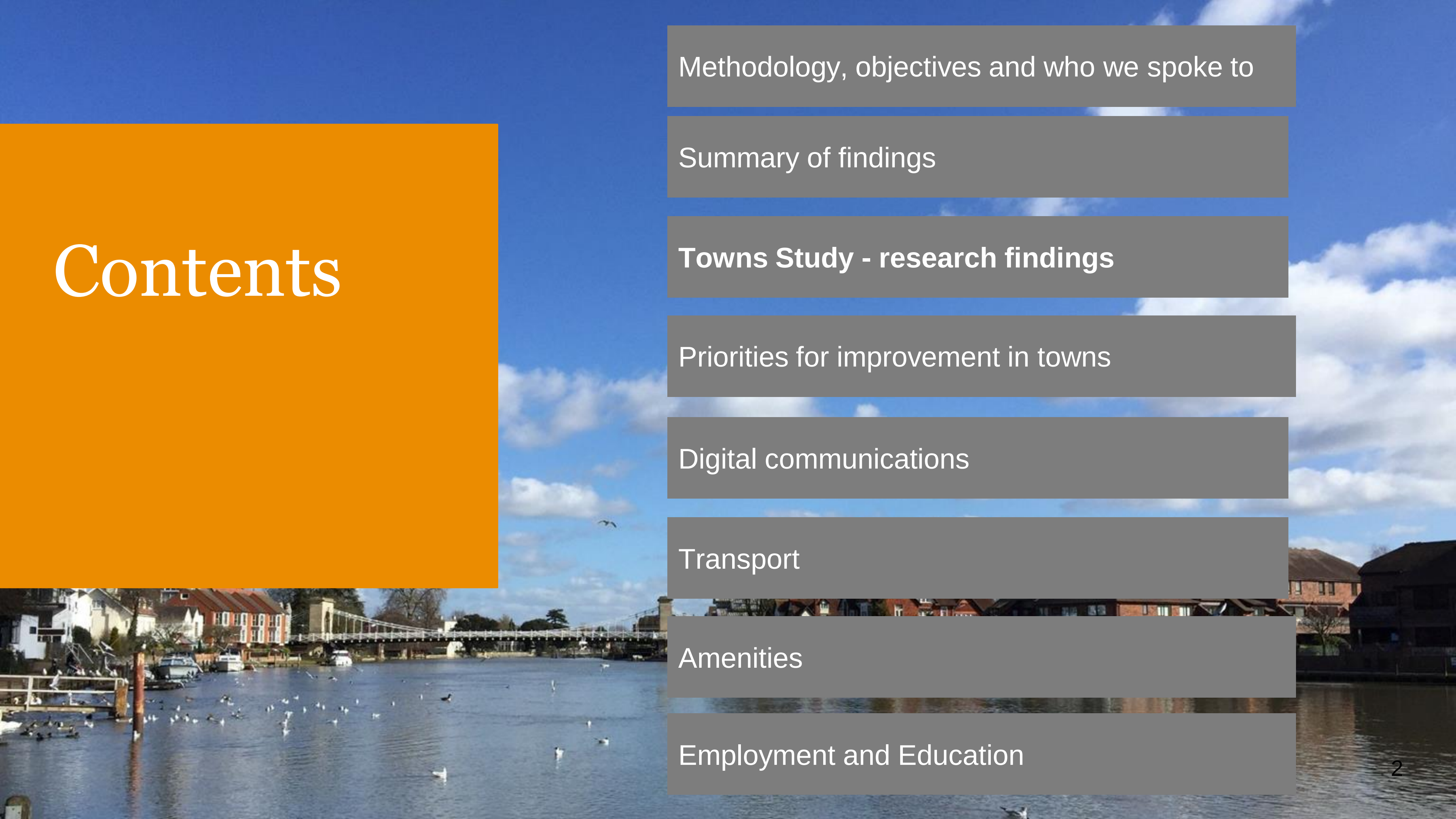
NIC Towns Social Research Study

Final report

August 2021

pwc



Contents

Methodology, objectives and who we spoke to

A reminder of the methodology

Quantitative research	Qualitative research
Fieldwork conducted between 1 June and 14 June 2021	Fieldwork conducted between 16 June and 25 June 2021
Online survey poll with **2,637** respondents	**6** focus groups and **3** in-depth interviews with mixed levels of isolation and deprivation
All respondents live in an English town (with a population between 5,000 and 225,000)	All respondents live in an English town (with a population between 5,000 and 225,000)

Research objectives

The research was focused on towns in England to:

- explore public perceptions on the perceived standard of transport and digital infrastructure in meeting economic and quality of life needs; and
- identify priorities for improvement

The findings from this research will contribute to the Commission's evidence base for its towns study, which will advise the government on infrastructure investment for towns in England.

Please note that throughout the presentation percentage figures may not add to 100% due to rounding

The quantitative study surveyed a spread of respondents by gender, age, region, social class, ethnicity and with different living arrangements

50% Males
50% Females

11% 18-24
16% 25-34
16% 35-44
18% 45-54
15% 55-64
23% 65+

29% Single
20% Couple -no children
7% Parent - preschool age
21% parent 5-18 age
24% Parent - over 18

15% East England
9% East Midlands
6% NE England
17% NW England
21% SE England
11% SW England
11% West Midlands
10% Yorkshire and the Humber

5% A
19% B
28% C1
11% C2
11% D
26% E

89% White
2% Mixed/multiple ethnic groups
5% Asian/Asian British
2% Black/African/ Caribbean/Black British
1% Other

Base: 2,637

This was reflected in the qualitative research, which included a range of respondents from each town in focus groups and depth interviews

Ponteland
- Small town
- Low deprivation / More connected

Radcliffe:
- Medium town
- High deprivation / More connected

West Bridgford
- Medium town
- Low deprivation / More connected

Diss / Watton
- Small town
- Medium deprivation / More isolated

Sutton Coldfield:
- Large town
- Low deprivation / More connected

Crawley
- Large town
- Medium deprivation*/ More isolated

*The closure of Gatwick airport means Crawley has been disproportionately affected by Covid 19

Each focus group contained 6 respondents:

SEG	Family	Ethnicity
3x ABC1 3x C2D	2x childless 2x young families 2x older families	1-2 non white British / Irish per group

Depth interviews:

Town	Description
Sutton Coldfield	Long term low income
Radcliffe	Long term health condition
Diss	No / low internet access

Glossary of terms used in this report

Size of town - ONS definition:
Large town (75,000 – 225,000 residents)
Medium town(20,000 – 75,000 residents)
Small town (5,000 – 20,000 residents)

Isolation:
For the qualitative groups ‘more connected’ means within a 40 minute drive of a large city

Deprivation:
Income deprivation deciles were calculated based on the income deprivation scores of the English Index of Multiple Deprivation. For this report, towns in decile 1-4 are High Deprivation, 4.1-5.9 are Medium Deprivation, and 6-10 are Low Deprivation.

Job density - ONS definition:
Job density is based on total employment data from the Business Register and Employment Survey 2019, and divided by population aged 16-64 from the 2019 mid-year population estimates.

Residential towns have a job density of 0.07-0.31
Mixed towns have a job density of 0.32-0.4
Working towns have a job density of 0.41-2

TTWA (travel-to-work area) - ONS definition:
When the majority of TTWA population are resident in:

- A UK conurbation - "Major Conurbation TTWA",
- An urban area, (not a conurbation), TTWA includes at least one town / city of population greater than 70,000 - "Large Town TTWA"
- An urban area (not a conurbation), TTWA has no towns or cities of population greater than 70,000 - “Small Town TTWA”
- A rural area - “”Rural TTWA”

Key terms

Quantitative research analysis notes

Where referenced in commentary around quantitative findings, ‘Agreement’ is the sum of ‘Strongly agree’ and ‘Agree’ combined. Similarly, ‘Confidence’ is the sum of ‘Extremely’, ‘Very’, and ‘Quite confident’ combined.

‘Net agreement’ is the sum of ‘Strongly agree’ and ‘Agree’, minus the sum of ‘Strongly disagree’ and ‘Disagree’.

‘Frequent users’ (e.g. of public transport or car) are defined as those who use either form of travel at least once a week, up to a maximum frequency of every day. ‘Less frequent users’ are those that use either form of travel a maximum of once or twice a week, or once every few months.

‘Non-rejectors’ is applied to public transport use only and are those that do not travel by public transport but are open to doing so in the future. ‘Non-users’ are defined as those that never travel by public transport or car.

The quantitative data and qualitative sample have been tagged based on ONS classifications defined earlier

Size of town

	Small	Medium	Large
Quant:	23%	41%	35%
Qual:	2x groups 1x depth	2x groups 1x depth	2x groups 1x depth
ONS spread of population:	23%	41%	35%

Income (deprivation)

	Low	Medium	High
Quant:	28%	20%	53%
Qual:	1x groups 1x depth	2x groups 1x depth	3x groups 1x depth
ONS spread of population:	28%	20%	53%

Job density

	Working	Mixed	Residential
Quant:	58%	21%	21%
ONS spread of population:	58%	21%	21%

TTWA (travel-to-work area)

	Rural TTWA	Small town TTWA	Large town TTWA	Major conurbation TTWA
Quant:	5%	12%	50%	32%
ONS spread of population:	5%	12%	50%	32%

Isolation

	More isolated	More connected
Qual:	2x groups 1x depths	4x groups 2x depth

Base: 2,637

Summary of findings

Summary of findings

- Over six in ten respondents agree that their town is a good place to live and that they can access the public services they need in their town

- Only three in ten, however, agree that their town gets a fair share of investment compared to other places in the UK
  - Disagreement that their town gets a fair share of investment is higher amongst high deprivation areas and small towns
  - Those in high deprivation areas see a need for regeneration in nearby areas, highlighting a lack of amenities in their town

- There is generally a 50/50 split as to whether respondents are open to change or want their town to stay as is, however openness to change increases if there is something offered in return, such as more amenities or jobs
  - Large towns are more open to their population increasing
  - Respondents in high deprivation areas are more open to change overall - they are dissatisfied with the status quo and view any change as 'good' change

Summary of findings

- Respondents in the survey were asked to rank 15 infrastructure and amenities/job provisions as areas for improvement in their town

- The top four areas that were highlighted for improvement relate to amenities/jobs
  - Better variety of shops (42% ranked in their top five priorities)
  - More jobs (39% ranked in their top five priorities)
  - More or better quality green space (38% ranked in their top five priorities)
  - Higher paying jobs (38% ranked in their top five priorities)

- Improvements for motorists was ranked fifth as an area for improvement (37% ranked in their top five priorities)

- Digital infrastructure improvements were ranked lower in terms of priority, with approximately a quarter ranking them in their top five priorities

- How priority areas were ranked differed slightly depending on town type. Looking at infrastructure improvements in particular:
  - Better public transport connections to cities are more of a priority for small towns
  - Improvements for motorists are more of a priority for both small and large towns, working and residential towns, small town TTWA
  - Better public transport connections are more of a priority for rural TTWA and small town TTWA

Summary of findings

- Satisfaction with digital infrastructure is higher than it is for transport infrastructure with at least six in ten satisfied. This is particularly the case amongst residents in large towns
  - This is consistent with respondents giving a lower priority to digital infrastructure when asked about priority areas for improvement
  - Almost six in ten respondents agreed that their home broadband is sufficient to enable them to work from home if needed, and this is higher amongst low deprivation towns than those in high deprivation areas
  - Digital infrastructure was deemed to have coped well with unforeseeable demand over the pandemic with problems generally attributed to location and service providers

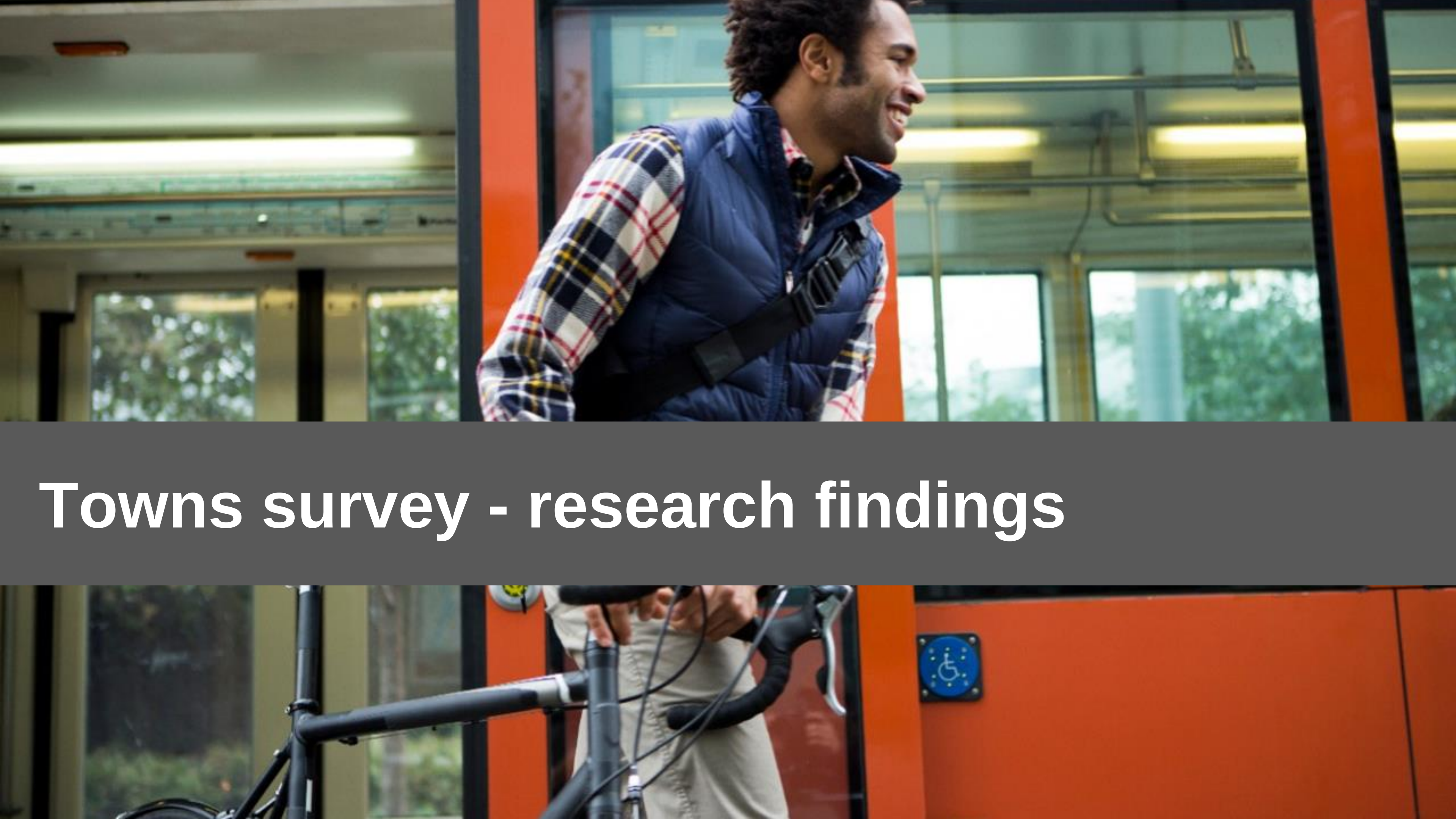
- Whilst satisfaction with transport infrastructure is lower than it is for digital infrastructure, it is slightly higher amongst residents in large towns and frequent public transport users
  - Satisfaction is particularly low with roads and cycling infrastructure, with only approximately a third of respondents satisfied with each
  - Potholes are seen as a universal issue and detrimental to quality of life
  - In lower deprivation areas it is felt that roads and parking have not been adapted to allow for increasing populations
  - In higher deprivation areas only one road going in or out of towns is seen as negative - making the town feel like a thoroughfare and causing heavy traffic
  - Electric vehicle infrastructure was also raised as a concern - there is a feeling that towns are not prepared or equipped for charging points and EV adoption
  - Only half of respondents, or less, agree that public transport enables them to access amenities or jobs they might want

Summary of findings

- 59% of respondents agreed that their town needs a greater variety of amenities, such as shops and restaurants, and this is higher amongst residents in higher deprivation areas
  - This is consistent with the fact that a better variety of shops was ranked as the top priority for improvement in towns (ranked by 41% in their top five priorities)
  - Variety is seen to mean more independent shops and restaurants
  - There is a fear of the ‘death of the high street’ and a lack of places to attract visitors/locals - the main obstacles to a thriving high street are perceived as high business rates and low footfall, as the number of places to go on the high street declines, people venture into town less
  - Building a sense of community and providing a space for families and teenagers is also a key focus for amenities - this is consistent with the fact that more or better quality green space was ranked fourth as an area for improvement in towns (ranked by 38% in their top five priorities)

Summary of findings

- More jobs and higher paying jobs were ranked second and fourth as priority areas for improvement (ranked by approximately four in ten respondents amongst their top five priorities)
    - This is particularly the case amongst residents in high deprivation areas - it is thought that there are few opportunities for locals, and few attractions for young professionals and families, which has been exacerbated by the pandemic
    - The pandemic has also brought about preferences for working from home, with 14% of respondents not wanting to travel to work at all, and this is higher amongst residents in large towns
    - The pandemic may also open up employment opportunities with 30% stating that changing working patterns may increase their options - particularly amongst 25-44 year olds, parents with children, SEG A and frequent users of public transport
    - The home working hub trial was supported by just over four in ten respondents in return for a rapid rollout of ultrafast broadband



Towns survey - research findings

At least four in ten workers work outside of the town they live in, with almost seven in ten students studying outside their town

