

DEMOS

THE FUTURE OF TOWNS

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DECEMBER 2020

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FOREWORD

Chris Hearld

Head of Regions, KPMG in the UK

“Much is talked about ‘left behind towns’ and a lot of it by people in cities – this report aims to change that.”

At KPMG, we’re working with businesses right across the country every day, with offices across the regions and a client base that operates within all the different types of towns we identified in our report. We wanted to hear from them, and people living within towns, to find out more about their ambitions and concerns for their area.

After all, it is private enterprise which will help towns grow their economies and bring jobs to communities. That’s why I was so keen to find out what business investors thought about the future of towns. What would it take to expand operations? What do business look for in deciding where to bring new jobs?

When we ran our focus groups with business leaders, many business leaders we spoke to were familiar with the challenges facing towns highlighted by the Demos research. What else did business tell us?

Above all else, businesses need long-term certainty on public investment. Why? For business, choosing their location is a long-term investment; in staff, operations and relationships. They aren’t just looking at the here-and-now. Knowing that public investment in local infrastructure won’t be reversed in the future is crucial for strengthening business confidence.

Skills matter. Alongside infrastructure, skills will be an increasing priority for business in deciding where to base their operations. And to retain talent,

a town must be able to show it can offer a good quality of life – whether that is affordable housing, a vibrant cultural scene, or easy access to local amenities.

Covid provides an opportunity to revive towns. In the short term, clear challenges remain for local businesses affected by the pandemic. But the displacement caused by Covid, with more people staying local and working from home, may well increase the importance of towns and encourage a shift in amenities towards towns rather than cities.

Business needs to recognise the role it can play in finding a common vision. As local employers, businesses are part of the community and must step up beyond the boundaries of their normal operations. Where the connectivity between a town and its major employers works well the private sector can make a huge difference – to skills, infrastructure and an overall sense of identity and confidence. Over the last decade, particularly in the North of England, I’d say that impact has happened more in the cities. Maybe now the levelling up agenda provides the opportunity for the towns and their major employers to start working together to foster that relationship to mutual benefit.

But it won’t just happen. Towns can be more active in shaping their growth in the next ten years and business will be an important part of that. I want to be a part of that. I support the recommendations in this report.

EXECUTIVE SUMMARY

People in towns are split into two groups with diametrically opposing views on what the future of the places they live should look like.

Around half belong to 'Group A': excited by the prospect of newcomers from cities and other countries, worried about the ageing population of many towns, demanding more houses be built, supportive of jobs of any type coming to their town, prioritising private and public amenities above a sense of community, and public transport links into nearby cities above public transport within the town.

Around half belong to 'Group B': concerned about the impact of newcomers on the character of their town, relaxed about the ageing population, more sceptical about housebuilding, unconvinced of the merits of new highly paid jobs if they go to people with no prior connection to the town, placing a higher priority on a sense of local community and a lower priority on amenities and links to cities.

We started this project in the early months of 2020, with the aim to get under the skin of what people in towns want the future of their towns to look like. Our findings outline the challenges of uniting people in towns behind any particular vision of the future.

The future for towns seems even more uncertain now than it did at the start of this project, before the Covid-19 pandemic. The pandemic poses existential risks to local businesses in towns across the country, some of which are the lifeblood of their local communities. On the other hand, a shift towards remote working - together with the promise of large-scale investment in towns as part of the government's "levelling-up" agenda - could be a once-in-a-generation opportunity for towns.

This report touches on the impact of the pandemic regarding the future of towns, but looks to go deeper. We develop a new typology of towns, and provide in-depth analysis of the challenges facing different town types. We analyse how people talk about their towns online and draw out people's revealed preferences, and what they say about their towns when unprompted and unguarded. We elicit attitudes and suggestions from, and test those same attitudes and suggestions with, people in towns - and we unpick how different attitudes hang together and what could build consensus between different groups. And we talk to business leaders from across the country about our findings, and explore the values and motivations that underpin their decisions around where they invest, and what would attract them to invest in a town or towns in future.

We find:

- Different towns have different needs: ex-industrial towns face particular challenges and should be a priority for investment.
- However, there is surprisingly little variation by town type in terms of preferences regarding the future of their town.
- That's not to say people in towns are united behind a clear vision of what they want their towns to look like: they are simply divided within towns rather than between them.
- Designing policies for the future of towns that unite people in them will be a tough task. Different groups are diametrically opposed across many areas.
- Attitudes regarding diversity will be a key issue to address - half of the population are very open to new people coming into their towns, half are strongly opposed.

- Most people are keen for jobs to come to their towns, but a surprisingly substantial minority are consistently opposed to a range of job types. Creating jobs in a way that is seen to preserve the identity of the town and employs people with an existing connection to the town will be important in developing support for change.
- People say they want a say in how decisions are made about their local area, but are much less likely to say they're willing to give up their spare time to contribute to doing so.
- There is clear majority support for building affordable housing and policies that benefit first time buyers (and obstruct buy-to-lets) - but it goes from consensus to controversy if you add any downsides to the housing (be it low quality and cheap, high quality and expensive, or built on a Green Belt).
- There are areas of consensus that can be used as the start of a conversation about the future of towns. People are agreed on prioritising problem areas in towns such as litter and graffiti; anti-social behaviour; homelessness; they want a traditional high street with independent shops; making driving easier is the key transport priority; proximity to green spaces is prioritised above everything else.
- Enhanced focus on the natural beauty of the landscape of towns where this is a feature, and enabling greater access to and appreciation of it, may increase people's pride in, commitment to, and ultimately enjoyment of, the town they live in.
- The Covid pandemic presents opportunities as well as great dangers. Pubs and restaurants are the lifeblood of towns. When people talk about going somewhere or doing something, they are most likely talking about pubs and restaurants. When they recommend their towns to visitors or new residents, they talk about pubs and restaurants. They are the locus of the community, a source of pride, and the star attraction - and the pandemic poses an existential threat to them.
- On the other hand, the pandemic has helped people connect with their local communities - and the shift to more remote working represents a once-in-a-generation opportunity.

- Business leaders want to see long-term certainty and commitments to public investment decisions beyond a single electoral cycle in order to build trust to invest in towns.
- Local government needs to engage both businesses and the public in conversation about the future of their towns. They must communicate both inspiring visions and hard truths - there is a path to an exciting future, and attempts to simply preserve the status quo will lead only to decline.

Drawing on our findings, we make 12 recommendations to progress towards a brighter future for towns, informed by meaningful engagement with the people who live there:

Recommendation 1: Town leaders must engage their residents and local business leaders in an open, participatory conversation about the future of the high street. This should be informed by relevant economic analysis (see Recommendation 2) to ensure citizens are aware of the trade offs and costs associated with their desired high street model.

Recommendation 2: Processes to determine the future of the high street must be informed by a rigorous economic assessment of the potential, or lack thereof, for retail and substitute sectors in that town.

Recommendation 3: Central government investment in towns should be conditional on buy-in from the local community and business leaders.

Recommendation 4: Local governments should look out for and encourage any post-pandemic trends towards investment in their area.

Recommendation 5: Local governments should help mutual aid groups who wish to to establish themselves as more formal organisations (while remaining light touch).

Recommendation 6: Further research should be conducted to understand what motivations and values underlie attitudes regarding identity and diversity within towns, and how these can be reconciled.

Recommendation 7: Towns leaders should make the social integration of long standing residents and newcomers a priority.

Recommendation 8: Further research should be undertaken to understand what types of jobs town residents desire, and what drives opposition to new jobs among some town residents.

