARE BRITAIN'S TOP PRIORITIES FOR THEIR LOCAL AREAS

As part of the process of constructing the index described in the previous chapter, we asked people to rank their four most important local priorities, forcing trade-offs between the high level themes.

CHART 3

WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY?

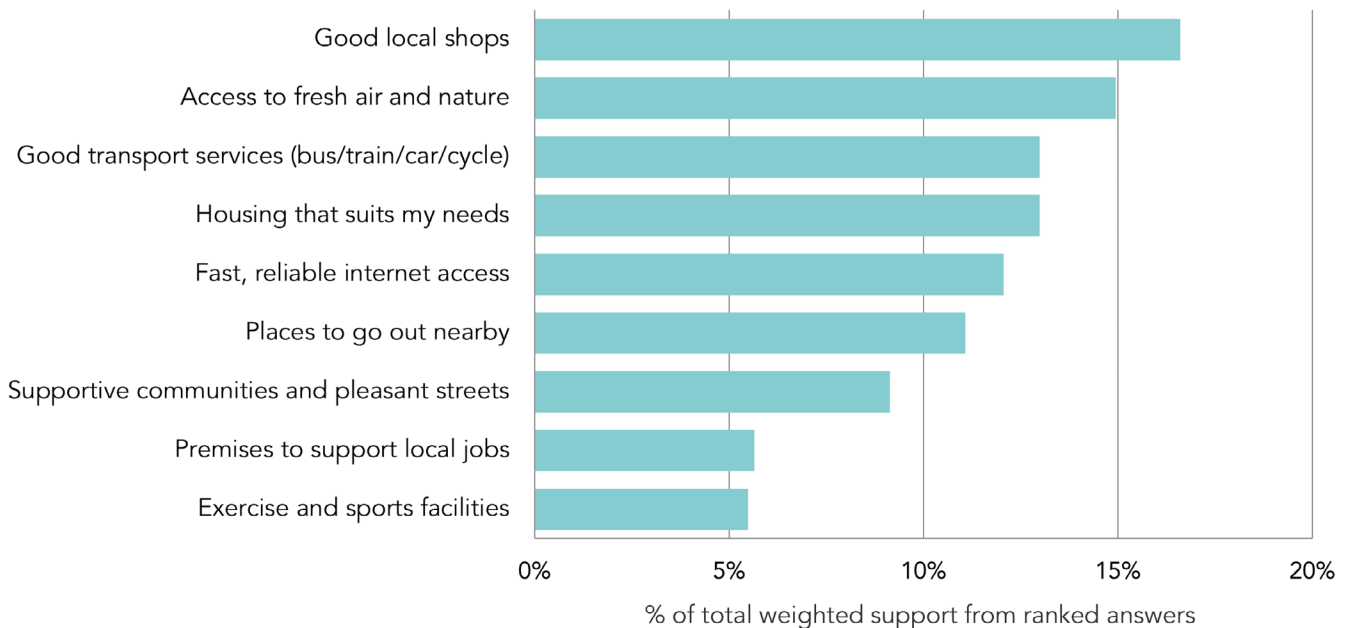
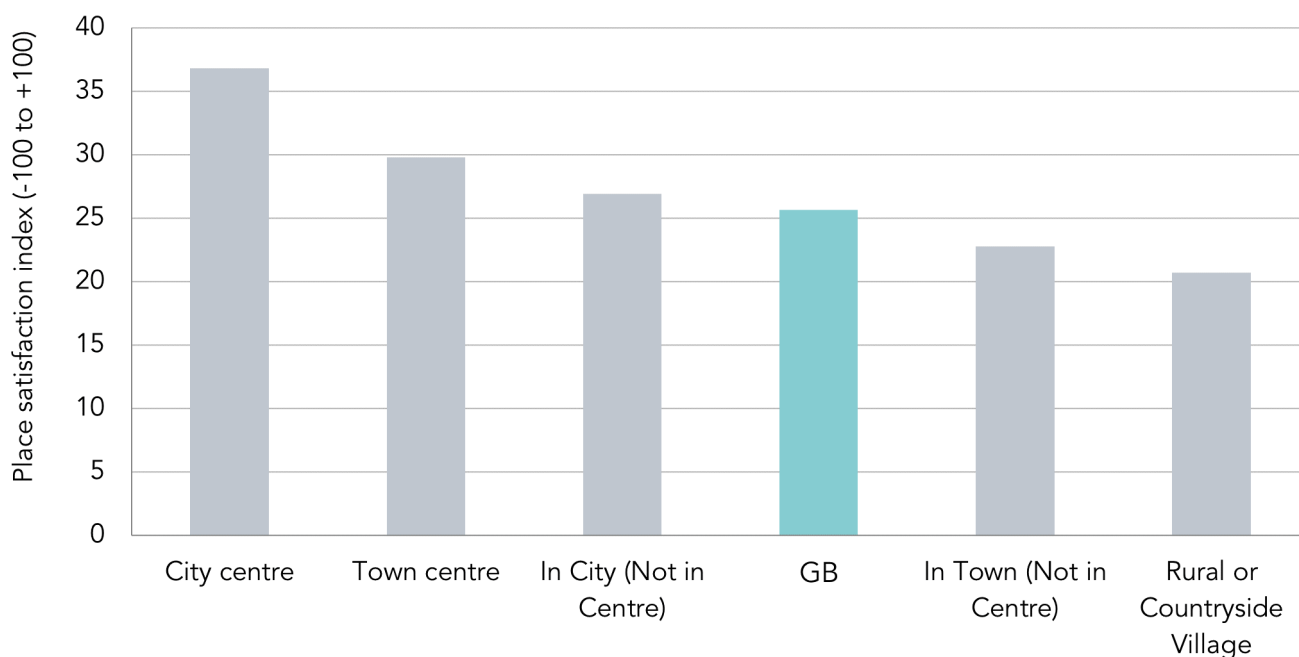


CHART 4

AVERAGE PLACE SATISFACTION INDEX: TYPE OF LOCATION



When the answers were weighted according to the priority given to each theme, we found that the most important priority overall is 'good local shops' followed by 'access to fresh air and nature' with 'exercise and sports facilities' and 'premises to support local jobs' attracting the lowest support.

However, when looking only at first priority choices, the most popular answer was 'access to fresh air and nature' suggesting that this is more of a top-of-mind response for many people, but that a higher proportion of the population overall includes shops in their top four. Households on the lowest incomes (under £20,000) emphasised the importance of housing, transport and shops more than 'access to fresh air and nature'. Chapter 7 discusses how these relative priorities alter for those who have a negative overall perception of their local place.

PLACE SATISFACTION DECREASES WITH RURAL-NESS

Overall, our findings show that satisfaction decreases as locations become more rural, and that the experience of people living in city suburbs (place satisfaction index score +27) is the closest to the national average (+26).

An associated finding is that the satisfaction levels of people living in town centres are closer to those of

people living in city centres than they are to their counterparts residing in town suburbs (see Chart 5). Similarly, characteristics of those living in city suburbs were closer to those in town suburbs than they were to people living in city centres. It seems that residents of urban centres share more in common with each other regardless of whether they live in towns or cities. Similarly residents of suburbs share more in common with each other regardless of whether they live on the outskirts of towns or cities.

Adding the next level of detail shows that cities perform well on all metrics apart from housing, and that all measures decline in less urban areas with the transport index becoming negative in rural areas.

A similar pattern emerges when we look at the variations between different types of towns. Using the existing Demos town typology we find that the lowest index scores are recorded in 'rural and coastal towns', and the highest in the more urban 'hub & spoke' (commuter) town category.⁸

Lower satisfaction with the provision of 'transport' services is a particular issue that drags the index down for less built up areas, alongside 'premises for jobs'. These differences between different location types are discussed in more detail in the following chapters.

8 Glover, B. Carr, H. Smith, J. Brown, S.P. The Future of Towns. 2020. Demos. Available at: <https://demos.co.uk/project/the-future-of-towns/> [date accessed: 09/02/21]. Our town types are: Affluent, Hub-and-Spoke (commuter towns), Industrial (including some ex-industrial towns), Rural and Coastal.

CHART 5

AVERAGE PLACE SATISFACTION INDEX: LOCATION TYPE AND CATEGORY

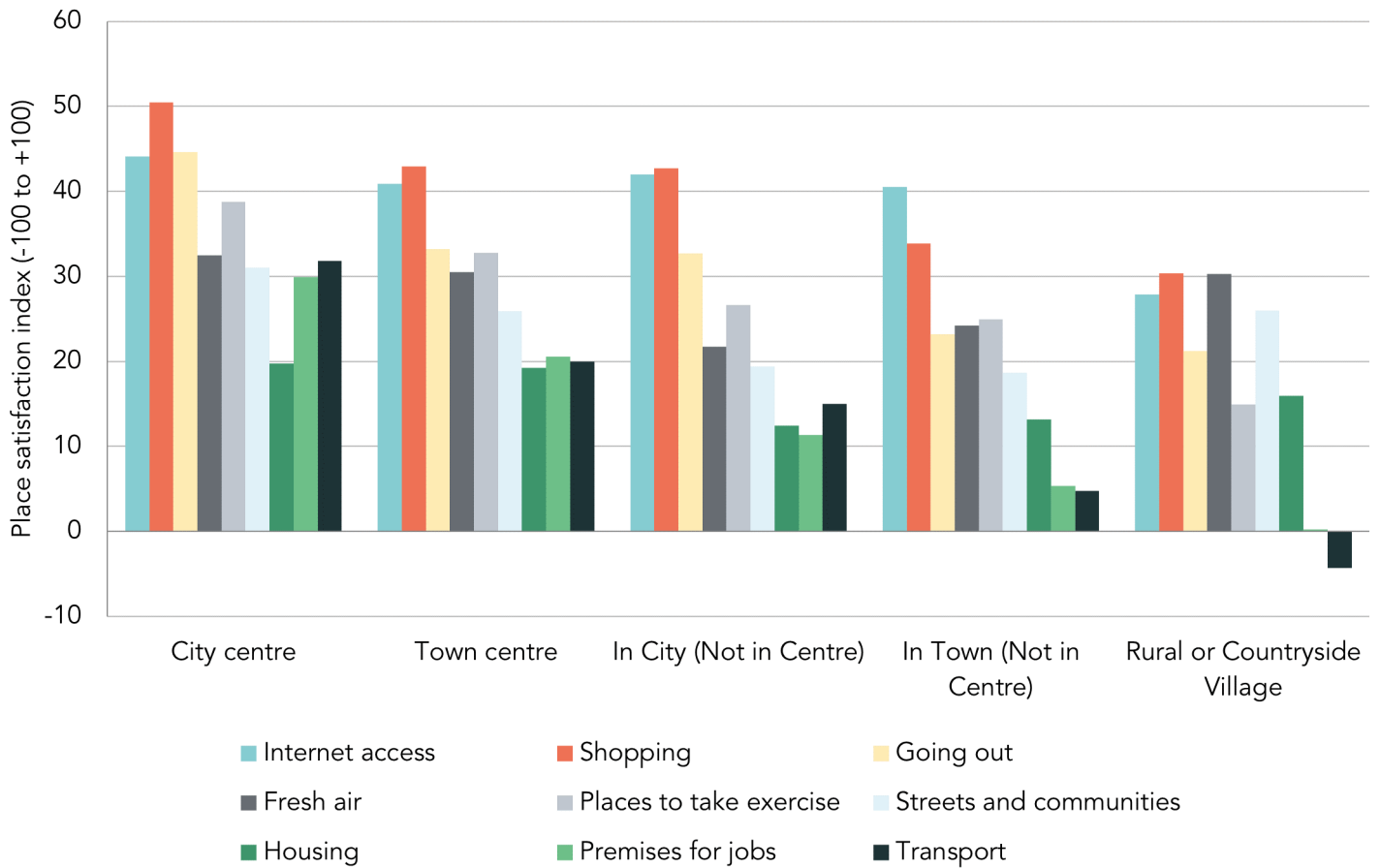


CHART 6

AVERAGE PLACE SATISFACTION INDEX: DEMOS TOWN TYPE

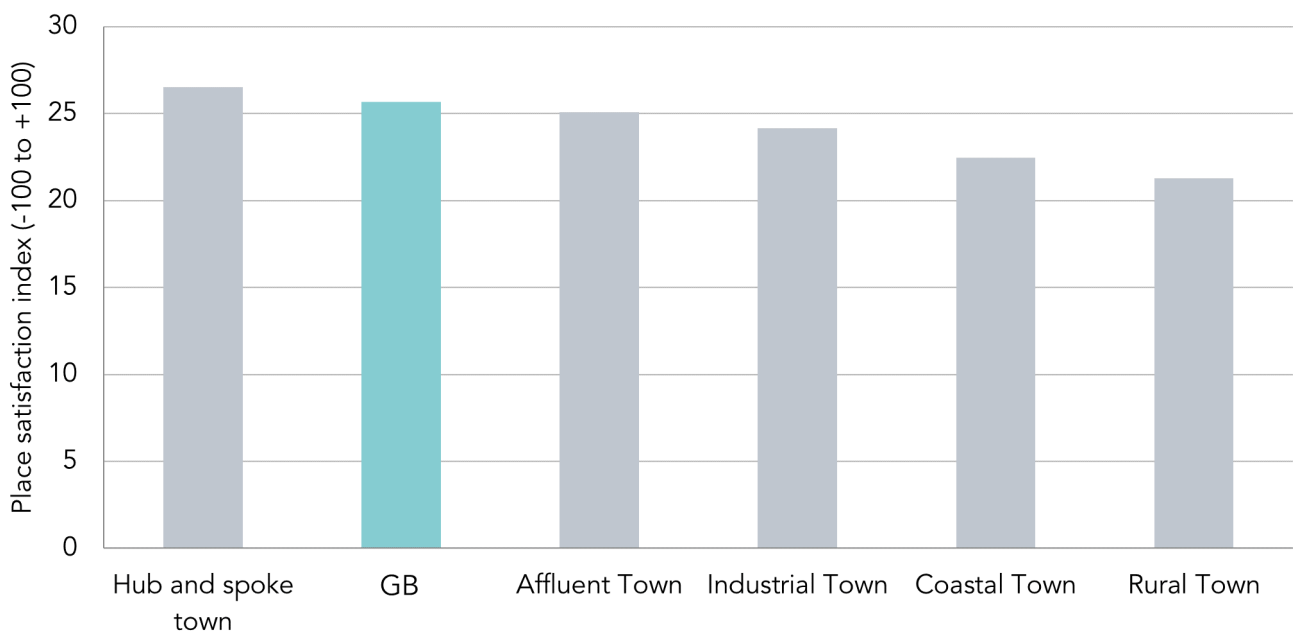
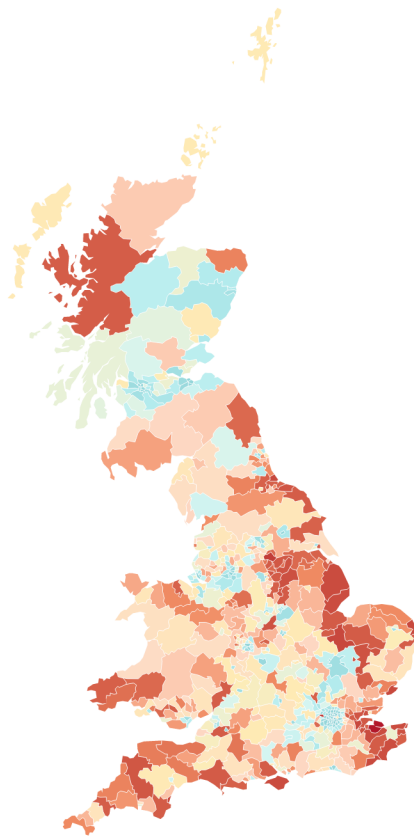


FIGURE 2

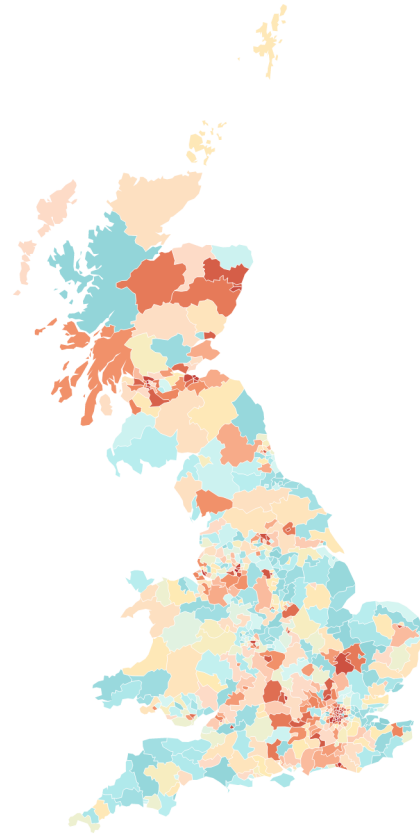
% of Population with Negative Place Satisfaction Score (national average 24.5%) by Constituency

% of constituency population
15.4 32



% of Population with Highly Positive Place Satisfaction score (over 30) by Constituency

% of constituency population
4 14



Map data: © Crown copyright and database right 2018 • Created with Datawrapper

CONSTITUENCY RESULTS

The MRP results by constituency estimated the proportion of the population in each constituency that lay within each 10-point bucket of the index scale. So, for example, it estimated the proportion that had a place satisfaction score of between 0 and +10, between +10 and +20 and so on. We aggregated these results to estimate the proportion of the population in each constituency that had a negative place satisfaction index score and, separately, the proportion of the population that had a high (over +30) place satisfaction index score. We found a strong connection between living in an urban area and having a high place satisfaction index score, with the weakest scores in the eastern coastal areas of England, and South West Wales. However some coastal areas are divided, containing smaller minorities with strongly positive results (Figure 2).

We then explored the dataset to see if it correlated with the index of multiple deprivation which is also available by constituency.^{9, 10}

As Chart 7 below shows, we could not find a connection between having a negative place satisfaction score and having high indices of multiple deprivation. This result seems to be connected to the fact that areas with dense urban housing tend to score poorly in the index of multiple deprivation, but more positively in our place satisfaction index due to the relative proximity of the wider range of things that people prioritise as important.

In fact, the constituencies that score most highly on our place satisfaction index (in that they have the lowest proportion of the population with negative scores) are all in London. The constituency with the highest proportion of the population with negative place satisfaction index scores is Sittingbourne and Sheppey in Kent, followed by Ealing North in North West London and Hemsworth in West Yorkshire. Individual constituency results can be obtained through our interactive microsite at places.demos.co.uk

⁹ House of Commons Library. Constituency data: Indices of deprivation Data Dashboard. 2020. Available at: <https://commonslibrary.parliament.uk/constituency-data-indices-of-deprivation/> [date accessed: 26/03/21]

¹⁰ The MRP results produced the proportion of the total population in each constituency that lay within different 10% bands of the index. We then used this to estimate what proportion of the population in each constituency had an overall negative place satisfaction score and compared this to the national average.

CHART 7

SCATTERGRAPH OF NEGATIVE PLACE SATISFACTION AGAINST
IMD RANKING BY CONSTITUENCY



TOP (LOWEST % OF THE POPULATION WITH NEGATIVE SCORES)

1. Hackney North & Stoke Newington
2. Islington North
3. Islington South and Finsbury
4. Hackney South and Shoreditch
5. Streatham

BOTTOM (HIGHEST % OF THE POPULATION WITH NEGATIVE SCORES)

1. Sittingbourne and Sheppey
2. Ealing North
3. Hemsworth
4. North East Cambridgeshire
5. Gravesham

NEGATIVE PLACE SATISFACTION SCORES ARE LINKED TO VOTING 'LEAVE'

Finally, we looked at whether there was a connection between place satisfaction index scores and how people voted in the 2016 referendum and the 2019 general election.

In general, people who voted Liberal Democrat in 2019 had higher average index scores (+34) than those who voted Conservative (+28), SNP (+27) or Labour (+24). The small proportion of the population who voted for the Brexit party in 2019 had far lower place satisfaction index scores on average (+13).¹¹

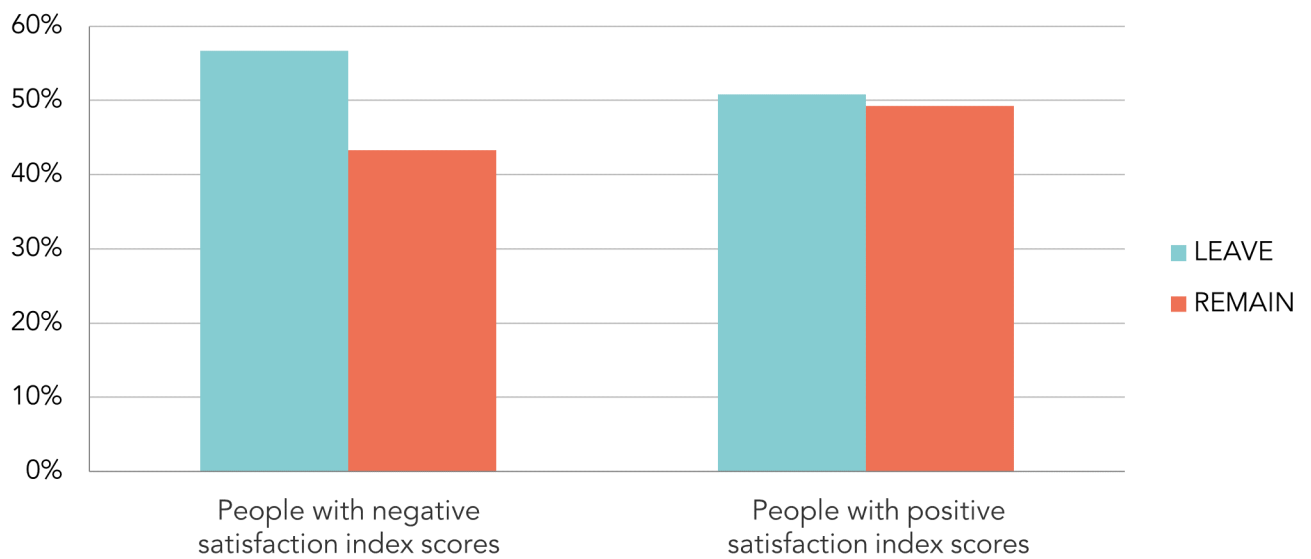
Exploring the results by how people voted in the 2016 referendum did not give a strong result when looking at overall or thematic place satisfaction index scores, however there did seem to be a suggestion that people who had a negative score - that is, people who rated provision of things that were important to them as nearer bad than good - were more likely to have voted Leave, as Chart 8 shows.

This suggests that some people who voted in favour of leaving the EU may have felt that it would help improve their local area, or conversely that their frustration with the 'local offer' led them to vote Leave; the issues that are particularly relevant for the cohort with negative place satisfaction index scores are explored in Chapter 7.

11 1.7% of our weighted sample (348 people).

CHART 8

PEOPLE WITH OVERALL NEGATIVE PLACE SATISFACTION SCORES ARE MORE LIKELY TO HAVE VOTED LEAVE.



In the sections that follow we first paint a portrait of the relative priorities of British people across all categories, then explore the particularly complex relationship that people have with the provision of local shopping opportunities. Chapter 4 conducts a deep-dive into the desires of the large group of people who live in town and city suburbs, and considers the extent to which provision of local amenities and services are fit for purpose, with implications for policymakers, planners and developers alike. We then look at the very different results obtained in rural areas, provide an insight into the differing preferences of the people who live in urban centres and conclude by exploring what policymakers need to do to reduce negative place satisfaction scores. The implications of these results are then presented in the final chapter.

CHAPTER 2

WHAT DO PEOPLE WANT FROM THEIR LOCATION?

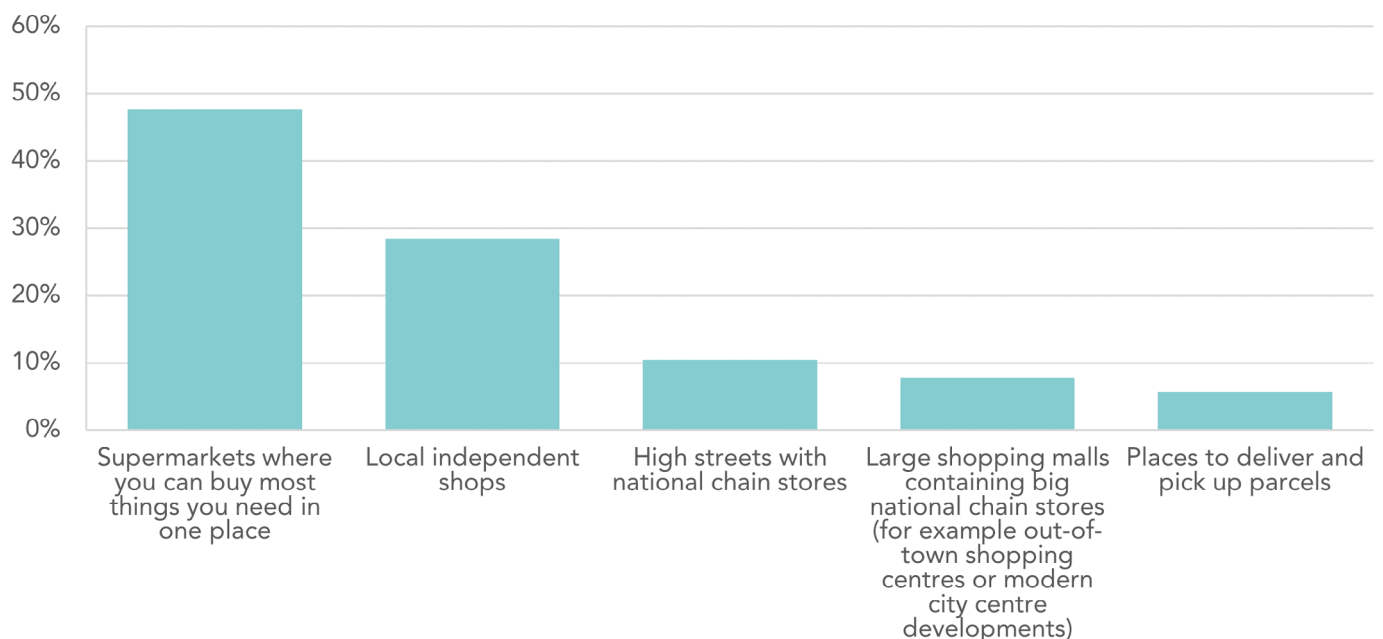
In this chapter, we focus on one aspect of the research that was undertaken to construct the place satisfaction index, namely the relative priorities of different items within the broad themes.¹² By looking at these in turn we can paint a picture of everyday life in early 21st century Britain.