Of the sample group who took part

59% Work full time

ONS spread of the population*: 46%

23% Work part-time

ONS spread of the population*: 14%

17% not currently working

ONS spread of the population*: 40%

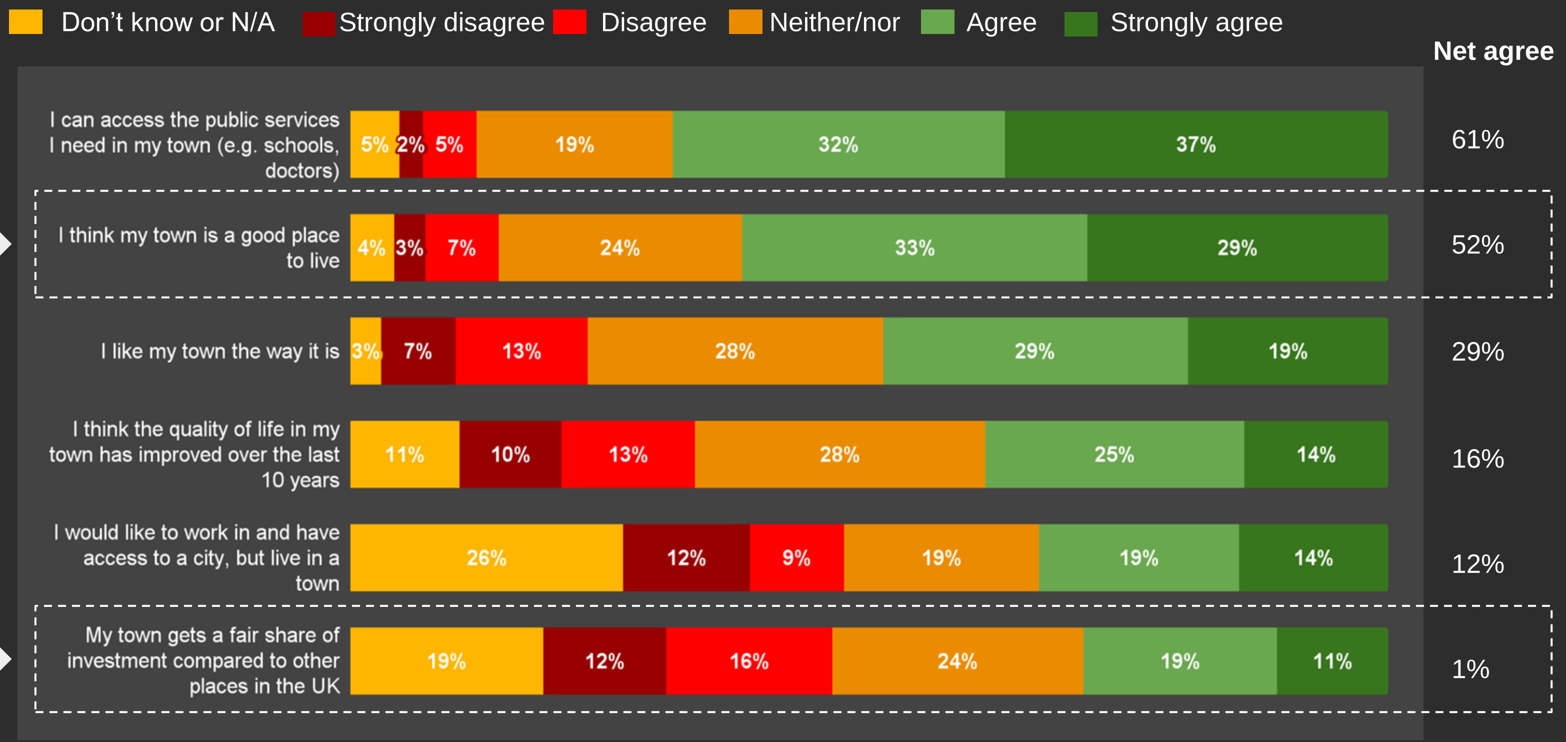
	Of the sample who work full time	Of the sample who work part-time	Of the sample who study
In the town I live in	46%	58%	30%
In a city	30%	18%	41%
Somewhere else in my local authority	15%	18%	23%
Elsewhere	9%	6%	7%

C1. Do you work full time or part-time?
C2. Where do you work/study?
Base: Respondents that work (1,830). Those that work full time (1,084). Those that work part-time (428). Those that study (82)
Figures from the ONS Labour Market Overview June 2021. Please note ONS data includes 16-18 year olds, are for adults aged 16 and over, whereas our survey is for adults aged 18 and over, which could explain why their figures show a greater percentage not currently working.

Just over six in ten respondents think their town is a good place to live, with only three in ten agreeing that their town gets a fair share of investment

Small towns (36%) are significantly more likely to strongly agree compared to medium sized towns (28%) and large towns (26%). Low (67%) and middle (66%) deprivation towns are significantly more likely to agree overall than high deprivation towns (58%)

High deprivation towns (33%) are significantly more likely to disagree overall compared to low (21%) and medium (24%) deprivation towns. Small towns (31%) are significantly more likely to disagree overall compared to large towns (24%), while working towns (31%) are significantly more likely to agree overall compared to residential towns (25%)



C4. To what extent do you agree with…
Base: 2,637

Though more prominent in high deprivation towns, respondents in all deprivation levels felt their town didn't receive a fair share of investment compared to neighbouring towns

Higher Income / Lower Deprivation

There is a sentiment in areas with lower deprivation that because their area is nice and remains a desirable place to live, investment is lower as it is not seen as 'necessary'

"It feels like money goes into other areas as Sutton is OK, and it's kind of to our detriment. " **Large town, low deprivation**

Lower Income / Higher Deprivation

Areas with higher deprivation see regeneration in nearby areas clearly as it's where they go to shop and socialise - highlighting a lack of amenities in their own town

"The eyes don't lie, we've been the poor relation. You look at the trendy wine bars in Prestwich and Ramsbottom and our centre is derelict." **Medium town, high deprivation**

The appearance of the town impacts attitudes to investment:
"It's noticeable if you do leave West Bridgford, other areas around the city have no flower beds, a bit untidy, they'd probably ask where their council tax is going more than we would." **Medium town, Low deprivation**

Broadly speaking, half of respondents would like their town to stay the way it is. Only three in ten respondents were open to their population increasing, but this increased to five in ten if more amenities opened up or their town got more jobs

51%	My town stays the way it is	My town's population increases, and as a consequence more amenities open up	49%
54%	My town stays the way it is	My town, or nearby region, gets more jobs and as a consequence its population increases	46%
54%	My town stays the way it is	My town, or nearby region, builds more houses and as a consequence the cost of renting or buying houses is reduced	46%
54%	My town stays the way it is	My town, or nearby region, gets more jobs, and as a consequence housebuilding increases	46%
70%	My town stays the way it is	My town's population increases	30%

C5. Which of the pairs of statements would you most prefer?
Base: 2,637

Respondents in high deprivation towns are more open to their town changing, with large towns being more open to their population increasing

% that chose statement	Size of town			Job density			Income (deprivation)			TTWA			
	Small	Medium	Large	Residential	Mixed	Working	Low	Medium	High	Rural	Small town	Large town	Major conurbation
My town's population increases, and as a consequence more amenities (e.g. shops, restaurants, theatres, cultural venues) open up	47%	50%	48%	49%	48%	49%	45%	46%	52%	50%	53%	47%	50%
My town, or nearby region, gets more jobs and as a consequence its population increases	44%	45%	48%	47%	46%	45%	42%	40%	49%	44%	45%	45%	48%
My town, or nearby region, builds more houses and as a consequence the cost of renting or buying houses is reduced	43%	46%	47%	43%	46%	46%	41%	41%	50%	51%	43%	44%	48%
My town, or nearby region, gets more jobs, and as a consequence housebuilding increases	44%	45%	48%	44%	46%	46%	40%	42%	50%	45%	46%	44%	49%
My town's population increases	28%	28%	34%	27%	31%	31%	28%	28%	32%	29%	30%	30%	31%

Base: Small town (613); medium town (1,090); large town (934). Residential (558); working (1,529); residential (550). Low deprivation (731); medium deprivation (516); high deprivation (1,390). Rural TTWA (129); small town TTWA (325); large town TTWA (1,329); major conurbation TTWA (854).

Dissatisfaction with the status quo amongst towns with higher levels of deprivation has led to an openness to change

Level of deprivation

Desire for population increase

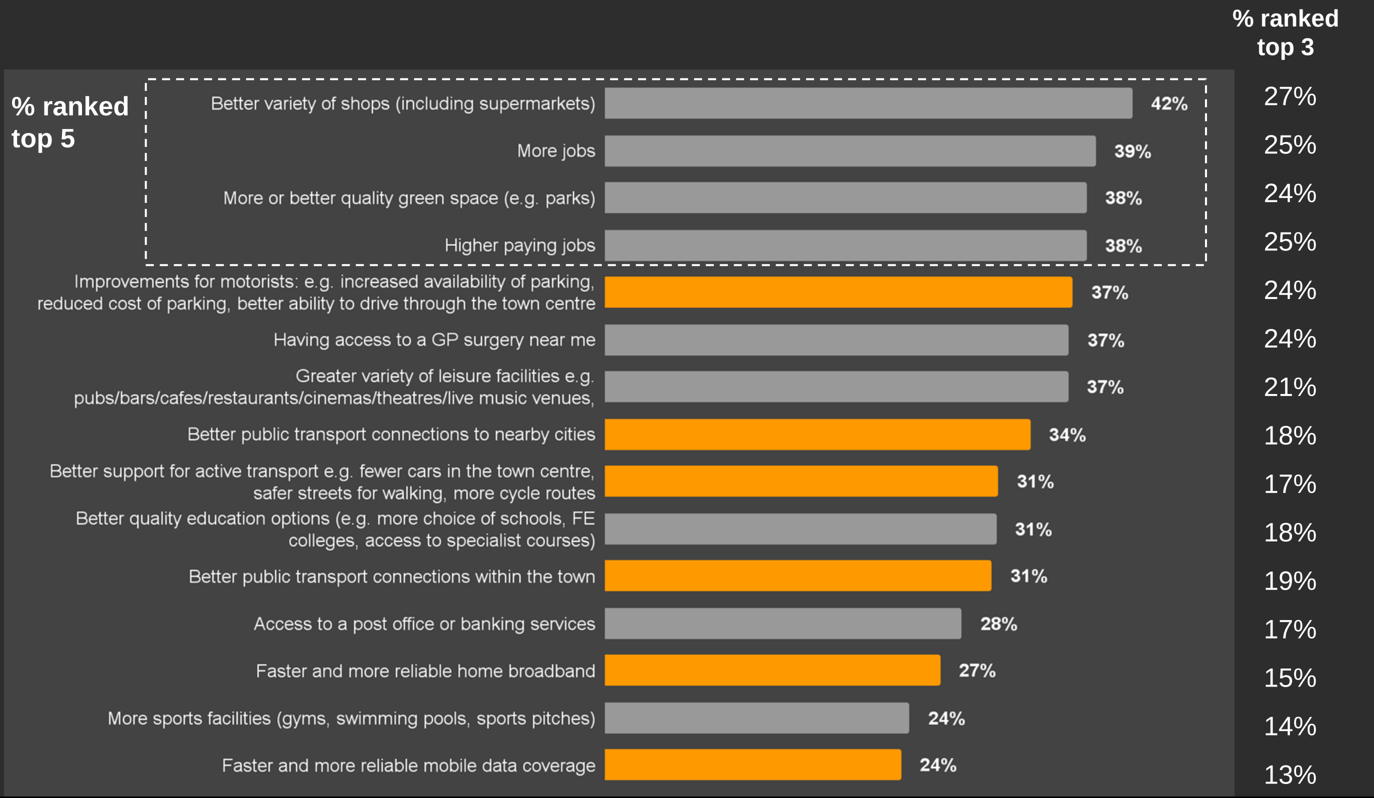
High deprivation = change is welcomed	Why?	**Dissatisfaction** with status quo has led to an attitude that **all change is good change**	*"I don't want the town to stay as it is. We need to try something new."* **Medium town, high deprivation**
Medium deprivation / small town = open to change	Why?	More jobs/amenities/people could **improve opportunities for young people**	*"The only young people here are stuck here"* **Small town, medium deprivation**
Medium deprivation / large town = sceptical to change	Why?	**House prices have increased** with population, and services and amenities **haven't kept up**	*"I don't believe house prices would go down, even if they did who would that attract?"* **Large town, medium deprivation**
Low deprivation = reluctant to change	Why?	Conscious choice to live in a safe, leafy, quiet place **outside of the city.** No appetite for increased crowds	*"I can get to town easily. I pay more to live here for the village feel. I don't want to lose that."* **Small town, low deprivation**

Improved roads and parking was not included in the statement pairs, but was spontaneously mentioned as a concern across **all sizes/deprivation levels of town**

Priorities for improvement in towns

The top four areas for improvement in towns relates to amenities (variety of shops and green space) and jobs, rather than infrastructure

Improvements for motorists was ranked **5th** as an area for improvement. Digital infrastructure improvements were prioritised last and third last in terms of priority.



C6. Please rank the following as priority areas for improvement in your town?
Base: 2,637

Relates to infrastructure
Relates to amenities/jobs

Focusing on infrastructure improvements, better public transport connections to cities are more of a priority for small towns with improvements for motorists a priority for large towns

% that ranked in **top** 5

Small town (top 5 priorities)	Medium town (top 5 priorities)	Large town (top 5 priorities)
Better variety of shops (44%)	Better variety of shops (45%)	Higher paying jobs (44%)
Better public transport connections to nearby cities (41%)	Greater variety of leisure facilities (39%)	More jobs (44%)
Having access to a GP surgery near me (38%)	More or better quality green space (39%)	Improvements for motorists (41%)
Improvements for motorists (38%)	Having access to a GP surgery near me (38%)	More or better quality green space (39%)
More or better quality green space (36%)	More jobs (38%)	Better variety of shops (38%)

Base: Small town (613; medium town (1,090); large town (934).

Amenities and jobs were the priorities, irrespective of job density in towns, however improvements for motorists is more of a priority for working and residential towns

% that ranked in **top** 5

Residential (top 5 priorities)	Mixed (top 5 priorities)	Working (top 5 priorities)
Better variety of shops (46%)	Better variety of shops (47%)	More or better quality green space (39%)
Having access to a GP surgery near me (40%)	More jobs (42%)	More jobs (39%)
Higher paying jobs (37%)	More or better quality green space (39%)	Better variety of shops (39%)
More jobs (37%)	Higher paying jobs (39%)	Higher paying jobs (39%)
Improvements for motorists (36%)	Greater variety of leisure facilities (38%)	Improvements for motorists (38%)

Base: Residential (558); working (1,529); mixed (550).

For medium and high deprivation towns, improvements for motorists is a top five priority

% that ranked in **top** 5

Low deprivation (top 5 priorities)	Medium deprivation (top 5 priorities)	High deprivation (top 5 priorities)
Better variety of shops (42%)	Better variety of shops (44%)	More jobs (44%)
Greater variety of leisure facilities (42%)	More or better quality green space (42%)	Higher paying jobs (43%)
Having access to a GP surgery near me (40%)	Improvements for motorists (40%)	Better variety of shops (41%)
More or better quality green space (39%)	Higher paying jobs (38%)	More or better quality green space (37%)
Better public transport connections to nearby cities (38%)	More jobs (38%)	Improvements for motorists (37%)

Base: Low deprivation (731); medium deprivation (516); high deprivation (1,390).

Improving amenities is more of a priority for large town and major conurbation TTWAs, with better public transport connections a priority for rural and small town TTWAs

% that ranked in **top** 5

Rural TTWA (top 5 priorities)	Small town TTWA (top 5 priorities)	Large town TTWA (top 5 priorities)	Major conurbation TTWA (top 5 priorities)
Better variety of shops (45%)	Better variety of shops (48%)	Better variety of shops (40%)	Better variety of shops (43%)
Better public transport connections to nearby cities (39%)	More jobs (39%)	More or better quality green space (39%)	More jobs (41%)
Better support for active transport (36%)	Better public transport connections to nearby cities (39%)	Higher paying jobs (39%)	More or better quality green space (40%)
Better public transport connections within the town (35%)	Higher paying jobs (39%)	Having access to a GP surgery near me (38%)	Higher paying jobs (39%)
Faster and more reliable home broadband (35%)	Improvements for motorists (38%)	More jobs (38%)	Greater variety of leisure facilities (37%)

Base: Rural TTWA (129); small town TTWA (325); large town TTWA (1,329); major conurbation TTWA (854)

Digital provisions such as mobile data coverage and home broadband are less of a priority amongst towns, irrespective of size, but particularly in large towns

% that ranked in **bottom** 5

Small town (bottom 5 priorities)	Medium town (bottom 5 priorities)	Large town (bottom 5 priorities)
More sports facilities (41%)	More sports facilities (44%)	Faster and more reliable mobile data coverage (45%)
Faster and more reliable mobile data coverage (39%)	Faster and more reliable mobile data coverage (42%)	More sports facilities (45%)
Better public transport connections within the town (37%)	Faster and more reliable home broadband (41%)	Faster and more reliable home broadband (41%)
Faster and more reliable home broadband (37%)	Better quality education options (34%)	Access to a post office or banking services (38%)
Higher paying jobs (35%)	Access to a post office or banking services (35%)	Better quality education options (33%)

Base: Small town (613; medium town (1,090); large town (934).

Support for active transport is less of a priority in residential areas, with better public transport connections within the town a lower priority for working towns

% that ranked in **bottom** 5

Residential (bottom 5 priorities)	Mixed (bottom 5 priorities)	Working (bottom 5 priorities)
More sports facilities (43%)	More sports facilities (50%)	Faster and more reliable mobile data coverage (44%)
Faster and more reliable mobile data coverage (39%)	Faster and more reliable mobile data coverage (44%)	More sports facilities (41%)
Higher paying jobs (38%)	Faster and more reliable home broadband (40%)	Faster and more reliable home broadband (41%)
Faster and more reliable home broadband (37%)	Better quality education options (36%)	Access to a post office or banking services (37%)
Better support for active transport (36%)	Access to a post office or banking services (35%)	Better public transport connections within the town (34%)

Base: Residential (558); working (1,529); mixed (550).

Better public transport connections within towns is of a lower priority for medium deprivation areas while better connections to nearby cities is a lower priority in high deprivation areas

% that ranked in **bottom** 5

Low deprivation (bottom 5 priorities)	Medium deprivation (bottom 5 priorities)	High deprivation (bottom 5 priorities)
More sports facilities (42%)	Faster and more reliable mobile data coverage (45%)	More sports facilities (45%)
Faster and more reliable mobile data coverage (40%)	More sports facilities (42%)	Faster and more reliable mobile data coverage (44%)
Faster and more reliable home broadband (38%)	Faster and more reliable home broadband (42%)	Faster and more reliable home broadband (40%)
More jobs (37%)	Better public transport connections within the town (34%)	Access to a post office or banking services (36%)
Higher paying jobs (37%)	Access to a post office or banking services (34%)	Better public transport connections to nearby cities (34%)

Base: Low deprivation (731); medium deprivation (516); high deprivation (1,390).