Recommendation 9: A review should examine the potential for empty high street shops to be converted into homes, appropriately weighing the pros and cons.

Recommendation 10: Build support for new homes in towns, with the goal to facilitate an increase in the availability of affordable housing and homes for first-time buyers.

Recommendation 11: The government should use upcoming planning reform to empower local communities to shape housebuilding decisions in their local area.

Recommendation 12: The upcoming Devolution White Paper should, where possible, seek to preserve autonomy for town councils to implement decisions made at a combined authority level in the way they see fit.

CHAPTER 1

DIFFERENT TOWNS

FACE DIFFERENT

PROBLEMS

DEMOS

The recent focus in our political discourse around the experience of people in towns is historically unusual. There has traditionally been comparatively little analysis of towns. What analysis there has been has come fairly recently, with the 2017 advent of the influential Centre for Towns, and the Conservatives' victory in northern towns (that had once been Labour heartlands) in the 2019 general election precipitating greater interest.

A TYPOLOGY OF TOWNS

Towns and their constituents are by no means monolithic, and analysis that has assumed they are has done them a great disservice.

In order to understand the needs and experiences of different types of town, we developed a typology reflecting the characteristics of different town types.

The typology is based on the 2011 ONS Local Authority Area Classification.¹ This is produced on the basis of a cluster analysis of 59 Census statistics. This grouped the whole of the UK into 8 supergroups, 16 groups and 24 subgroups. Our typology combines these to produce 5 types of area, and then looks at the towns within these areas. A full overview of the methodology used to devise our typology can be found in Appendix One.

Towns were split into the following categories:

- **Affluent towns:** towns of this type are more prosperous, older, and less ethnically diverse than average, and are more likely to be found in rural areas.
- **Coastal towns:** towns defined by their coastal geography, they tend to be older than average.
- **Ex-Industrial towns:** towns whose traditional industries have disappeared. A greater proportion of people here work in manufacturing, but also face problems of unemployment and wider social issues, as we will show.
- **Rural towns:** towns in rural areas that are less well off than affluent towns and do not have a coastline.
- **Hub-and-spoke towns:** comparatively urban towns that are often satellite towns of bigger cities, or are hub towns with their own satellites. These towns have higher levels of ethnic diversity.

1. Office of National Statistics. 'Pen portraits for the 2011 Area Classification for Local Authorities'. Office of National Statistics, 24 July 2018. Available at: <https://www.ons.gov.uk/methodology/geography/geographicalproducts/areaclassifications/2011areaclassifications/penportraitsandradialplots> [Accessed 19 November 2020]

FIGURE 1.

SUMMARY OF DEMOS' TYPOLOGY FOR TOWN TYPE CLASSIFICATION

Town type	Resident population	Percentage of town population	Number of towns	Examples
Affluent towns	7,319,084	24%	270	Guildford, Colchester, Stockport, Newton Mearns
Rural towns	5,958,123	19%	326	Hereford, Taunton, King's Lynn, Dumfries
Hub-and-spoke towns	6,065,360	20%	152	Huddersfield, Worthing, Sutton Coldfield, Queensferry
Ex-industrial towns	9,581,880	31%	345	Doncaster, Darlington, Chatham, Kirkcaldy
Coastal towns	1,973,483	6%	89	Torquay, Newport, Scarborough

DIFFERENT TOWNS FACE DIFFERENT PROBLEMS

We analysed the make-up of, and challenges facing, different types of town across factors including income, work, skills and education, demography, health, housing, social mobility, crime and transport. Further detail on the analysis in this chapter can be found in Annex One.

Our findings demonstrate that needs and experiences vary vastly across different types

of town. Ex-industrial towns in particular face significant economic, demographic and social challenges, faring worst among all town types across the key metrics we examined (as displayed in Figure 2). Hub-and-spoke and coastal towns also appear to face significant challenges. But the picture looks extremely different for affluent towns, which performed above average for all the key metrics, with the same true of rural towns, though to a lesser extent.

Town type	Affluent towns	Coastal towns	Ex-industrial towns	Rural towns	Hub-and-spoke towns
Average income	relatively good performance	average performance	relatively poor performance	average performance	average performance
Low wage jobs	relatively good performance	relatively poor performance	average performance	average performance	average performance
Educational attainment	relatively good performance	average performance	relatively poor performance	average performance	relatively poor performance
Population growth	relatively good performance	relatively poor performance	relatively poor performance	relatively good performance	average performance
Health deprivation	relatively good performance	average performance	relatively poor performance	relatively good performance	relatively poor performance
Crime	relatively good performance	average performance	relatively poor performance	relatively good performance	relatively poor performance

FIGURE 2.

PERFORMANCE DASHBOARD ACROSS KEY ECONOMIC AND SOCIAL DOMAINS BY TOWN TYPE

- relatively good performance compared to other towns
- average performance for towns
- relatively poor performance compared to other towns

Our analysis shows:

In ex-industrial towns...

Average incomes after costs are much lower than average: £385 per week, compared with £520 in affluent towns, £544 in London, but higher than in non-London core cities (£355).²



FIGURE 3.
AVERAGE NET WEEKLY INCOME AFTER COSTS BY TOWN TYPE

Source: Demos analysis of ONS data

Employment deprivation is a measure of the proportion of a local population that are involuntarily excluded from work. This includes those that would like to work but are unable to, due to unemployment, illness, disability or caring responsibilities.

Ex-industrial towns appear likely to face significant challenges relating to employment deprivation,

with 34% of ex-industrial towns falling in the most employment deprived quintile. It is worth noting that hub-and-spoke and coastal towns also appear to have significant challenges here. This suggests these places are likely to have a disproportionately high number of people that are involuntarily out of work, bringing with it a range of social challenges.

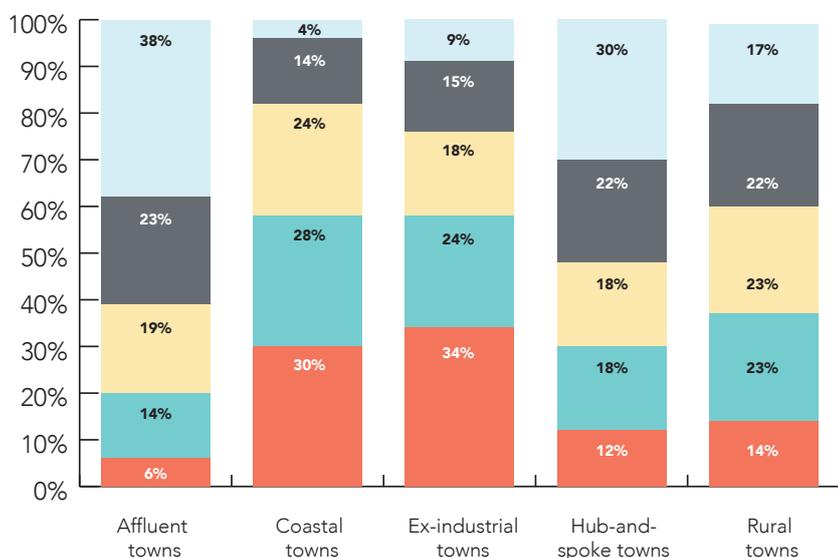


FIGURE 4.
TOWN TYPE BY EMPLOYMENT DEPRIVATION QUINTILES (WHERE 1 IS MOST DEPRIVED 20% OF ENGLAND)

Source: Demos analysis of English Indices of Deprivation 2019

- Most deprived 20%
- 20%-40%
- 40%-60%
- 60%-80%
- Least deprived 20%

2. Costs include housing costs, national insurance contributions, income tax payments, domestic rates/council tax, contributions to occupational pension schemes, all maintenance and child support payments.