WE ARE A NATION OF SUPERMARKET SHOPPERS

We have already seen that access to good local shops is seen as a high priority. Delving a little deeper shows that within the broad shopping theme, supermarkets are the most favoured type of shopping outlet, with around half of the population

CHART 9

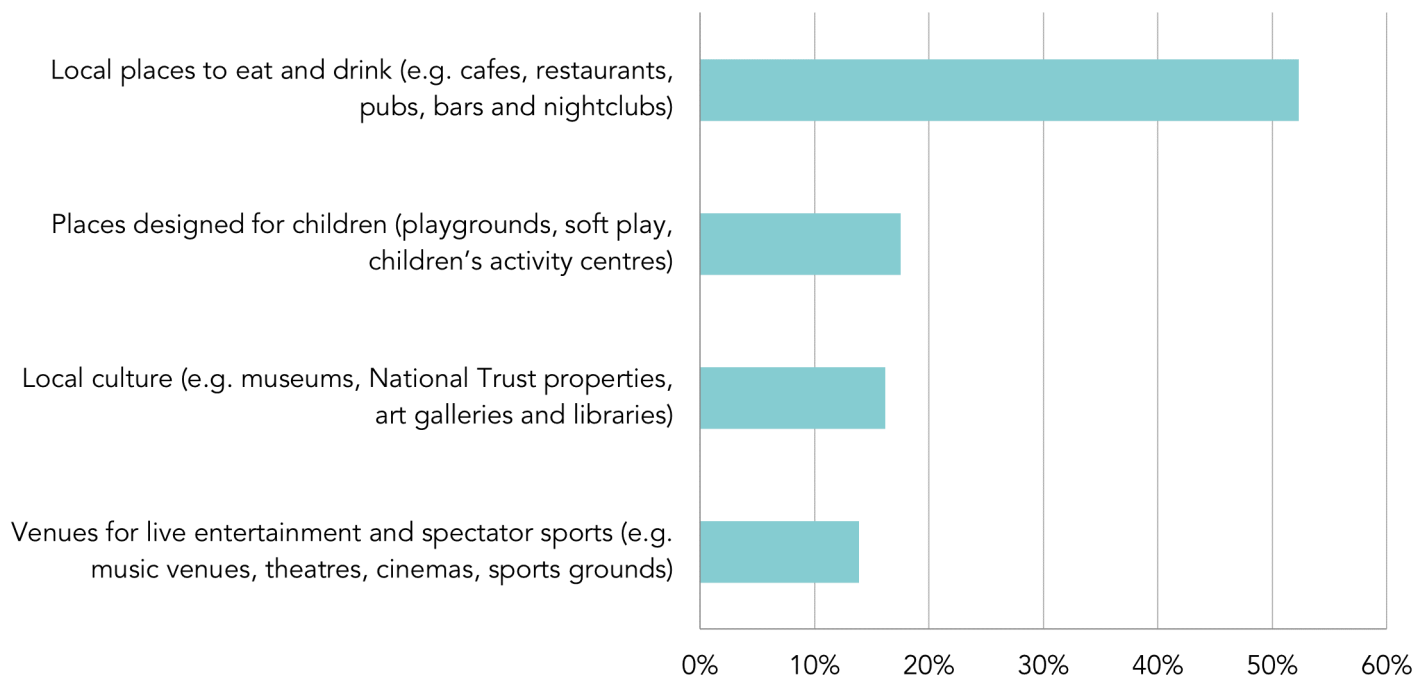
THINKING ABOUT SHOPPING, WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL ARE, FOR YOU PERSONALLY...? (RANKED 1ST)



12 These subcategories are listed in the Appendix.

CHART 10

THINKING ABOUT GOING OUT, WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY? (RANKED 1ST)



(48%) picking them as their top priority, followed by local independent shops (28%).¹³ By comparison, other shopping facilities are regarded as less important, including high streets with national chain stores (10%), shopping malls (8%) and places to deliver and pick up parcels (6%).

This popularity of supermarkets is uniform across all regions and nations of Britain and all demographic types. However they are particularly popular among people over 50 and, as we will see in Chapter 4, those living in suburbs. Younger people (under 30) were more likely to prefer large shopping malls than other population groups but supermarkets were still their most popular shopping outlet.

Access to local independent shops also becomes more important as people get older: 20% of people aged 18-24 cite local independent shops as their top priority rising to 34% for those aged 65 or over. Younger people find high streets with national chain stores and shopping malls more of a draw. City centre dwellers and people from ethnic minority backgrounds also give a slightly higher weight than other population groups to high street national chain stores and shopping malls, although they still prioritise supermarkets overall.

WE LIKE GOING OUT TO EAT AND DRINK (BUT NOT WITH YOUNG CHILDREN)

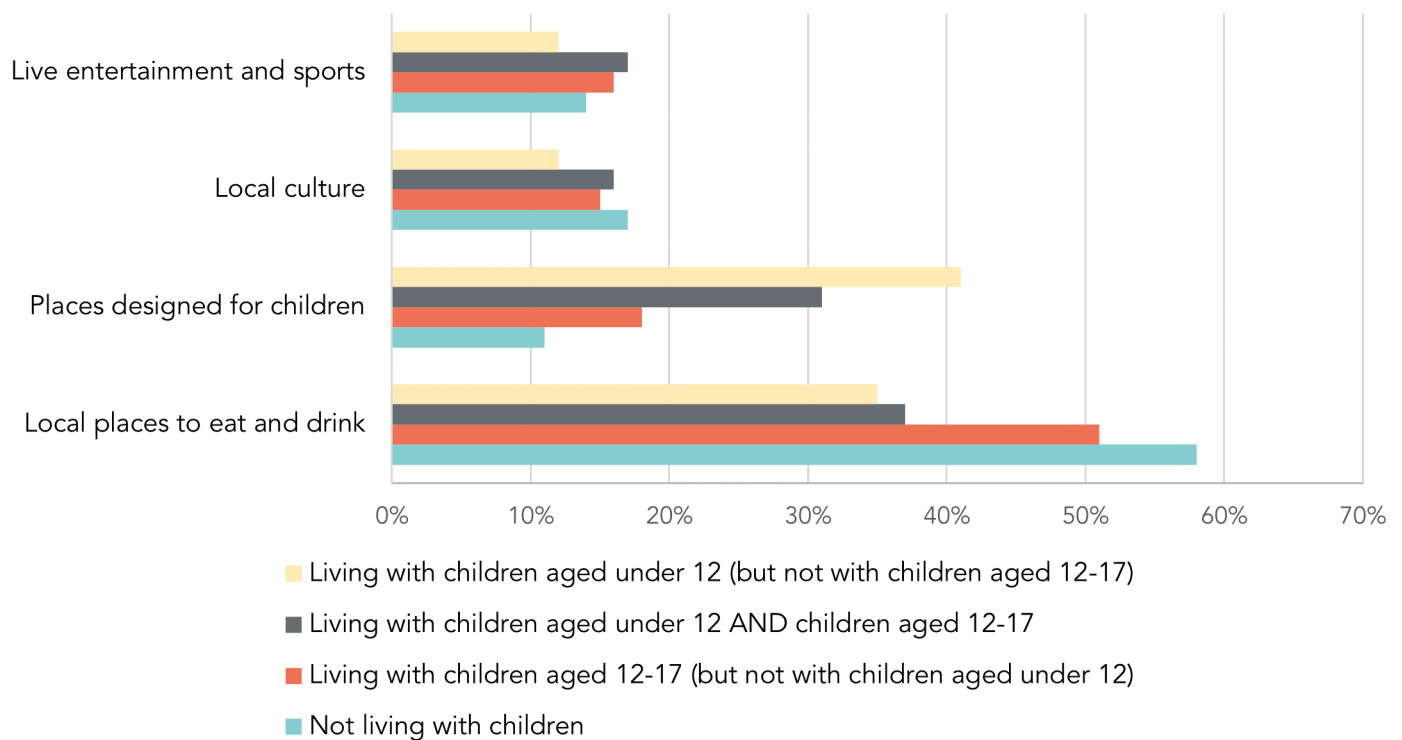
Within the broad category of 'going out', the highest priority is given to 'local places to eat and drink' which receives an overall majority (52%) of first preference rankings. This is particularly so for people living outside city centres and in rural areas.

However, amongst those on lower household incomes (under £20,000) this support is slightly more muted (48%) in favour of 'local culture' and 'places designed for children'; a factor to bear in mind when ensuring that communities contain leisure opportunities for everyone, including households with lower disposable incomes. And only 35% of people with exclusively young children (under 12) rated 'local places to eat and drink' as their top priority, with 41% choosing 'places designed for children' instead. For those living with older children, restaurants and cafes start to become more popular again as Chart 11 shows.

¹³ During the research we asked people to rank their top three items within each theme. However, for ease of presentation, we describe our results as in terms of the percentage who chose each item as their first priority. Unless otherwise stated, using weighted rankings does not change the main finding.

CHART 11

THINKING ABOUT GOING OUT, WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY? (RANKED 1ST)

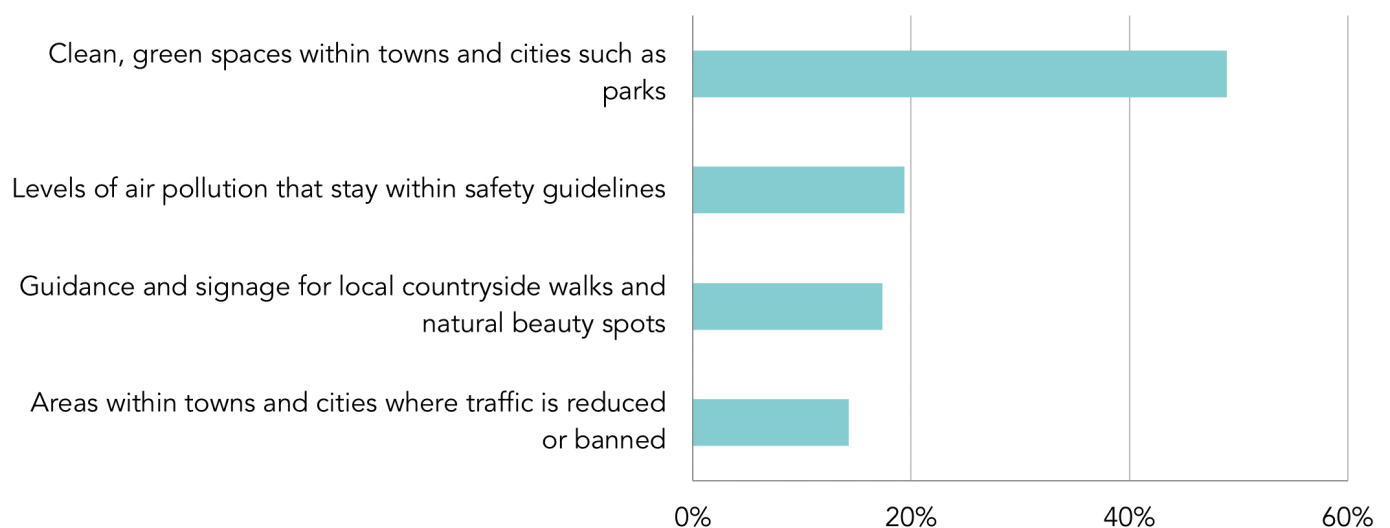


OUR PARKS ARE HUGELY VALUED

Within our 'fresh air and nature' theme, we found very strong support for 'clean, green spaces within towns and cities such as parks', which received 49% of first preference responses, more than safe levels of air pollution (19%), guidance for local walks and nature spots (17%) and reducing or banning traffic in areas within towns and cities (14%).

CHART 12

THINKING ABOUT FRESH AIR, WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY? (RANKED 1ST)



Priorities are, however, affected by the type of location. Parks are particularly valued in suburban settings; urban centres place more priority than elsewhere on reducing or banning traffic (19%) and, possibly unsurprisingly, guidance for local walks and nature spots was particularly valued in rural areas (26%). The under-35s attach slightly greater priority to issues affecting air pollution and walking, while older people are even more likely to prioritise parks.

OLDER PEOPLE LIKE SWIMMING POOLS, YOUNGER PEOPLE LIKE GYMS

Within the high-level theme of places to take exercise, participants in general expressed a

preference for local 'swimming pools', with 32% ranking it above other types of exercise facilities. However, there was also significant support for 'gyms with equipment for individual workouts' (21%), 'pitches or courts for group sport' (19%), and 'venues for exercise classes' (17%). By contrast, despite the surge in popularity for jogging during the pandemic just 10% of people we surveyed ranked 'signed running routes' as their top priority.¹⁴

Priorities for local exercise vary considerably across different age groups, with younger people generally less concerned about the provision of swimming pools and more in favour of gyms, a trend that reverses as ages rise.

CHART 13

THINKING ABOUT PLACES TO TAKE EXERCISE, WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY? (RANKED 1ST)

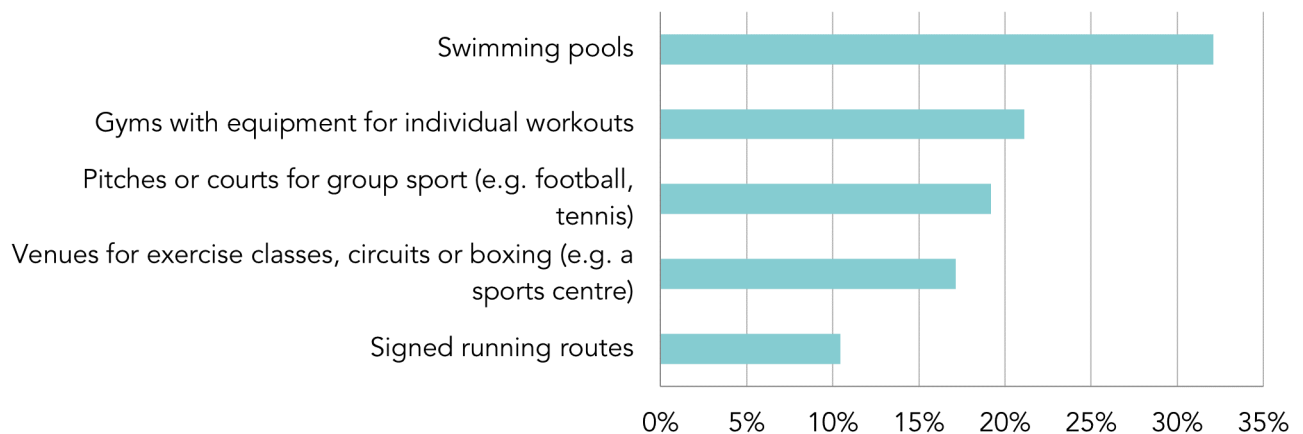
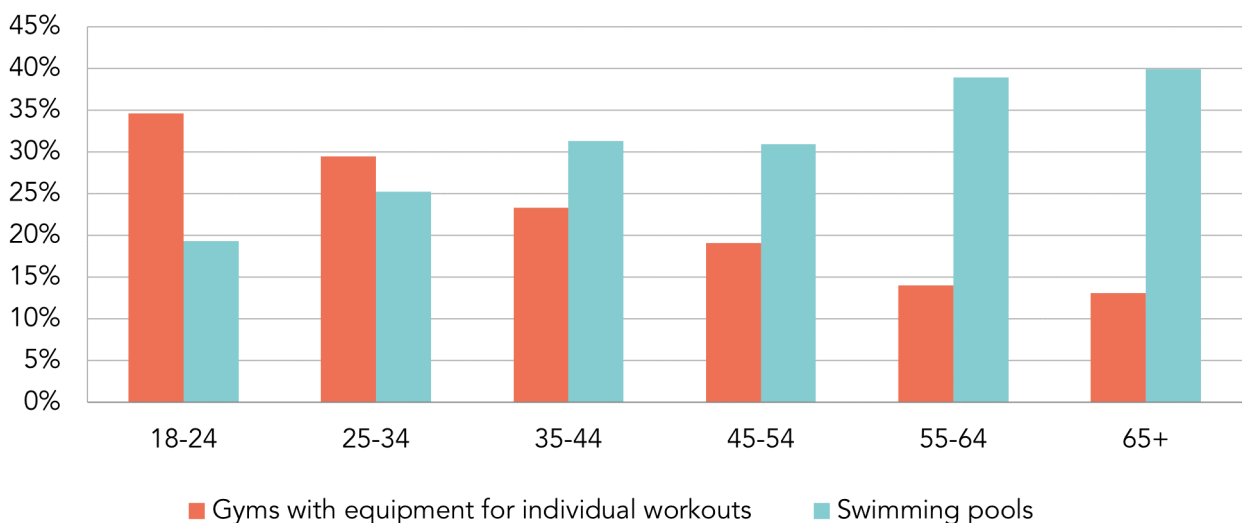


CHART 14

THINKING ABOUT PLACES TO TAKE EXERCISE, WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY? (RANKED 1ST)



14 Macmillan Cancer Support. Keep calm and jog on: millions turn to running to relieve lockdown stresses. 2021. Available at: <https://londonmarathon.macmillan.org.uk/about/news/keep-calm-and-jog-on> [date accessed: 26/03/21]

CRIME PREVENTION IS CITED AS A HIGHER PRIORITY THAN NEIGHBOURLINESS

At the time that the survey was undertaken - in between lockdowns two and three - neighbours knowing each other and working to help each other, whilst viewed positively, was rated as a lower priority for the population as a whole than local crime prevention measures and easy access to public services. This is likely to be a hierarchy of needs: meaningful engagement with neighbours may be easier to pursue when fear of crime in a neighbourhood is reduced.

GARDENS ARE PARTICULARLY IMPORTANT FOR OLDER PEOPLE

Within the broad category of suitable housing, we asked people to rank their preferences around housing tenure, affordability, gardens and places for home offices. We also included an option for aspirational housing which we phrased as 'higher quality, more expensive housing that will improve the feel of the area'.

For Britain as a whole, 'affordable housing to buy' and 'homes with gardens' are the most popular housing choices, each commanding 30% of first preference choices. The next most popular

CHART 15

THINKING ABOUT STREETS AND COMMUNITIES, WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY? (RANKED 1ST)

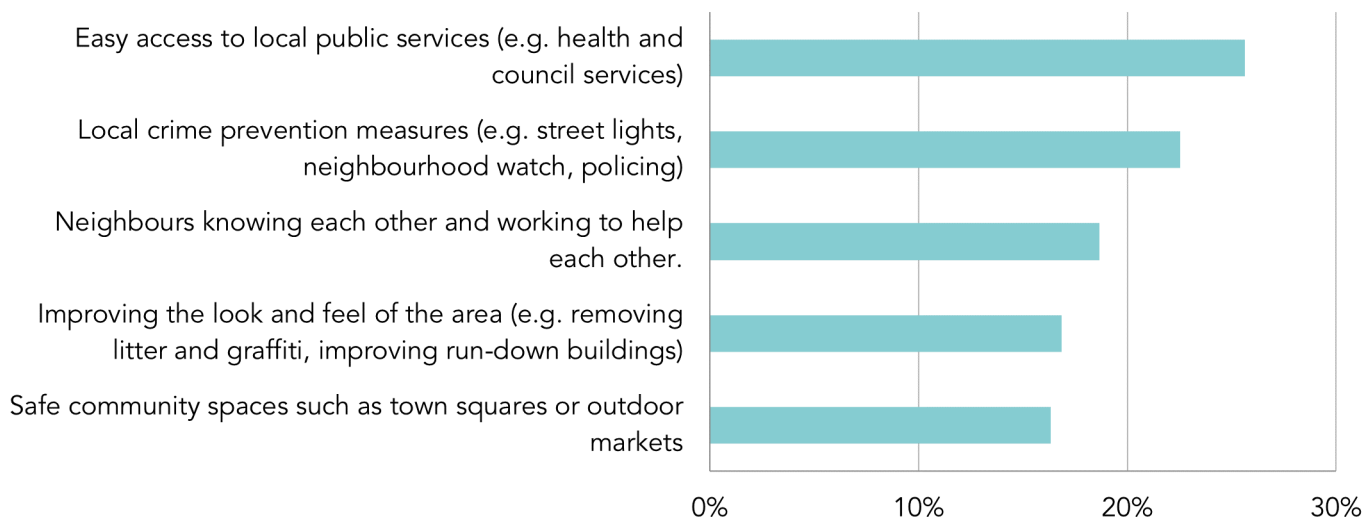
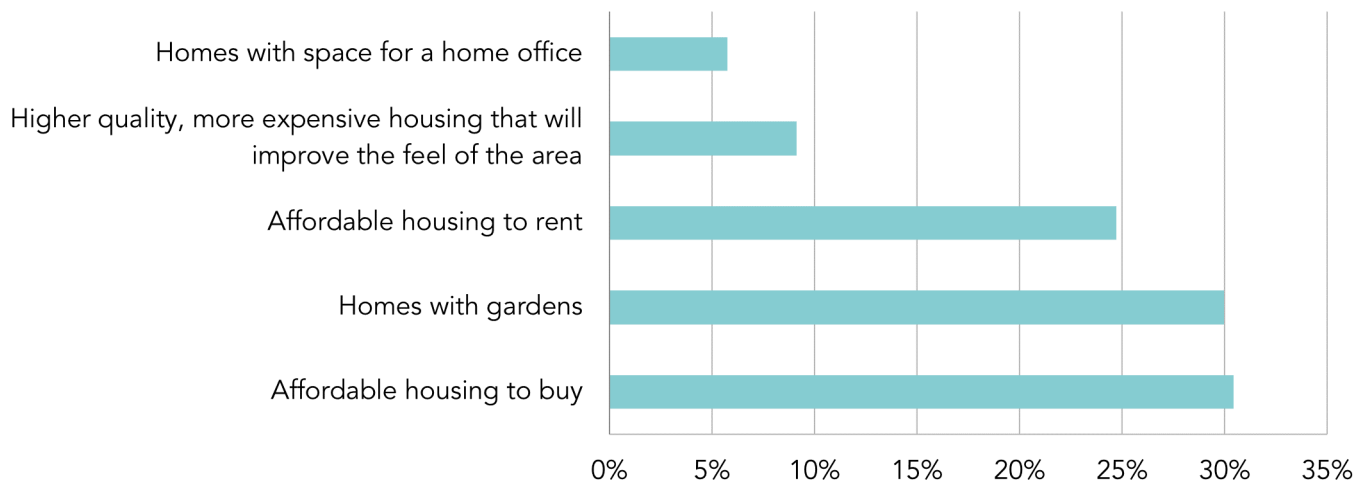


CHART 16

THINKING ABOUT HOUSING, WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY? (RANKED 1ST)



category was 'affordable housing to rent' (25% of first preferences) while lower order priorities overall included 'higher quality, more expensive housing' (9%) and 'homes with space for a home office' (6%). Given that the tenure of 'homes with gardens' is not specified, this is a particularly strong result, perhaps reflecting the importance that people attach to having their own private outdoor space during the pandemic.

In city centres, 'affordable housing to rent' was the most popular category (30% of first preferences) whereas in rural areas 'homes with gardens' was the most important category (38% of first preferences). Separately, there is a clear connection between wanting homes with gardens and age: 16% of those under 24 ranked it as their top priority, rising in a linear fashion to 43% of the over-70s.

PEOPLE FORCED TO WORK FROM HOME SEE THE VALUE IN HOME OFFICES

Although the priority placed on home offices is low overall, it is more likely to be important to those required to work from home because of the pandemic than to other working people, or those not working. Of those required to work from home because of the pandemic, 43% included it in their top three housing priorities, compared to 29% of working people who were not required to work from home because of the pandemic and 32% of the population as a whole. It is also more likely to

be prioritised by people with larger families: 42% of people living with both younger children (under 12) and older children (between 12-17) included it in their top three choices.

Demand for homes with gardens and affordable housing to rent are connected - in opposite ways - to socioeconomic group, as the chart below shows. In Chapter 7 we discuss in more detail the priorities of people who are more income constrained.

PUBLIC TRANSPORT IS A NECESSITY FOR THOSE ON LOW INCOMES

Of the population as a whole, the strongest support - 45% of first preferences - went to the public transport option of 'affordable and regular buses and trains', which was prioritised over the private vehicles option of 'good roads, convenient parking and electric vehicle charge points' (39%), with 'investment in cycling' coming in a distant third at 16%.

However, socioeconomic group also plays a large part in people's priorities when it comes to transport services with those on lower incomes understandably placing an even greater priority on public transport, while those on higher incomes give a higher priority to the car-based option. In our sample 40% of those on incomes of less than £20,000 did not own or have access to a vehicle, compared to 24% for the country as a whole.