Not surprisingly, better public transport connections to nearby cities is of lower priority to major conurbation TTWAs

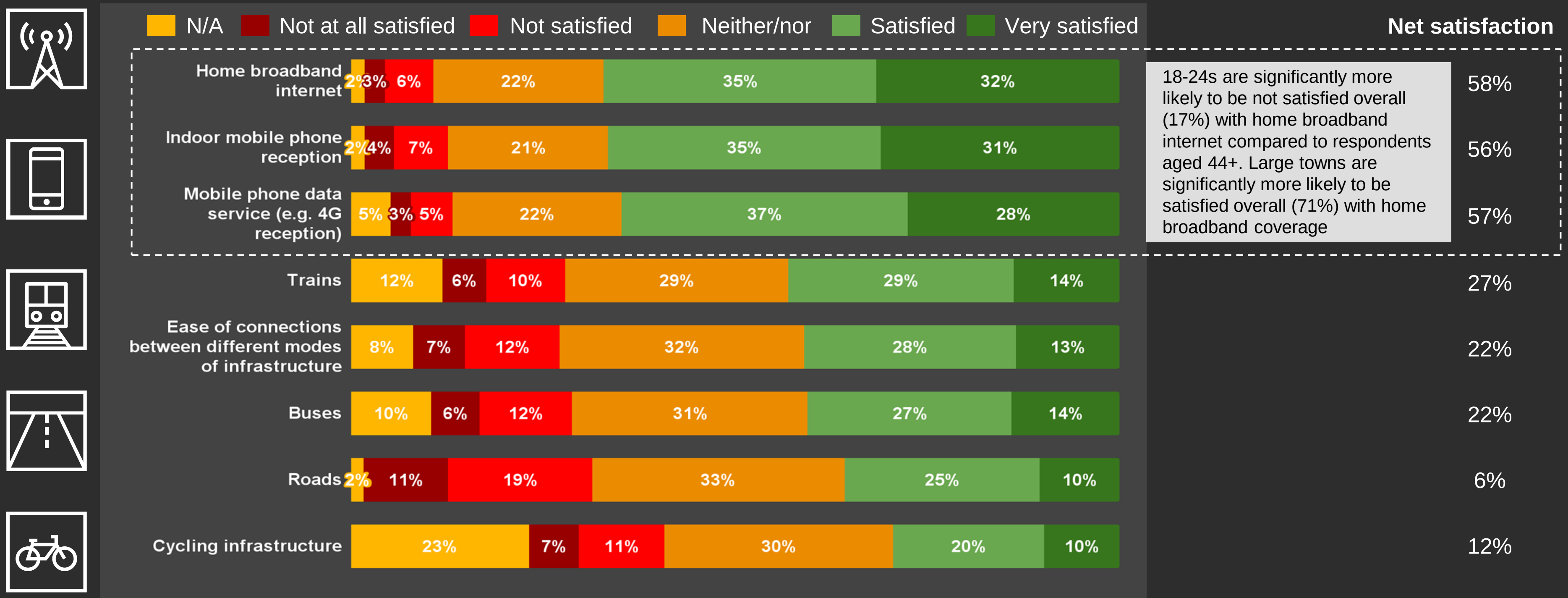
% that ranked in **bottom** 5

Rural TTWA (bottom 5 priorities)	Small town TTWA (bottom 5 priorities)	Large town TTWA (bottom 5 priorities)	Major conurbation TTWA (bottom 5 priorities)
More sports facilities (45%)	More sports facilities (49%)	Faster and more reliable mobile data coverage (44%)	Faster and more reliable mobile data coverage (43%)
Access to a post office or banking services (42%)	Faster and more reliable mobile data coverage (41%)	More sports facilities (43%)	More sports facilities (42%)
Faster and more reliable mobile data coverage (37%)	Access to a post office or banking services (40%)	Faster and more reliable home broadband (40%)	Faster and more reliable home broadband (41%)
Having access to a GP surgery near me (36%)	Better public transport connections within the town (39%)	Access to a post office or banking services (35%)	Better public transport connections to nearby cities (35%)
Better public transport connections within the town (36%)	Faster and more reliable home broadband (38%)	Better support for active transport (34%)	Access to a post office or banking services (34%)

Base: Rural TTWA (129); small town TTWA (325); large town TTWA (1,329); major conurbation TTWA (854)

Digital communications

Satisfaction with digital infrastructure is higher than it is for transport infrastructure, particularly amongst residents in large towns



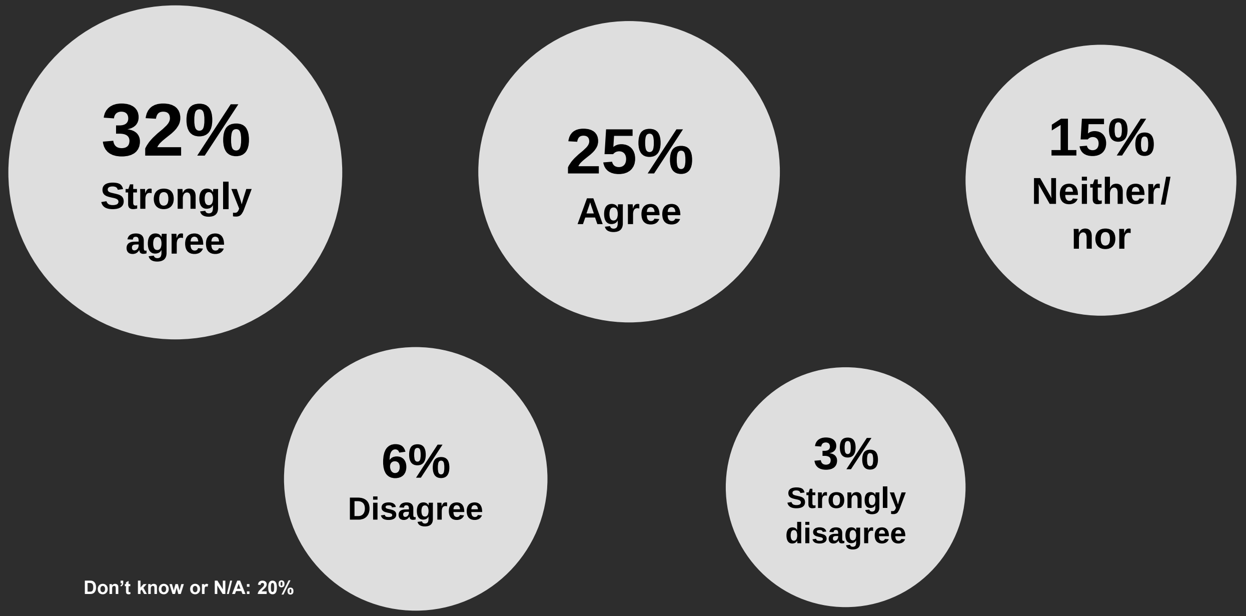
C3. To what extent are you satisfied with the following services where you live?
Base: 2,637

Almost six in ten respondents agreed that their home broadband is sufficient, but this is higher amongst low deprivation towns than those in high deprivation areas

My home broadband is sufficient to enable me to work from home if I need to (% agreement)

57% agree that their home broadband is sufficient to enable them to work from home if they need to.

Residents in high deprivation towns are less likely to agree overall (55%) compared to low deprivation towns (62%)



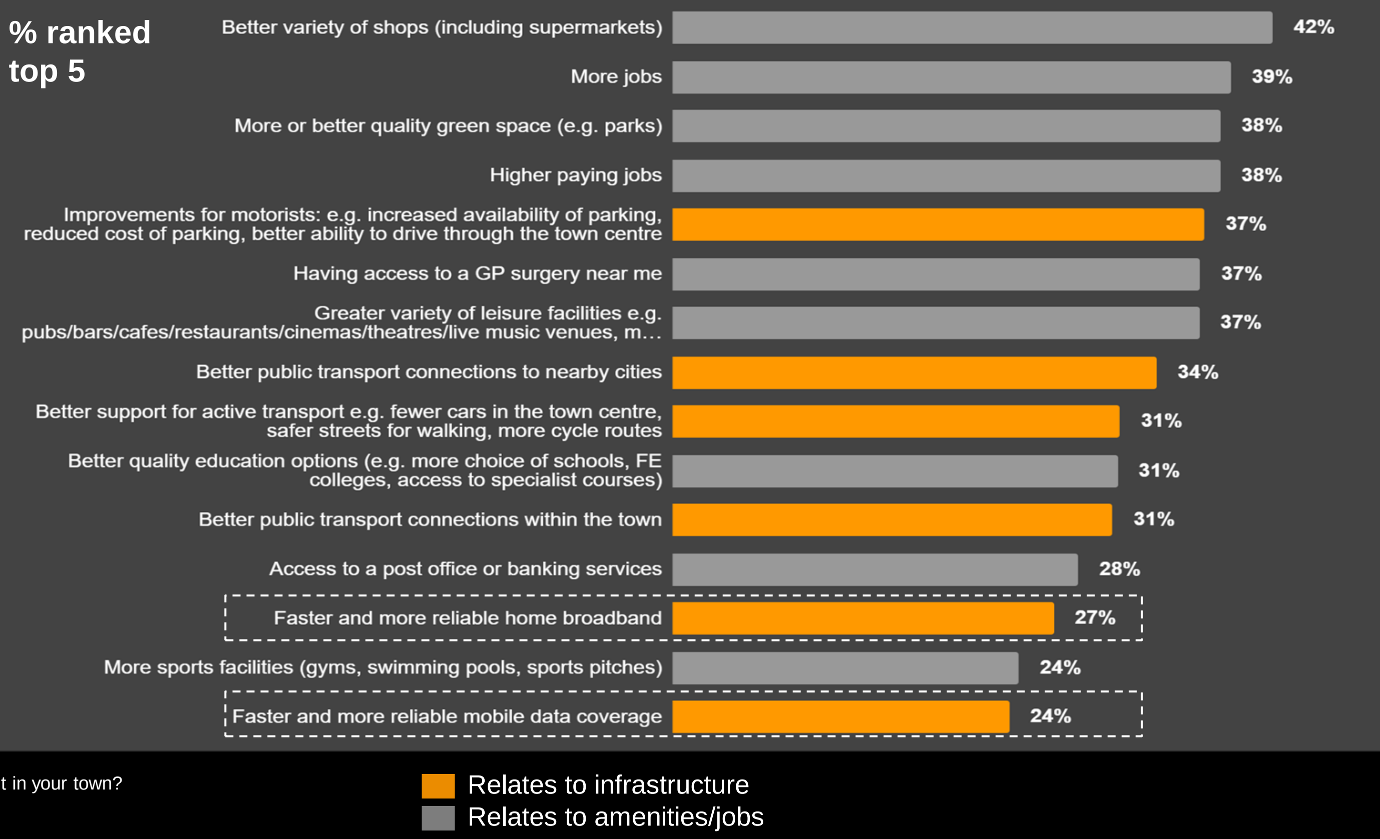
Don’t know or N/A: 20%

C4. To what extent do you agree or disagree with the following statements?
Base: 2,637

Faster and more reliable home broadband and mobile data coverage were ranked as lower priority areas for improvement in all types of towns, with areas outside infrastructure, such as amenities and jobs ranked more important

Approximately **a quarter** of respondents ranked faster and more reliable home broadband and mobile data coverage in their top 5 priorities for improvement (ranked last and third last).

Respondents aged 18-24 (31%) are significantly more likely to rate faster and more reliable mobile data coverage as a priority overall and compared to those 65+ (16%).



C6. Please rank the following as priority areas for improvement in your town?
Base: 2,637

Digital infrastructure was deemed to have coped well with unforeseeable demand over the pandemic. Any problems are generally attributed to location and service providers

Views on Digital Infrastructure:

Positive

It has been **tested by the pandemic**, and has **coped well**

"Nobody could have planned for the last 18 months" **Medium town, low deprivation**

5G towers have been installed in a way that **blends in**

"They blend in with the trees on the motorway, they don't spoil the area" **Large town, medium deprivation**

Neutral

Mixed digital literacy - satisfied with speed **as long as they can do what they need to**

Arbitrary fibre availability - not a huge issue for those that can't have it / some who have fibre **don't see a difference**

"I have fibre, I feel like I'm paying extra for normal internet" **Large town, low deprivation**

Negative

Some have 5G devices but have **never seen it work**

Consequences can be serious when the internet doesn't work

"I've never seen that little symbol on my phone say 5G" **Small town, low deprivation**

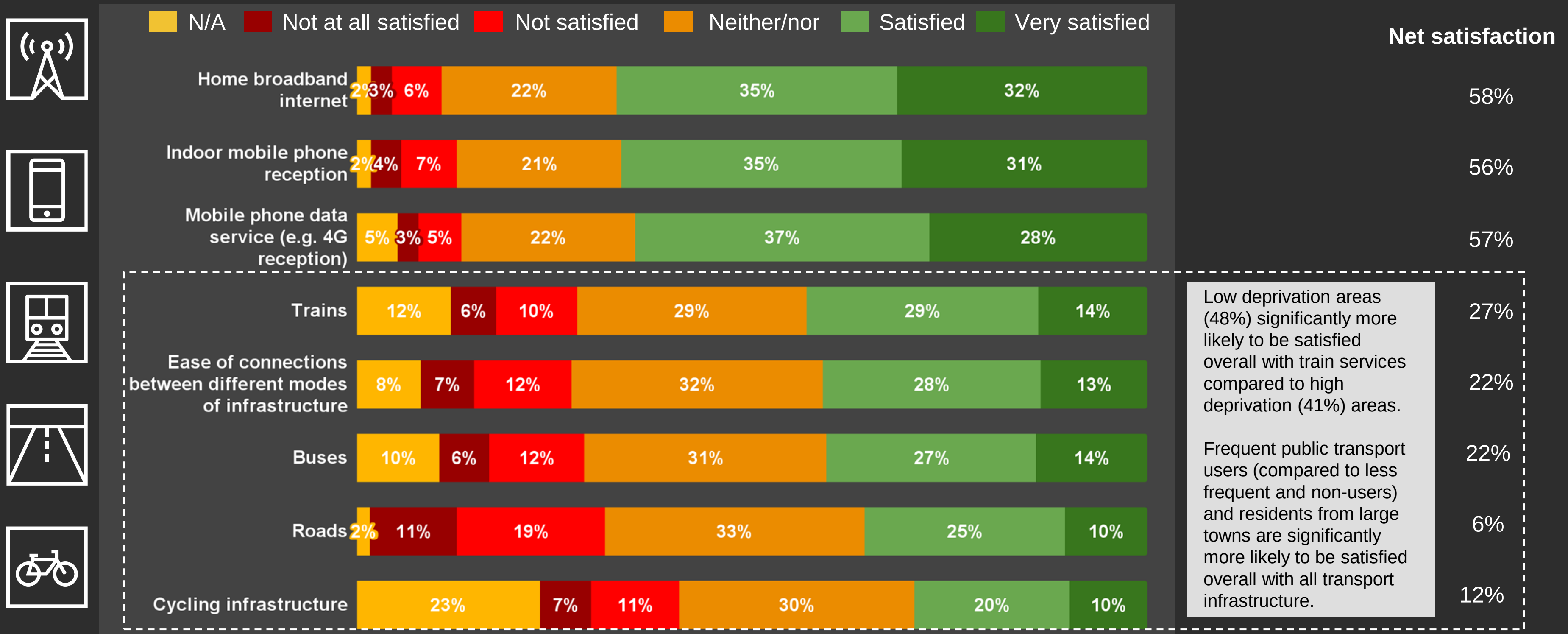
Satisfaction with Digital **didn't change** depending on size or deprivation

There's room to improve 'patchy' internet, but as it works eventually, **lower impact on quality of life**

Digital problems were not seen as infrastructure issue: many change providers, which can often fix their issues, and there is an acceptance of slower internet in hilly or rural areas, or old homes with thick walls

Transport

Satisfaction with transport infrastructure is lower than it is for digital infrastructure, however it is slightly higher amongst residents in large towns and frequent public transport users



C3. To what extent are you satisfied with the following services where you live?
Base: 2,637

Roads received the most varied criticism, with multiple factors causing dissatisfaction across the towns studied

Roads are used most frequently, so low satisfaction = high priority

Potholes are a **universal** issue and **detrimental to quality of life:**

They are encountered **daily**

They **damage cars** (can be **expensive for drivers**) and have caused **injury to joggers and cyclists**

Perception that repairs are **low cost, quick fixes** and the problem will re-occur soon

Higher income / Lower deprivation:

Population has increased, but roads and parking haven't adapted to multiple new homes with 2 car families and no new infrastructure

Pre-pandemic, traffic to nearby cities / motorways was getting steadily worse, increasing commute times

"They're building 3-4 bed houses with 2-3 cars, but the roads in town are narrow and there's just streams of traffic getting worse" **Medium town, low deprivation**

Lower income / Higher deprivation:

Having only one road going in or out of town seen as a negative, the town feels like a thoroughfare, causes bad traffic

"Traffic in and out is diabolical, there's a standstill every morning and evening" **Small town, medium deprivation**

A question spontaneously arose from multiple towns participants around electric vehicle infrastructure - feeling that they are not equipped or prepared for charging points and EV adoption

In towns, satisfaction with cycling is lowest for any form of transport, however it is more of a leisure activity than a mode of transport for commuting

Cycling infrastructure

Lower income / Higher deprivation:

Cycling infrastructure was not spontaneously mentioned. It wasn't picked up on as a priority area in response to stimulus

Higher income / Lower deprivation:

Cycling is a social / leisure activity - infrastructure between nearby towns and cities is low priority

Cyclists are currently using roads: infrastructure for them would benefit cyclists and motorists

Routes to get to green areas or the countryside are currently unsafe or don't exist - high priority for cycle infrastructure

'Boris bike' style initiatives warmly welcomed and desired, and would make it easier for teens and adults to be active and outdoors