Ex-industrial towns and, to a lesser extent, coastal towns, have also experienced a significantly lower than average population growth rate over this period. This suggests that ex-industrial and coastal towns may be failing to attract people to their area, in comparison to other places.

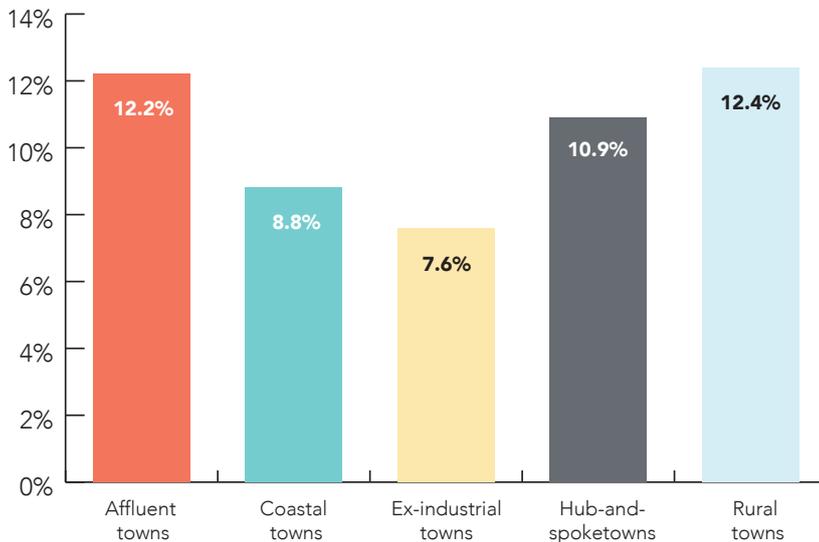


FIGURE 5.
PERCENTAGE GROWTH
IN POPULATION BY
TOWN TYPE IN ENGLAND
AND WALES, 2002-2018

Source: Demos analysis of
ONS mid-year estimates

In affluent towns...

Mean incomes after costs are much higher than average: £520 per week, compared with £385 in ex-industrial towns (see Figure 3 above). On average, the population is comparatively well-off across every area of analysis - though of course pockets of deprivation remain even in the wealthiest towns.

One potential area for concern for affluent towns is house price growth. Affluent towns have experienced a significant increase in house prices over the last decade, with house price growth in these places far outstripping other town types. Whilst this might be expected to benefit longstanding homeowners living in affluent towns, it could be causing a significant squeeze on living standards for low income renters and new arrivals in these places.

In coastal towns...

Low pay is a particular issue: 31% of workers are paid less than the living wage, as defined by the Living Wage Foundation - this compares with 25% of workers across the country.

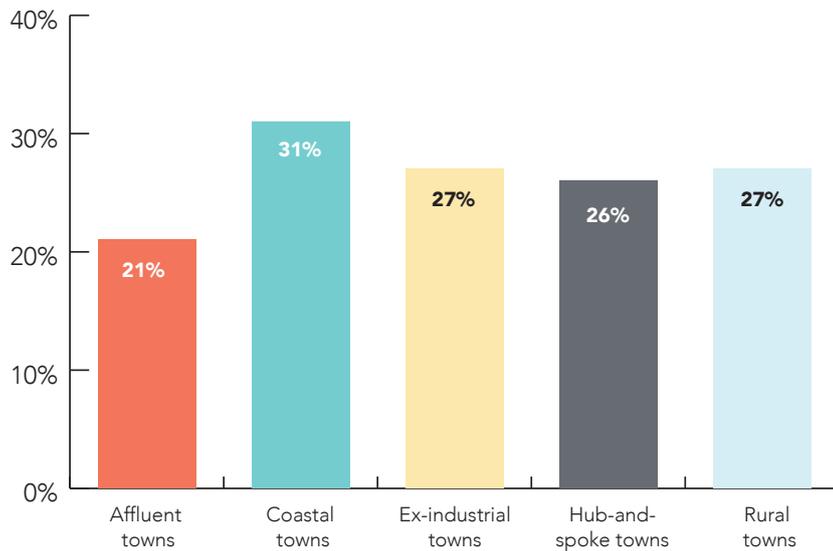
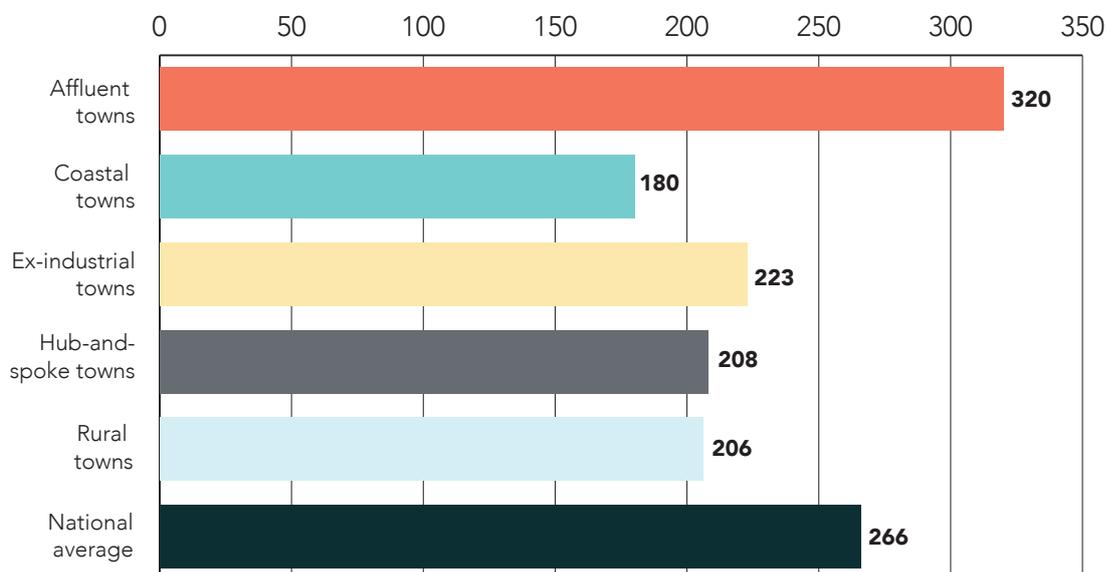


FIGURE 7.
PERCENTAGE OF JOBS THAT ARE PAID LESS THAN THE APPLICABLE LIVING WAGE FOUNDATION LIVING WAGE
Source: Demos analysis of Living Wage Foundation

Social mobility is also significantly lower than average in coastal towns, as measured by the government's Social Mobility Index - the worst of all town types, though this is a problem for every type of town except affluent towns.

FIGURE 8.
SOCIAL MOBILITY INDEX - OVERALL RANK BY TOWN TYPE (HIGHER IS MORE SOCIALLY MOBILE)
Source: Demos analysis of House of Commons Library



Finally, the higher education entry rate at age 18 is lowest of all town types in coastal towns. This suggests that those living in coastal towns may face significant barriers to accessing higher education, affecting their life chances.