CHART 17

THINKING ABOUT HOUSING, WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY? (RANKED 1ST)

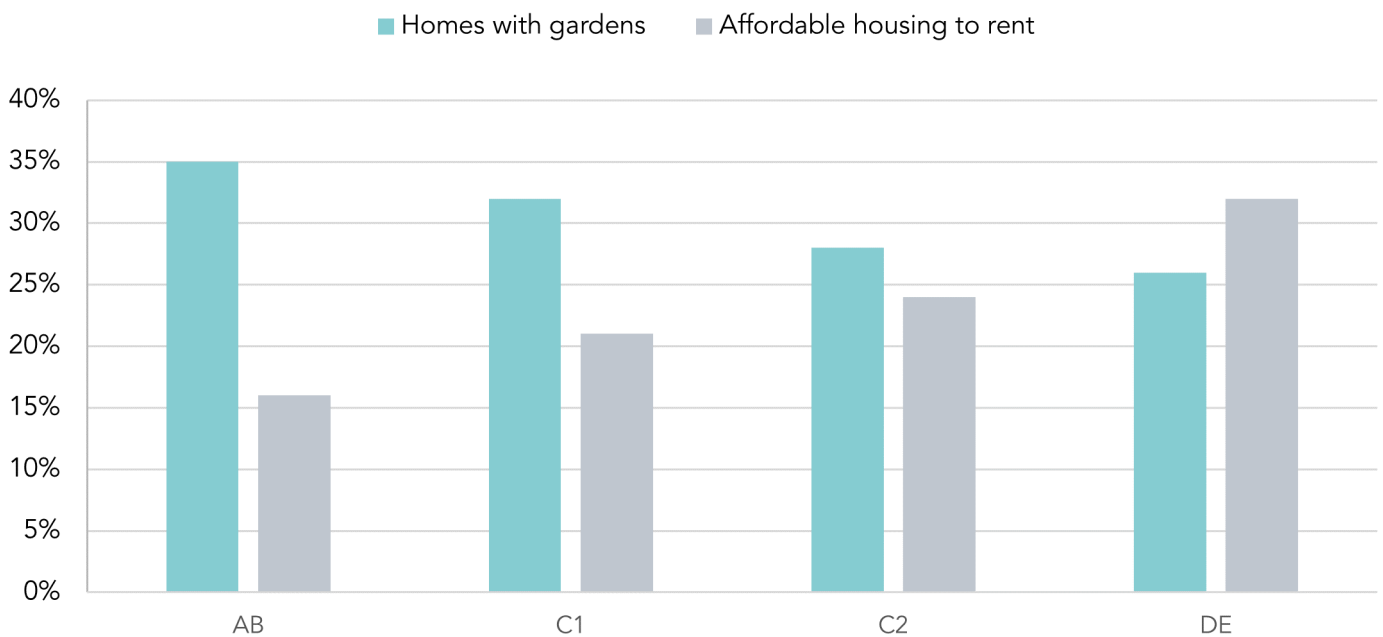


CHART 18

THINKING ABOUT TRANSPORT, WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY? (RANKED 1ST)

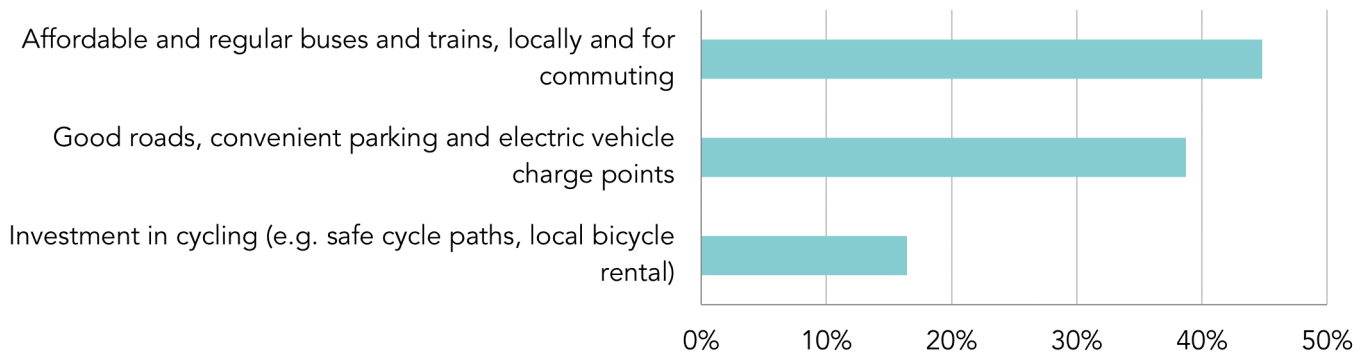
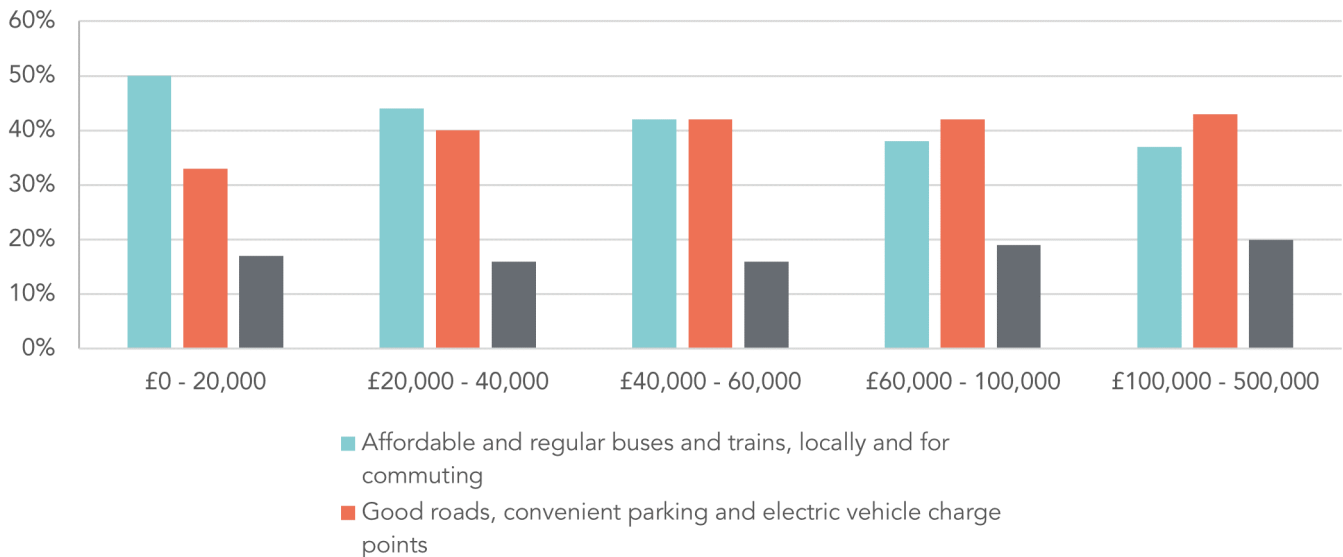


CHART 19

THINKING ABOUT TRANSPORT, WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY? (BY HOUSEHOLD INCOME)



THERE IS A MARKET FOR LOCAL DESK SPACE

Finally we explored what types of premises people thought were most important in order to support jobs in the area.

The results perhaps reflect the differing historic investment patterns and employment structures in different parts of the country, with premises for small and medium sized businesses receiving the most support, particularly outside urban centres. Self-employed people are more likely to prioritise workspaces for entrepreneurs and start-up companies, with 28% of self-employed people choosing this as their top priority of all the options provided regarding premises for jobs compared to 20% of the population as a whole.

As we discussed in our parallel project around how people's relationship with place has been affected by the pandemic, personal experience seems to be relevant. Local desk spaces for remote office workers are more likely to be the top priority in this for working people who had been required to work from home (17%), than those who hadn't (11%), and also by working people living with young children under the age of 12 (16%) compared to working people with no children (14%).

Possibly also because they welcome space outside the home to work, people earlier in their careers are also more likely to prioritise local desk space for office workers: across the whole country nearly one in five (19%) of people in their 20s ranked it as their top priority in the jobs category.

CHART 20

THINKING ABOUT JOBS, WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY?... RANKED 1ST

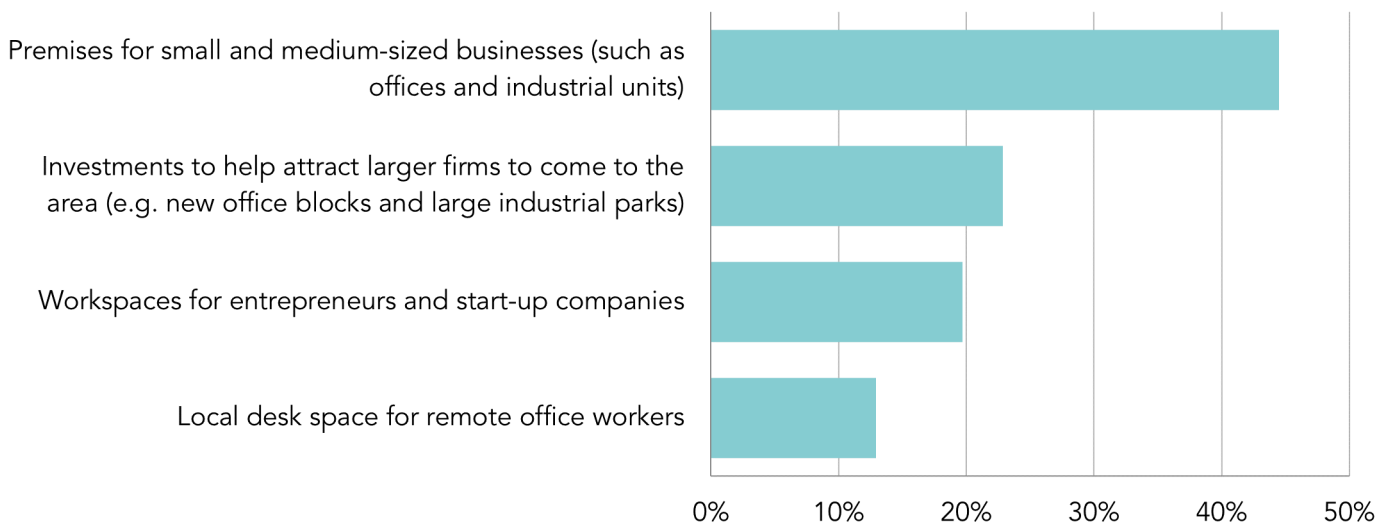
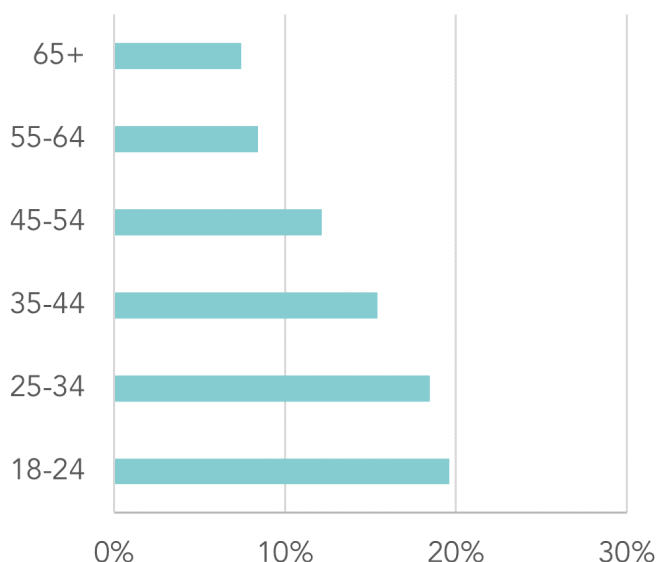


CHART 21

THINKING ABOUT JOBS, WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY?... LOCAL DESK SPACE FOR REMOTE OFFICE WORKERS (RANKED 1ST)



SHOPS ARE THE MOST URGENT REGENERATION PRIORITY

Bringing all this together, we asked those surveyed to select the one high level theme from the nine being measured that they felt most urgently needed improving in their local area. This is the 'call to action' question that is designed to give a derived measure of which aspect of regeneration would be most welcome.

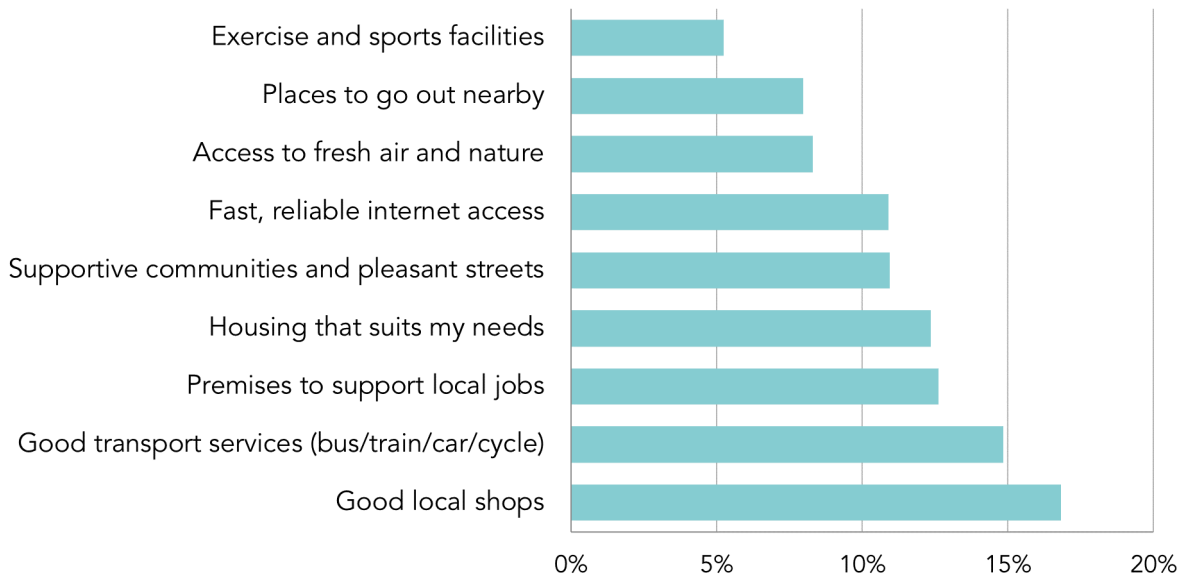
As the chart below shows, for the country as a whole responses were fairly evenly spread but the top priority was 'good local shops' (17%) followed by 'good transport' (15%).

When comparing this to the results of the place satisfaction index, which compares people's priorities with how they rate actual provision, the priority given to transport is to be expected: as we saw in the last chapter this is prioritised highly and people tend to think provision is less good than other amenities and services.

More surprising, therefore, is the result around shops given that, as we saw in the previous chapter, people on the whole rate the provision of shops in their area relatively highly. Why is it that people cite 'good local shops' as their top regeneration priority, while at the same time reporting that provision is already reasonably good? This is the question that we explore in the next section.

CHART 22

THINKING ABOUT WHAT IS AVAILABLE IN YOUR LOCAL AREA AT THE MOMENT, WHICH ONE OF THE FOLLOWING MOST URGENTLY NEEDS IMPROVING?



CHAPTER 3

SHOPS AS A SOURCE OF COMMUNITY PRIDE

We saw in the previous chapters that despite being more satisfied with the shopping offer than other aspects of what was available in their localities, there is also - perhaps paradoxically - a sense of urgency around improving local shops as a regeneration priority.

In this section we explore in more detail the relationship that people have with shops and what it means for planning and policy in the future. As well as drawing on the poll we also explored the issue in more depth during focus groups that were undertaken in February 2021 with people who live in towns in the North and South of England.

IMPROVING THE SHOPPING OFFER IS PARTICULARLY IMPORTANT FOR OLDER PEOPLE, AND THOSE ON THE OUTSKIRTS OF TOWNS.

The need to improve the local shopping offer is a popular view across all population groups and locations. However, it is felt particularly strongly by older people (22% for those 55 and over compared to 17% for the country as a whole) and people living in towns, but outside the town centres (20%).

At the finest level of granularity, our data show particular support for improving the shopping offer among people living outside the centre of towns in the East Midlands (23%), East of England (22%) and in particular Scotland (27%).

In addition, when considering our town typology, we found that a slightly higher proportion regard local shops as a regeneration priority in rural towns (19%) than the commuter 'hub and spoke towns' (15%).

Politically, support for improving the shopping offer is greater among Leave (19%) and Conservative (20%) voters. On the other hand, those on the highest household incomes (above £100,000) are less likely to regard better local shops as their most urgent priority (14%). Geographically, support for shops as a regeneration priority is lower in London and the South East and Wales and higher in the North East and Scotland.

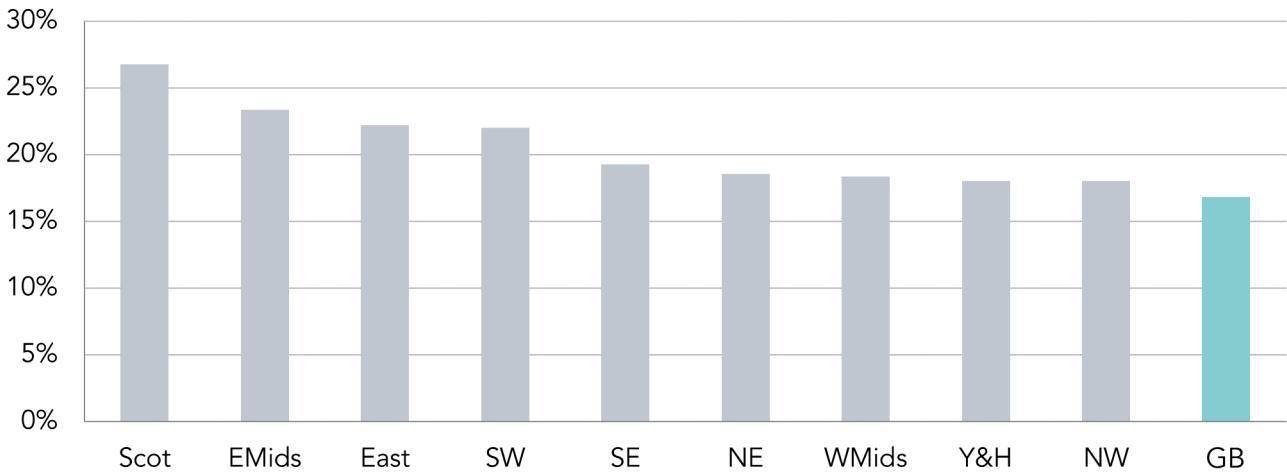
LOCAL SHOPS ARE A SYMBOL OF THE HEALTH OF A PLACE

We explored the relationship that people had with their local shops and high streets in the focus groups and found a widely held sense of regret about what people perceive to be the demise of the local high street. It was one of the main aspects that participants referred to when they were asked to describe the area in which they live and it was evident from their feedback that local shops are a kind of visual symbol of the overall socioeconomic health – and prestige - of a place.

*A lot of high street shops have now closed. And so the high street itself is kind of bare compared to how it was perhaps 5-10 years ago. So yeah, it's becoming quite derelict
[Group of workers, North]*

CHART 23

PROPORTION OF PEOPLE LIVING IN TOWNS, BUT OUTSIDE THE TOWN CENTRES, WHO SAY THAT "GOOD LOCAL SHOPS" MOST URGENTLY NEEDS IMPROVING IN THEIR LOCAL AREA: BY REGION



*London and Wales are excluded due to small sample sizes

The high street has gone now. People used to work for banks, insurance companies but they've all gone. Now it's just charity and takeaway shops and pubs. There is no community spirit.

[Group of non-workers, North]

The Highstreet is under-invested. There are lots of empty shops, lots of charity shops and barbers. It needs more variety to match the new builds. High street is somewhere that could help the area thrive.

[Group of workers, South]

Apart from the cinema complex, there's not very much to do. And because the high street is just full of charity shops and, because the area really isn't terribly affluent any more, the charity shops aren't that good, you know?

[Group of non-workers, South]

A FIT-FOR-PURPOSE HIGH STREET REQUIRES A MIX OF SHOPS

People are looking for a mix of shops to be represented on their high streets to ensure they don't have to go out of the area to meet their everyday shopping needs. This includes having both brands and independent outlets, different categories of retail, and not just 'low end' shops (e.g. charity, betting and money lending shops).

There is some appreciation of the challenge faced by independent shops to compete with chains and, particularly, with the convenience of one-stop-shopping at big brand supermarkets. However, the prevailing feeling is that the two should be able to co-exist locally.

I think having your own independent greengrocers, and butchers and things like that, get them on your high street along with chains, and have them all mixing and co-existing together. Certainly, I think there's room for it where I live, people do want it. And I think if they can coexist with the chains, it will help the high street, because for your independent shops, they're only going to employ a set amount of people before when they start to employ the big people, that's when they become big chains. And so I think we need a mixture of both, one for the economy, two for people's jobs and three to keep it vibrant.

[Group of workers, North]

SHOPPING AREAS SHOULD ENCOURAGE PEOPLE TO GO THERE

However, a successful high street is perceived to be about more than just the shops. It also requires local shopping areas to be accessible and for people to want to go there. A number in the focus groups

suggested that efforts be made to improve parking and public transport links, as well to ensure that high streets are safe and attractive spaces for local people to spend time.

If we went to shop in our town centre, the price that you have to pay to park is not worth it. Because there aren't enough open shops to justify the parking, the condition of the car parks are not great, they feel awful. You know, so it's not really desirable as an experience to go to the town centre, and shop because by the time you've got all of your family there you've paid a lot, and there isn't really enough places to sit down, everything's grubby. It doesn't feel welcoming enough.

[Group of workers, North]

THERE IS STRONG SUPPORT FOR HIGH STREET REGENERATION

There is a strong desire to see local high streets revitalised and both government and local authorities are perceived to have a significant role to play in achieving this, for example by providing rent relief and grants to small businesses operating independent shops, as well as investing in the associated infrastructure. As part of this, people are not averse to some repurposing of empty shops from retail to offices and/or housing as long as the integrity of the high street is not compromised.

The payback for this investment is expected to be significant, including support for local businesses, more local jobs, a catalyst for wider regeneration, and a renewed 'pride in place' amongst those living locally.

(There needs to be) small business loans and rent-free periods to revive the high street because, otherwise, all the jobs are gonna go online. And we'll all end up working in an Amazon warehouse.

[Group of non-workers, North]

So like, just making it somewhere you can be proud of going... it's got to be something that's going to bring people in and bring jobs in as well. It would just be nice to see local jobs for people rather than them having to travel miles and miles away to try and get a job.

[Group of non-workers, North]

THE HIGH STREET COULD HAVE A NEW ROLE TO COMPLEMENT ONLINE SHOPPING

With online shopping having become further entrenched during the pandemic some expect that people's needs from physical shopping will become less transactive and more experiential as a result. They suggest that high streets will need to become social spaces to attract people who wish to 'spend money while they're spending time'. It is felt that this in turn will require regeneration of high streets focused on making them more attractive places in which to enjoy spending time.

That's what gives people a reason to go into a town centre, to maybe to sit by the canal to spend money while they're spending time in the town centre. At the minute, people don't want to go to the town centre, it doesn't feel a very nice, safe place. So if you, as a business owner, are investing in bricks and mortar, nobody's gonna really want to go into your shop, it might be the best shop in the world. But unless it's a welcoming, safe, inspiring, cultural environment, people are not going to go anymore.

[Group of workers, North]

An area needs an attraction, a pull-factor... The place I go to now is a lovely place. It's not just the shops there that are nice but it's beautiful and picturesque in terms of its buildings and architecture, you feel like it's a day out. It's like I'm going to meet my friends and have lunch about the shops. It's kind of like a pleasurable experience.

[Group of workers, South]

Given the importance of the shopping offer to people's sense of place, one of our main conclusions is that policy should do more to align the local retail experience with what people in a given area want to see; we suggest in the concluding section some ways in which this could be done.

CHAPTER 4

IS SUBURBIA FIT FOR PURPOSE?

When we asked people to choose the type of location they lived in, around 20% said they live 'in a city, but not in the centre' and a further 37% that they live 'in a town, but not in the centre'. Taken together these two groups of suburban dwellers therefore make up over half (57%) of the population.

Moreover, as we showed in Chapter 1, people living outside the centre of both cities and towns have more similar place satisfaction index results to each other than they do to people living in their respective urban centres.

In this section we explore specifically what people who live in suburban Britain say they want from their location and the extent to which existing provision matches up.

SUBURBAN DWELLERS ARE OLDER THAN THE AVERAGE

People living in suburbs have a slightly older age profile than the population as a whole: where 57% of the adult population as a whole live in suburbs, this rises to 59% of people in the 40-49 age bracket and 63% of those aged 50 or over. In line with this age profile, a slightly higher proportion of the population in suburban areas is retired (18%) compared to people living in other types of locations (14%).

Possibly as a result, suburban households are more likely not to contain children (70%) than elsewhere (65%); consequently 58% of suburban households have less than three occupants (54% elsewhere).

A slightly higher proportion of people in suburban areas state that their ethnic origin is white in our survey (90%) compared to Britain as a whole (88%), with the difference being driven by suburban areas having a lower proportion of people with an Asian or Asian British background (4.5% in the suburbs compared to 6.2% across all non-suburban areas).

Although, as for Britain as a whole, the largest single socioeconomic group living in the suburbs is DE (38%), there is a larger number of people from socioeconomic group C1 (27%) who live in suburban areas compared to other types of location (21%).

Rates of employment, education and worklessness are similar in suburban areas to the Britain as a whole, as are the sectors of the economy that people are likely to be working in, although there are slightly more suburban households in the middle income band earning £20,000-£40,000 than in the under £20,000 band when compared to Britain as a whole.

SUBURBAN WORKING PATTERNS ARE SLIGHTLY LESS LIKELY TO HAVE BEEN DISRUPTED BY THE PANDEMIC

Perhaps because of these features of the suburban population, people living in the suburbs are also less likely to have had their lives disrupted by the pandemic than those in other parts of the country. For example, the proportion who were furloughed at some point during the pandemic is 15% in the suburbs compared to 21% in other types of location, and the proportion who were required by their employer to work at home because of the pandemic is 27% in the suburbs compared to 33% in other locations.

Amongst employees specifically a distinction also emerges: 48% of working people who live in suburban locations were required to work at home during the pandemic, compared to 54% of working people in other locations, with a suggestion in the data that this is because people living on the edge of conurbations are slightly more likely to be key workers.

THE SUBURBS ARE MORE LIKELY TO VOTE LEAVE AND CONSERVATIVE

People living in suburban locations are very slightly more likely to have voted in the 2016 Referendum and 2019 General Election than those elsewhere (2% higher turnout in 2016 and 1% in 2019). Those who participated in these polls are more likely to have voted Leave in 2016 (43% compared to 39% elsewhere) and Conservative in 2019 (37% compared to 34% elsewhere).

SUBURBAN PRIORITIES DRIVE THE NATIONAL RESULTS

When we asked people which are the most important amenities and facilities to have in their local area we found the results for people living in the suburbs to be similar to the national average,

which is unsurprising given it makes up the single largest population group. However, the differences in priorities between suburb-dwellers and those who say they live in urban centres is striking.