"There's a beautiful park near town, but getting there on a bike is quite dangerous, I wouldn't let my 12 year old ride there" **Large town, low deprivation**

"We're lacking proper cycle paths that really take you somewhere" **Medium town, low deprivation**

"It's 2 minutes on a bike into countryside which is lovely. I don't think cycle routes would work in Pont, you just need to drive or get the metro between cities" **Small town, low deprivation**

Buses can impact multiple aspects of life in areas with higher deprivation, though impact is limited in areas with higher incomes

Buses

Low Deprivation

Little to no impact

Minimal Impact

Times aren't ideal to return after an evening out, however it's possible to 'just get a taxi'

"The last bus back is 8pm, but I just get the train in and a taxi home for an evening out" **Small town, low deprivation**

Impact on employment

Impact on leisure

Significant impact

Cost of bus service would be too high to use every day for work

Start and finish times can be a barrier to overtime / flexi time for non-drivers

"I work a flexi-contract and I have to tell my manager I can't work early even if I wanted to because the bus doesn't even leave here til 7" **Small town, medium deprivation**

Significant barriers to leisure

Even if the town centre had leisure / amenities, it would be difficult to get home in the evening

Safety concerns of evening public transport across genders/ages

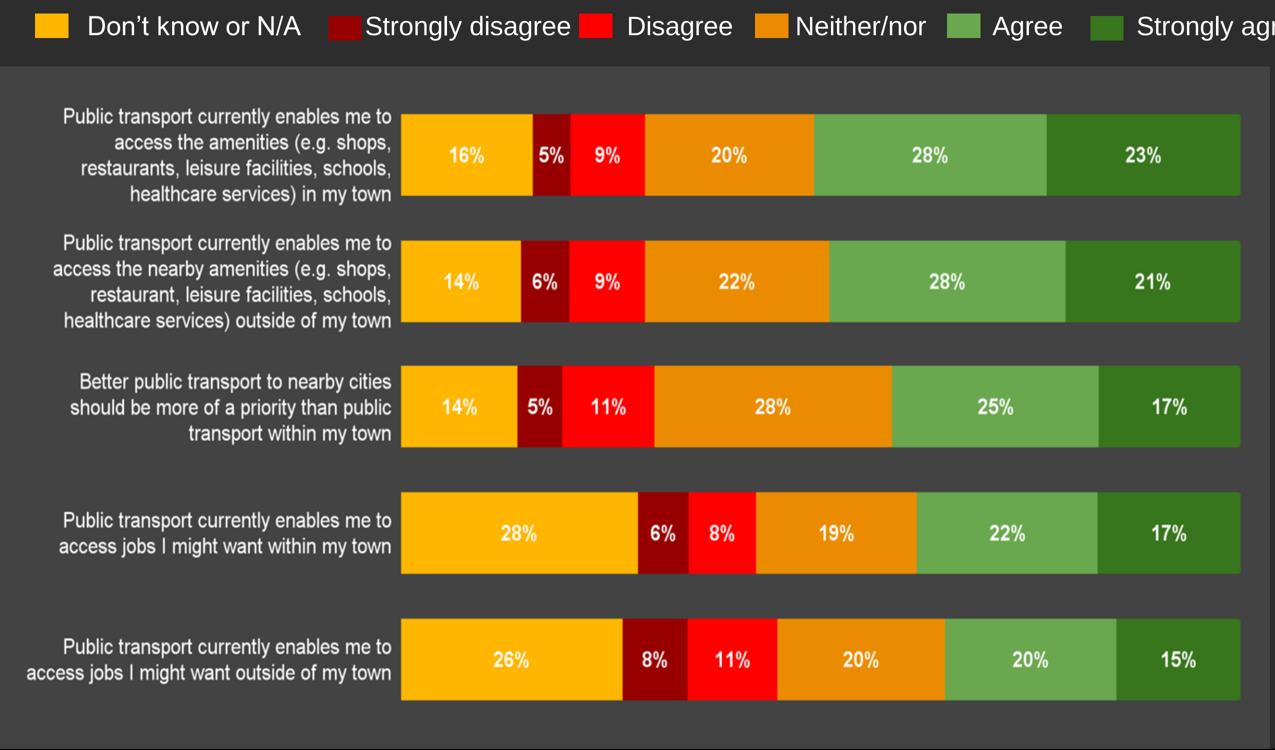
Increased cost of buses with no perceived improvements is off-putting

"It's gone from 60p to £2 for the same old battered bus. As a kid, that would have been lunch and bus money" **Large town, medium deprivation**

"I'd need to feel safe on a bus to want to start using one" **Medium town, high deprivation**

High Deprivation

Only around half of respondents agree that public transport enables them to access amenities or jobs they might want



Net agree

Frequent public transport users (61%) and those living in major conurbations (55%) and large towns (57%) are significantly more likely to agree overall

37%

Overall Agreement is significantly higher among frequent public transport users (58%) and those living in major conurbations (54%) and large towns (53%). Those in small (18%) and medium towns (16%) are significantly more likely to disagree overall compared to large towns

34%

Frequent users of public transport (47%) are significantly more likely to agree overall compared to respondents overall (41%) and compared to less frequent (36%) and non-users (26%)

25%

18-24's (52%) are significantly more likely to agree overall compared to respondents overall (39%) and those aged 45+ (26%). Frequent public transport users (48%) are also significantly more likely to agree overall compared to less frequent (26%) and non-users (20%)

24%

Small towns (24%) significantly more likely to disagree overall compared to large towns (16%). Less frequent public transport (23%) users also significantly more likely to disagree overall compared to regular users (16%)

17%

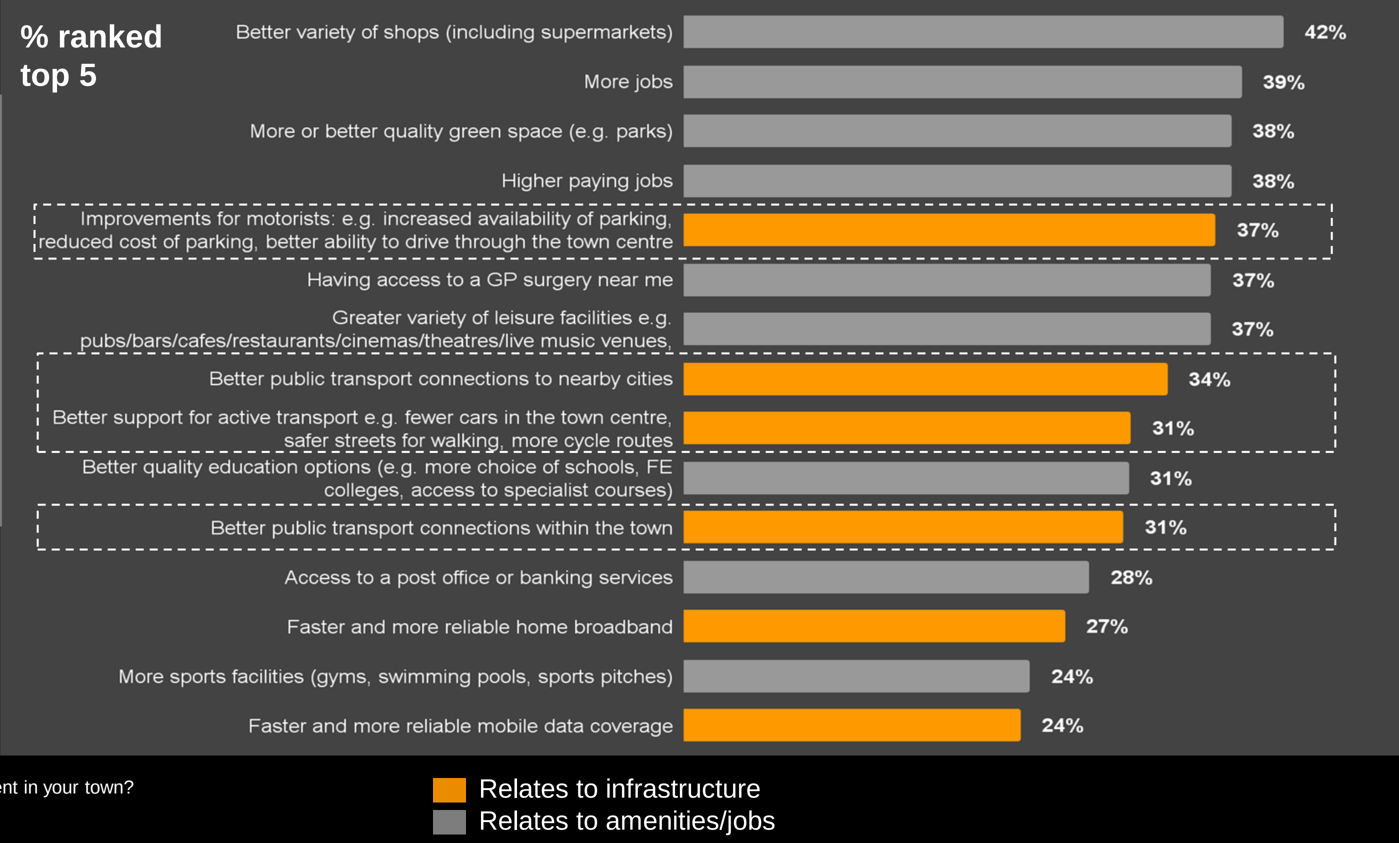
C4. To what extent do you agree with…
Base: 2,637

Improvements for motorists was ranked fifth as a priority area

At least **31%** of respondents stated that better public connections within the town and to nearby cities and better support for active transport and motorists should be priority areas for improvement.

Small towns are significantly more likely to rank better connections to nearby cities as a priority (41%)

Improvements for motorists is significantly more likely to be a priority in large towns (41%) compared to medium towns (34%)



C6. Please rank the following as priority areas for improvement in your town?
Base: 2,637

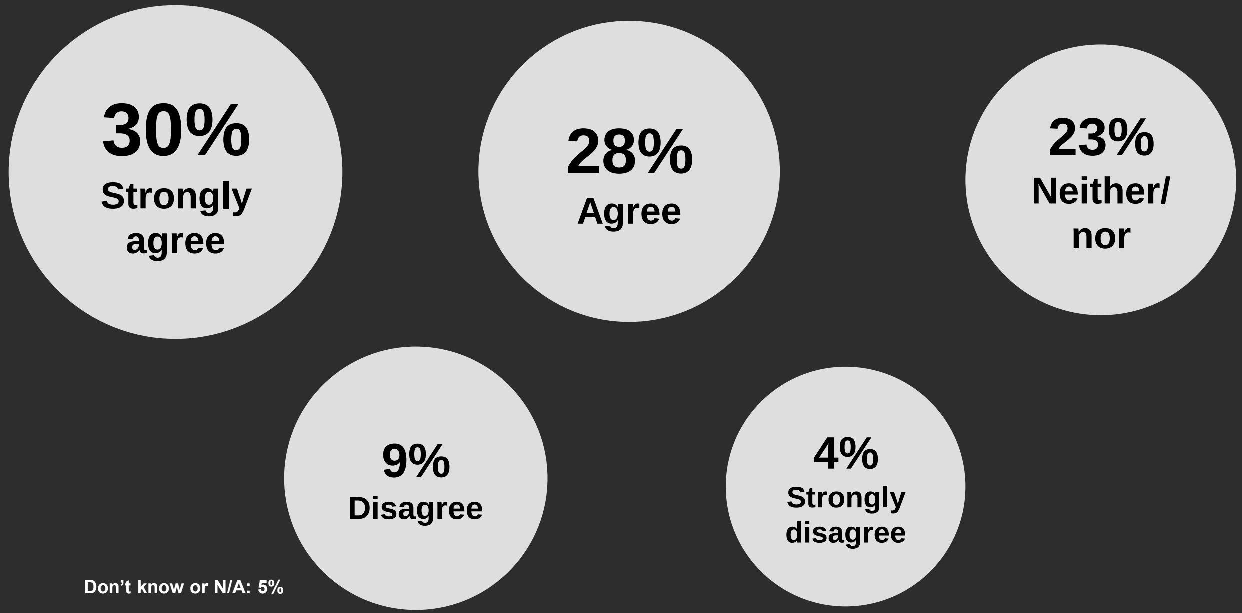
Amenities

Almost six in ten respondents agreed that their town needs a greater variety of amenities, such as shops and restaurants. This was particularly the case in high deprivation areas

59% agree that their town needs a greater variety of amenities.

Overall agreement is higher amongst residents in high deprivation areas (61%)

My town needs a greater variety of amenities - shops, restaurants etc (% agreement)



Don’t know or N/A: 5%

C4. To what extent do you agree or disagree with the following statements?
Base: 2,637

‘Variety’ is understood to mean more independent shops and restaurants. Business rates and footfall are seen as the main obstacles to a thriving high street

Universal: fear of the death of the high street and lack of places to attract visitors/locals

High turnover of retail businesses - little footfall, high rates, poor local government planning are blamed

No appetite for more coffee shop chains - not a reason to visit the centre as they’re everywhere

Desire to imitate nearby areas that have regenerated shopping and/or dining

Looking for a centre where locals and visitors can spend a day - a nice walk in, shops, lunch, a drink

“The shops are all closed so there’s no reason for anyone to come into town. There’s nowhere to go” **No internet access, medium deprivation**

“Now it's just pizza and coffee shops. No footfall and shopping is dying, people leave the area for days out” **Medium town, low deprivation**

Higher income / Lower deprivation:

Generally happy with bars / restaurants / pubs

“The bars and restaurants aren’t bad, they bring people in over the weekend” **Male, 18-24, Low deprivation**

“We have some lovely pubs” **Small town, low deprivation**

Lower income / Higher deprivation:

More pubs, looking for bars/restaurants for younger/professionals to spend time

Although independent businesses are mentioned, chains would also be also welcome

“I leave the town if I want to go out for a drink” **Medium town, high deprivation**

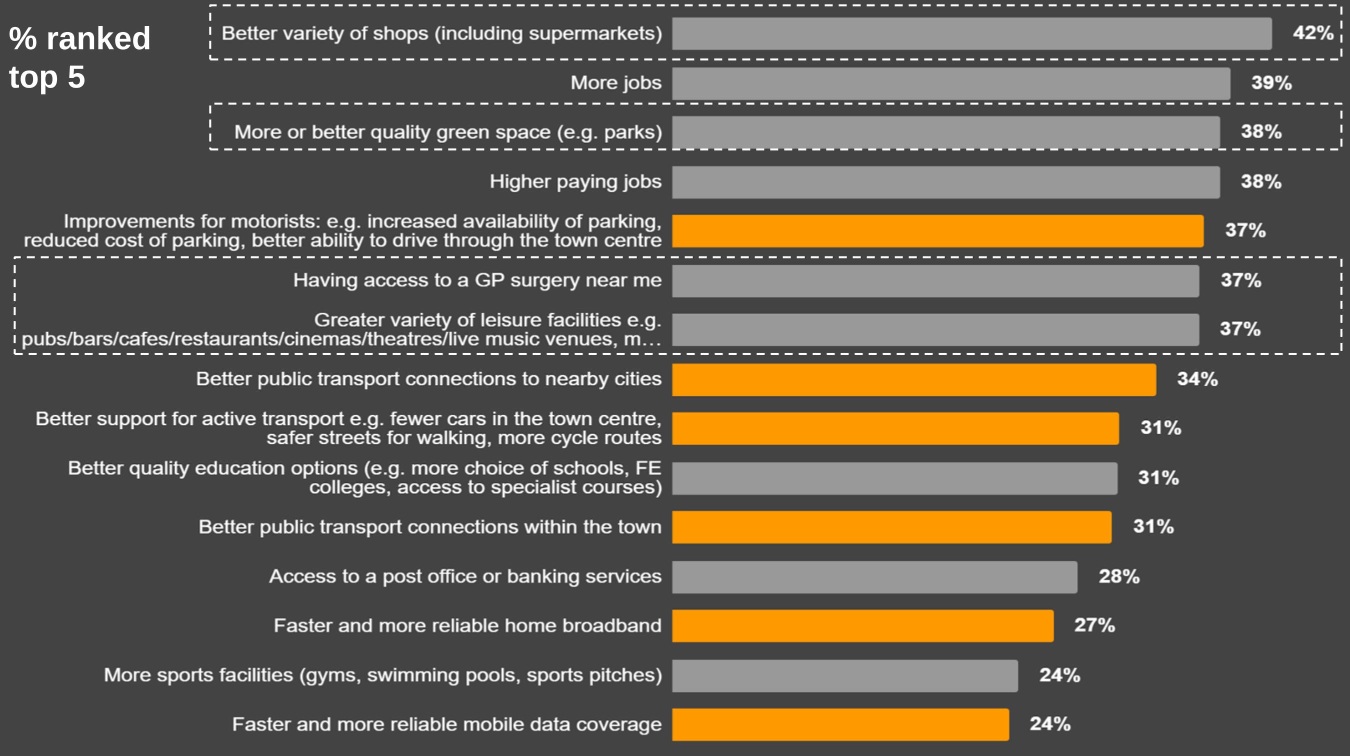
“An IKEA would make sense here, there’s enough people, it’s just the rates” **Small town, medium deprivation**

A better variety of shops and leisure facilities, green space and access to a nearby GP surgery were ranked as top priority areas for improvement by over a third of respondents

Having a better variety of shops (including supermarkets) was ranked as the top priority area for improvement by **42%** of respondents.

Better variety of shops is significantly more likely to be a priority in medium sized towns (45%), compared to large towns (38%) and in mixed towns (47%) compared to working towns (39%). It is also significantly more likely to be a priority in small town TTWA's (48%).