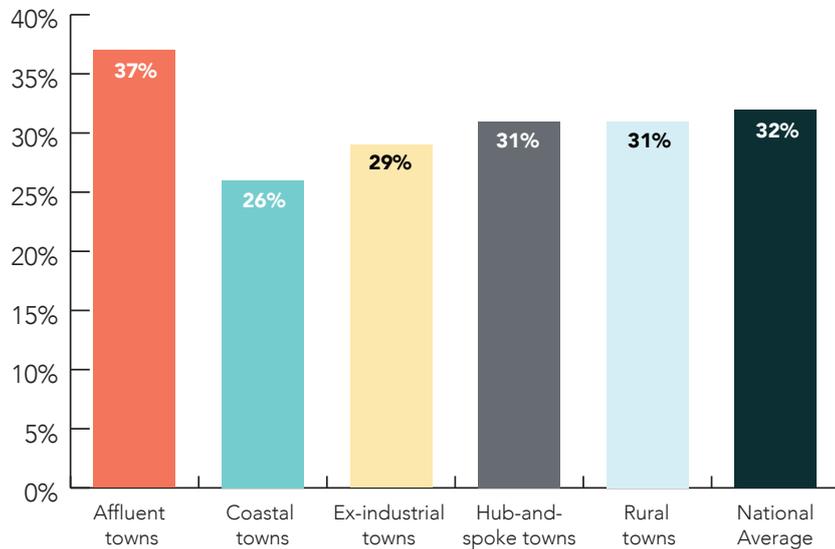


FIGURE 9.
HIGHER EDUCATION
ENTRY RATE AT AGE
18 BY TOWN TYPE,
ENGLAND AND WALES

Source: Demos analysis
of UCAS 2017 End of Cycle data

In hub-and-spoke towns...

Income Deprivation measures the proportion of a population experiencing deprivation relating to low income. As a result, it can give us a sense of poverty in a place, as opposed to average income which gives us a sense of overall affluence across the whole income distribution. This measure of

deprivation includes those that are out-of-work and those that are in-work on low income.

Hub-and-spoke and ex-industrial towns face significant challenges relating to income deprivation, with 30% and 29% of hub-and-spoke and ex-industrial towns respectively falling into the most income deprived quintile.

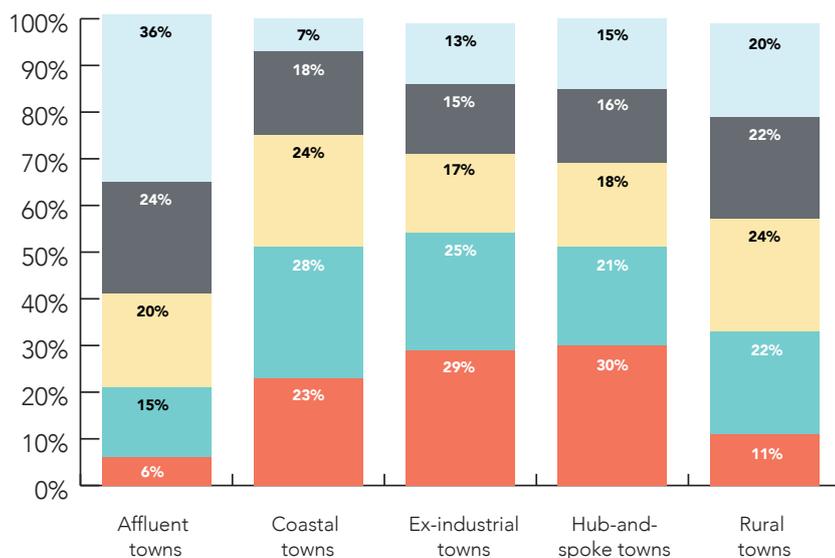
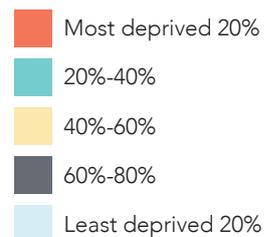
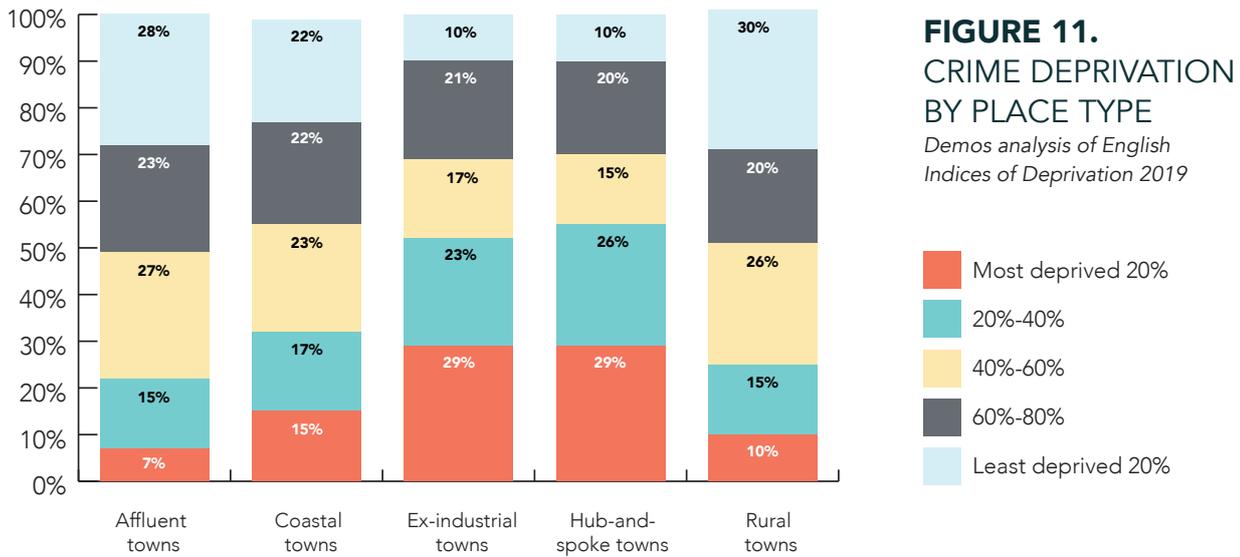


FIGURE 10.
ACUTE INCOME DEPRIVATION
IS MOST PREVALENT IN HUB-
AND-SPOKE TOWNS

Demos analysis of English
Indices of Deprivation 2019

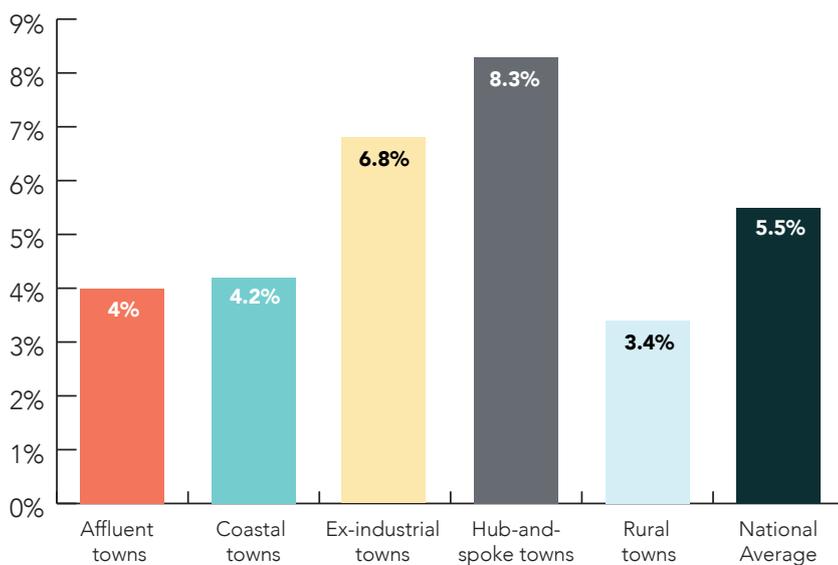


The Index of Multiple Deprivation crime score measures the risk of personal and material victimisation at a local level. On this measure hub-and-spoke towns and ex-industrial towns face much greater challenges relating to crime than other types of town, with rural and affluent towns seeing a significantly more rosy picture.