As Chart 24 shows, 'access to fresh air and nature', 'good local shops' and 'suitable housing' are more popular choices for those living in suburban than urban centres, while 'exercise and sports facilities' and 'premises to support local jobs' are less so.

Within the suburban population, lower income groups are more likely to prioritise suitable housing than 'access to fresh air and nature', and higher income groups are less likely to prioritise 'good local shops'.

Exploring differences by geography, we found that people living in suburban areas in the south of England are slightly more likely to prioritise suitable housing and fresh air, and correspondingly less likely to prioritise shopping and 'supportive communities and pleasant streets'.

When asked separately about what one category most urgently needs improving, 'good local shops' is the clear winner for suburban Britain as a whole, with 'good transport services' second, followed closely by 'premises to support local jobs', 'housing that suits my needs' and 'supportive communities and pleasant streets' (see Chart 26).

CHART 24

WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY? ... RANKED 1ST

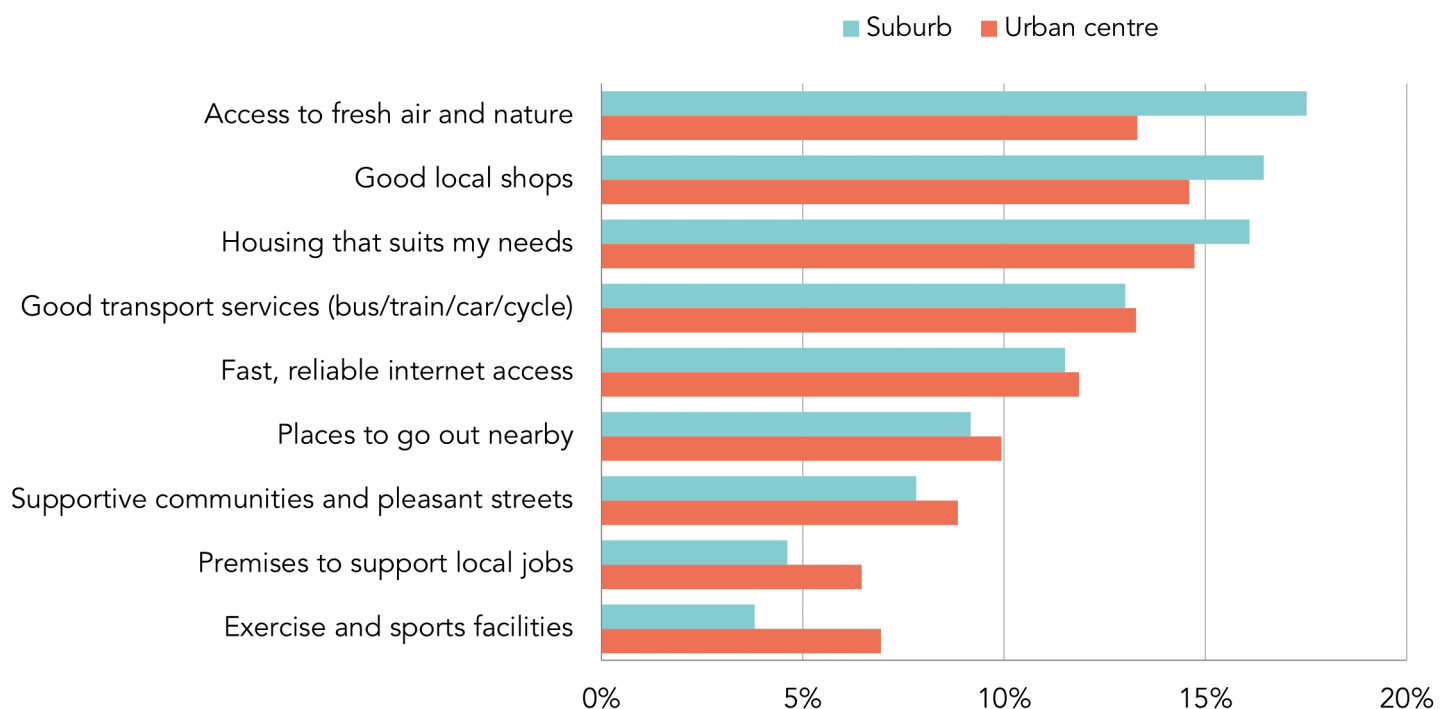
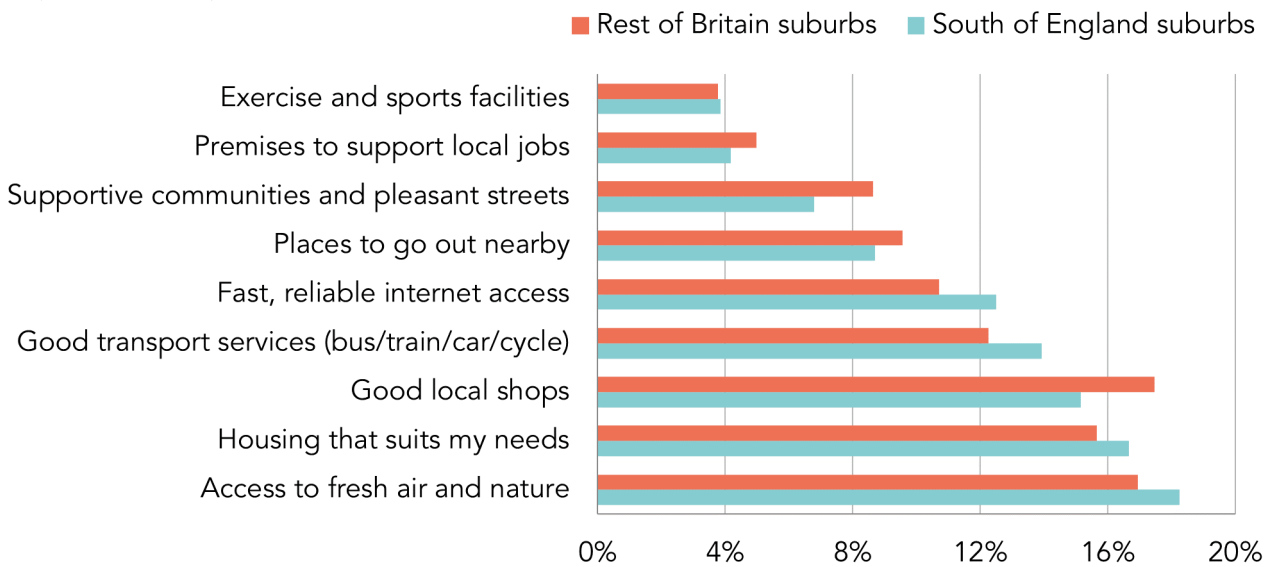


CHART 25

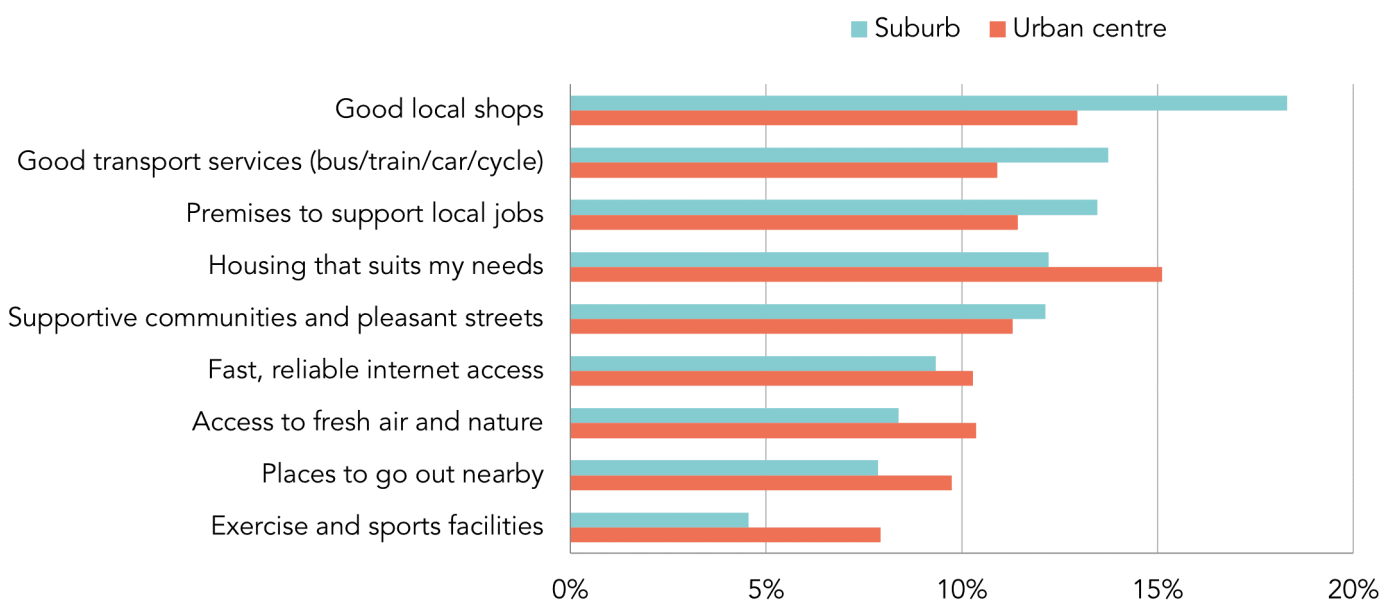
WHICH OF THE FOLLOWING ARE MOST IMPORTANT TO HAVE IN YOUR AREA, FOR YOU PERSONALLY? (RANKED 1ST)



South of England includes London, South East, South West and East of England regions.

CHART 26

THINKING ABOUT WHAT IS AVAILABLE IN YOUR LOCAL AREA AT THE MOMENT, WHICH ONE OF THE FOLLOWING MOST URGENTLY NEEDS IMPROVING? PLEASE ANSWER CAREFULLY BECAUSE YOUR ANSWERS WILL BE SENT TO THE GOVERNMENT.

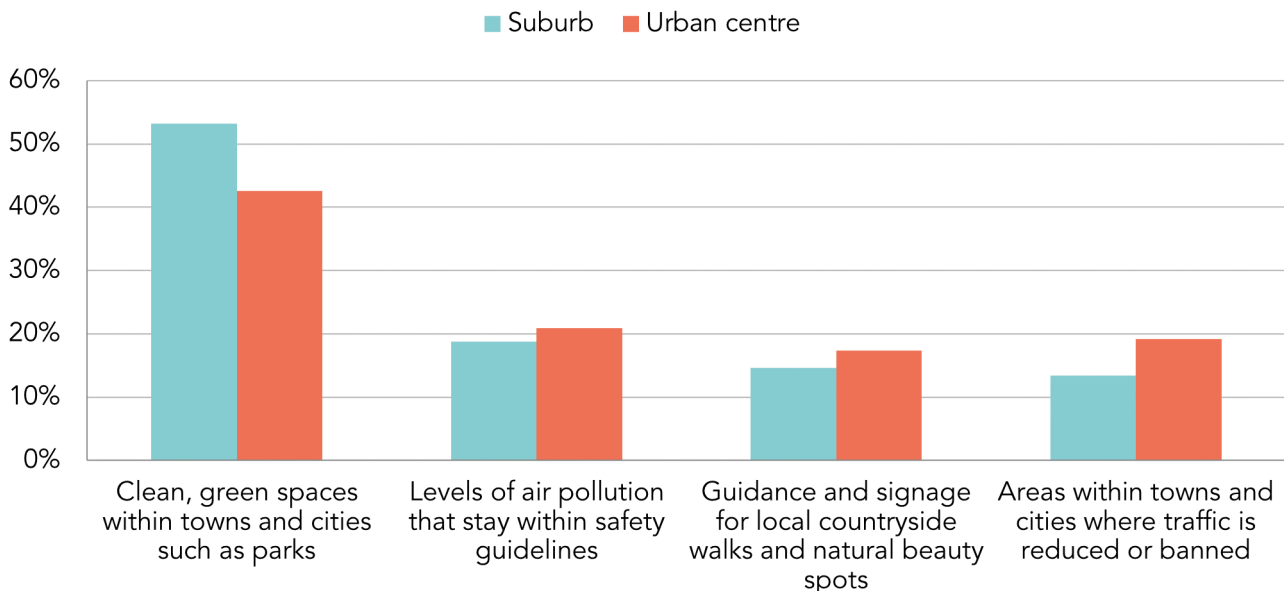


Within the suburban population, those with lower household incomes (under £20,000) are slightly more likely (14%) to cite housing as the category that most urgently needs improving than the average (12%), suggesting that for some, their basic needs are not being met. A particularly stark difference emerges when looking at ethnicity: 17% of non-white respondents stated that suitable housing is their most urgent priority for improvement.

In the next sections, we explore the priorities of people living in the suburbs in more detail and the extent to which the provision of services matches what people want to see. We focus on the four categories that are ranked most highly: fresh air, shopping, transport and housing.

CHART 27

THINKING ABOUT FRESH AIR, WHICH OF THE FOLLOWING ARE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY....? (RANKED 1ST)



SUBURBAN DWELLERS ATTACH A HIGH PRIORITY TO PARKS AND GREEN SPACES

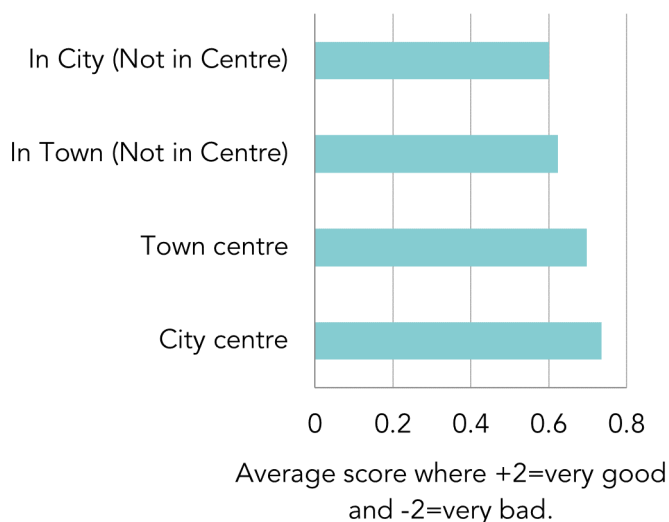
Starting with the ‘fresh air’ category, we find that the most important priority by far is ‘clean green spaces within towns and cities such as parks’, with 53% of suburban dwellers listing this as their top priority, which is higher than their counterparts in urban areas. On the other hand, suburban dwellers are less likely to prioritise traffic-free zones. In addition, they are on par with people living in central areas in demonstrating only moderate concern about pollution.

PROVISION OF PARKS IS WORSE THAN IN URBAN CENTRES

When it comes to provision of green spaces and parks, however, people living in suburban areas are less satisfied than those in urban centres, and this is particularly true of those living in city suburbs.

CHART 28

DO YOU THINK YOUR LOCAL AREA DOES A GOOD OR BAD JOB OF PROVIDING THEM? ... CLEAN, GREEN SPACES WITHIN TOWNS AND CITIES SUCH AS PARKS



THERE IS A SUBURBAN LOVE AFFAIR WITH SUPERMARKETS

After 'fresh air', 'good local shops' is the highest priority for people living in suburban areas.

Within the shopping category, we find that people living in suburbia are significantly more likely to prioritise supermarkets compared to other physical retail outlets. Just over half of people living in suburbia (52%) regard supermarkets as their top priority within the shopping category, compared to two in five (41%) of people in urban centres; conversely, high streets and shopping malls are less relevant to people in the suburbs.

SUPERMARKET PROVISION IS LESS GOOD ON THE OUTSKIRTS OF TOWNS

When asked to rate the actual provision of supermarkets in their area, the average score in suburban areas was not dissimilar to the country as a whole, at 0.96 on a scale of -2 (very bad) to +2 (very good), indicating that on the whole people think that supermarket provision is 'good'. However lower satisfaction scores are also evident from people living on the outskirts of towns, at 0.92 compared to a rating of 1.03 for people living in city suburban areas.

SUBURBAN TRANSPORT SERVICES NEED GREATER INVESTMENT

We saw above that people living in suburbia are more likely to want urgent improvements in all transport services than those living in urban centres. Within the transport category, the most important priority is public transport (particularly in cities), with infrastructure for cars not far behind; suburbanites are less interested in good facilities for cyclists.

However, suburban dwellers are unfortunately less likely to be satisfied with existing provision of transport services, and this is one of the main reasons why the overall place satisfaction index scores are lower in suburban areas.

For example, when asked to consider the provision of public transport the average net rating was +0.4 in city suburbs and +0.2 in town suburbs, as compared to +0.7 and +0.5 in the respective urban centres. In a sense this is understandable given the radial nature of public transport provision into conurbations, however suburbs also fare badly in provision for cars.

CHART 29

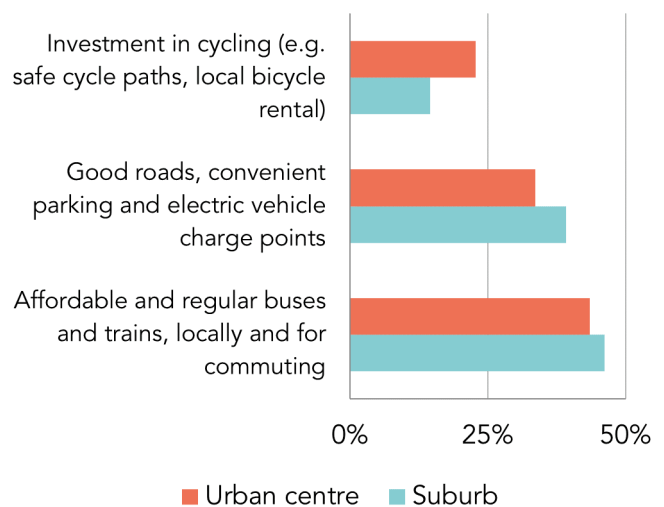
THINKING ABOUT SHOPPING, WHICH OF THE FOLLOWING ARE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY....? (RANKED 1ST)



*For example out-of-town shopping centres or modern city centre developments

CHART 30

THINKING ABOUT TRANSPORT, WHICH OF THE FOLLOWING ARE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY....? (RANKED 1ST)



When asked to rate local provision of 'good roads, convenient parking and electric vehicle charge points', the average score given by people living in the suburbs was close to zero, meaning it was considered 'neither good nor bad', with people on the edge of towns scoring it as negative. The corresponding rating of provision for cars in city and town centres was significantly higher at around +0.4, a striking result given that parking restrictions are more common in urban centres.

AFFORDABLE HOUSING IS A BIG PROBLEM IN THE SOUTH

People living in suburbs attach the same overall importance to suitable housing as they do to good local transport, but they are generally even less satisfied with its provision.

Within the broad housing category, people living in suburbs attach particular priority to 'affordable houses to buy' and 'homes with gardens', in each case more so than people living in urban areas. This is particularly so for people living in the outskirts of towns. Conversely, suburban dwellers are less likely to prioritise 'homes with space for a home office' and 'higher quality, more expensive housing' than their urban centre counterparts.

Across the country, regardless of location, the average rating for the provision of homes with gardens is somewhere between 'good' and 'neither good or bad' with, unsurprisingly, slightly higher

CHART 31
DO YOU THINK YOUR LOCAL AREA DOES A GOOD OR BAD JOB OF PROVIDING THEM?

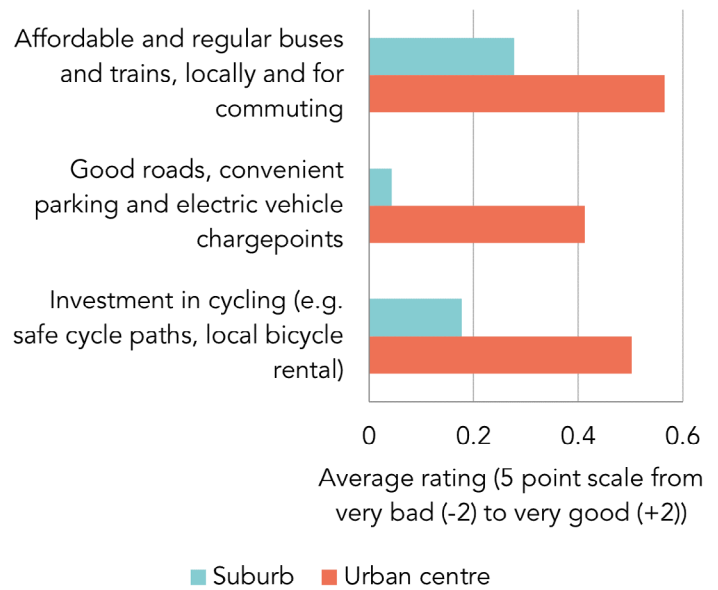
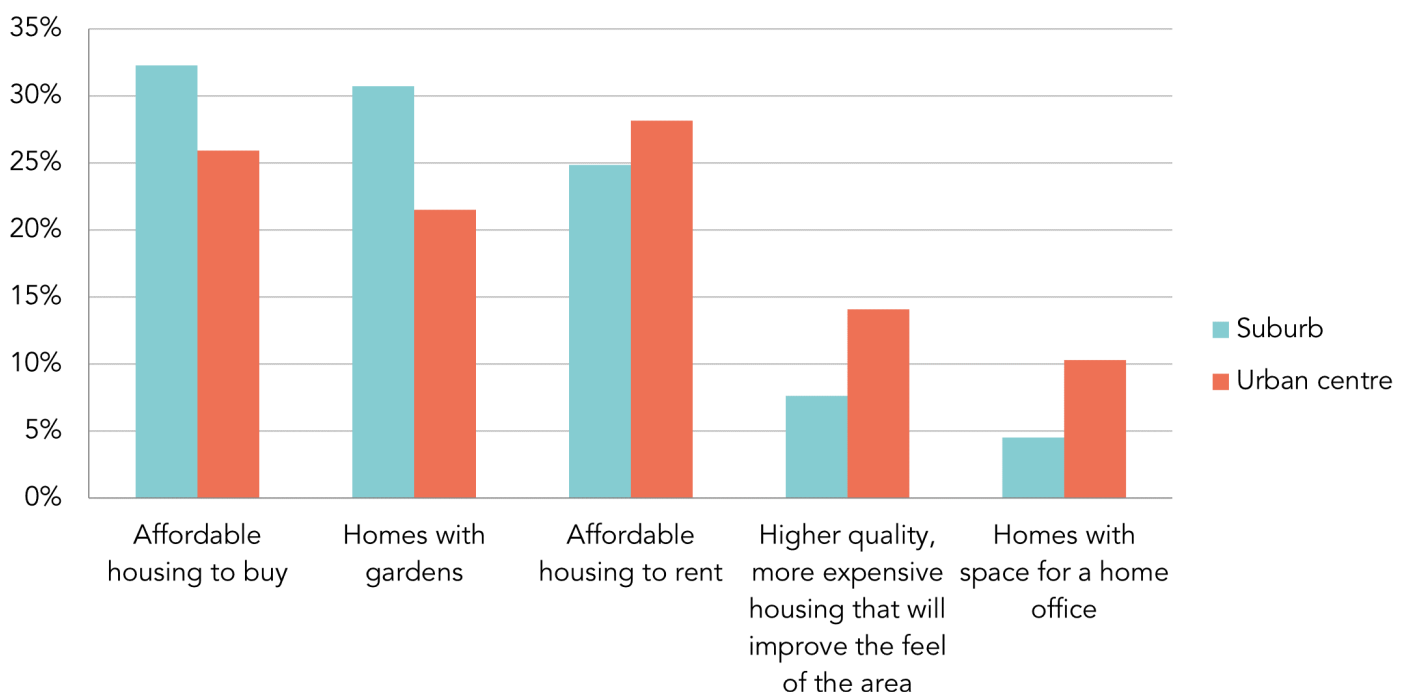


CHART 32

THINKING ABOUT HOUSING, WHICH OF THE FOLLOWING ARE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY...? (RANKED 1ST)



scores in the countryside and lower scores in city centres with suburbs somewhere in between.

However, when looking at how people view the provision of 'affordable houses to buy' which is seen as equally important in suburban areas to elsewhere, a different pattern emerges. Across the country, the overall perception of availability is neutral ('neither good nor bad.') However, this perception leans towards 'bad' in the suburbs and is more positive in more built up areas as the chart below shows.

Delving a bit more deeply shows that there is a strong geographic driver to this perception. In the Southern part of England (comprising the regions

of East of England, Greater London, the South East and South West) the average rating of provision of 'affordable housing to buy' is negative, whereas in other parts of Britain it is positive, as shown in the chart below.

Similarly, the provision of 'affordable housing to rent' is also perceived negatively in southern suburban areas but not elsewhere in the country. No such North-South split is observed in the other housing categories we asked about. It therefore seems likely that high house prices in the South of England is one of the factors driving the lower overall place satisfaction index scores that were observed in the introductory chapter.

CHART 33

DO YOU THINK YOUR LOCAL AREA DOES A GOOD OR BAD JOB OF PROVIDING...