Greater variety of leisure facilities is significantly more likely to be a priority in low



C6. Please rank the following as priority areas for improvement in your town?
Base: 2,637

Building a sense of community and providing a space for families and teenagers is the key focus for amenities

The key priority for improving amenities is to build a sense community, especially for families and teens

Examples of good community activities:	**How these could be improved:**
Going well: public footpaths and accessible green space	Currently nowhere for kids to ride their bike / play outside
	"I have noticed even at my age that there's nowhere for me and my mates to have a kickabout, never mind for kids" **Small town, low deprivation**
Low deprivation - local pantomime, safe environment	Craft / farmers markets, nearby towns have street parties
	"I see the community events in Boldmere and it just seems such a waste not to have them here" **Large town, low deprivation**

Sports facilities were ranked as a low priority overall, however they are high in towns that don't have them

For young people to hang out / stay out of trouble

"There's no old-school boxing clubs or anything like that where young lads can get off the street without costing loads of money" **Medium town, high deprivation**

Gyms can bring jobs

"I work in the fitness industry, it's ideal on my doorstep" **Male, 45+, Low deprivation**

"My mum's a spin instructor and she's always had to work out of town" **Medium town, high deprivation**

Services in areas are important, however they are only considered a priority for improvement when they are unable to meet needs

Education - Important for the town as a whole:

Considered important everywhere, but only a high priority in areas without schools / good schools

It's important for the town as a driver for people to stay and raise their families, creating community

Also able to improve opportunities for young people in their area

"I wouldn't think about moving, I want my kids in the school here" **Large town, medium deprivation**

"Why would anyone bring their family here when there's no high school" **Medium town, high deprivation**

GPs - Important for individuals:

Low priority when access to a GP is good, however other concerns are spontaneously raised

This includes concerns over funding for GPs, sentiment that it is hard to get prescriptions

GPs aren't the only relevant service - dentists were also mentioned

"Our GPs combined to make one big one, super easy access" **Large town, low deprivation**

"I think there are staffing problems, we just can't seem to get GPs here" **Small town, medium deprivation**

Post offices and banks - Important for others:

These amenities weren't a priority for respondents, but most felt they were essential to older people

There is a feeling that the demographic that needs these services is small and diminishing

Some considered travelling a little further to these services acceptable

"The banks are a bit further out now, but not really a priority" **Medium town, low deprivation**

"Banks are a bit redundant, the demographic that needs them is de-creasing" **Large town, medium deprivation**

For many, priorities aren't based on individual needs, but on what would benefit the town as a whole - young adults still consider good schools important, those who bank online still care about branches for the elderly

Employment and Education

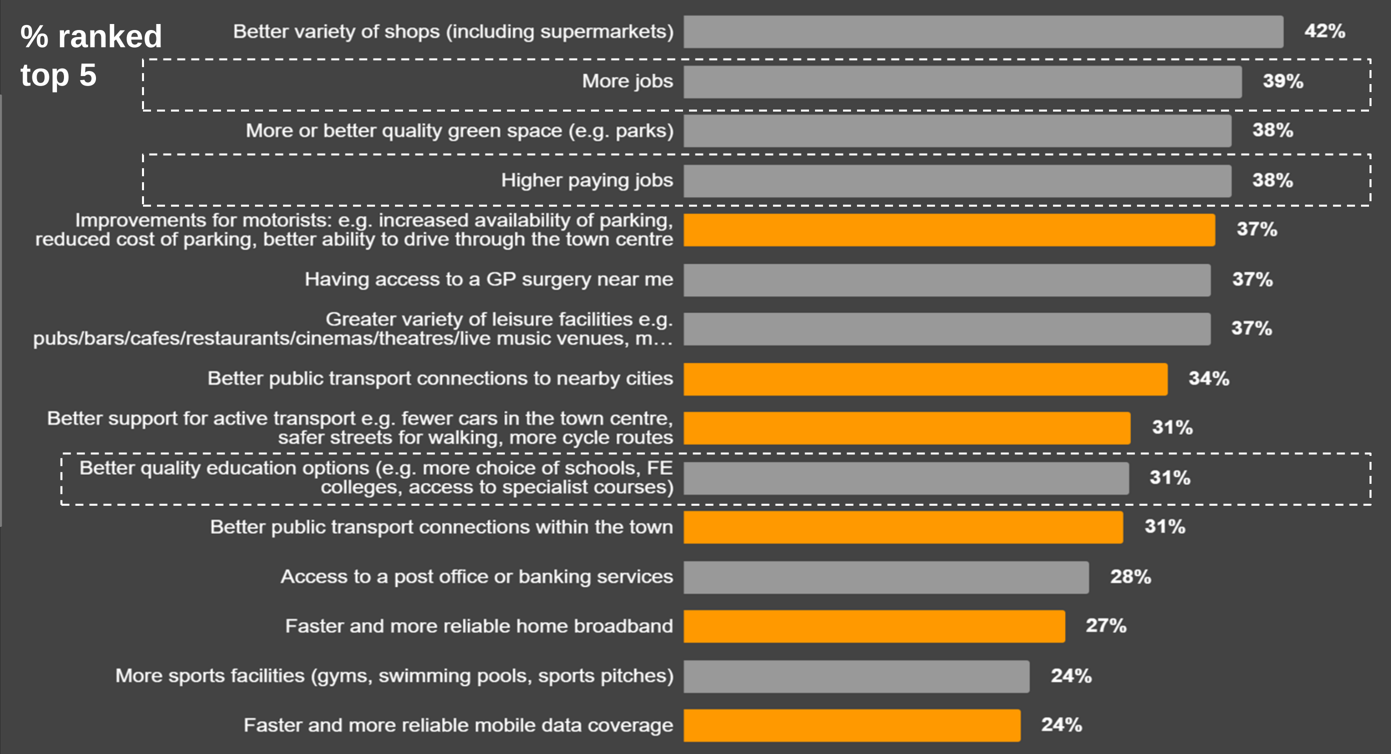
More jobs and higher paying jobs were ranked second and fourth as priority areas for improvement, particularly amongst residents in high deprivation areas and large towns

More and higher paying jobs were ranked as priority areas for improvement by at least

38% of respondents.

Better quality education is significantly more likely to be a priority among 18-44 year olds and parents with children 5-18

More jobs and higher paying jobs is significantly more likely to be a priority in high deprivation areas and also in large towns



Relates to infrastructure

Relates to amenities/jobs

C6. Please rank the following as priority areas for improvement in your town?
Base: 2,637

More jobs and higher paying jobs are a higher priority in more deprived areas, which has been exacerbated by the pandemic

Less deprived, happier to travel for work

Level of deprivation

High deprivation = more AND higher paying jobs

Why?

Few opportunities for locals, and no attraction for young professionals / families

"There's not a lot of jobs apart from service, you'd need to move or have a long commute." **Medium town, High deprivation**

Medium deprivation = higher paying jobs for locals

Why?

Linked to house prices - many feel priced out of the area / underpaid compared to London

"It seems wages are low compared to the rest of the country, I'll have to move out to buy which is a bit sad" **Medium town, low deprivation**

Low deprivation = more jobs for students/young people

Why?

No appetite for increasing industry, but small businesses employing students / grads welcome

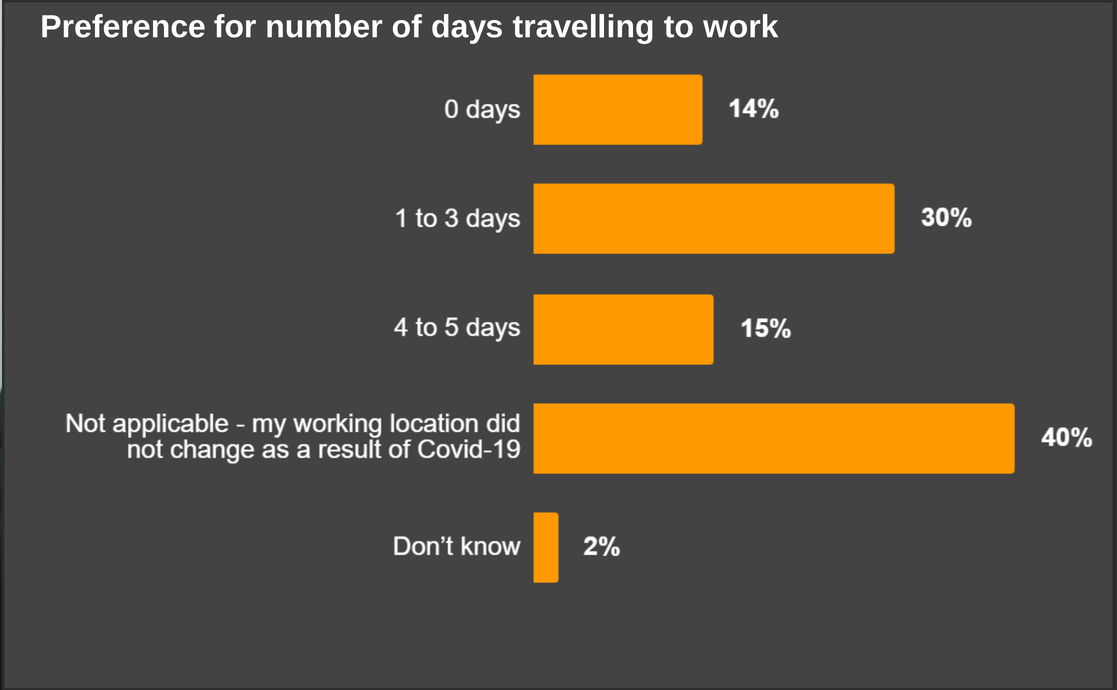
"You don't move here for a high paid job, you know you need to travel" **Small town, low deprivation**

Desire for more / higher paying jobs

Towns that rely on airport, travel, or tourism have struggled with jobs during the pandemic, however there is no expectation that this situation will be permanent

"We've been hit hard by the airport shutting, but I reckon the jobs will be back after Covid" **Large town, medium deprivation**

Following on from the pandemic, three in ten respondents would prefer to travel to their workplace one to three days per week with 14% not wanting to travel to work at all



C7. If your working pattern has changed as a result of the Covid-19 pandemic, which of the following would you prefer to do in the future?
Base: Respondents that work (1,813)

Respondents living in large towns (compared to small towns) and working towns (compared to residential towns) are more likely to want to work from home all of the time

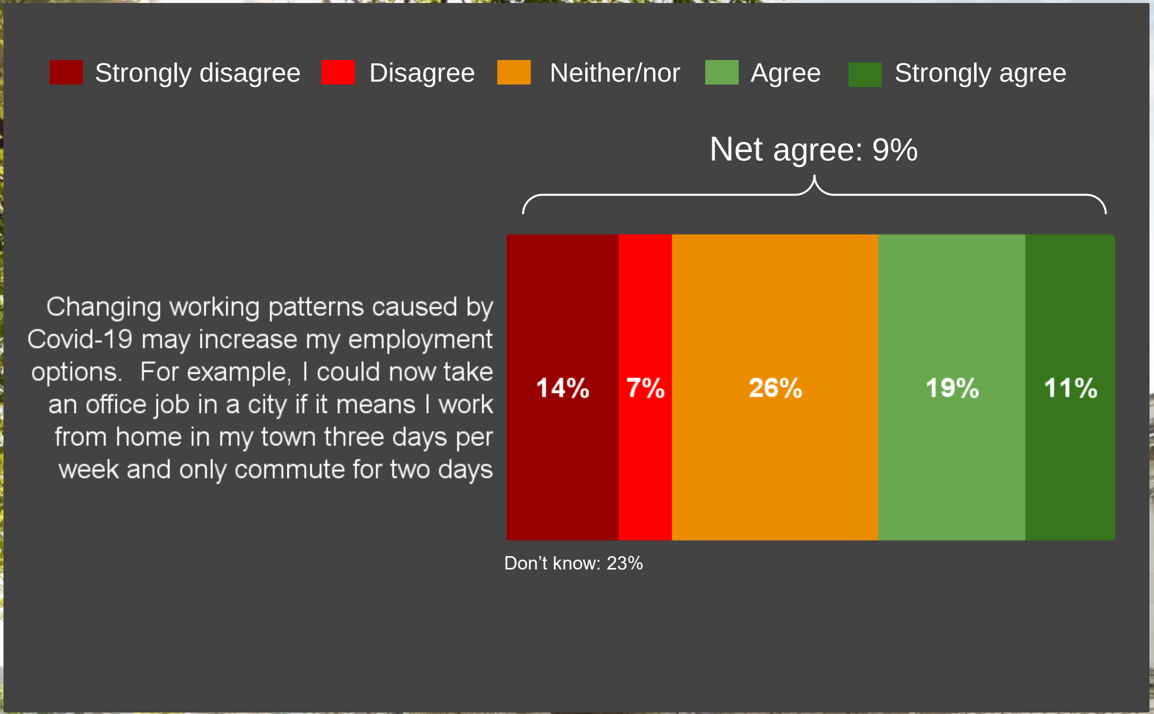
Preference for number of days travelling to work

	Size of town			Job density		
	Small	Medium	Large	Residential	Mixed	Working
0 days	11%	12%	17%	10%	14%	15%
1-3 days	33%	31%	28%	37%	29%	28%
4-5 days	12%	17%	14%	14%	16%	14%
Not applicable - my working location did not change as a result of Covid-19	43%	39%	38%	37%	40%	41%

	Income (deprivation)			TTWA			
	Low	Medium	High	Rural	Small town	Large town	Major conurbation
0 days	13%	14%	14%	11%	12%	15%	13%
1-3 days	34%	30%	28%	30%	29%	30%	31%
4-5 days	11%	15%	17%	17%	16%	12%	17%
Not applicable - my working location did not change as a result of Covid-19	40%	41%	39%	42%	41%	41%	37%

C7: Base: Small town (442); medium town (724); large town (665). Residential (410); working (1,055); Mixed (366). Low deprivation (538); medium deprivation (355); high deprivation (937). Rural TTWA (80); small town TTWA (233); large town TTWA (926); major conurbation TTWA (592).

The pandemic may well open up opportunities with three in ten respondents agreeing that changing working patterns may increase employment options



Groups who are more likely to agree overall include:

- 25-34 year olds: 40%
- 35-44 year olds: 44%
- Grade A: 47%
- Parent with pre-school children: 43%
- Parent with children aged 5-18: 41%
- Frequent users of public transport: 34%
- Frequent users of train: 40%
- Large towns (32%) vs. small towns (26%)

Groups who are more likely to disagree overall include:

- 55-64 year olds: 28%
- Grade D: 29%
- Parent with children over 18 years: 25%
- Non users of public transport: 28%

C8. To what extent do you agree or disagree with the following statement?
Base: 2,637

The ‘home working hub’ trial was supported by just over four in ten respondents in return for rapid rollout of ultrafast broadband

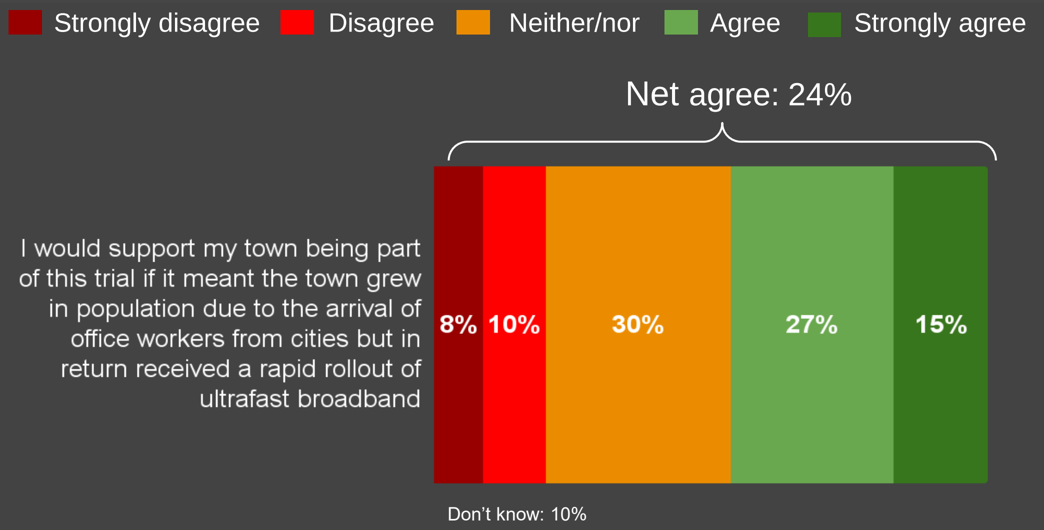
Groups who are more likely to agree overall include:

- Males: 45%
- Grade A: 60%
- Parent with children aged 5-18: 48%
- Frequent users of public transport: 45%
- Frequent users of trains: 50%
- Large towns (44%) vs. small towns (36%)

Groups who are more likely to disagree overall include:

- Parent with children over 18 years: 23%
- Less frequent users of public transport: 25%
- Less frequent users of trains: 23%

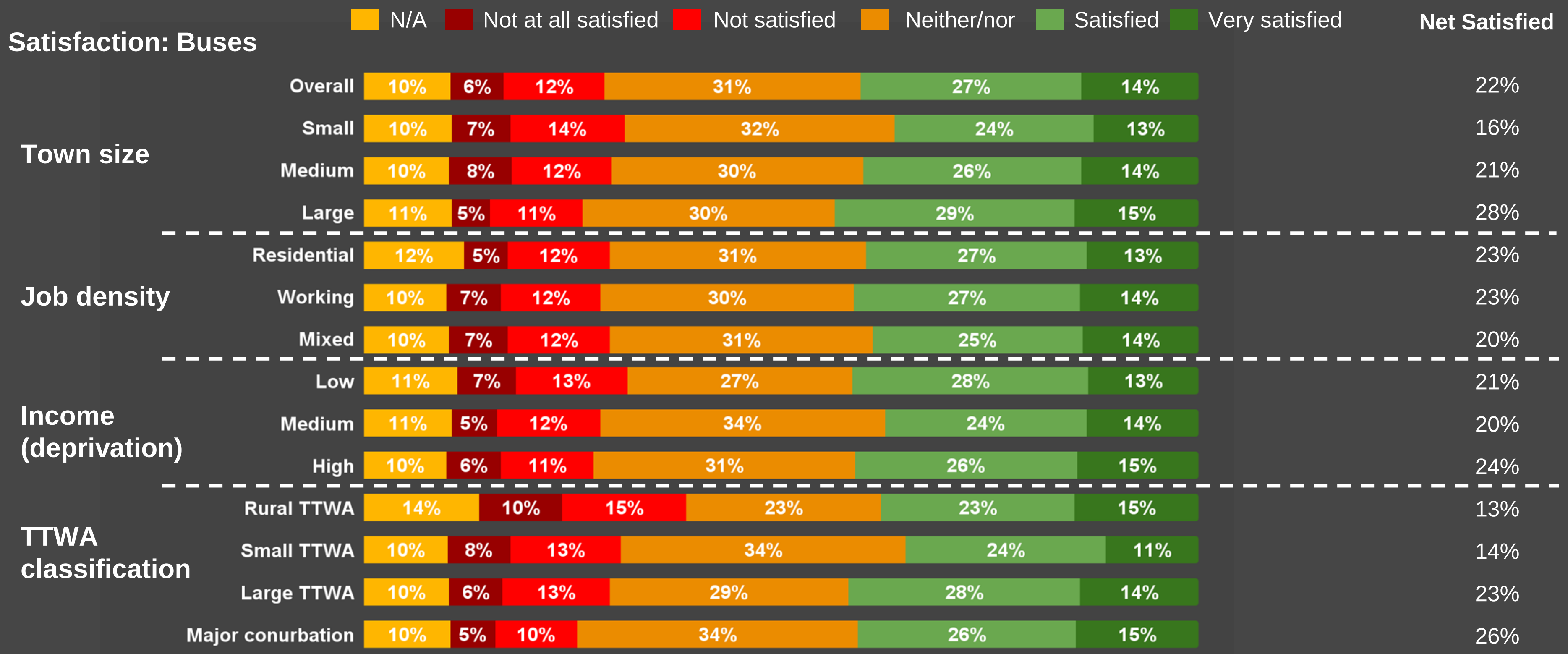
The Covid-19 pandemic has changed the way that some people work, and these changes may or may not be permanent. This may mean we need to trial new ways of working to suit the new situation. For example, we might trial making some towns ‘home working hubs’ where the town receives a rapid roll out of full-fibre broadband in return for setting up ‘co-working’ spaces in the town centre, where office workers can work without commuting into a city.