Residents of hub-and-spoke towns are much more likely than average to use buses to travel to work. The bus sector has been more significantly hit by funding cuts in recent years than other modes of transport, with a large number of routes

lost and significant fare increases.³ This means that residents in hub-and-spoke towns could be disproportionately affected by higher transport costs and a poorer service.



3. Campaign for Better Transport. 'Charity reveals extent of bus funding cuts, and how new funding settlement could reverse the decline'. Campaign for Better Transport. Available at: <https://bettertransport.org.uk/future-of-bus-funding-oct-2019> [Accessed 19 November 2020]

In rural towns...

The average resident's age has increased by five years between 2002 and 2018, from 39 to 44, the biggest increase of any town type - though towns across the spectrum have an ageing population (unlike cities, which have seen no change in median age over the same period). These significant increases in the median age could be putting a strain on local services for older people in rural and coastal towns.

	Median age in 2002	Median age in 2018	Change
Affluent towns	38	41	+3
Rural towns	39	44	+5
Hub-and-spoke towns	37	38	+1
Ex-industrial towns	38	40	+2
Coastal towns	43	47	+4

FIGURE 13.
RURAL TOWNS ARE THE FASTEST AGEING (AGEING BY TOWN TYPE, GREAT BRITAIN)

Source: Demos analysis of ONS data

In addition, whilst the picture generally looks rosier for rural towns than all other town types (except affluent towns), our analysis shows they have seen the smallest increase in the higher education entry rate in recent years. Rural towns today enjoy a

higher education entry rate close to the national average today. This data suggests that unless action is taken to boost the higher education entry rate in these places, the position of rural towns in this respect may decline in years to come.

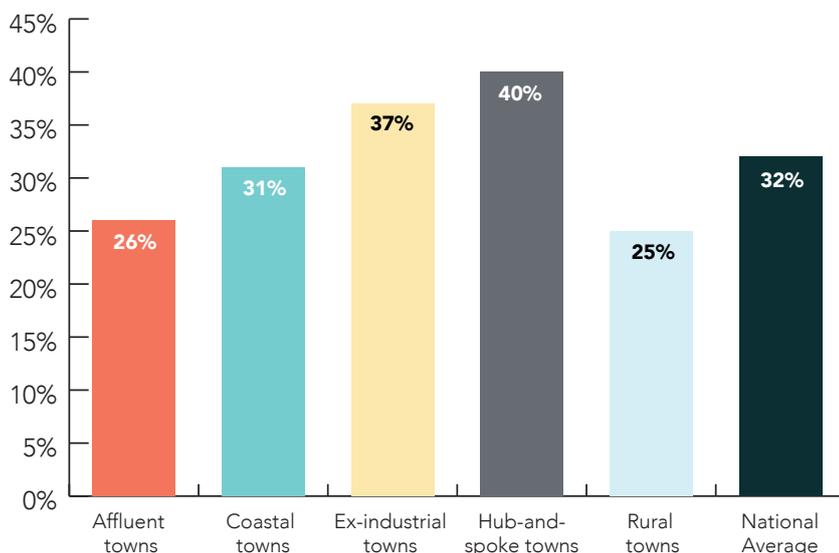
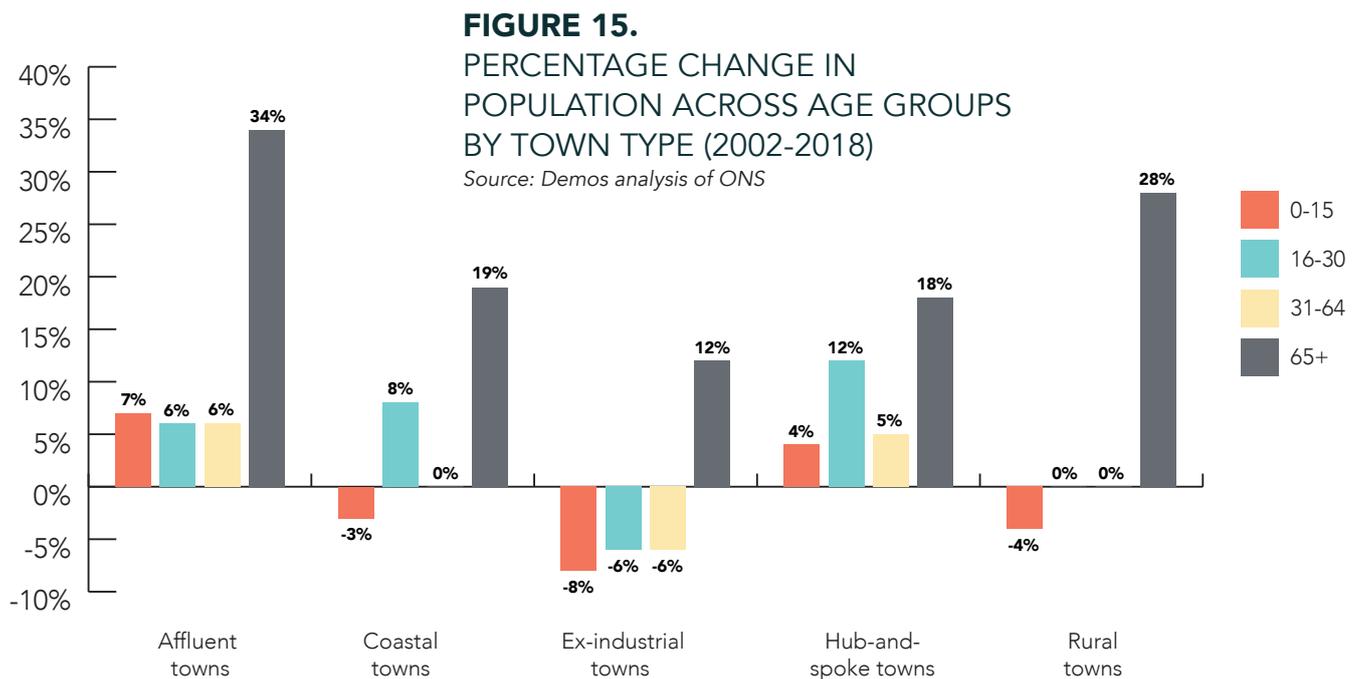


FIGURE 14.
INCREASE IN HIGHER EDUCATION ENTRY RATE AT AGE 18 FROM 2006 TO 2017 BY TOWN TYPE, ENGLAND AND WALES

Source: Demos analysis of UCAS 2017 End of Cycle data

Age trends across different town types

The trends in the age profile across the different town types are worth highlighting: in every type of town, the population has aged considerably over recent years, and there's been a particular growth in the number of people aged 65 and over. In rural, coastal and particularly ex-industrial towns, this has been accompanied by a concerning plateauing or outflow of children and working-age adults.



CONCLUSIONS

Different towns will require tailored approaches to meet their individual needs. Ageing populations are a problem facing towns of every stripe, though the problem is more acute in some town types than others - particularly ex-industrial towns.

Indeed, ex-industrial towns require support across a range of areas. Many of the challenges they face - deprivation across multiple indicators, lower rates of educational attainment - are shared by other town types too (particularly hub-and-spoke towns), but not as acutely.