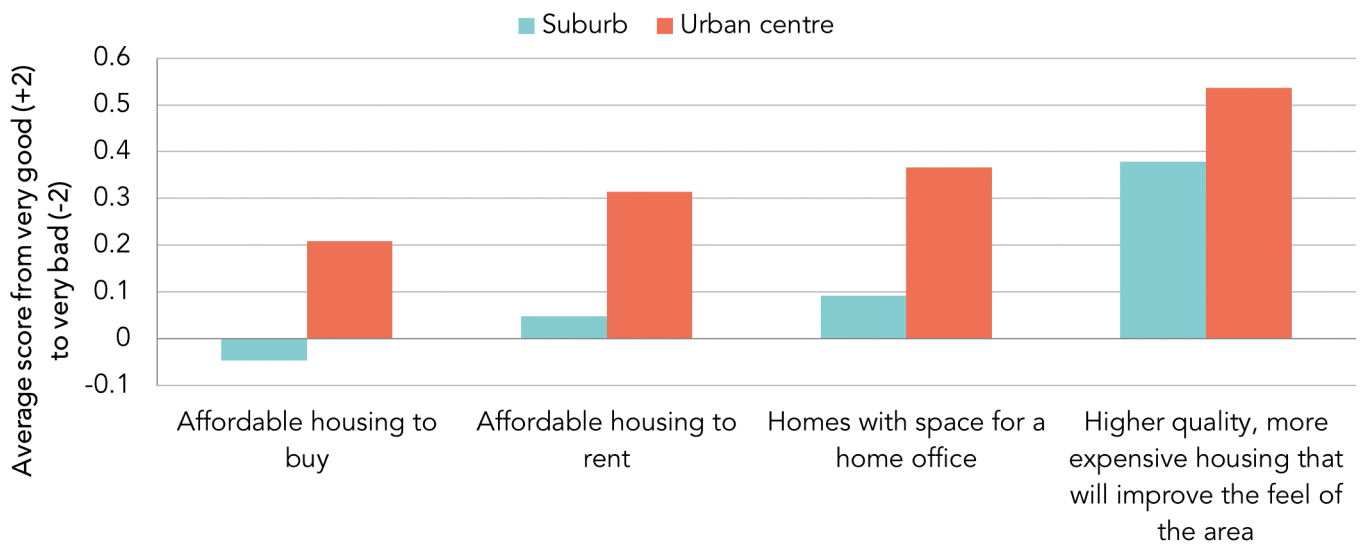
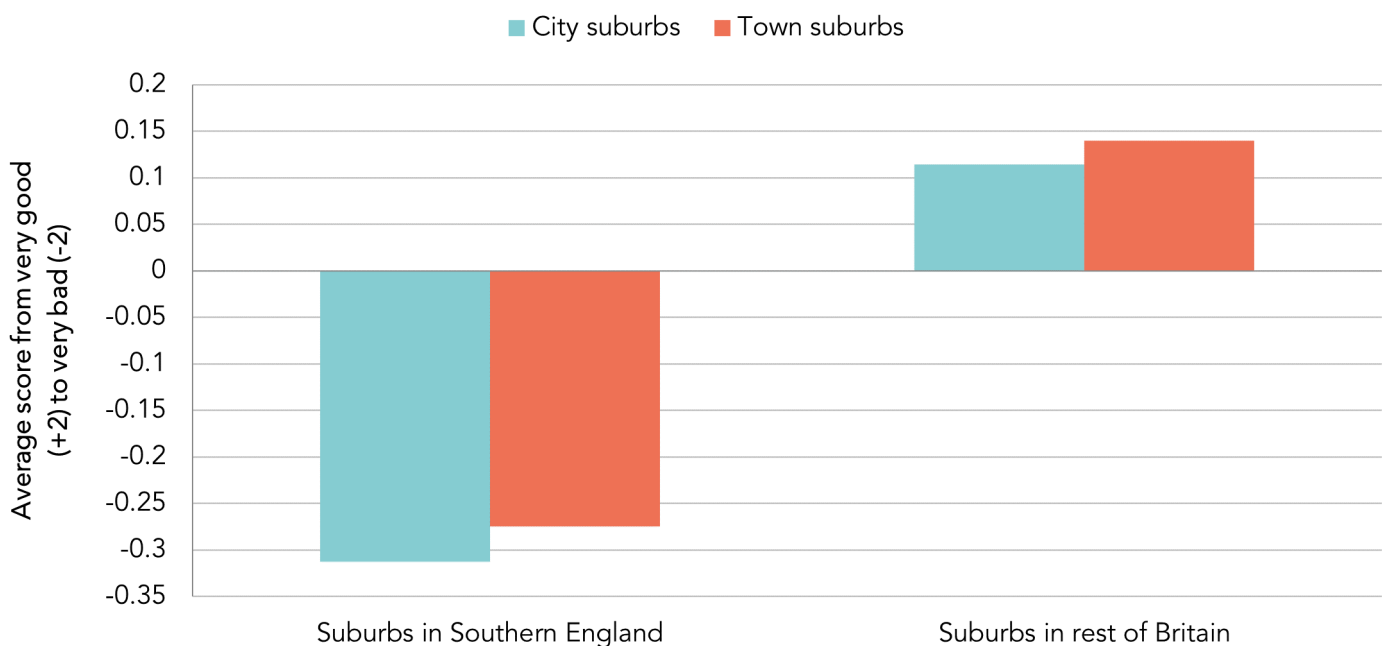


CHART 34

DO YOU THINK YOUR LOCAL AREA DOES A GOOD OR BAD JOB OF PROVIDING...AFFORDABLE HOUSING TO BUY



CHAPTER 5

THE EVERYDAY NEEDS OF RURAL BRITAIN

In our poll, which was weighted to be nationally representative according to age, gender, region, education, 2019 general election vote, and 2016 EU referendum vote, around 19% of our sample (3,758 people) defined their location as 'rural, or in a countryside village'.¹⁵

In our sample this group has an older skew than the national average: 36% of our rural population is 65 or over, compared to 23% of our population as a whole. It also consists of a higher proportion of people in socioeconomic group AB: 28% compared to a national average of 24%. Although rates of part-time and self-employed work are not dissimilar to the country as a whole, there is a significantly lower proportion of the rural population in full-time work (27%) compared to the national average (36%) and the proportion who are retired (25%) is correspondingly higher (16% nationally). Of those

who voted, our rural sample is more likely to have voted Leave in 2016 (57% to 52%) and Conservative in 2019 (55% to 45%).

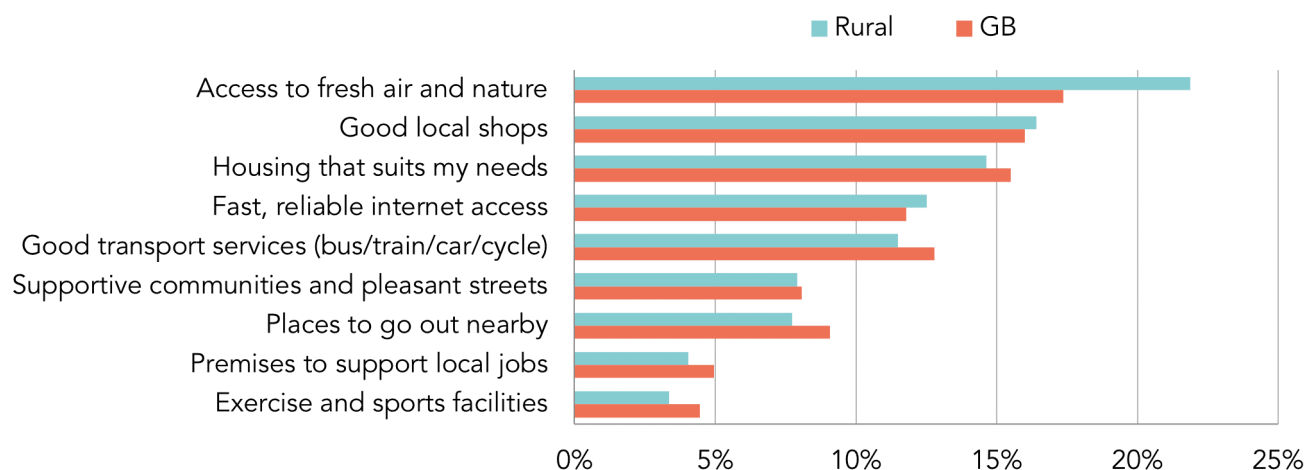
Of those who are working, a slightly lower proportion (45%) were required to work at home at some point during the pandemic than nationally (51%) and the proportion of employees who were furloughed at least once is also a little lower than the national average (29% compared to 34%).

RURAL DWELLERS APPRECIATE THEIR ACCESS TO NATURE

Rural Britain particularly appreciates its access to fresh air and nature: when asked what is most important, this comes top (22% of first choices), followed by good local shops (16%), suitable housing (15%) and fast, reliable internet access (13%).

CHART 35

WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY?... RANKED 1ST



¹⁵ The government estimate of the rural population is 17% of the total, based on analysis of ONS Lower Super Output Areas. See Defra. Rural population and migration estimates. 2020. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/912408/Rural_population_August_2020.pdf [date accessed: 27/03/21]

This appreciation among rural dwellers of their access to fresh air and nature is universal across all income and socioeconomic groupings. However, beyond that, people in lower income households (under £20,000) are more likely to prioritise shops, housing and transport while those on higher household incomes (over £40,000) are more likely to prioritise fast, reliable internet access.

THOSE WITHOUT A VEHICLE PRIORITISE TRANSPORT

For the minority of rural residents who do not have access to a vehicle, however, rural life feels very different. This group comprises 14% of the total rural population, and their top priority is transport, followed by local shops, with access to fresh air and nature slipping to third place.

Even for those who do have access to a vehicle, transport services in rural areas are seen as lacking. For example, we found that those in the countryside attached a far greater urgency to improving transport services than the national average (23% compared to 15%). Those in socioeconomic group AB are particularly likely to prioritise improvements in transport (26%) as are - unsurprisingly - people without access to a vehicle (25%). The experience of the pandemic appears to also have affected people's priorities in rural areas. With mobility

constrained, people who were furloughed are less likely to prioritise transport as most urgently needing improving (18%, compared to 23% of employees who were not furloughed) as are people who were required to work from home (20% compared to 23% of working people not required to work from home). However, both groups of working people affected by the pandemic are correspondingly more likely to prioritise suitable housing as needing urgent improvement. People living in lower-income households (under £20,000) were also, as elsewhere, more likely to prioritise housing, suggesting their basic needs were less likely to be being met.

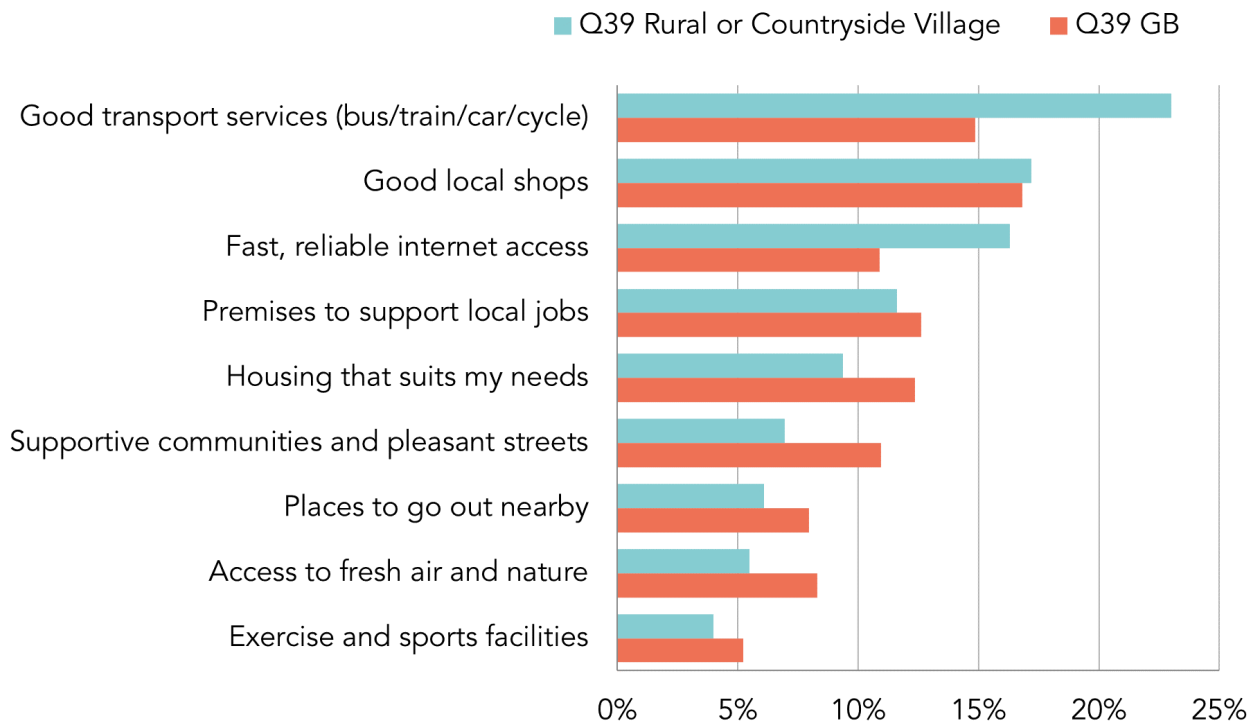
In the sections that follow we explore the detailed preferences within the main categories of importance to rural residents. In each case we look in particular at the preferences of those parts of the population that see the greatest urgency for change.

THE PRIORITY FOR CHANGE IS PUBLIC TRANSPORT

As a group, rural residents are slightly more likely than the country as a whole to rate provision for cars as their top priority within the transport category (44% compared to 39%). However, for those people who think transport is the category that most urgently needs improving in their local area, the

CHART 36

THINKING ABOUT WHAT IS AVAILABLE IN YOUR LOCAL AREA AT THE MOMENT, WHICH ONE OF THE FOLLOWING MOST URGENTLY NEEDS IMPROVING?



picture changes: public transport is the highest priority for this group with 54% putting it first, compared to 35% who prioritise facilities for cars (see Chart 37).

Across the rural population generally, provision of all transport service is rated poorly, with more people rating the provision of public transport and facilities for cars as bad than good. However, for those who cite transport as the thing that most urgently needs fixing in their area, ratings of current provision are even more negative: 56% of this group rate provision of public transport locally as bad and 51% rate provision of facilities for cars as bad compared to 37% of the rural population as a whole for both categories.

LOCAL INDEPENDENT SHOPS ARE MORE IMPORTANT IN RURAL AREAS

People in rural areas like their supermarkets but are less reliant on them than elsewhere in Britain, ranking local independent shops as equally important. This is true both for the rural population overall and for people within this who feel shops are the most urgent priority for improvement.

As elsewhere in the county, retail provision is generally quite highly rated in rural areas, although scores tend to be lower than the national average. This is perhaps unsurprising given there are fewer facilities in general in more rural areas. Even people who prioritise local shops as the most urgent thing that needs improving in their local area are, however, still more likely to rate current provision as good rather than bad.

RURAL BRITAIN IS TWICE AS LIKELY TO BE DISSATISFIED WITH INTERNET ACCESS

In Britain as a whole, access to the internet is perceived as very important and its provision is also seen as good; this contributes to high satisfaction scores on this metric, as we saw in the introductory chapter. Rural areas, however, stand out as being less well served. Almost 1 in 5 rural residents (19%) consider internet access to either be 'bad' or 'very bad' compared to only 1 in 10 (10%) of people living in other location types. Dissatisfaction is particularly high (over 23%) in rural Wales, Scotland and the West Midlands.

AFFORDABLE RURAL HOUSING IS IN SHORT SUPPLY

Within the housing category, the most popular type of housing in rural areas is 'homes with gardens' (38%) followed by 'affordable housing to buy' (30%). However, for those people who prioritise

CHART 37

THINKING ABOUT TRANSPORT, WHICH OF THE FOLLOWING ARE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY...? (RANKED 1ST)

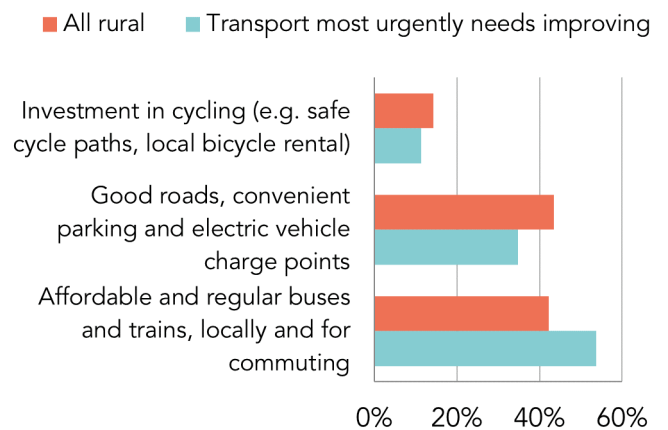


CHART 38

THINKING ABOUT SHOPPING, WHICH OF THE FOLLOWING ARE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY...? (RANKED 1ST)

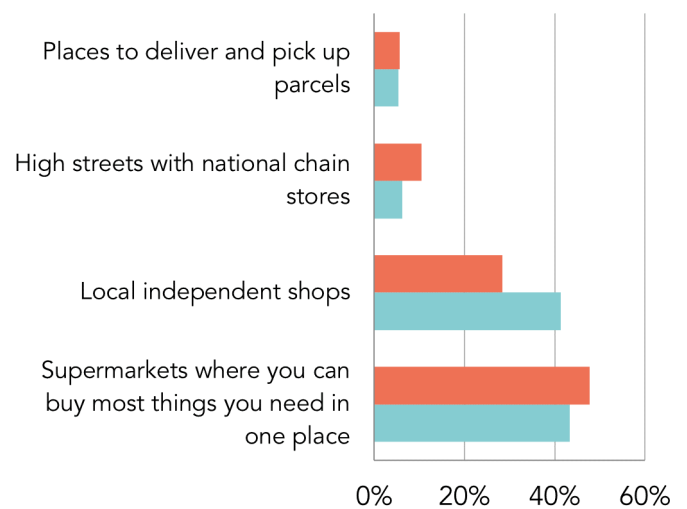


CHART 39

DO YOU THINK YOUR LOCAL AREA DOES A GOOD OR BAD JOB OF PROVIDING...FAST, RELIABLE INTERNET ACCESS?

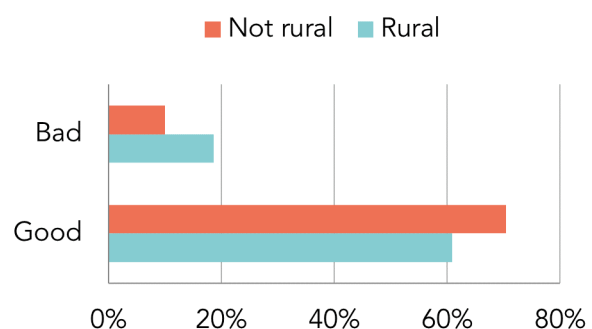
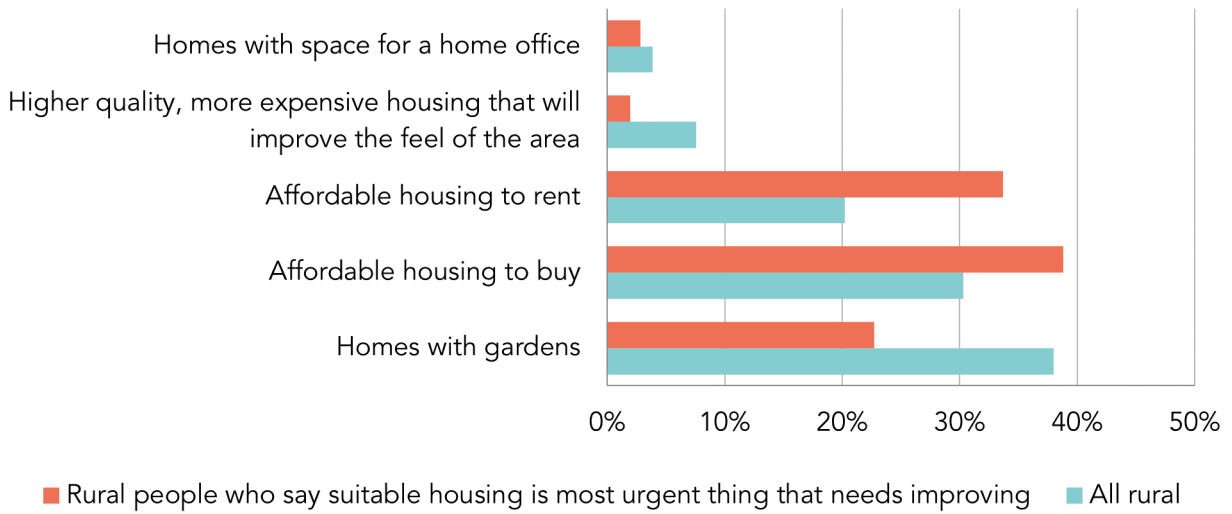


CHART 40

THINKING ABOUT HOUSING, WHICH ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY? (RANKED 1ST)



suitable housing as the most urgent thing that needs improving, affordability becomes key, rather than whether a house has a garden. 45% of this group are moving or planning to move, compared to 23% of the rural population as a whole, potentially motivated by cost considerations.

Turning to how housing provision is viewed, most people in rural areas (70%) think that provision of homes with gardens - their top priority - is good, but that affordable housing to buy is in shorter supply (31% good, 36% bad) as is affordable housing to rent (30% good, 32% bad).

We saw in Chapter 1 that rural areas tend to score poorly when compared to other areas in the place satisfaction index. Having explored this in more depth in this chapter, the driving factors appear to be very low transport scores - particularly for public transport, lower internet scores, poor provision of affordable housing for those who need it and generally weaker shopping satisfaction scores.

CHAPTER 6

UNDERSTANDING THE URBANITES

There has been much discussion about the implications for urban centres of the exodus of office workers, and absence of tourists, as a result of the pandemic. However, there has been less consideration of the priorities of those people who continue to live in the centres of towns and cities.

Our survey demonstrates that this is a relatively large group of people: we found that 10% of the population self-identify as living in a city centre and 37% in a town centre. The largest proportion of those who say they live in a city centre are in London (36%) followed by Scotland (9%), Yorkshire & the Humber (8%) and the North West (8%). The largest proportion of those living in town centres are in Greater London and the South East (16% each) and the North West (also 16%).

As shown in the introductory chapter, those living in either a city or town centre share more similarities with each other than they do with people living in their respective suburbs and, as a whole, this group is more satisfied with their place than people living in other types of location.

In this chapter we briefly describe how the preferences of urbanites differ from those of Britain as a whole.

URBANITES ARE YOUNGER

These urbanites are significantly younger: 61% are under the age of 40, compared to 36% of the population as a whole. They are more likely to be living in households with children (45%) compared to the average (32%) and younger children in particular. Only 4% of people living in urban centres are retired.

We also find greater ethnic diversity in urban areas: 21% identified as non-white (10% Asian/Asian British, 4% Black/Black British, 3% mixed) compared to 12% in the population as a whole.

Urbanites who voted were significantly more likely to vote Labour in the 2019 election (44%) than the country as a whole (33%), but they were also more likely not to vote at all (21% compared to 16%).

THEY ARE MORE LIKELY TO WORK

Possibly because of their younger ages, urbanites are significantly more likely to be in work than elsewhere, but they don't necessarily earn more. In fact, a slightly higher proportion of urbanites earn the lowest salaries: 35% of urbanites earn less than £20,000 compared to 32% of the population as a whole.

The high working rate means that, as a population, they are more likely to have been furloughed or required to work from home as a result of the pandemic. Perhaps for this reason, they are also more likely to consider that 'local desk space for remote office workers' is important when considering premises for jobs: it is top priority for 17% of urbanites, compared to 13% of the population as a whole.

THEY VALUE WORKSPACES FOR ENTREPRENEURS, LOCAL DESK SPACES AND HOME OFFICES

Urbanites are also a little more likely to be entrepreneurial, with 22% valuing workspaces for entrepreneurs and start-up companies as their top priority of all the different options provided for job-related premises locally, 2% more than the national

average. However, like the rest of the country, they consider premises for small and medium-sized businesses to be the most important type of premises overall to support jobs in their local area.

URBANITES PRIORITISE ACTIVITY

When asked what is most important to have in their local area, the overall ranking of priorities are familiar, with high priorities given to housing, shops, fresh air and transport. However 'exercise and sports facilities' and 'premises to support jobs' attract higher support from people living in urban centres than the national average, with correspondingly lower levels of

support for 'access to fresh air and nature' and 'good local shops'.

For urbanites, suitable housing and good local shops top the list, each being selected by just under 15% as first priorities. For urbanites living on low household incomes (under £20,000), suitable housing is prioritised only slightly more highly (16%) than for urban centre dwellers in general (15%).

Within the exercise and sports category, people living in urban areas are significantly more likely to prioritise gyms compared to the national average (27% to 21% of first preference choices) and correspondingly less likely to prioritise swimming pools (26% to 32% of first preference choices).

CHART 41

WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY...? (RANKED 1ST)

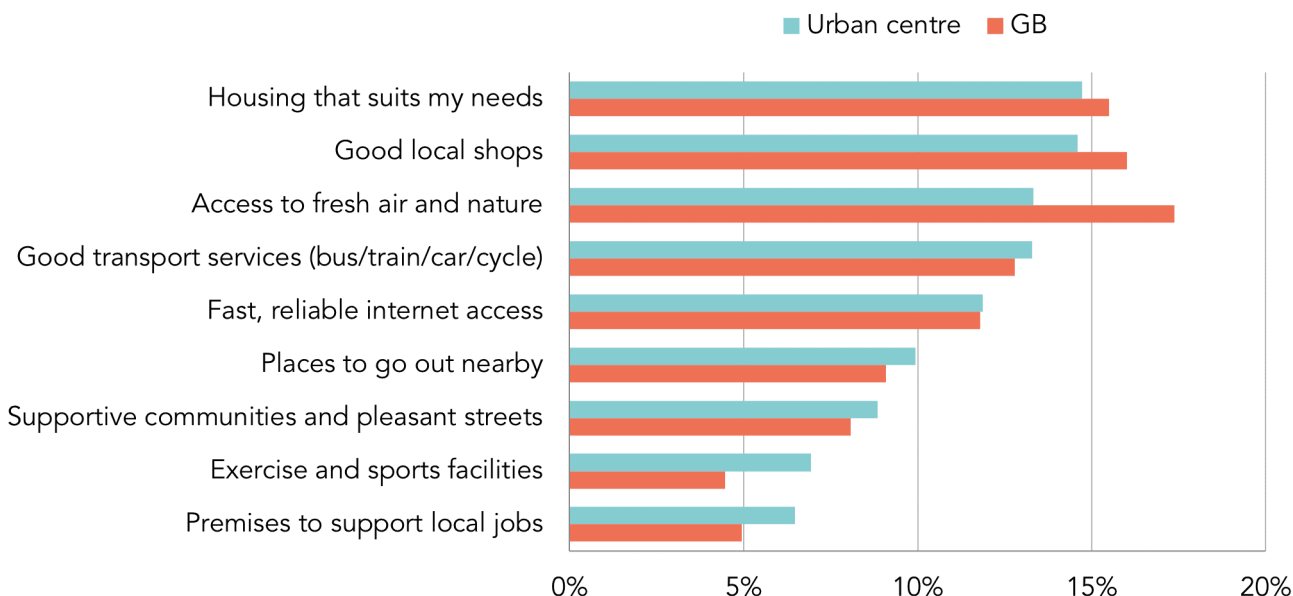


CHART 42

THINKING ABOUT PLACES TO TAKE EXERCISE, WHICH OF THE FOLLOWING ARE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY...?