C9. To what extent do you agree or disagree with the following statement?
Base: 2,637

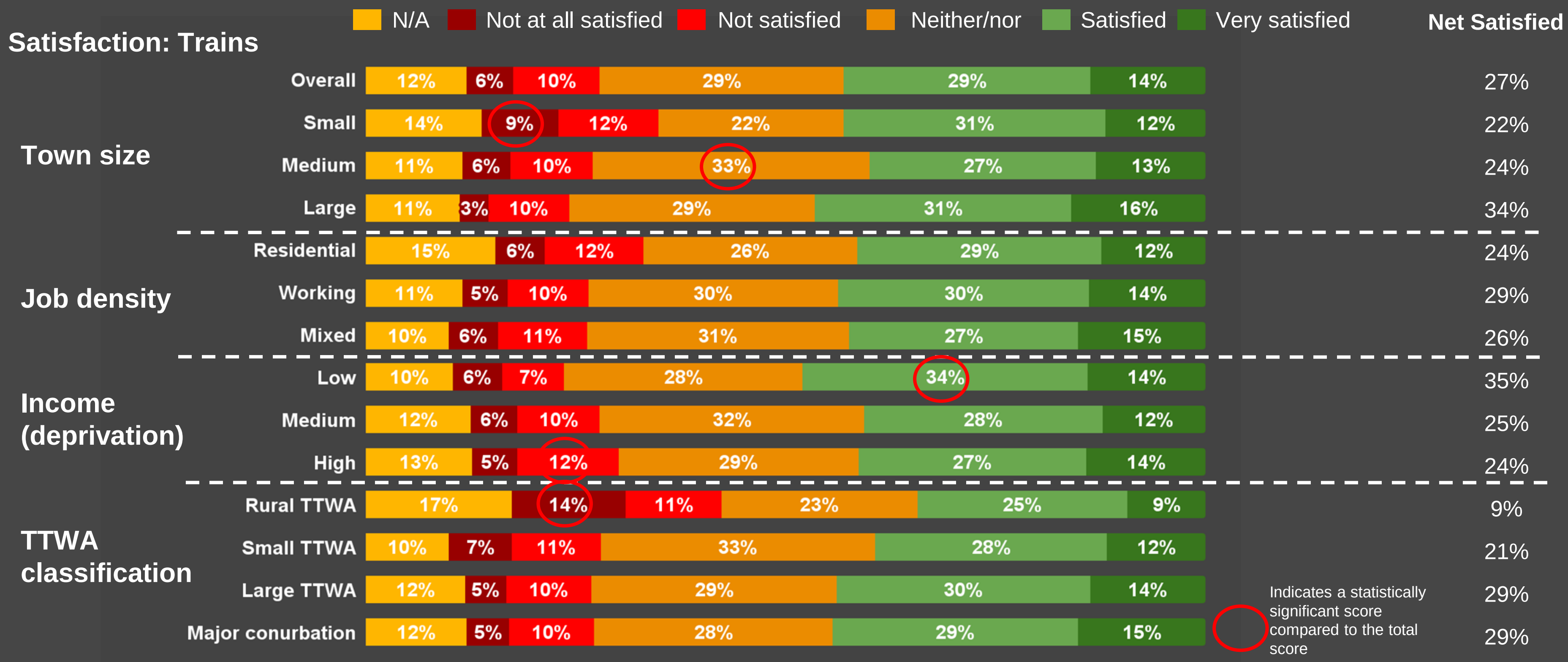
Appendix 1: Towns survey - detailed slides

Respondents in large towns show slightly lower dissatisfaction levels with buses



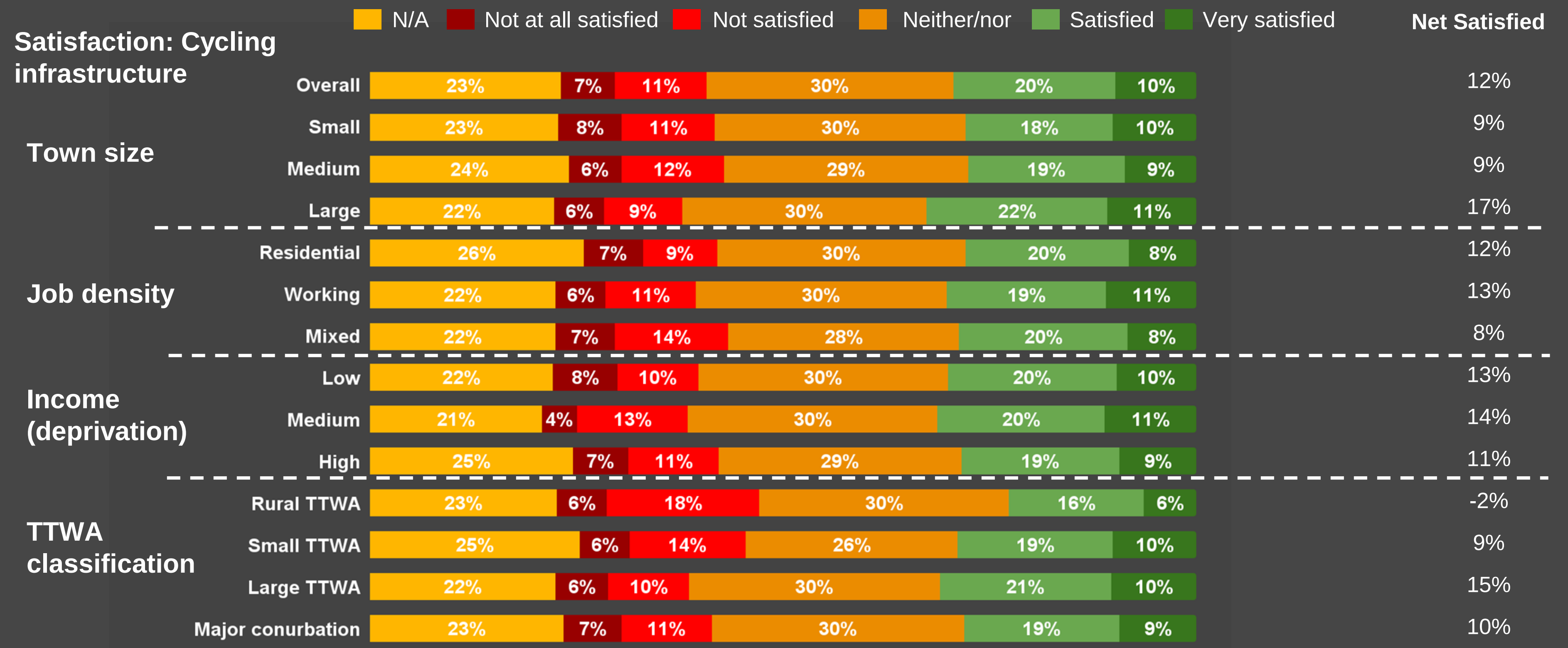
C3. To what extent are you satisfied with the following services where you live?
Base: Small town (613); medium town (1,090); large town (934). Residential (558); working (1,529); mixed (550). Low deprivation (731); medium deprivation (516); high deprivation (1,390). Rural TTWA (129); small town TTWA (325); large town TTWA (1,329); major conurbation TTWA (854).

Respondents in small towns show higher levels of dissatisfaction with trains whilst those in low deprivation towns show higher levels of satisfaction



C3. To what extent are you satisfied with the following services where you live?
Base: Small town (517); medium town (1,074); large town (1,046). Residential (459); working (1,652); mixed (526). Low deprivation (620); medium deprivation (523); high deprivation (1,494). Rural TTWA (152); small town TTWA (368); large town TTWA (1,363); major conurbation TTWA (754).

Respondents in rural TTWAs show higher levels of dissatisfaction with the cycling infrastructure



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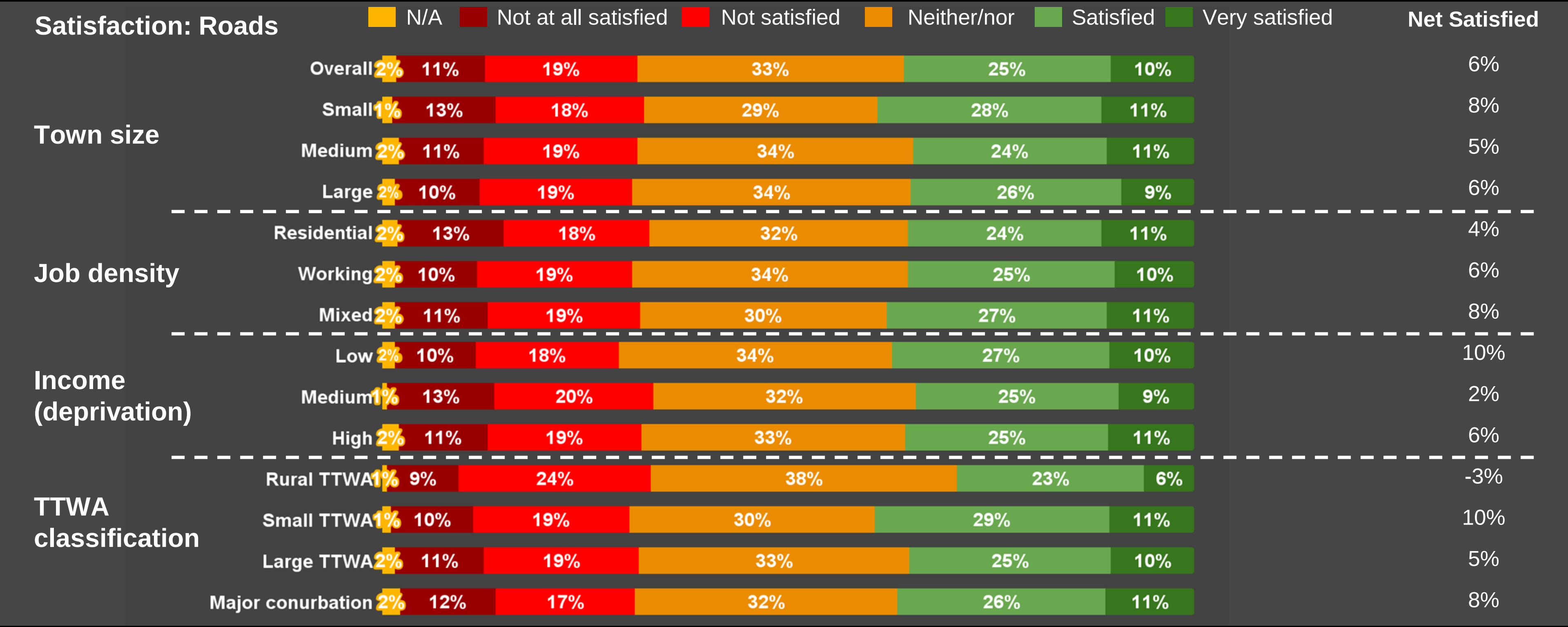
Satisfaction with roads is broadly similar across the different town categories, however those from low deprivation areas and small TTWAs are more likely to be 'net satisfied'



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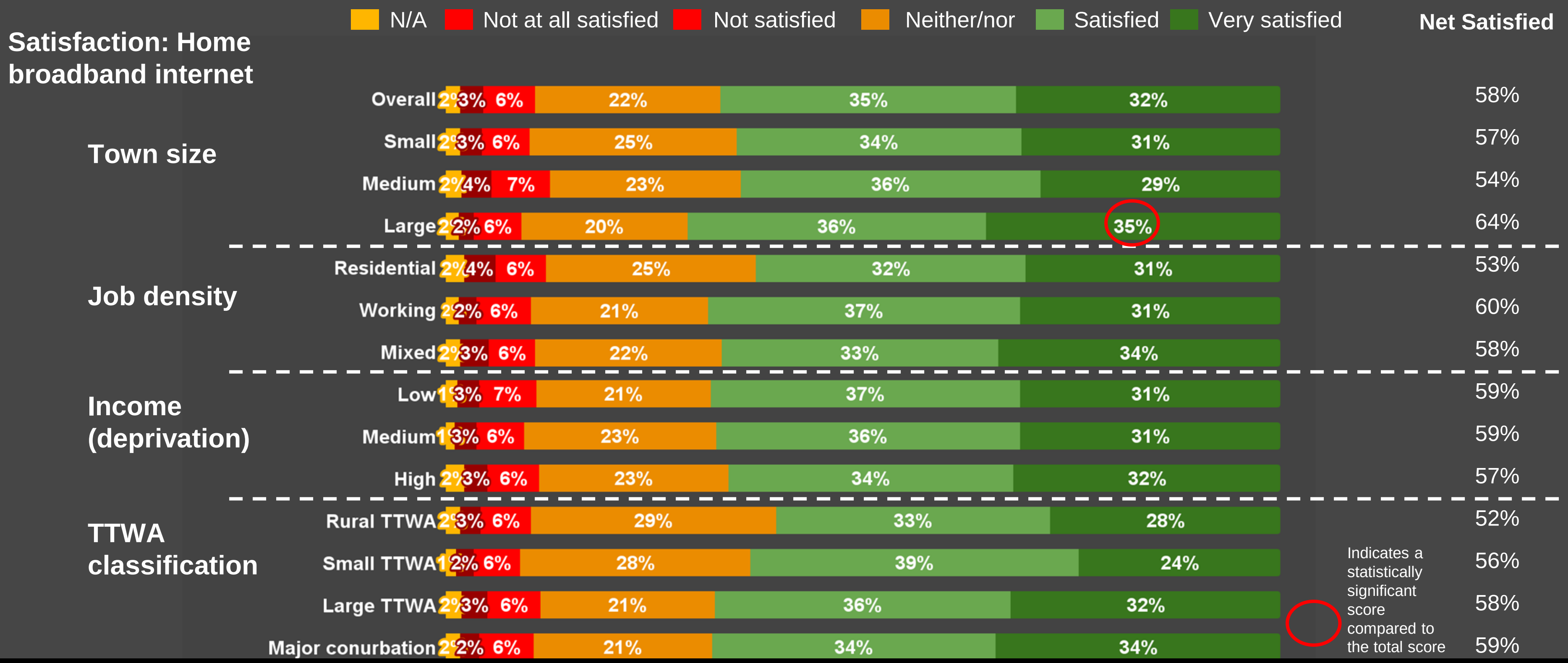
Respondents in large towns are more satisfied with home broadband internet and those in medium towns and small TTWAs show lower levels of satisfaction



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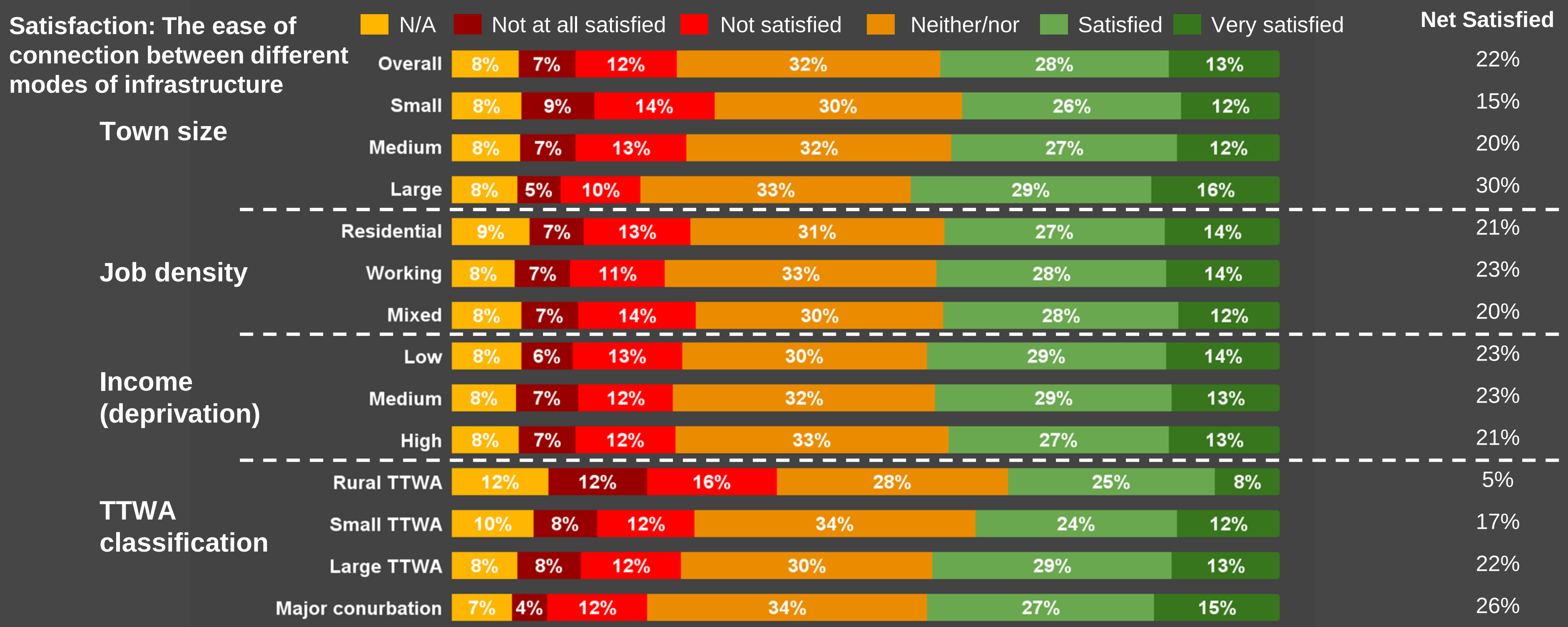
Those in large towns and major conurbation TTWAs show lower levels of dissatisfaction with the ease of connections between different modes of infrastructure