Coastal towns generally don't fare as badly, but have specific issues to address - around rates of low income jobs, and social mobility.

Affluent towns, and to a lesser extent rural towns, fare much better, and are not in such clear need of intervention (with exceptions in some areas: social mobility in rural towns, for example, is poor).

Efforts to "level-up" towns must be informed by the particular challenges faced in different types of town. Our typology provides the toolkit to guide policymaking and target investment to where it is most needed.

CHAPTER 2

WHAT DO WE TALK ABOUT WHEN WE TALK ABOUT OUR TOWNS?

DEMOS

In this section, we draw from publicly available online forums to investigate how our towns are discussed by the people who live within them, in their own words.

This gives us a window into the revealed preferences and unfiltered, unprompted views of the public, outside of a context in which they feel they are being watched and analysed - and, as such, a unique insight into what people want from their towns.

KEY FINDINGS

Pubs and restaurants are vital. When people talk about going somewhere or doing something, they are most likely to be talking about pubs and restaurants. When they recommend their towns to visitors or new residents, they talk about pubs and restaurants. These are the locus of the community, a source of pride, and the star attraction. This is important to note in a context where many businesses in the hospitality sector may face an existential threat from the coronavirus pandemic.

Coronavirus has started online conversations about community where before they did not exist. There is little evidence of discussion about community

online, particularly amongst the younger user base of Reddit, except for in the context of Covid-19, where people talk about concerns for vulnerable neighbours and local businesses.

If you're talking about jobs or local government, it's probably because there's a problem. People in ex-industrial towns talk more than anyone else about both. Regarding jobs, there is also a positive story to be told here, though - people do come together to provide recommendations and advice for job-hunting (usually around low-skilled jobs).

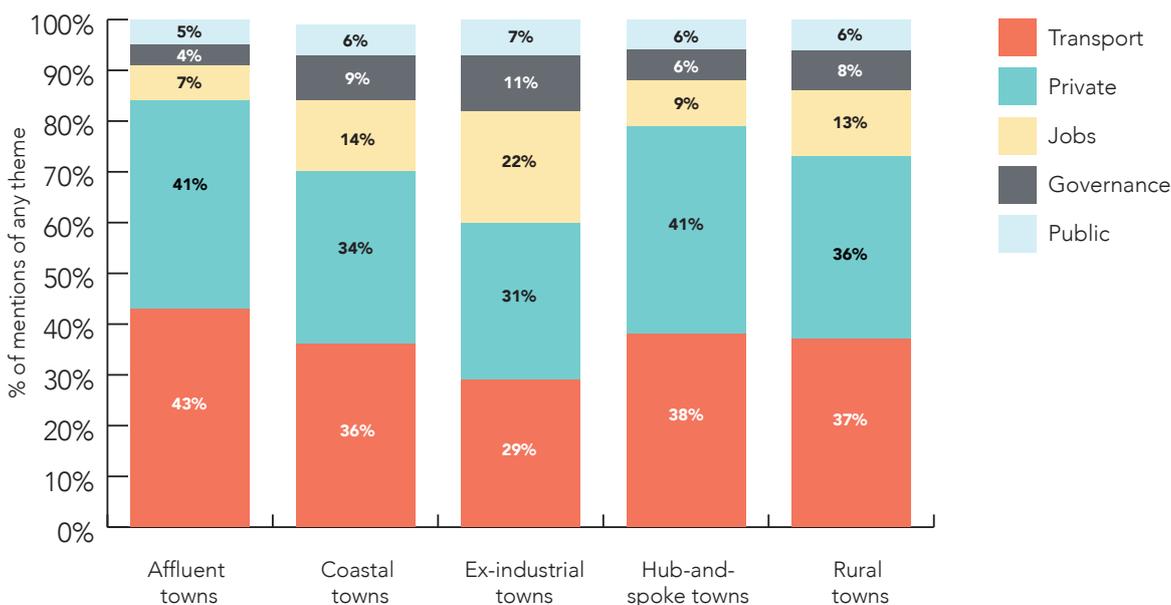
Roads - and potholes - are the transport priority. Rail travel is talked about, but, as we found in the evidence review, the population of towns is dominated by drivers and residents are more likely to be bus users - and conversation is dominated by talk about and frustrations with roads, rather than the absence of good rail services.

METHOD

We wanted to use online conversations to understand how people talk and feel about their towns, to sit alongside our Polis analysis and focus groups in towns. This method was designed to capture discussion of local issues and discussion of living in a town.

We used Method52, a social media analysis tool developed by Demos in partnership with the University of Sussex, to collect posts and comments from different online spaces dedicated to local town discussions. A detailed overview of the methodology can be found in the annex to this report.

TOPICS DISCUSSED - AN OVERVIEW



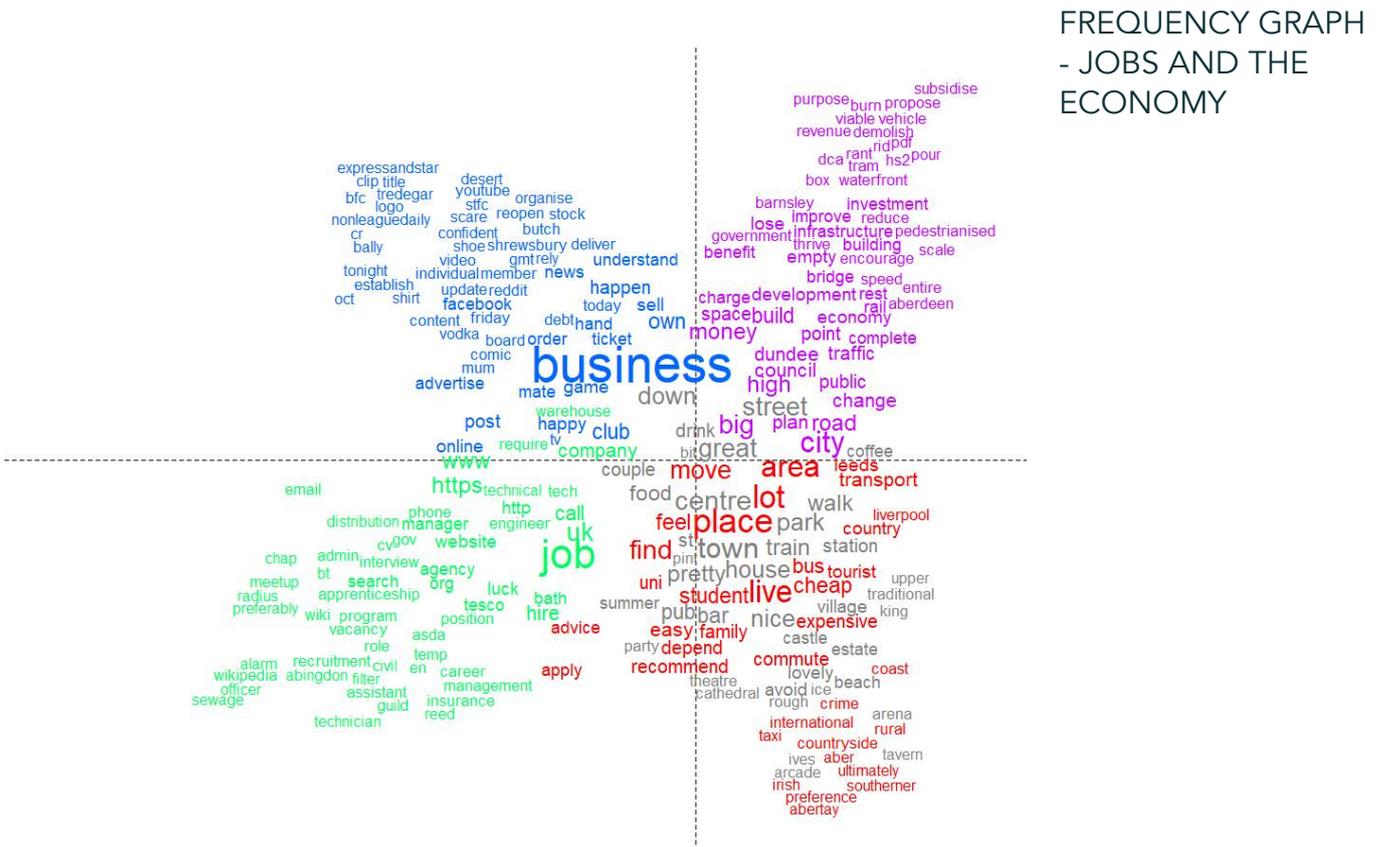
The figure above shows the proportion of online conversations in different types of town relating to different themes.