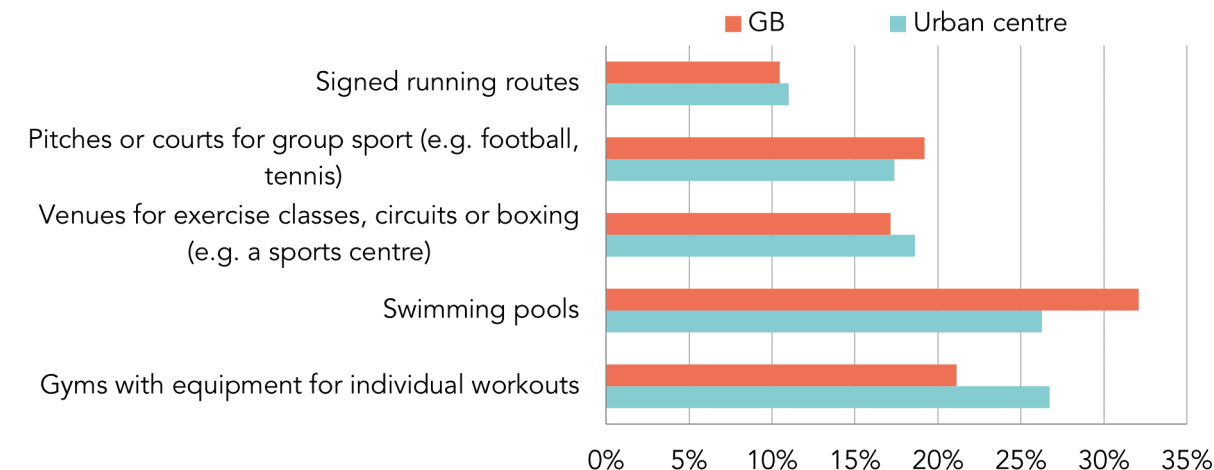
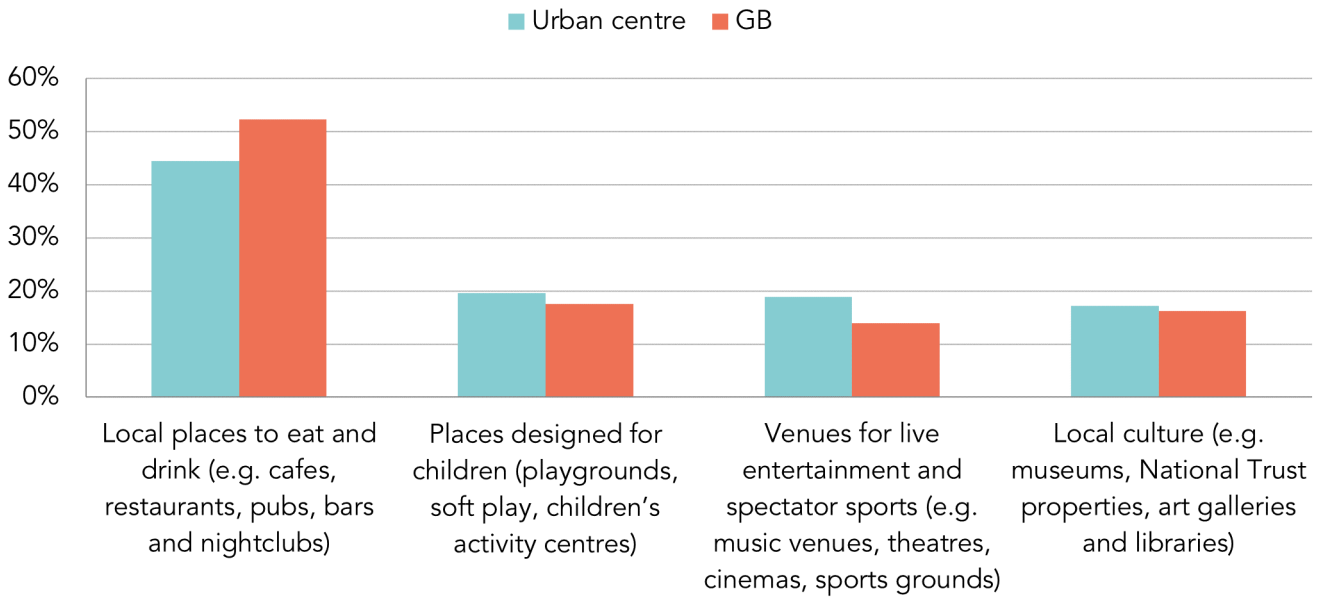


CHART 43

THINKING ABOUT GOING OUT, WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY...? (RANKED 1ST)

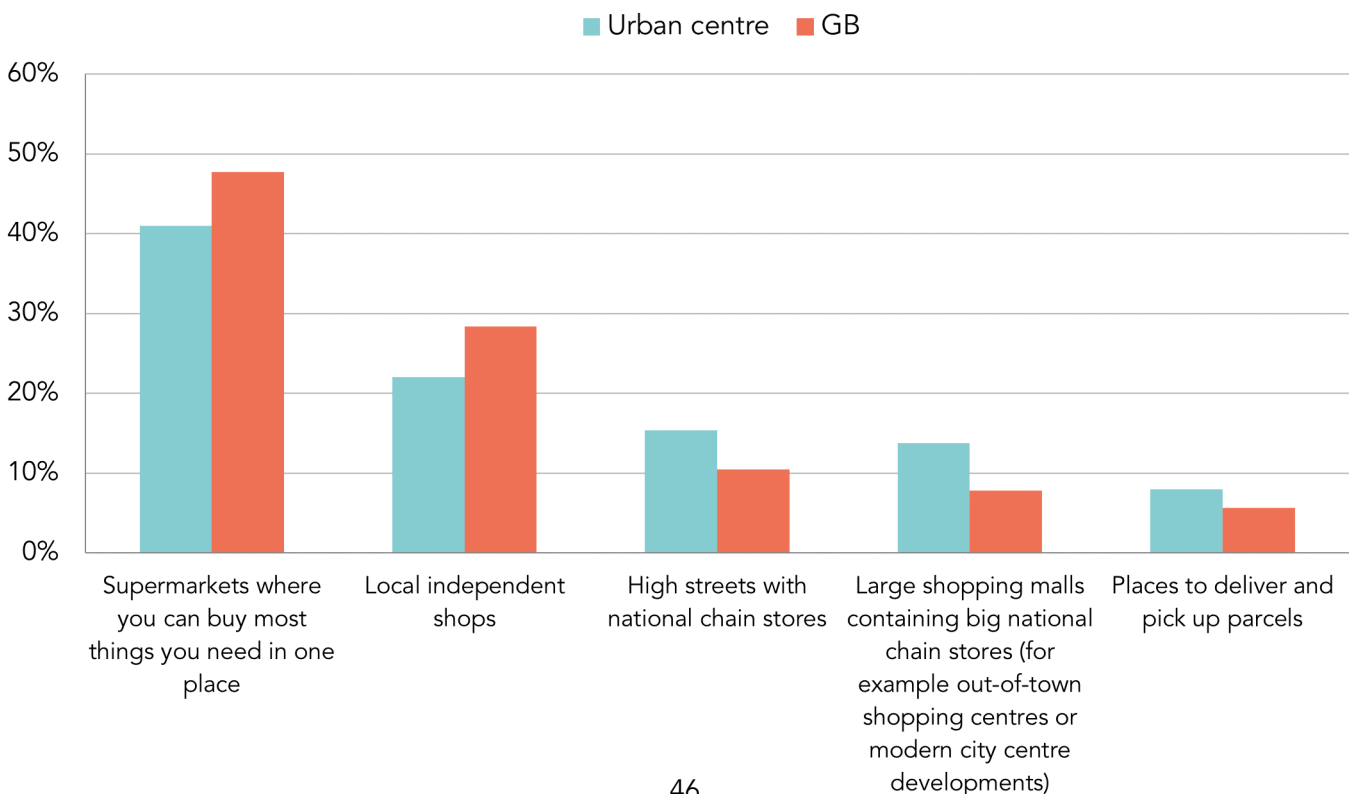


When considering going out, urban dwellers' interests are more diverse than the national average. While local places to eat and drink remains the most popular choice, urbanites are also more likely to prioritise places designed for children and venues for live entertainment than the general population.

Shopping, too, is more likely to be considered a leisure activity in itself. Like the rest of the country, the most popular shopping outlet among people living in urban centres is supermarkets. But they are also more likely to prioritise experiential shopping facilities such as high streets with national brands and large shopping malls, as Chart 44 shows.

CHART 44

THINKING ABOUT SHOPPING, WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY? (FIRST PRIORITY)



When thinking about the local street scene and built environment, the overall priorities are the same, but urbanites attach slightly greater importance to improving the 'look and feel of the area' and 'safe community spaces such as town squares and outdoor markets', and a little less to crime prevention and neighbourliness.

THEY WANT BETTER HOUSING - AT THE TOP AND BOTTOM OF THE MARKET

When asked their most urgent priority for improvement in their area, however, people living in urban centres are less likely to prioritise 'good local shops' or 'good transport services' when compared to the country. Instead, the most popular option is 'housing that suits my needs'. Slightly higher emphasis for improvement is also placed on 'access to fresh air', 'exercise and sport' and 'places to go out' than the national average.

Within the housing category, the preferences of urbanites are also different. A greater priority is given to affordable homes to rent but also to the 'aspirational' housing category and homes with space for a home office. Homes with gardens and affordable housing to buy, although still important, figure less highly on the collective wish lists of people in urban centres.

For those who stated that suitable housing is the one thing that most urgently needs improving in their area, affordability is key: 36% of this group prioritised affordable housing to rent, compared to 28% of urban dwellers as a whole and 24% across Britain.

THEY ARE SIGNIFICANTLY MORE LIKELY TO BE MOVING DUE TO THE PANDEMIC

It is worth noting that the pandemic appears to have affected the location of people living in urban centres to a far greater extent than elsewhere. In our survey, a lower proportion of people living in urban centres (52%) agreed with the statement 'I am not thinking of moving house' than people living elsewhere in the country (74%). Moreover, for urbanites, around two-thirds of those moving or thinking of doing so attribute this to the effect of the pandemic, with 'seeking suitable housing' being one of the main reasons given for the move.¹⁶

CHART 45

THINKING ABOUT WHAT IS AVAILABLE IN YOUR LOCAL AREA AT THE MOMENT, WHICH ONE OF THE FOLLOWING MOST URGENTLY NEEDS IMPROVING...?

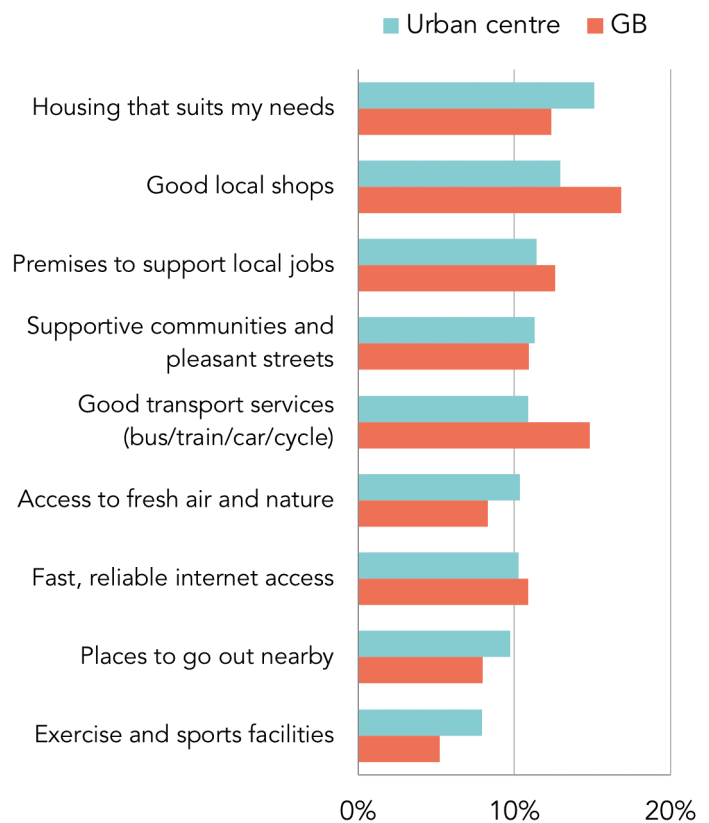


CHART 46

THINKING ABOUT HOUSING, WHICH OF THE FOLLOWING ARE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY?

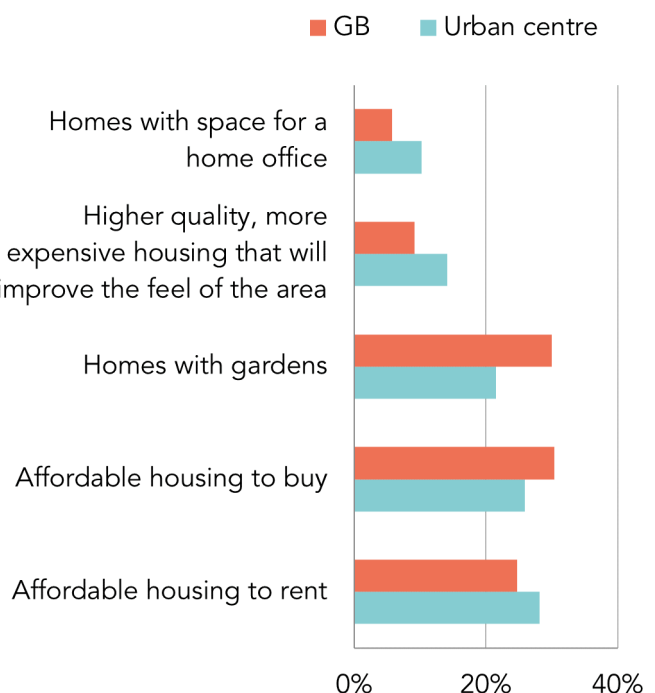
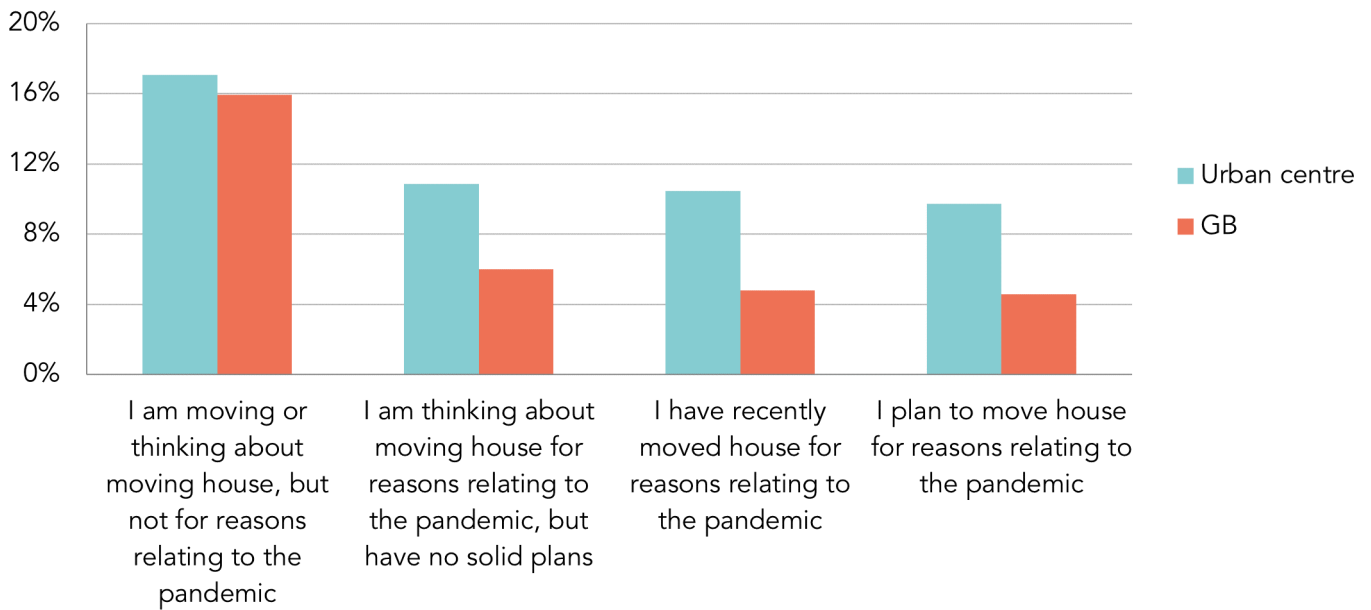


CHART 47

HAVE YOU MOVED HOUSE, OR ARE YOU PLANNING TO MOVE HOUSE, FOR REASONS RELATING TO THE COVID-19 PANDEMIC?



CARS ARE LESS IMPORTANT

In Britain as a whole, our data showed that three-quarters (75%) of the population owns or has access to a vehicle for their personal use. However, for people living in the centre of cities or towns that proportion falls to two thirds (66%), and people’s preferences are affected accordingly.

Within the transport category, urbanites are less likely to prioritise ‘good roads, convenient parking and electric vehicle chargepoints’ compared to the national average (34% to 39%) and more likely to prioritise ‘investment in cycling’ (23% to 16%).

THERE IS GREATER SUPPORT FOR TRAFFIC-REDUCTION MEASURES

People living in the centres of cities and towns are also more aware of the negative effects of traffic: within the fresh air category, while provision of parks is the most important priority, urbanites are more likely to prioritise ‘areas within towns and cities where traffic is reduced or banned’ (19% compared to 14% nationally) and ‘levels of air pollution that stay within safety guidelines’ (21% prioritise this, compared to 19% nationally).

CHART 48

THINKING ABOUT TRANSPORT, WHICH OF THE FOLLOWING ARE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY? (RANKED 1ST)

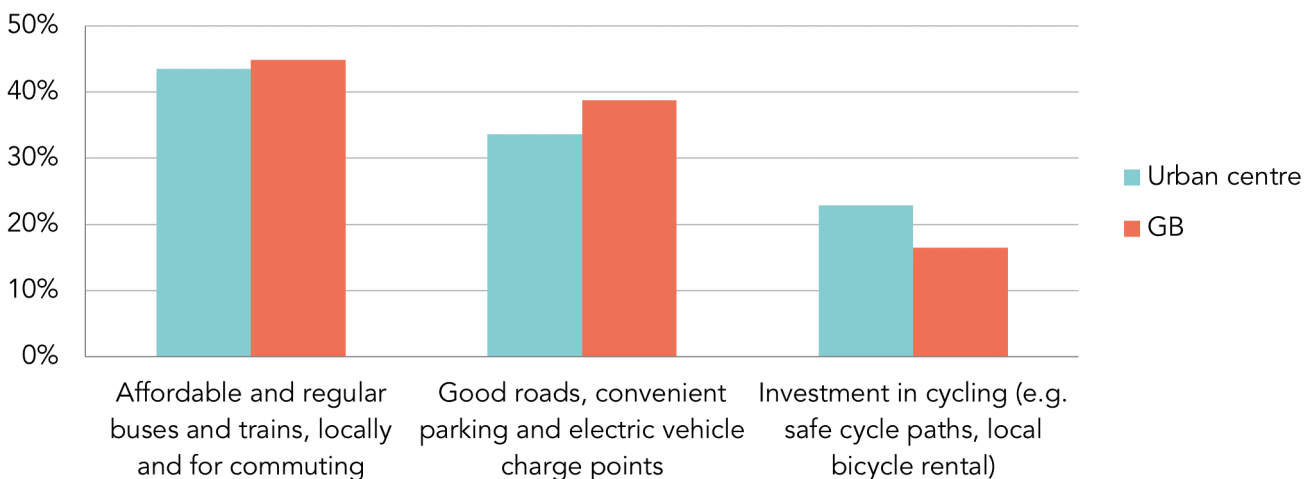
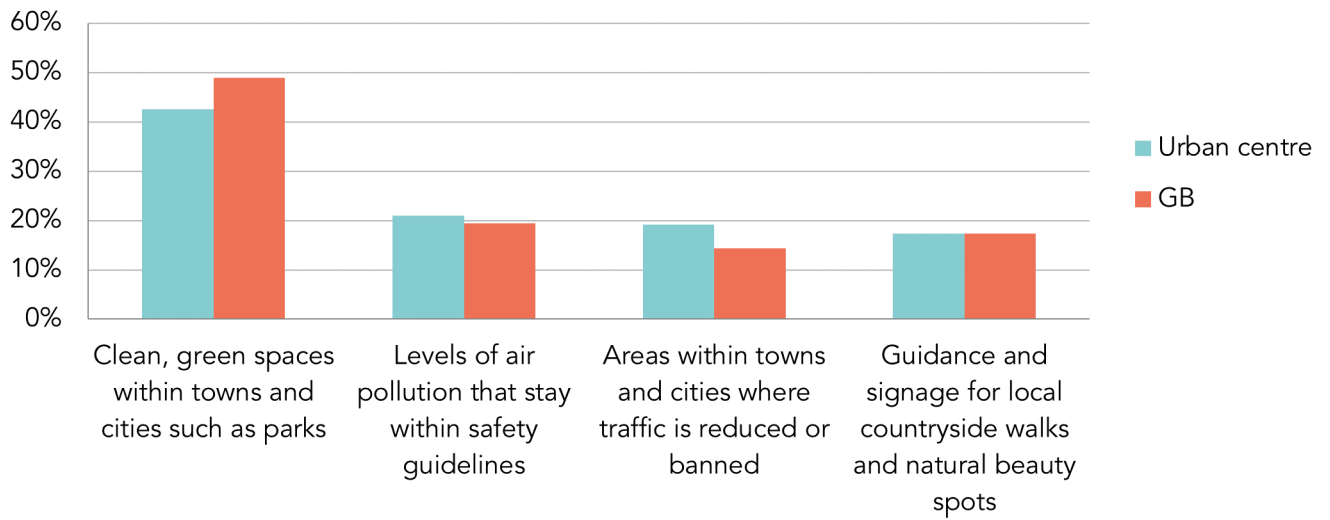


CHART 49

THINKING ABOUT FRESH AIR, WHICH OF THE FOLLOWING ARE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY...? (RANKED 1ST)



Urbanities are also more likely to think that their local area does a good job of reducing air pollution compared to people living in the suburbs (52% compared to 44%). However, we also found some differences between people living in city and town centres in the fresh air category: 57% of those living in city centres say that their local area has done a good job of providing areas where traffic is reduced or banned, but only 51% in town centres. There is perhaps scope, therefore, for more traffic prevention measures in town centres.

CHAPTER 7

HOW TO REDUCE NEGATIVITY

As described in the opening chapter, Britain as a whole scores +26 on our place satisfaction index, on a scale of -100 to +100.¹⁷ This is the average (mean) value across the population and most people in fact have scores that are different to this. Across the sample the distribution of index values is wide, although fairly balanced: the middle (median) score (+25) is almost the same as the average (mean).

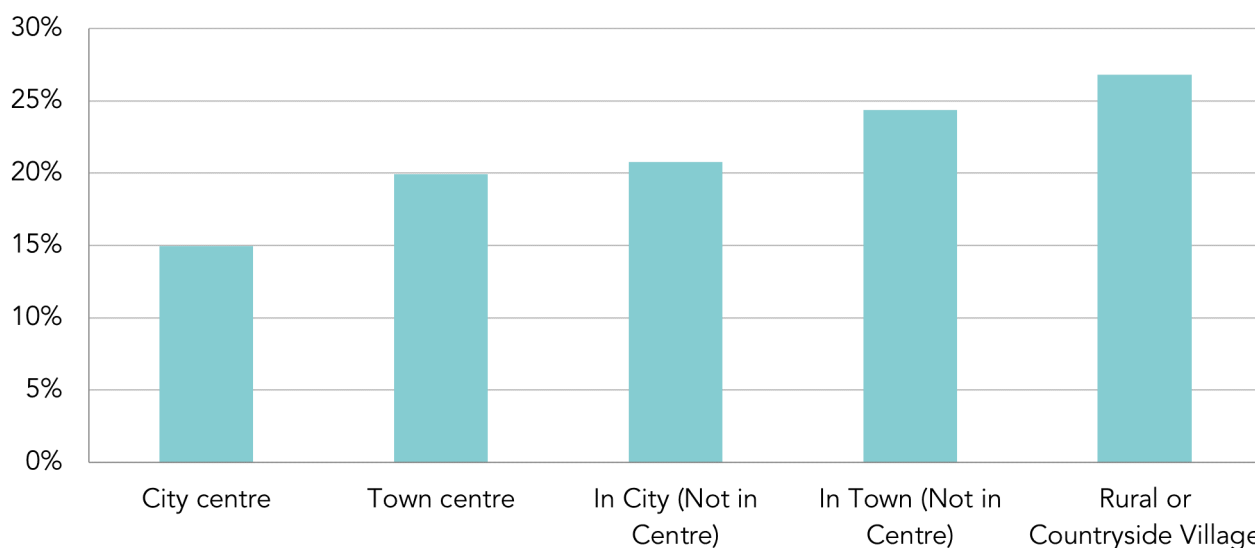
It follows that to raise the average score, a good place to start is to explore the priorities and characteristics of those people who recorded negative index values. These are the people who think the provision in their local area of the things they consider to be important is worse than neutral.

To try and get a handle on this, we divided our polling data into two parts: one for people whose responses led to an overall index value that was positive, and one for people whose responses led to an overall index value that was negative, and then compared the characteristics of the two groups. The dataset of people who were negative consisted of around 4,500 people or 23% of our total sample.