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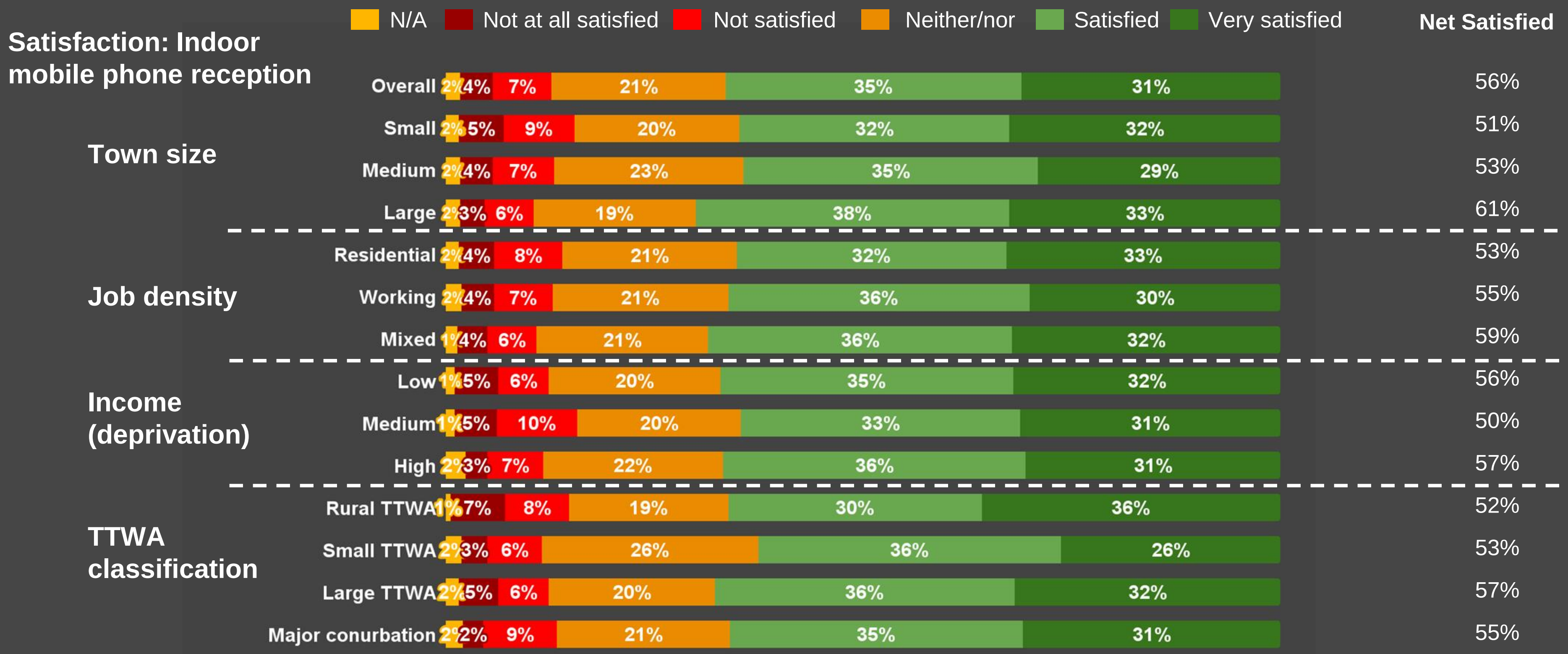
Satisfaction with indoor mobile phone reception is similar across the different town categories



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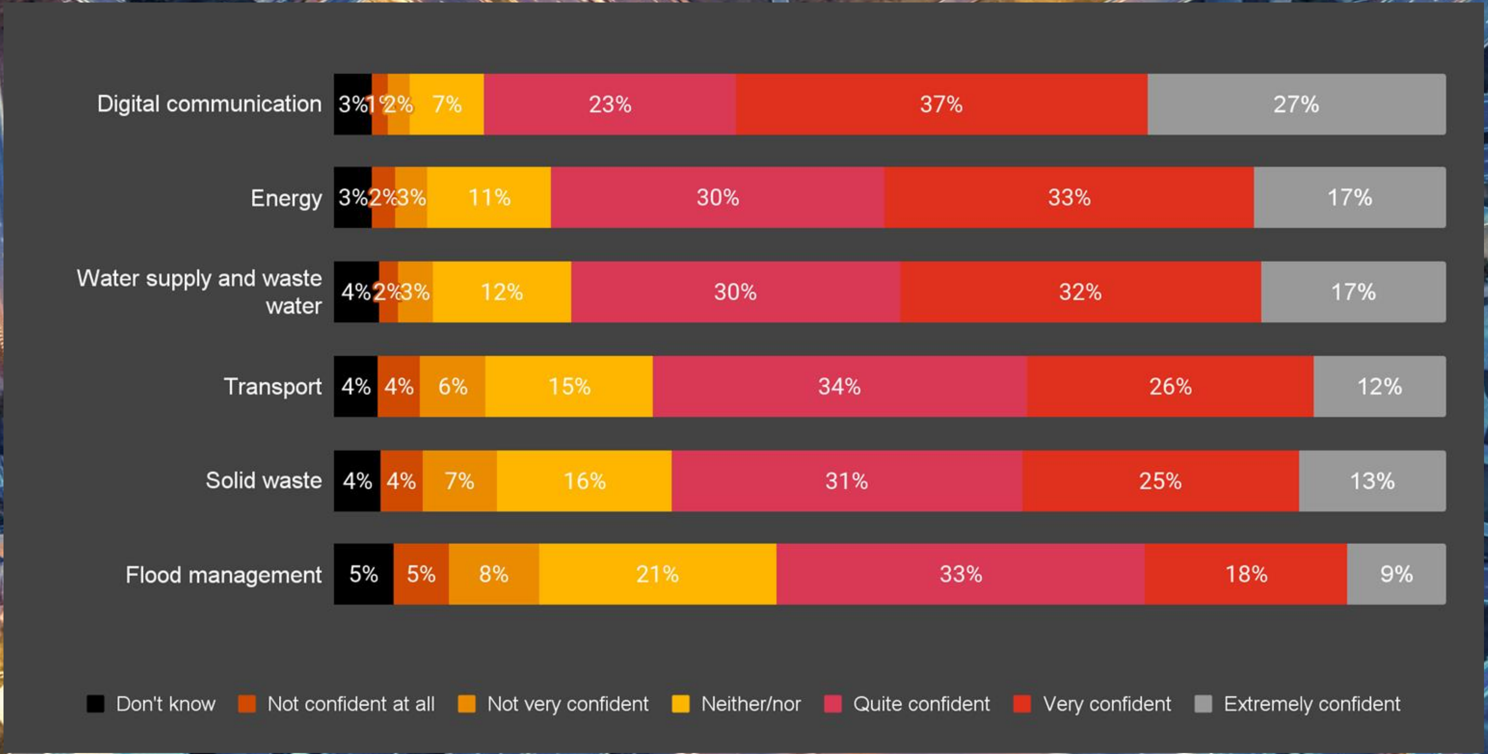
Respondents in large towns are more satisfied with their mobile phone data service

C3. To what extent are you satisfied with the following services where you live?
Base: Small town (613); medium town (1,090); large town (934). Residential (558); working (1,529); mixed (550). Low deprivation (731); medium deprivation (516); high deprivation (1,390). Rural TTWA (129); small town TTWA (325); large town TTWA (1,329); major conurbation TTWA (854).

Appendix: NIA2 data for towns in England

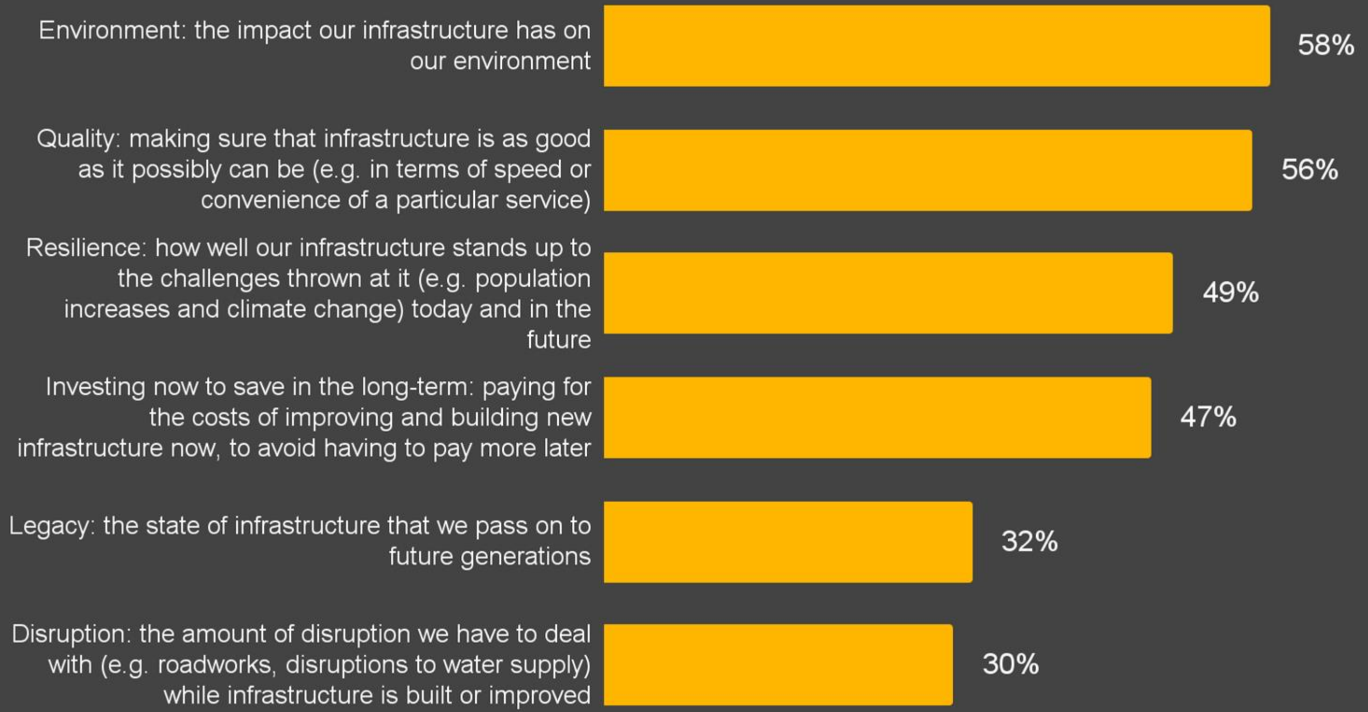
Respondents were most confident in the digital infrastructure and least confident in flood management



B3. Thinking about the next 30 years, how confident are you, if at all, that each of the following forms of infrastructure in the UK will meet our needs? Base: (2637)

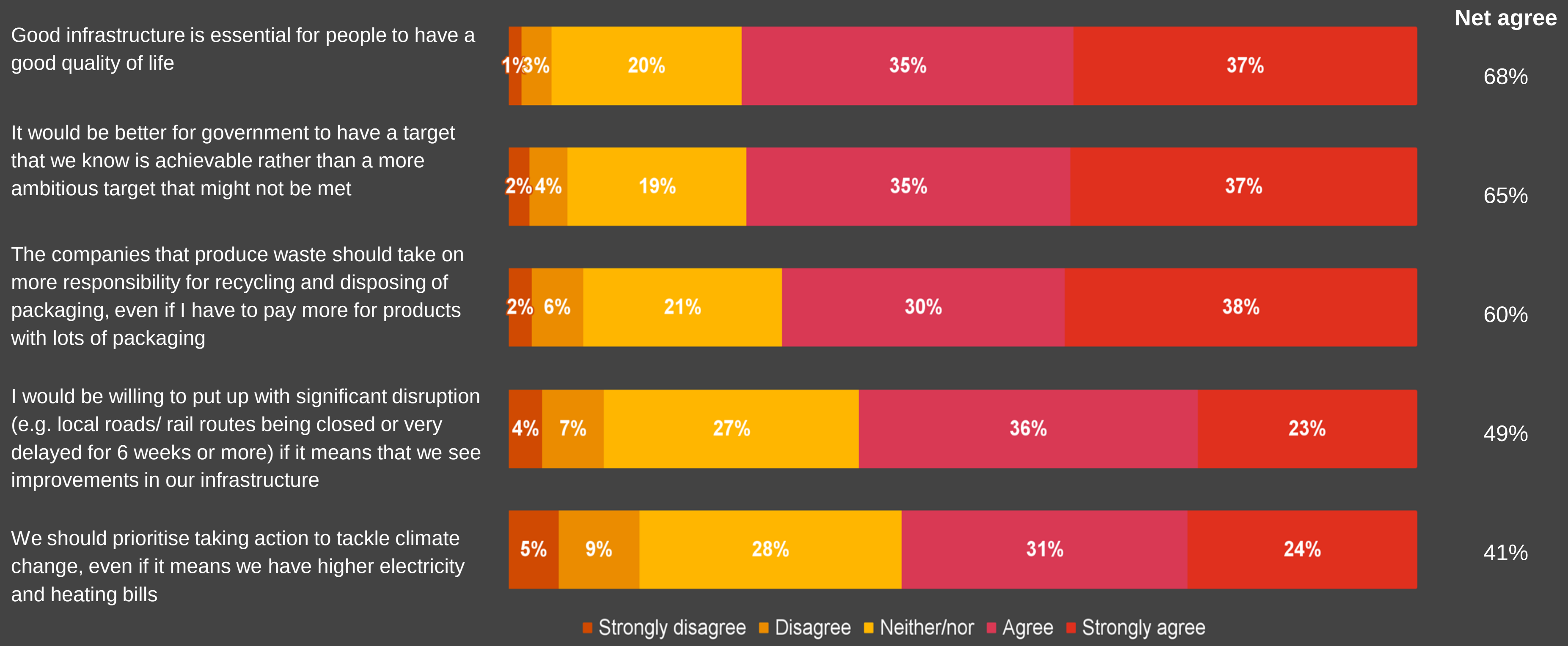
The environment and quality were the two main factors that respondents prioritised in relation to NIC's future planning

Ranked top 3



B4. The NIC is putting together a plan for what the UK's infrastructure should be like in 30 years time. When putting together this plan, which of the following factors do you think are the most important to consider? Base: (2637)

Nearly three in four agree that good quality infrastructure is important for quality of life



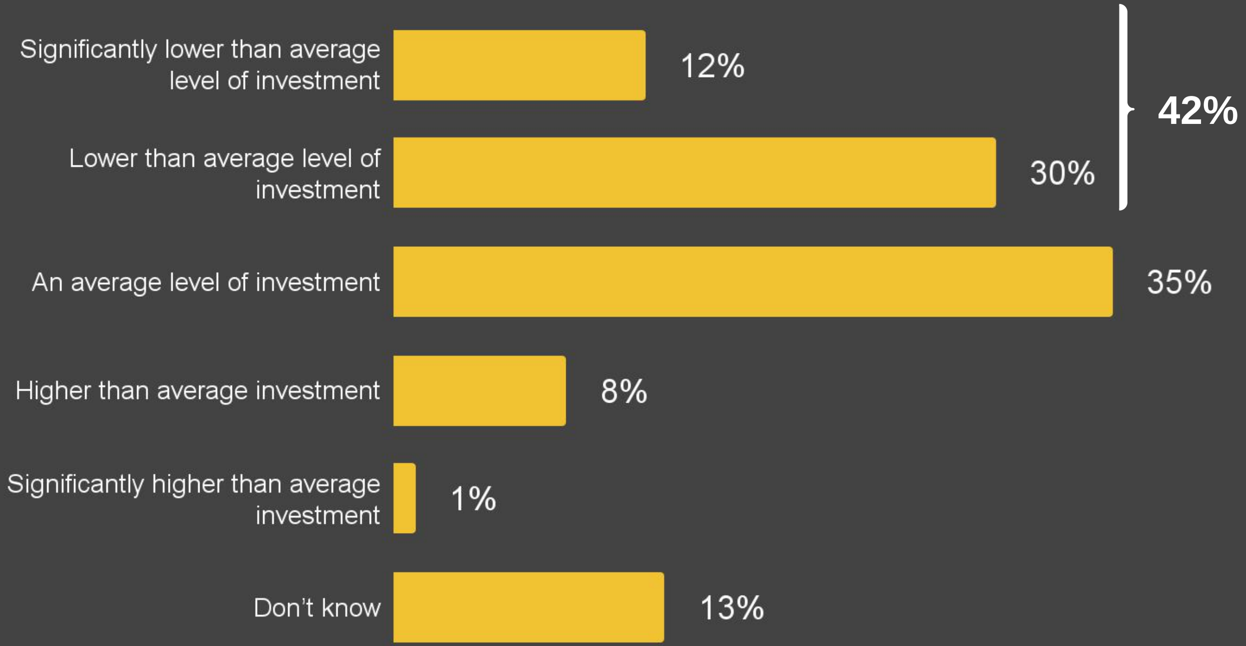
B5. To what extent do you agree with: Base: (2637)

Around two-fifths of people living in towns prioritised combating climate change as an important part of the vision for UK infrastructure in 30 years’ time

Ranked top 2

B6. The following statements all outline a ‘vision’ for the UK’s infrastructure in 30 years time. Please select your two most preferred statements Base (2637)