This shows some striking differences across different types of town. In particular, people in ex-industrial towns spend considerably more time talking about jobs, and - perhaps relatedly - governance. As we will see, when jobs and governance are talked about it tends to be because they are a problem - when people talk about jobs in their towns they are

frequently seeking and providing advice for finding (often low-skilled) employment, while people are much more likely to talk about the failings of their local council than its successes. This reflects the findings in Chapter One, where those in ex-industrial towns are more likely to struggle with unemployment - it seems they are also more likely to take to forums to help find work, and vent their frustration at local governance.

Jobs and the Economy - 3,462 posts and comments

Jobs and the economy includes comments about employment, the quality of jobs, discussion of the wider economy and personal finances.



We are concerned about the future of our local economies: whilst there are some positive posts in this theme, the overall sentiment is nervousness about the future.

We look for advice on finding jobs: people use these online local discussion sites to draw on each other's knowledge of the town's job market and what opportunities are available near them. In green, we can see discussions of hiring, apprenticeships, temping and careers.

The public sympathises with the difficulties of running businesses: in particular, we seem to sympathise with people running the kind of businesses we like to see. In blue, we can see

'pubs', 'restaurants', 'comic shops', 'board game shops', 'nightclubs', 'football clubs'; many of the same businesses that we found people talking enthusiastically about and recommending in the private amenities theme.

And we discuss local investments and empty properties: the purple cluster is the largest in this theme (22%) and it involves discussion of investment and economic development projects. It also includes discussion of empty properties.

"My mate who was an advisor on the phone for Jobcentre Plus has been laid off too, bad times ahead."

A prominent focus was on destinations for days out: in purple we can see discussion of where people are going - or want to go - when talking about transport. Eating out is a big part of that - food is the most typical thing to be talked about in this cluster, followed closely by places where you can buy it - 'cafe', 'restaurant' - and types of cuisine - 'burger', 'pizza', 'tapas', 'Italian', 'Indian', 'Chinese', 'Thai', and the closely connected 'fish' and 'chip'. Drinking establishments are similarly prominent - 'pub', 'bar', 'inn', 'tavern' - and relatedly 'beer', 'ale', 'cider' and 'cocktail'. 'Wine' is noticeably absent. Coastal areas are unsurprisingly a destination of choice, with beaches particularly prominent. And more highbrow cultural pursuits are also present - museums, cathedrals, theatres and history make an appearance - as do castles, though their position nestling between 'cathedral' and 'beach' suggests different people were referring to quite different types of castle.

'Road' is the most frequently appearing word used in posts relevant to this theme, but is relatively small in this graph as it appeared prominently across every cluster.

We talk about our daily travels. In green in the top left, there is the everyday of transport: 'commutes', 'trains', 'delay', and the resigned 'doable'. Nestled next to that, the considerations of where to live: amenities, nice areas, rents, properties, campus, nightlife, all weighed up against the convenience of the location and the distance to the bus station.

And we talk about how this shapes the places we live. As found in other themes, the blue cluster focuses on what people talk about regarding transport near to the place they live: this makes up the largest cluster in the theme at 29%. The impact of students within towns is apparent - 'student', 'studenty' and 'uni' featuring prominently. The impact of issues relating to transport on house prices is notable - 'price', 'expensive', 'budget', and reference to the property website 'Rightmove' all feature.

Predictably, the length of commute and having a place to park are also key issues here. The location of the word 'station' indicates that distance to the station is also key.

Discussion of transport relating to local and national government around transport is drawn out in red. Potholes are notably the only specific issue connected with governance in the chart. The cost of transport and how finances are allocated appears to be more typically talked about in relation to governance - 'cost', 'pay' and 'money' all featuring.

"Mayfair on Mansfield Road BYOB and amazing food."

"Definitely driving. If you're stuck using public transport then get the train/bus to Morpeth and then another bus from there."

"Nice area but terrible if you don't drive."

"I always have to smile at the standard excuse for loads of potholes being due to the poor weather this winter. Actually, no, it's due to years of poor road maintenance mostly."

CHAPTER 3

WHAT DO WE WANT FROM OUR TOWNS?

DEMOS

We have seen the issues facing towns - and different types of town - and how people talk about them online, unprompted. Informed by these findings, we looked to ask people living in towns about what they wanted - using an innovative approach that can provide deeper insights than traditional research methods.

Demos has pioneered the use of Polis, an online tool which allows respondents to interact with each other constructively: mapping out the lay of the land (with regard to opinion on a given subject), identifying attributes that define and differentiate between different clusters of opinion, and crucially, highlighting areas of consensus between otherwise disparate attitudinal groups.

In particular, Demos is the first organisation anywhere to conduct Polis using a nationally representative sample. This innovation provides a uniquely rich view of public attitudes around a given subject, enabling a grounded theory study with citizens providing their verbatim views. It also allows the public to react to views they would not otherwise be exposed to, at a scale where nationally and demographically representative inferences can be drawn from the results.

KEY FINDINGS

Designing policies for the future of towns that unite people in them will be a tough task. People in towns are divided - frequently quite diametrically opposed - in many areas.

Attitudes regarding diversity will be a key issue to address - half of the population are open to new people coming into their towns, half are strongly opposed.

Most people are keen for jobs to come to their towns, but a surprisingly substantial minority are consistently opposed to a range of job types. Creating jobs in a way that is seen to preserve the identity of the town and employs people with an existing connection to the town will be important in developing support for change.

People want a say in how decisions are made about their local area, but are much less likely to be willing to give up their own spare time to contribute to doing so.

There is clear majority support for building affordable housing and policies that benefit first time buyers (and obstruct buy-to-lets) - but it goes from consensus to controversy if you add any downsides to the housing (be it low quality and cheap, high quality and expensive, or built on a Green Belt).

There are areas of consensus that can be used as the start of a conversation about the future of towns. People are agreed on prioritising problem areas in towns such as litter and graffiti, anti-social behaviour, homelessness; they want a traditional high street with independent shops; making driving easier - as throughout this report - is the key transport priority; proximity to green spaces is prioritised above everything else. But for most of these the potential trade-offs were not explored.

Different types of town show surprisingly few differences in attitudes; the prevalence of the two attitudinal groups is remarkably constant across our typology's five town types. This suggests that there are likely to be significant attitudinal differences within towns rather than between towns.