THERE IS A STRONG CONNECTION BETWEEN NEGATIVITY AND PLACE

As mentioned previously, it is in less built up areas, and rural and coastal towns that higher proportions of the local populations have negative place satisfaction scores.

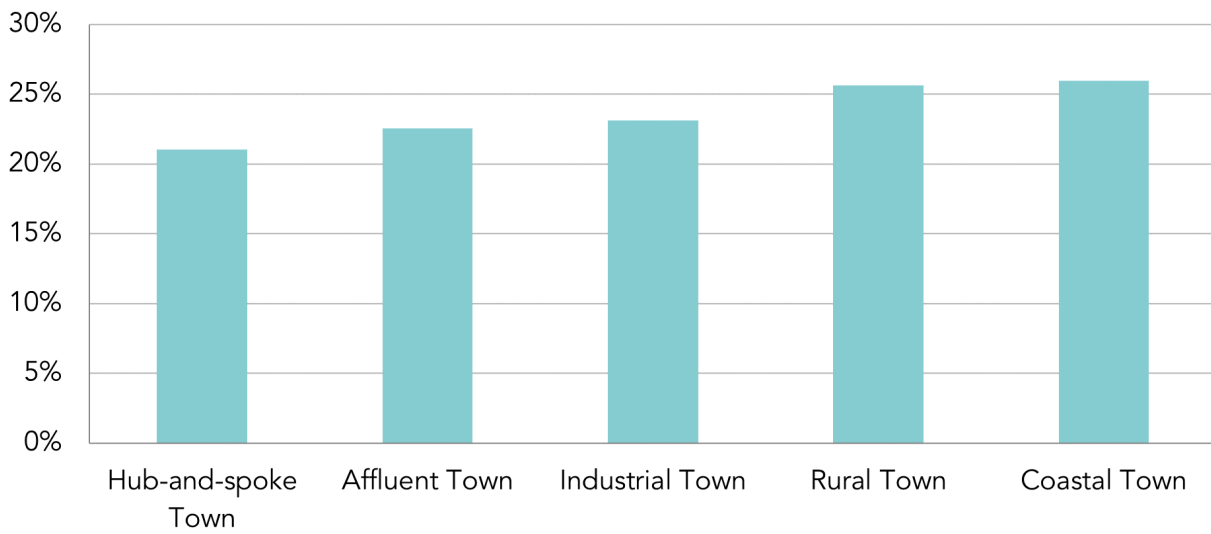
CHART 50
PROPORTION OF PEOPLE WITH NEGATIVE PLACE SATISFACTION INDEX SCORE



¹⁷ As described in the introduction, the most negative scores correspond to 'provision of the things I prioritise is very bad', the most positive scores correspond to 'provision of the things I prioritise is very good' and a score of zero corresponds to 'the provision of things I prioritise is neither good nor bad'.

CHART 51

PROPORTION OF PEOPLE WITH NEGATIVE PLACE SATISFACTION INDEX SCORE



Overall, we found that the highest proportion of the population with negative place satisfaction scores are in Wales, the South and then the East of England and the lowest proportions of the population with negative scores are found in the North of England, Scotland and London.

CHART 52

PROPORTION OF PEOPLE WITH NEGATIVE PLACE SATISFACTION INDEX SCORE



PEOPLE WITH NEGATIVE PLACE SATISFACTION INDEX SCORES ARE TRYING TO MEET THEIR BASIC NEEDS

A clear finding from this research is that people with negative place satisfaction scores are finding it harder to have their basic needs met. People who are negative about their location are more concerned than other people about transport, housing and premises for jobs. Conversely, they place a lower priority than other people on access to fresh air, good local shops, reliable internet access and places to go out, as Chart 53 shows.

The relationship between negativity and access to transport services is particularly worth noting: if affordability is an issue, and the local street scene is undesirable, then it is plausible that a feeling of being 'stuck' is even greater if transport services are lacking.

THEY PRIORITISE CRIME PREVENTION AND IMPROVING THE FEEL OF THEIR AREA

At the subcategory level, people with overall negative place satisfaction scores display the same broad priorities as the rest of the population. So, for example, within the category of 'shopping', the

most important aspect for the negative group is supermarkets, within 'transport' it is public transport, within 'going out' it is local places to eat and drink, within 'exercise' it is swimming pools and within the category of 'premises for jobs' the priority is places for small and medium-sized businesses to trade.

However, there were two main exceptions to this trend, which perhaps are indicative of the driving factors behind negative place scores.

The first exception to the norm relates to the theme of 'streets and communities'. Those people with negative place scores on average select the subcategory of 'local crime prevention measures (e.g. street lights, neighbourhood watch, policing)' as their most important priority, whereas for the rest of the population it is 'easy access to local public services'. They are also significantly more likely to prioritise 'improving the look and feel of the area (e.g. removing litter and graffiti, improving run-down buildings)' above neighbourliness as Chart 45 shows.

It seems likely, therefore, that people who give overall negative scores to their place feel that the environment in which they live in is less desirable, perhaps due to a run-down feel, a weak community and concerns about local crime levels.

CHART 53

WHICH OF THE FOLLOWING ARE MOST IMPORTANT TO HAVE IN YOUR AREA FOR YOU PERSONALLY?

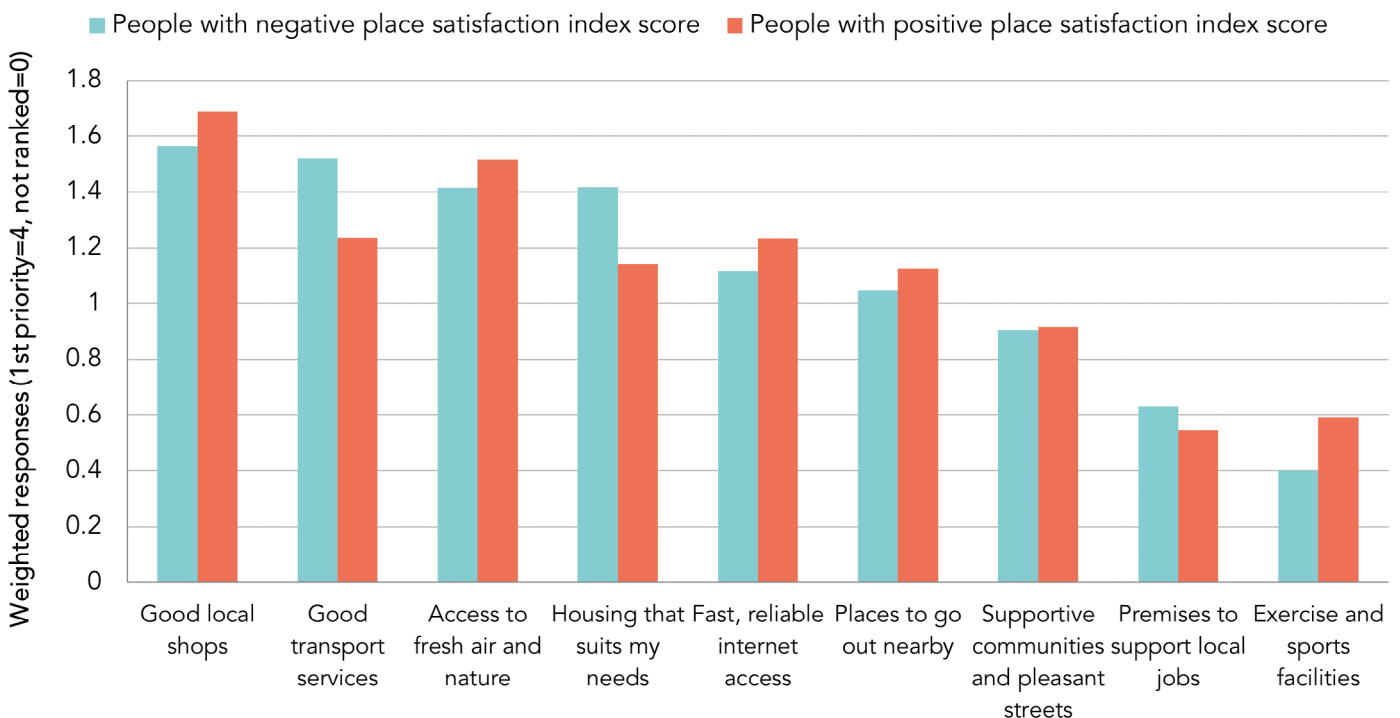
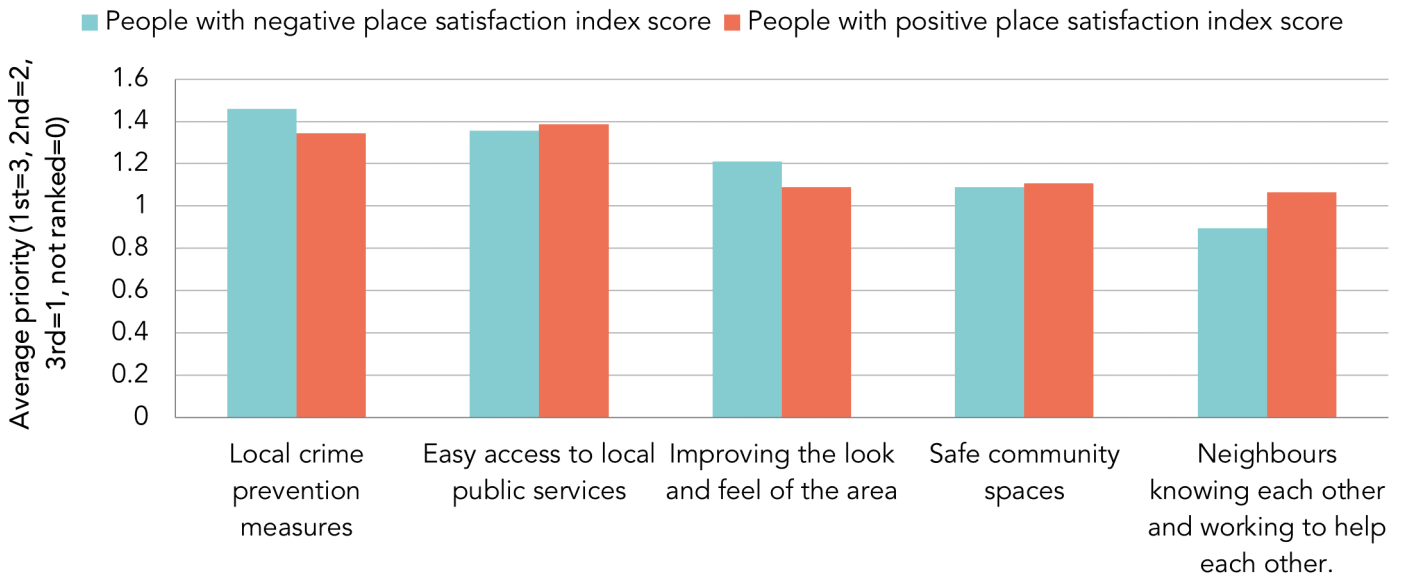


CHART 54

THINKING ABOUT STREETS AND COMMUNITIES, WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY?



My area, it was nice 10-15 years ago, but since all the new teenagers, the under 18's and 19's, there's a lot of violence, a lot of drug abuse and alcohol. Quite a lot of bad things are going on here. I just would not advise anyone to come and live where I am! Especially the area two miles around me, it's very bad, and I mean very, very bad. A lot of violence, a lot of fights, troubles, police every half an hour, 45 minutes you can hear the cops, the ambulance, fire engines, people's windows getting smashed just for nothing. It's just madness here to be honest.

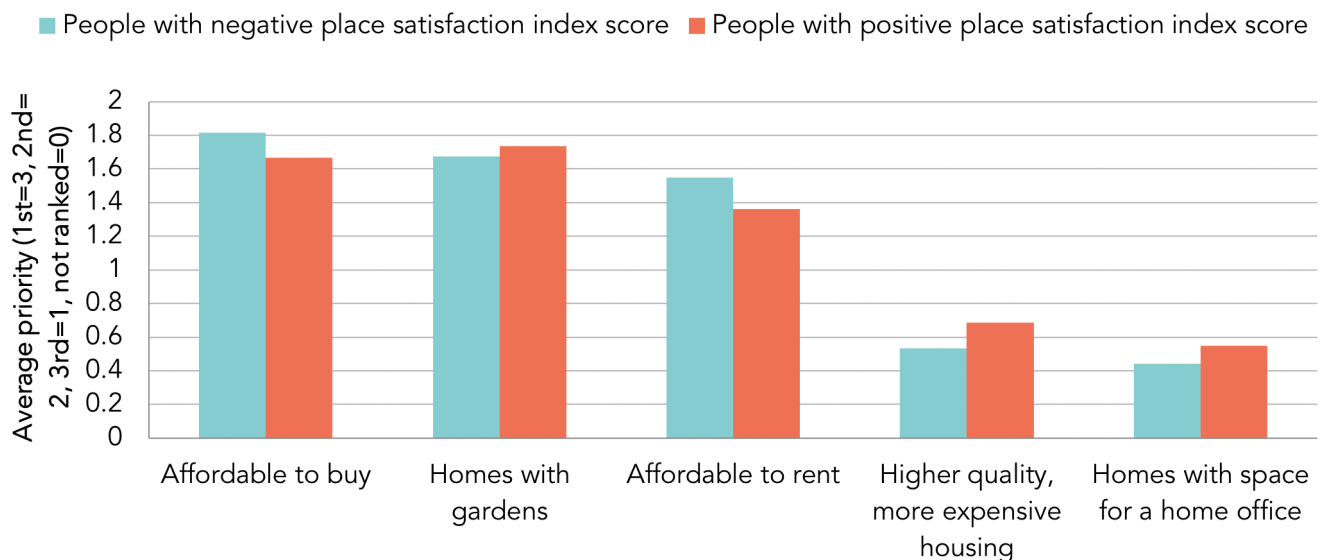
[Group of non-workers, North]

AFFORDABLE HOUSING TO BUY IS KEY

The second exception to the norm relates to the category of housing. People with negative place satisfaction scores overall demonstrate the strongest support for 'affordable housing to buy', whereas the top priority for people with positive place scores is 'homes with gardens'. Those with negative place scores are also significantly more likely to prioritise 'affordable homes to rent' (14%) and significantly less likely to prioritise aspirational housing 'higher quality, more expensive housing', or 'homes with space for a home office' (Chart 55).

CHART 55

THINKING ABOUT HOUSING, WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY?



This finding is supported by the qualitative research where a perceived lack of affordability of housing was specifically referenced by less affluent participants from the South:

My parents moved here 40 years ago, and they said there were bits of land they never thought they'd build on and now there are just houses literally everywhere. But I don't think it's affordable housing. I don't own a house - I'm 36 and I don't see myself being able to afford one, that's the problem.... I just think affordable housing would be great. You know, it doesn't need to be luxurious, it just needs to be safe, dry and practical.

[Group of non-workers, South]

THEY ARE MORE LIKELY TO BE CONSIDERING MOVING HOME

It's no surprise then that people with negative place satisfaction scores are more likely to be thinking about moving than the population as a whole: 20% of people with negative place scores said they are have moved or are thinking about moving house (for reasons unrelated to the pandemic) compared to 15% of the population as a whole.

POOR TRANSPORT AND HOUSING ARE STRONGLY LINKED TO PLACE NEGATIVITY

The previous section explored the relative priorities of people who had overall negative place satisfaction scores. Unsurprisingly, we also found that they tend to rate provision in their priority areas negatively.

In fact, across all 36 subcategories that we tested, only 7 are not rated negatively by this group (the provision of gyms, places to eat and drink, supermarkets, local independent shops, places to pick up parcels, homes with gardens, and internet access). All of these were rated neutrally on average: none is rated above 0.4, where a score of 1 indicates 'good' and 2 is 'very good'.

The most negative scores have been given in the category of transport, which, as shown, is a high priority for people who are dissatisfied about their place. Here the gap between those who are positive and negative about their place is stark, as Chart 57 shows.

For example, people who are negative about their place think on average that the provision of public transport is nearer 'bad' than neutral (a score of -0.6) whereas people who are positive about their

CHART 56

HAVE YOU MOVED HOUSE, OR ARE YOU PLANNING TO MOVE HOUSE, FOR REASONS RELATING TO THE COVID-19 PANDEMIC?

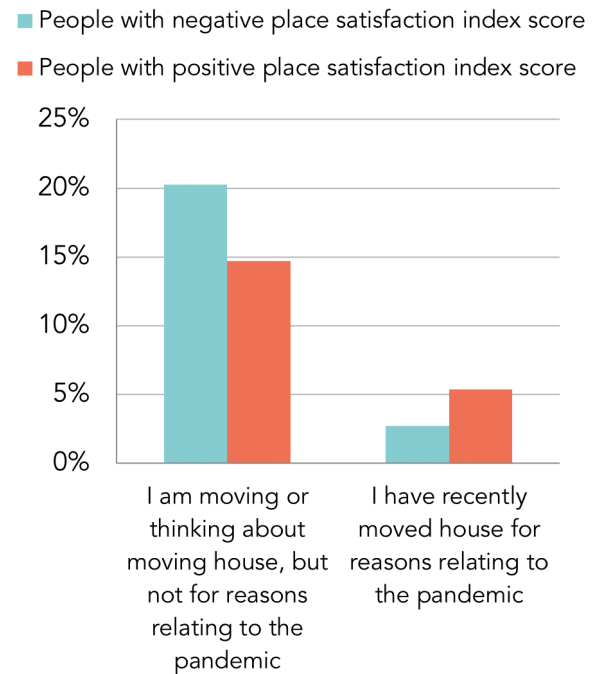


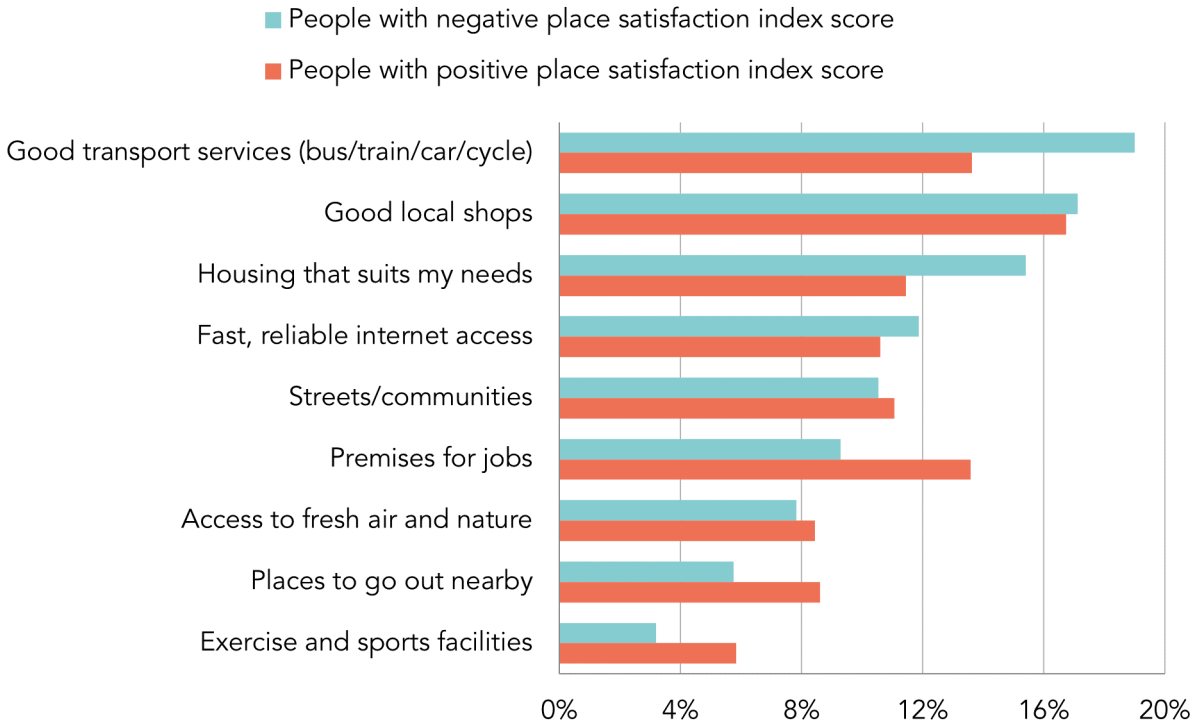
CHART 57

DO YOU THINK YOUR LOCAL AREA DOES A GOOD OR BAD JOB OF PROVIDING?



CHART 58

THINKING ABOUT WHAT IS AVAILABLE IN YOUR LOCAL AREA AT THE MOMENT, WHICH ONE OF THE FOLLOWING MOST URGENTLY NEEDS IMPROVING?



place think on average that the provision of public transport is nearer 'good' than neutral (a score of just over +0.5). Views expressed in the focus groups give some clues to what is driving negative views:

Public transport is non-existent in the evening. The last bus north is quarter past five at night. No service on Sunday. It's just rubbish for public transport. It's just awful. They've cut back on it massively. Absolutely massively. The result is you couldn't go anywhere in the evenings even you wanted to.
[Group of non-workers, North]

I travel (to London) a lot for hospital it's not affordable at all. You're looking at about 120 pounds return and that's if you even if you book a bit in advance and that's for like a non-refundable ticket I mean it's just ridiculous. If you were to book today to leave tomorrow it could cost you over 200 pounds, 250 pounds plus, you know, sometimes you might get the odd deal, but it's rare.
[Group of non-workers, South]

Given that those who are negative about their place are less likely than other people to have access to a vehicle if they need it (72% to 76% in our survey) this is damning indeed. And even for those who do, the quality of roads and other provision for drivers is given the most negative score of all: minus 0.8 as compared to +0.4 among those who are positive about their place. This suggests that transport is one of the main drivers of place negativity.

It is therefore not surprising that when asked a separate question about regeneration priorities for their area, people who are negative about their place are far more likely than positive people to nominate transport services as their top priority.

Those who are negative about place are also far more likely to seek urgent improvements in housing than the rest of the population, as Chart 58 shows. It seems likely that those negative about their place are far less likely to be having their basic needs met than other people.

THERE ARE LINKS TO AGE AND INCOME

So far, this chapter has presented evidence that being negative about 'place' has a link to an individual's perception of the desirability of the area, but also that being cash-constrained is an issue. We also found a strong connection between the provision of public transport and overall levels of negative place satisfaction according to our index.

However, we also find that negativity links to more intrinsic characteristics, most notably that older age groups have a higher proportion of people with negative place satisfaction scores, as Chart 59 shows. Those who live alone are also slightly more likely to have negative place satisfaction scores than those who live in larger households.

There is also a link with income: a lower proportion of more affluent households have negative place value scores, as Chart 60 shows.

There are a number of ways of thinking about this connection with income. One interpretation could be that those on higher incomes have more ability to choose their location, and use that agency to live in places they prefer. Alternatively, more run-down areas may have fewer job opportunities, causing the incomes of people who live there to be lower. Alternatively, regardless of location, our results could also suggest a psychological connection between income, wellbeing and agency that affects the whole population leading to those on higher incomes having a more positive disposition towards where they live.

NEGATIVITY IS CORRELATED TO LABOUR MARKET STATUS

We also found a strong connection between labour market status and negativity: the more secure the labour market position, the less likely someone is to record a negative place satisfaction score (see Chart 61). As with income, these differences may be influenced by where people live as much as their personal characteristics. For example, two otherwise identical people display very different scores if one lives in a location with more job opportunities than the other.