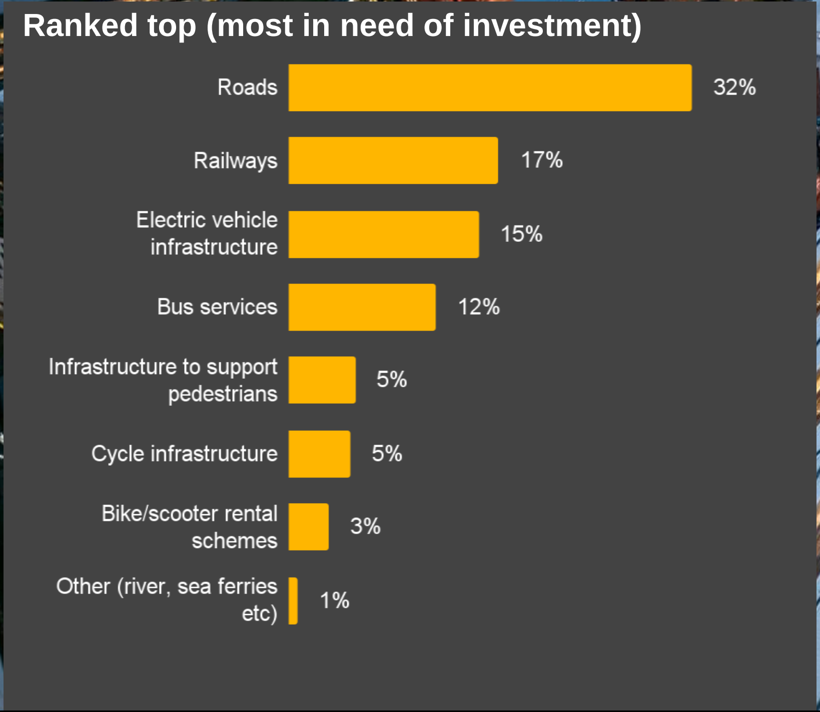
Two-fifths feel their region receives lower than average level of infrastructure investment



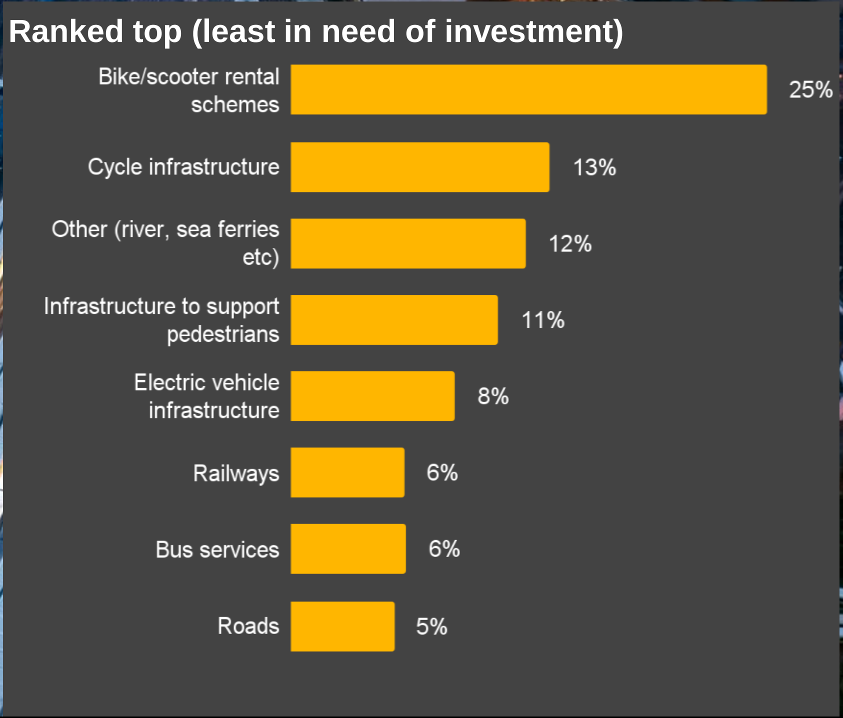
B7. Thinking about the balance of infrastructure investment across the UK, how much do you think your region receives? Base: (2637)

Roads, railways and electric vehicle infrastructure are viewed as most in need of investment - bike/scooter rental schemes less so

Most in need of investment

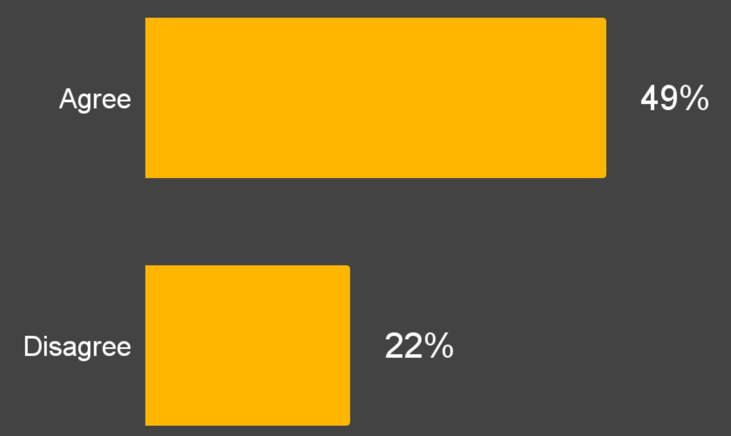


Least in need of investment



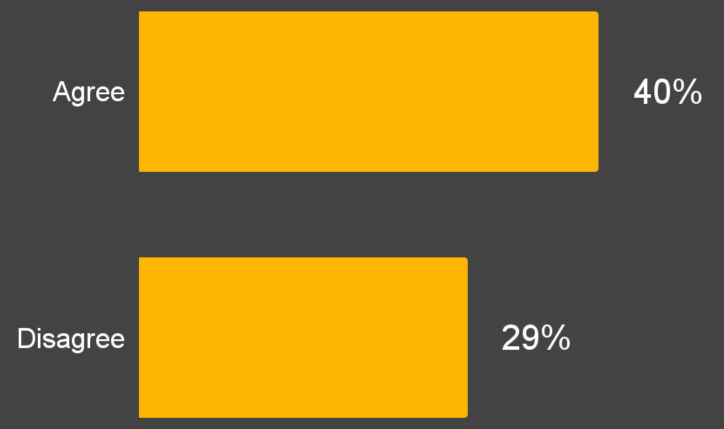
B8a. Thinking about the current state of transport in the UK, which of the following areas of transport do you think are in need of the most investment? Base: (2637)

A substantial proportion of respondents in the Towns survey would be willing to pay a levy each year for flood protection and nature-based solutions



Neither/nor: 26%; Don’t know: 4%

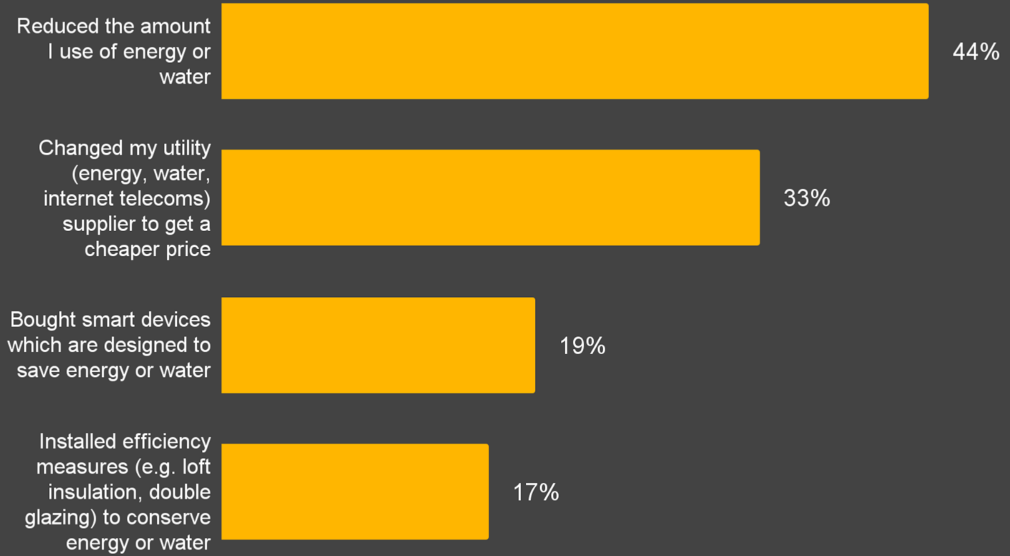
B9. I would be willing to pay £10 more per year towards protecting people from the impacts of flooding, even if my household is not at risk Base: (2637)



Neither/nor: 28%; Don’t know: 3%

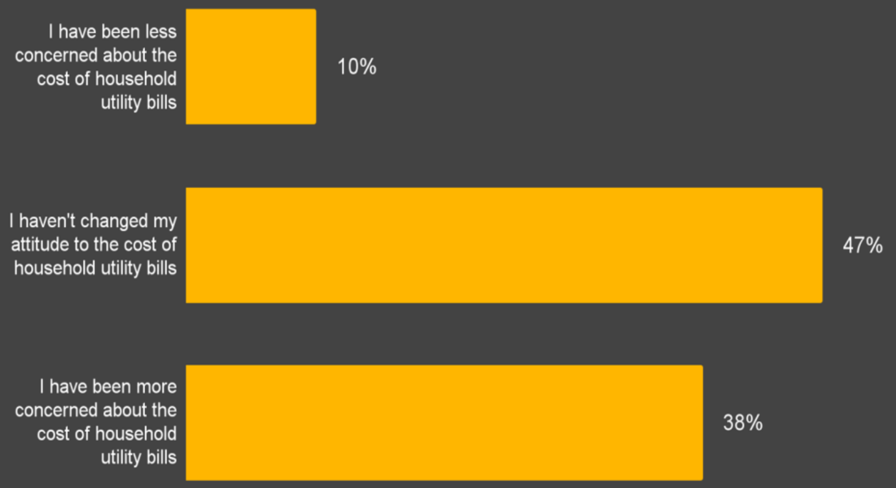
B10. I would be prepared to pay £20 more on my annual water bill for nature-based solutions Base: (2637)

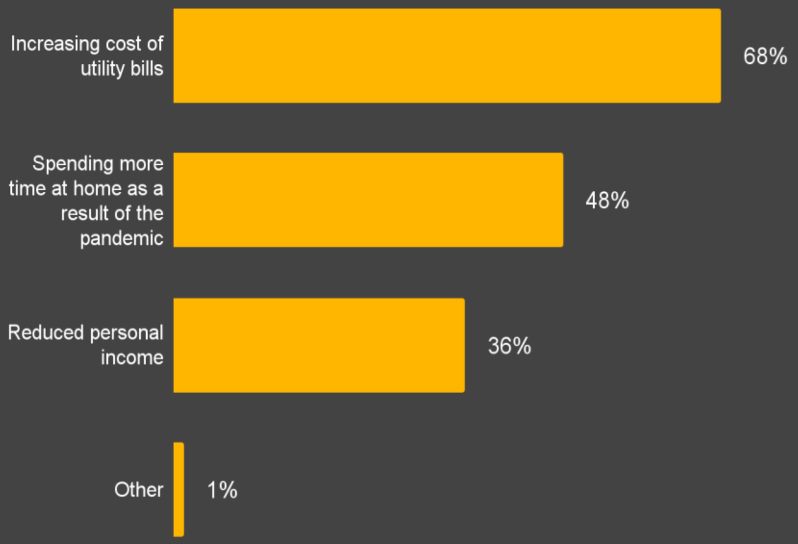
One in five say they have bought a smart device to save energy or water in the past year



B11. Have you undertaken any of the following over the past year? Base: (2637)

A substantial proportion (two in five) have become more concerned about household bills over the last year

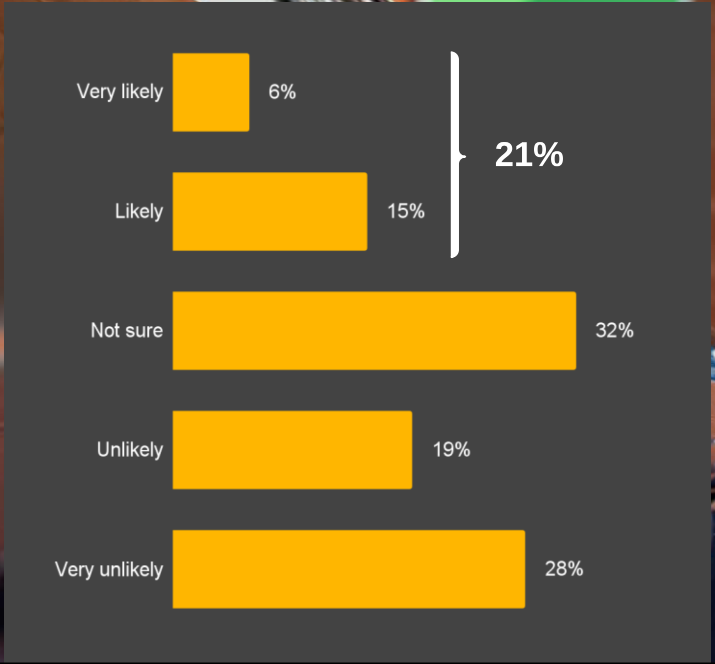




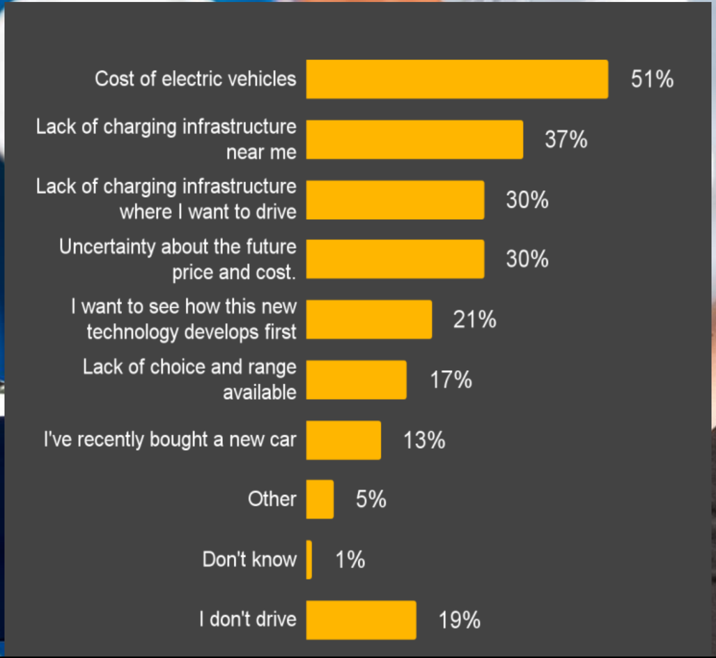
B12. Which of the following statements best describes your view, over the last year, towards household utility bills (energy, water, internet and telecoms)? Base: (2637)
B13. Which of the following reasons have led to you being more concerned? Base (1021)

Only a fifth say they are likely to buy an electric car in the next five years. Half say they are unlikely to buy due to cost

How likely are you to purchase an electric vehicle in the next 5 years?

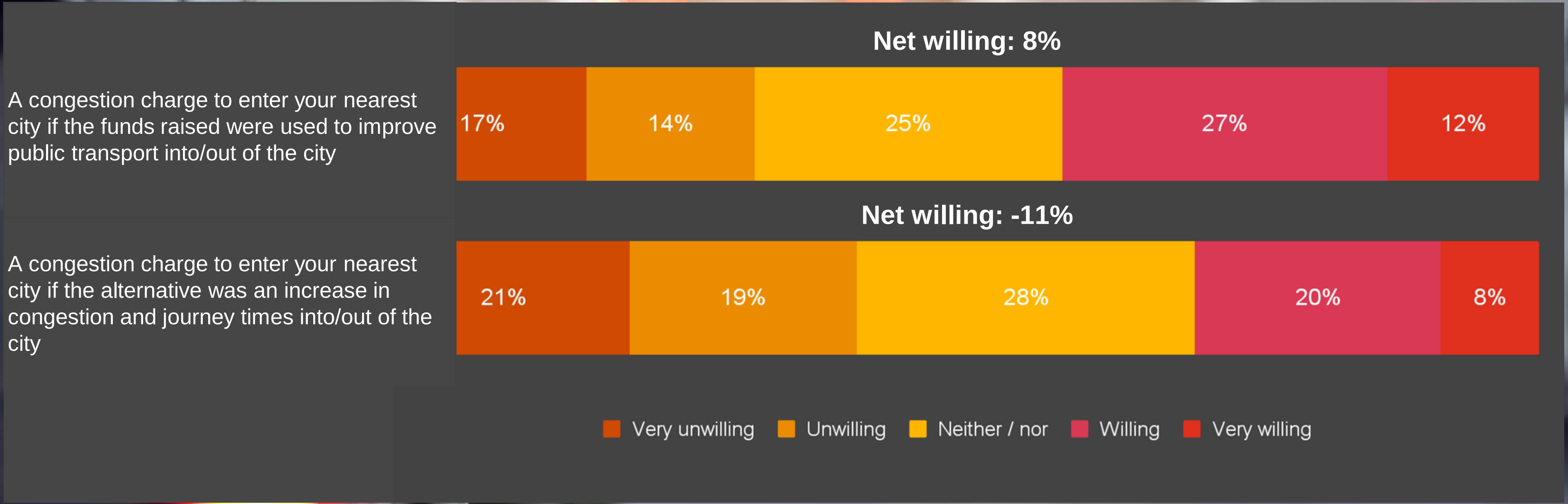


Why are you unlikely to purchase an electric vehicle in the next 5 years?



B14a. The government has set a timetable to ban the sale of petrol and diesel cars by 2030. How likely are you to purchase an electric vehicle in the next 5 years? Base: (2637)
B14b. Why are you unlikely to purchase an electric vehicle in the next 5 years? Base: (1233)

Two-fifths say they are willing to pay a congestion charge if funds were raised to improve public transport



B15. How willing would you be to accept: A congestion charge to enter your nearest city if the alternative was an increase in congestion and journey times into/out of the city? Base: (2637)
B15. How willing would you be to accept: A congestion charge to enter your nearest city if the funds raised were used to improve public transport into/out of the city? Base (2637)

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