CHART 59

PROPORTION OF POPULATION WITH NEGATIVE PLACE SATISFACTION INDEX SCORE

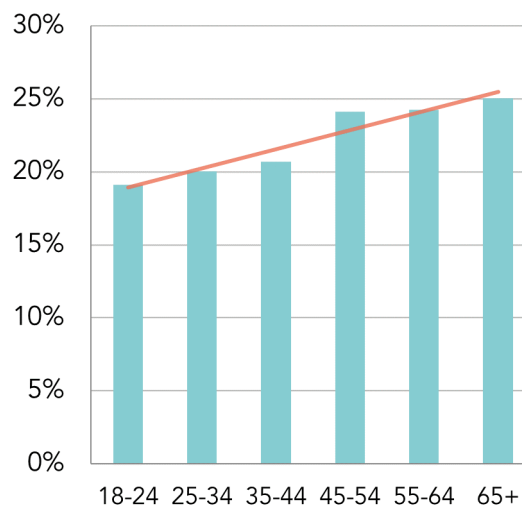


CHART 60

PROPORTION OF PEOPLE WITH NEGATIVE PLACE INDEX SCORES: HOUSEHOLD INCOME

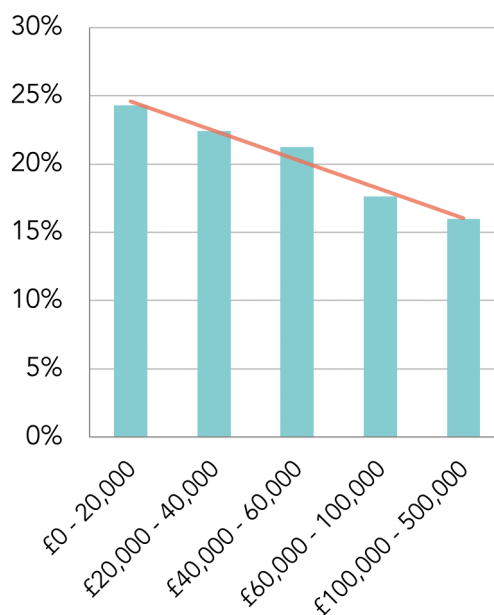
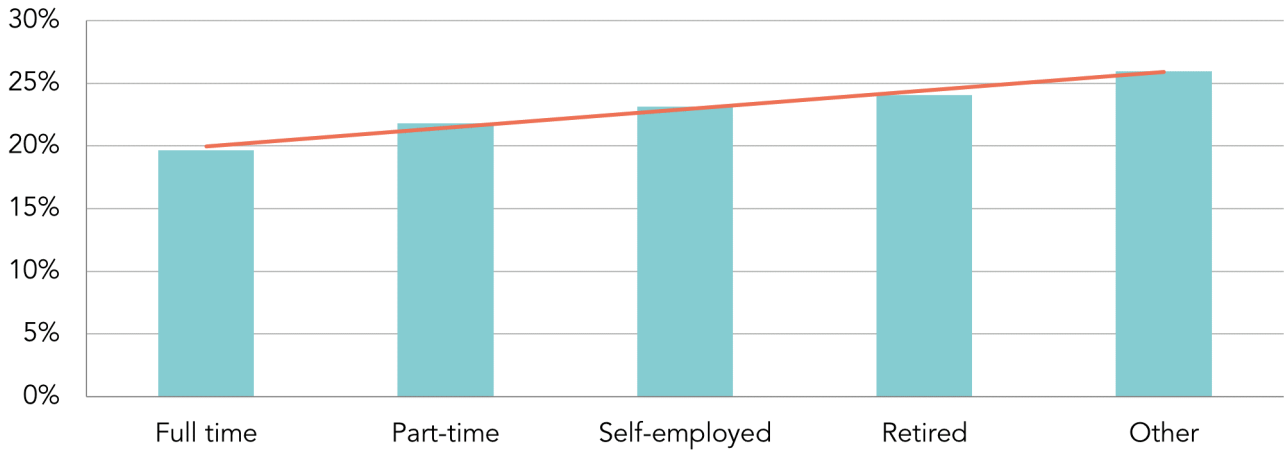


CHART 61

PROPORTION OF PEOPLE WITH NEGATIVE PLACE SATISFACTION INDEX SCORES: WORKING STATUS



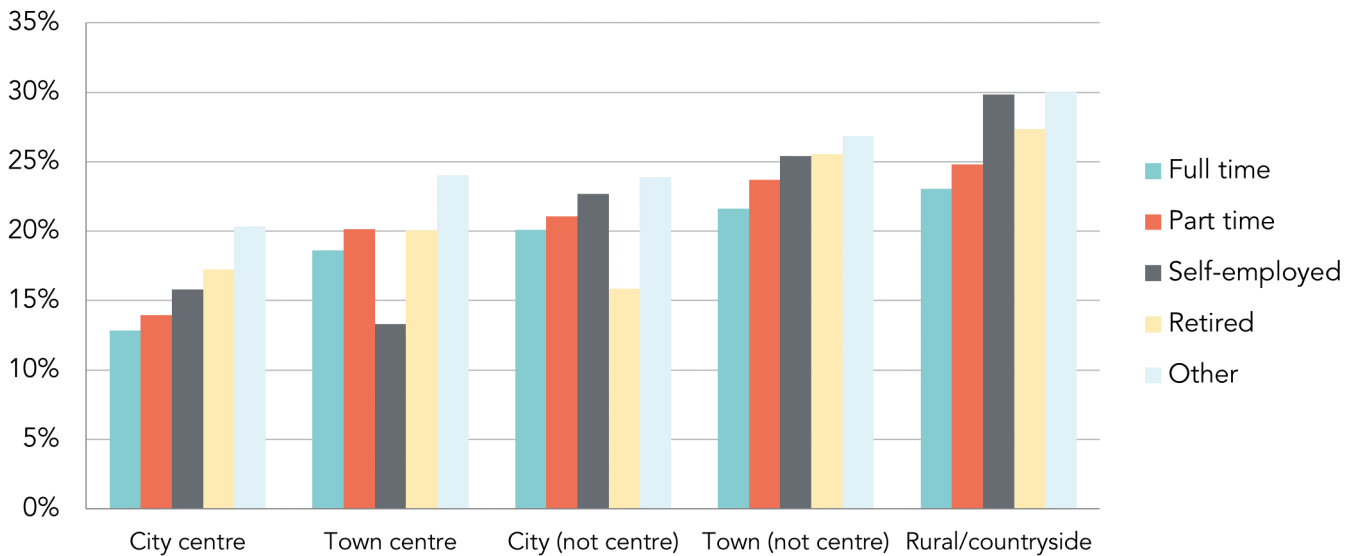
THERE IS ALSO A CONNECTION WITH PLACE

Regardless of the causality, we also found a strong connection between place and negativity, demonstrated by the fact that the proportion of people with negative place satisfaction scores varies by location, just as we saw in the beginning of this chapter.

Perhaps the most useful way of summarising the situation is to explore the data simultaneously by location and working status. As the chart below shows, the overall type of location makes a difference but, within each location, those with greater engagement in the labour market have, in most circumstances, a more positive experience with their place.¹⁸ Similar patterns can be seen if the data are segmented by income or socioeconomic group.

CHART 62

PROPORTION OF PEOPLE WITH NEGATIVE PLACE SATISFACTION INDEX SCORE



18 Small sample sizes are observed for the subcategories of self employed and retired in both city centres and town centres.

As described in the opening chapter we used the statistical technique of multilevel regression with post stratification (MRP) to estimate the proportion of the population who had negative place value scores by constituency. The statistical method for doing so explores connections between a number of different variables to drive the results.

The analysis demonstrated that the best fit is obtained through considering both place-based and demographic variables, as well as voting patterns and working status, demonstrating the interrelated nature of extrinsic (place) and intrinsic (person) variables in determining satisfaction with location.

CONCLUSION

The place satisfaction index that lies at the heart of this research is an innovation: a public policy experiment. The essence of the experiment, namely the ability to capture the mismatch between what people say are their priorities for their local area and the actual provision of those items has a potentially wide application to ensure that investment decisions are aligned with community desires. In particular, the design of the index, that requires people to trade off different options through the use of rankings, is valuable to focus policy attention on the issues of most importance to local communities, rather than spurious concerns.

The results obtained by our research pass the 'meaningful' test by producing conclusions that feel common sense. Place satisfaction index scores come out as higher, for example, in more dense urban areas where, almost by definition, there is greater provision of most of the items under consideration. Similarly, affordable housing comes through as more of an issue in the South than the North and good quality internet access as more of a problem in rural areas. We know this already: the fact that it has also emerged from the place satisfaction index is important not because of the newness of the insights themselves but because it acts as a quality control for the methodology.

Our first recommendation is therefore that this type of subjective satisfaction index, that measures the difference between people's priorities and how they view provision, should be adopted across Government as a tool to gauge the relative priorities of competing priorities in specific geographic areas. Within Demos we will also seek ways to repeat the exercise periodically in order to create a longitudinal time series that tracks changing views.

It is important, however, not to over-interpret the results. When we are asking people to rank items in terms of their personal importance to the respondent, it may be that the answers say more about their current way of life than they do about the 'ideal' neighbourhood.

For example, if an individual currently finds it easiest to obtain essential groceries by driving to the nearby supermarket, and so undertakes that journey routinely, obtaining both practical help and social interaction from the experience, they are very likely to rank supermarkets, and facilities for driving, as highly important.

Another otherwise identical individual living within walking distance of a high street with an abundance of independent shops would, however, be more likely to score 'local independent shops' highly when answering the same questions. It does not therefore follow that all retail units should be designed for supermarkets, or indeed for independent shops. However it is still notable that when compared to other themes, shopping as a whole attracts wide and strong support.

A similar risk of over-interpretation emerges when considering the results of the 'premises for jobs' question. A person living in an area where there are few large corporations and most private sector activity is conducted via small or medium sized businesses may be less likely to choose 'investments to help attract larger firms to come to the area' as their first priority even if the economic effect of so doing would be transformational. More interesting perhaps for the 'premises for jobs' theme is its relative overall importance (low) when compared to the other high-level themes.

However, by comparing the different priorities of people in different location types, as well as from different demographic groups, we can still get a relative sense of how people currently use, and rate, different types of provision. This can then be used to form a view of what, if anything, needs to change to meet our public policy goals - be they for lower emissions, stronger communities or a general improvement in the relationship between person and place.

So if, with these caveats, the place satisfaction index passes the meaningful test, the next question is whether it is useful. To judge this, we need to consider what additional insights it has provided over and above those that already form part of the public policy debate. We think there are potentially four results that fall into this category.

A POLICY FOCUS ON SUBURBS

The first is that suburbs in towns and cities have more in common with each other than town suburbs do to town centres, or city suburbs do to city centres. This is a strong result and comes through repeatedly in our analysis: generally speaking, our place satisfaction index gives the highest results in city centres, then town centres, followed by people living in city and town suburbs respectively. This is in contrast to the Westminster policy debate in recent years that has been particularly concerned with either the particular issues that affect regional cities or, separately, those affecting towns.¹⁹

Given that, as our research shows, a majority of the total population in Britain (57%) self identifies as living 'not in the centre' of a city or town, and that the views and priorities of this group - almost by definition - are nearest to the national average, we therefore recommend that Government launch a policy workstream specifically to consider whether the characteristics and quality of Britain's suburbs are fit for purpose. The questions this might want to consider are: what types of amenities and facilities should people expect to be provided locally compared to in the urban centre? How much of people's economic lives could or should be on their doorsteps? What tangible steps can be taken by local and national policy-makers to increase the place satisfaction index scores of suburban areas? Our analysis, outlined in Chapter 4, suggests there are particular issues to be resolved around access to decent local shops, transport and parks.

In our parallel publication, *Post Pandemic Places*, we argued that the strengthening of the bond between person and place that has been witnessed as a result of the pandemic is also a regeneration opportunity: those people who have recently acquired the taste for working in or near their homes are also looking forward to spending more money locally than they did before.²⁰ This spreading of spending power

affects all parts of the country, but it represents a particular opportunity to **redefine the suburbs away from places where commuters return to, towards places where communities live and work.**

DISTRIBUTED CENTRES

In particular, building on the insights obtained in this project we recommend that local authorities consciously define and seek to create micro communities, or distributed centres, in areas of cities and towns that were previously purely residential. A stark finding of our research, for example, is that urbanites rate provision of green spaces more highly than people living in the suburbs. The greater reliance on supermarkets and cars in suburban areas is also suggestive of a lack of reasonable retail opportunities within walking distance. We know from Chapter 3 that decent experiential retail is an important component in the quest to build local pride; if the provision of local shops is seen as wanting in the suburbs, perhaps it is therefore unsurprising that 'neighbourliness' is also less valued.

In 2019, Demos argued that future housing developments should have the aim of building local communities at their core, including encouraging healthy modes of transport; providing spaces for home workers; providing easy access to green spaces and providing easy access to local amenities including shops, and that these requirements should be incorporated into the National Planning Policy Framework.²¹

In our parallel publication to this, we demonstrated that the experience of the pandemic has only accentuates this need, citing research in Denmark that suggested neighbourhoods offering a mix and diversity of amenities seemed to be more popular and advocating greater adoption of the principles of the '15 minute neighbourhood' developed by Carlos Moreno.²²

In order to address the result of this research that suburban areas have a less satisfactory mix of amenities and facilities than urban centres, we additionally suggest that local authorities be required to state how they intend to incorporate the principles of the 15-minute neighbourhood for all residential areas in cities and towns, regardless of how far they are from a traditional urban centres. To aid this, the Government should, as part of its policy review for suburban areas, set out what facilities and amenities it expects should be available for all citizens living in urban areas within a 15 minute radius.

19 The relatively recent establishment of the excellent think-tanks the Centre for Cities (2007), the Centre for London (2011) and the Centre for Towns (2017) is a case in point.

20 Ussher et al. *Post Pandemic Places*. Demos. 2021.

21 Glover, B. *Future Homes*. Demos. 2019.

22 Ussher et al. *Post Pandemic Places*. Demos. 2021.

RETAIL REGENERATION

As described in Chapter 3, the quality of the retail offer is inextricably linked to people's sense of place. We found that shopping is an experience as much as a practical necessity and also a community reference point; the quality of the local retail offer says as much for the emotional prosperity of a place as it does for its economic prosperity. Seen in this light, the look and feel of neighbourhood shops and high streets becomes, at least in part, a public good, justifying greater policy intervention. In some cases, shopping that is perceived as being of higher quality can itself spur regeneration by improving the status of an area and so its land value.

This has huge implications for the government's current review of business rates. Established when the internet did not exist, and when store location was viewed as comparatively inelastic, its structure feels out of date in a post-pandemic world where customers can switch between in-store and on-line purchases and the health of the high street is front and centre of the minds of government, public (as our research shows) and furloughed shopworkers alike.

Following an inquiry by the Treasury Select Committee, the Government published a call for evidence for short- and long-term reform to the business rates system in the second half of 2020; their proposals are - at the time of writing - still forthcoming.^{23, 24} On the basis of our research alone we propose that the overriding consideration for a design of a new business rates system is that local authorities should align local retail offerings to the stated desires of their local population, and be given both the policy flexibility (local taxation and grants) and the incentives (a formal duty to consult, retaining a greater proportion of rates receipts for higher local satisfaction) to achieve this.

Other issues within the scope of the workstream around design of business rates - such as the mechanism for the redistribution of revenues between local authorities; the desirability of online sales taxation; whether to tax profits, land or tenants; and, how valuations are conducted - are secondary

to this overriding imperative that the quality and mix of the local retail offering should reflect what it is that local residents want to see. In particular, our focus groups suggest that the sense of place is heightened by more aspirational brands.

We therefore recommend a fundamental reform of the business rates scheme that has at its heart the aim of aligning the local retail experience to what residents in a particular area demonstrably say that they want. In particular, we recommend that the Treasury include a requirement on local authorities to ensure that the retail offer reflects community priorities, and be given the ability to set rates and grants at the rates necessary to achieve this.

As part of this, consideration should be given to how to incentivise local authorities to repurpose retail units if local residents would prefer an alternative use - be it for new houses, local provision of public services, parks or even allotments. The key is to be able to demonstrate local support for change, and then have the tools to deliver it.

FREE TRAVEL FOR WORK SEEKERS

In Chapter 7 we looked at the experiences and preferences of people with negative place satisfaction index scores, that is people who rated the provision of things that were important to them as nearer bad than good. We found a strong sense of people feeling 'stuck' in a place that they had negative feelings towards. In the medium term the policy solution is to improve the quality of all communities so that they engender pride from the people who live there. As a more immediate measure, thought should be given to help ensure that individuals most at risk of feeling out of place do not feel 'stuck', unable to access opportunity and with low household incomes, also unable to move.

In particular, our research showed that two of the variables most strongly linked to people who had a negative place satisfaction index were dissatisfaction with public transport and lower engagement with the labour market. We also found that satisfaction with transport was negative in rural areas more generally. As a starting point greater investment in public transport is required in rural areas. Another policy solution that could help would be to remove some of the barriers to personal mobility for people who have lower financial resources.

23 Treasury Committee. Impact of business rates on business. UK Parliament. 2019. Available at: <https://publications.parliament.uk/pa/cm201919/cmselect/cmtreasy/222/22203.htm> [date accessed: 27/03/21]

24 HM Treasury. Business Rates Review: Call for Evidence. 2020. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/903429/Business_Rates_Review_-_CfE.pdf [date accessed: 26/03/21]

An evaluation by the Department for Transport of the impact of the concessionary bus travel scheme concludes that take-up is twice as great for those on lowest incomes, and three times for those without cars, with some evidence of quality-of-life improvements for those who take advantage of the scheme.²⁵ Yet currently it is only available for the disabled and those of pensionable age. Free travel for jobseekers more generally can only be obtained after discussion with a personal job coach at a JobCentre Plus job coach, and is then granted on a discretionary basis; only a small number of local transport authorities provide even discounted travel for unemployed people.^{26,27,28}

Based on our evidence, we therefore recommend that everyone eligible for jobseekers benefits, including Jobseekers Allowance, Employment Support Allowance and the newer equivalent components of Universal Credit, be automatically granted a jobseekers travel pass that gives free travel within a wide commuting area, without the need to apply for or request it, in order to open up horizons, opportunities and agency for those who need it most.

Taken together we feel that over time these recommendations have the potential to increase place satisfaction index scores for the country as a whole by improving the alignment between what people say they want from their local area and what is actually provided.

25 Department for Transport. Evaluation of Concessionary Bus Travel. 2016. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/876395/evaluation-of-concessionary-bus-travel.pdf [date accessed: 30/03/21]

26 Department for Transport. Support to help with the cost of transport. 2013. Available at: <https://www.gov.uk/government/publications/support-to-help-with-the-cost-of-transport/support-to-help-with-the-cost-of-transport> [date accessed: 26/03/21]

27 Mason, C. obseekers urged to apply for FREE railcard giving 50% off fares. Money Saving Expert. 2018. Available at: <https://www.moneysavingexpert.com/news/2018/03/job-seekers-encouraged-to-get-50-off-railcard/> [date accessed: 26/03/21]

28 Department for Transport. More details on enhancements provided in each TCA in Support to help with the cost of transport. 2013. Available at: <https://www.gov.uk/government/publications/support-to-help-with-the-cost-of-transport/support-to-help-with-the-cost-of-transport> [date accessed: 26/03/21]

APPENDIX

PROCESS FOR CALCULATING THE PLACE SATISFACTION INDEX

At the core of our research is a list of 35 items (sometimes referred to as subcategories) that all places have to a greater or lesser extent. It is a prosaic, everyday list including things such as supermarkets, parks, office premises, playgrounds and homes with gardens. These are grouped into eight broad themes - going out, shopping, fresh air and so on. Given the importance of digital technology, we added 'internet access' as an additional standalone theme, to give nine themes in total.

STAGE 1: RANKING WITHIN EACH THEME

The first stage of the construction of the index was to ask people, within each of these broad themes, to rank the various items in accordance with their own priorities. So, for example, there was a question on shopping where people were invited to select which, out of the following list was 'most important to have in your local area, for you personally' and then the second most important and third most important:

- Local independent shops
- Supermarkets where you can buy most things you need in one place
- High streets with national chain stores
- Large shopping malls containing big national chain stores (for example out-of-town shopping centres or modern city centre developments)
- Places to deliver and pick up parcels

This was repeated for each of the broad themes: jobs, going out and so on.

STAGE 2: RATING OF PROVISION

Regardless of their priorities, the second stage was to ask people to rate the provision in their area of each item on a five-point scale from 'very good' to 'very bad'. At this point we added 'fast, reliable, internet access' as an additional stand-alone theme.

STAGE 3: CONSTRUCTION OF CATEGORY INDICES

We then created satisfaction ratings within each broad theme. This was done by assigning numeric values to people's answers. For the rankings, we assigned a value of +3 for the first choice, +2 for the second choice and +1 for the third choice. Items that were not prioritised were given a value of zero.

For the ratings, we assigned a value of +2 for 'very good', +1 for 'good', zero for 'neither good nor bad', -1 for 'bad' and -2 for 'very bad'. By multiplying a person's priority ranking of an item by the rating they gave to its provision we could then create an index value where the rating was amplified by the importance that person attached to the item in question.

For example, if within the housing theme, a person considered 'homes with gardens' to be their most important item and thought the provision was 'very good' then that item would contribute +6 to their housing score (+3 for being the most important multiplied by +2 for being rated 'very good'). However, if they had not rated 'homes with gardens' as one of their top three priorities, their rating of the provision of homes with gardens would drop

BOX 1: LIST OF THEMES AND SUBCATEGORY ITEMS USED FOR STAGES 1 & 2

Shopping

Local independent shops
Supermarkets where you can buy most things you need in one place
High streets with national chain stores
Large shopping malls containing big national chain stores (for example out-of-town shopping centres or modern city centre developments)
Places to deliver and pick up parcels

Going out

Local places to eat and drink (e.g. cafes, restaurants, pubs, bars and nightclubs)
Venues for live entertainment and spectator sports (e.g. music venues, theatres, cinemas, sports grounds)
Local culture (e.g. museums, National Trust properties, art galleries and libraries)
Places designed for children (playgrounds, soft play, children's activity centres)
Places to take exercise
Signed running routes
Venues for exercise classes, circuits or boxing (e.g. a sports centre)
Gyms with equipment for individual workouts
Swimming pools
Pitches or courts for group sport (e.g. football, tennis)
Jobs
Local desk space for remote office workers.
Workspaces for entrepreneurs and start-up companies
Premises for small and medium-sized businesses (such as offices and industrial units)
Investments to help attract larger firms to come to the area (e.g. new office blocks and large industrial parks)

Streets and communities

Local crime prevention measures (e.g. street lights, neighbourhood watch, policing)
Safe community spaces such as town squares or outdoor markets
Improving the look and feel of the area (e.g. removing litter and graffiti, improving run-down buildings)
Neighbours knowing each other and working to help each other.
Easy access to local public services (e.g. health and council services)

Fresh air

Clean, green spaces within towns and cities such as parks
Guidance and signage for local countryside walks and natural beauty spots
Levels of air pollution that stay within safety guidelines
Areas within towns and cities where traffic is reduced or banned

Transport

Investment in cycling (e.g. safe cycle paths, local bicycle rental)
Affordable and regular buses and trains, locally and for commuting
Good roads, convenient parking and electric vehicle charge points

Housing

Affordable housing to rent
Affordable housing to buy
Homes with gardens
Homes with space for a home office
Higher quality, more expensive housing that will improve the feel of the area

out regardless of whether it was rated good or bad as it would be multiplied by zero. By adding the scores for each subcategory, in this way, we created a weighted average score for each person for each theme.²⁹

STAGE 4: TRADE-OFFS BETWEEN THE BROAD THEMES

So far we have rated the provision of services according to people's priorities within each broad theme of housing, jobs, shopping and so on. However, we lacked a mechanism for aggregating between themes. It may be, for example, that however strongly someone feels about the provision of leisure opportunities to go out in their local area, actually their most important issue is around access to fresh air. We therefore asked a separate question that asked people to prioritise their top four out of the nine broad themes, adjusting the phrasing accordingly as shown in box 2.

BOX 2: HIGH-LEVEL THEMES USED FOR STAGE 4

Which of the following are the most important to have in your local area, for you personally?

Ranked 1st (score 4), 2nd (3), 3rd (2), 4th (1), not ranked (0)

- Good local shops
- Places to go out nearby
- Exercise and sports facilities
- Premises to support local jobs
- Supportive communities and pleasant streets
- Access to fresh air and nature
- Good transport services (bus/train/car/cycle)
- Housing that suits my needs
- Fast, reliable internet access

STAGE 5: CONSTRUCTING THE FINAL PLACE SATISFACTION INDEX

We then used the results from this second question to create a numeric value where the most important high-level category was given a score of 4, the second most important a score of 3 and so on. For each person, we then multiplied these scores by the category-level index scores obtained in stage 3

²⁹ When considering the index for each theme in isolation, these weighted averages are rebased to give values between -100 and +100 for ease of reference.

to obtain their overall place satisfaction score. This was then rebased to a scale from -100 to +100 for ease of reference and weighted to be nationally representative in the same way as the original poll.

Taken together, this approach ensures that the issues that are most important to people make their way into their final score, alongside their views on whether the provision of those items is positive or negative. For example, for an individual passionate about cycling who rates provision poorly, they would have had the opportunity to rank cycling first within the transport section (score +3), then rate provision 'very bad' (-2) then select transport services including cycling as their most important broad theme (+4) giving an overall contribution of -24 to this item alone.

Overall, an individual achieving a score of -100 represents a situation where everything they prioritise as important is 'very bad' and a score of +100 represents an individual who thinks the provision in their area of everything that is important to them is 'very good'.

STAGE 1: 8 QUESTIONS, ONE FOR EACH BROAD THEME

Which of the following are the most important to have in your local area, for you personally? *Ranked 1st (score 3), 2nd (2), 3rd (1), not ranked (0)*

SHOPPING

Local independent shops
Supermarkets where you can buy most things you need in one place
High streets with national chain stores
Large shopping malls containing big national chain stores (for example out-of-town shopping centres or modern city centre developments)
Places to deliver and pick up parcels

GOING OUT

Local places to eat and drink (e.g. cafes, restaurants, pubs, bars and nightclubs)
Venues for live entertainment and spectator sports (e.g. music venues, theatres, cinemas, sports grounds)
Local culture (e.g. museums, National Trust properties, art galleries and libraries)
Places designed for children (playgrounds, soft play, children's activity centres)

PLACES TO TAKE EXERCISE

Signed running routes
Venues for exercise classes, circuits or boxing (e.g. a sports centre)
Gyms with equipment for individual workouts
Swimming pools
Pitches or courts for group sport (e.g. football, tennis)

JOBS

Local desk space for remote office workers.
Workspaces for entrepreneurs and start-up companies
Premises for small and medium-sized businesses (such as offices and industrial units)
Investments to help attract larger firms to come to the area (e.g. new office blocks and large industrial parks)

STREETS AND COMMUNITIES

Local crime prevention measures (e.g. street lights, neighbourhood watch, policing)
Safe community spaces such as town squares or outdoor markets
Improving the look and feel of the area (e.g. removing litter and graffiti, improving run-down buildings)
Neighbours knowing each other and working to help each other.
Easy access to local public services (e.g. health and council services)

FRESH AIR

Clean, green spaces within towns and cities such as parks
Guidance and signage for local countryside walks and natural beauty spots
Levels of air pollution that stay within safety guidelines
Areas within towns and cities where traffic is reduced or banned

TRANSPORT

Investment in cycling (e.g. safe cycle paths, local bicycle rental)
Affordable and regular buses and trains, locally and for commuting
Good roads, convenient parking and electric vehicle charge points

HOUSING

Affordable housing to rent
Affordable housing to buy
Homes with gardens
Homes with space for a home office
Higher quality, more expensive housing that will improve the feel of the area

STAGE 2: FOR EACH INDIVIDUAL ITEM PLUS 'FAST, RELIABLE, INTERNET ACCESS'

Do you think your local area does a good or bad job of providing them? 5-point scale. *Very good (+2)..neither good or bad (0)..very bad (-2)*

PLACE SATISFACTION INDEX

(-100 to +100)
Constituency results by MRP



WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT TO HAVE IN YOUR LOCAL AREA, FOR YOU PERSONALLY?

Ranked 1st (score 4), 2nd (3), 3rd (2), 4th (1), not ranked (0)

Good local shops

Places to go out nearby

Exercise and sports facilities

Premises to support local jobs

Supportive communities and pleasant streets

Access to fresh air and nature

Good transport services (bus/train/car/cycle)

Housing that suits my needs

Fast, reliable internet access

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