Enhanced focus on the natural beauty of the landscape of towns where this is a feature and enabling greater access to and appreciation of it may increase people's pride in, commitment to, and ultimately enjoyment of the town they live in.

METHOD

Demos recruited over 2,019 respondents, with over 300 from each type of town in England as defined in Chapter 1. Responses were sampled to be representative of each town type by gender, age, region and social grade, and weighted to be representative of all towns included within our typology. We boosted the sample size of town types that make up a smaller proportion of the population of towns - for example coastal towns, which make up 6% of the overall population - to allow for robust statistical analysis by town type.

CLUSTER ANALYSIS - DEMOGRAPHICS

Polis conducts a 'cluster analysis' of results to understand not just the average view, but whether there are distinct clusters of opinion. The Polis algorithm uses machine learning to analyse all votes on all statements. Then, it generates an opinion 'landscape' in which people with similar sets of responses are clustered near each other. The number of clusters depends on the results, and is not predetermined - in this case, two clear groups of opinion emerged.

Group A comprises just under half of those allocated a group (48%); they tend to be slightly younger (23% are aged over 60, compared with 34% of Group B); they are more prevalent outside of the south of England (68% are from the South,

compared with 77% for Group B); they were more likely to have voted Remain in the EU referendum (54%), and were evenly split in general election voting intention between the two largest parties in England (36% Conservative, 34% Labour).

In contrast, Group B tend to be slightly older, are more likely to live in the south of England, are more likely to have voted Leave (51%), and more likely to vote Conservative (43% Conservative, 25% Labour).

GROUP A	GROUP B
Slightly less than half of the population	Slightly more than half of the population
Leans Remain	Leans Leave
Skews younger	Skews older (particularly 60+)
Less prevalent in the South	More prevalent in the South
Evenly split Labour/ Conservative	Leans Conservative

AREAS OF DIVISION

The groups fit fairly comfortably on different sides of the traditional socially liberal/conservative spectrum: Group A is more socially liberal, Group B more socially conservative. This is reflected in divisions across a range of issues.

DIVERSITY AND CONCERNS ABOUT TOWN IDENTITY

Group A are consistently positive about seeing a greater degree of diversity in their towns, while Group B have more concerns - though on both sides the extent of this support or opposition differs in different contexts.

A clear majority overall and eight in ten in Group A support the statement, submitted by a participant: "I would like to see my town flourish, and I don't care where people come from in order to make this happen." However, the fact that - even with this wording - the plurality of people in Group B oppose the statement highlights that the flourishing of the town in their eyes at least partly is defined by who the people involved are.

Another statement from a participant: "I'd like it if my town was more diverse and attracted more alternative types to it" split responses down the middle, and again highlights the division between

the two clusters - 68% of Group A support this, while 53% of Group B oppose it. With the wording left so vague, again this makes the message clear cut - those in Group B have more concerns.

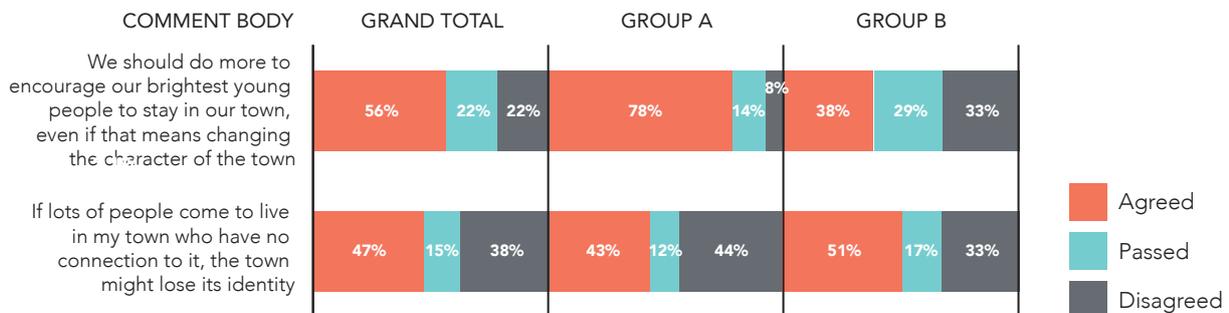
Opposition grows stronger when talking about more specific groups who might come into the town - more disagree than agree overall that they would like their town to attract more people from cities or from other countries.



One factor behind this is a concern about the town losing its identity or character - though the differences in this regard aren't enough to fully explain the discrepancies in attitudes to diversity. Group B are less enthusiastic about encouraging the brightest young people to stay in their town, if it risks changing the character of the town, but the plurality still agree (along with the vast majority

of Group A). On the other hand, Group A do demonstrate some concern for the identity of their town - they are evenly split between agreeing and disagreeing with the statement "If lots of people come town who have no connection to it, the town might lose its identity", while Group B support the statement, by 51% to 33%.

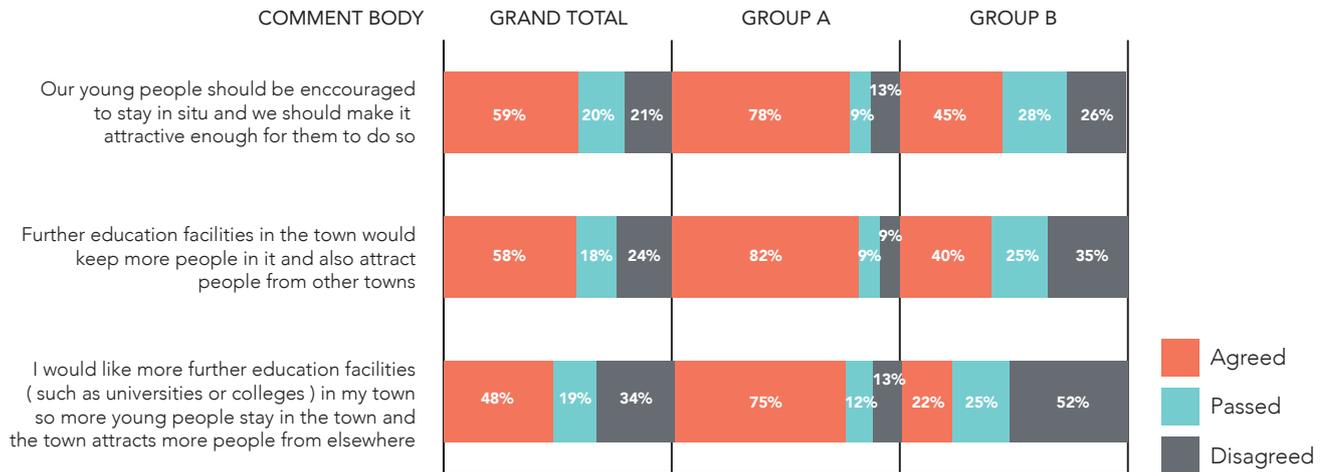
FIGURE 17



Simply attracting young people to stay in towns was more controversial than one might expect: a quarter of those in Group B and 21% overall disagreed with the statement: "Our young people should be encouraged to stay in situ and we should make it attractive enough to do so". Having said that, 59% overall agreed with the statement.

Higher and further education facilities were yet more controversial, especially if they brought in people from outside the town - the majority of Group B would oppose more higher and further education facilities to encourage young people to stay and attract more people from elsewhere (52% oppose, 22% support).

FIGURE 18



At the other end of the age spectrum, Group A were much more worried about the ageing population of their town, and Group B much more relaxed. Neatly, both groups are evenly split as to whether they are worried about the changing demographics of their towns overall - presumably with quite different demographic trends in mind.

FIGURE 19

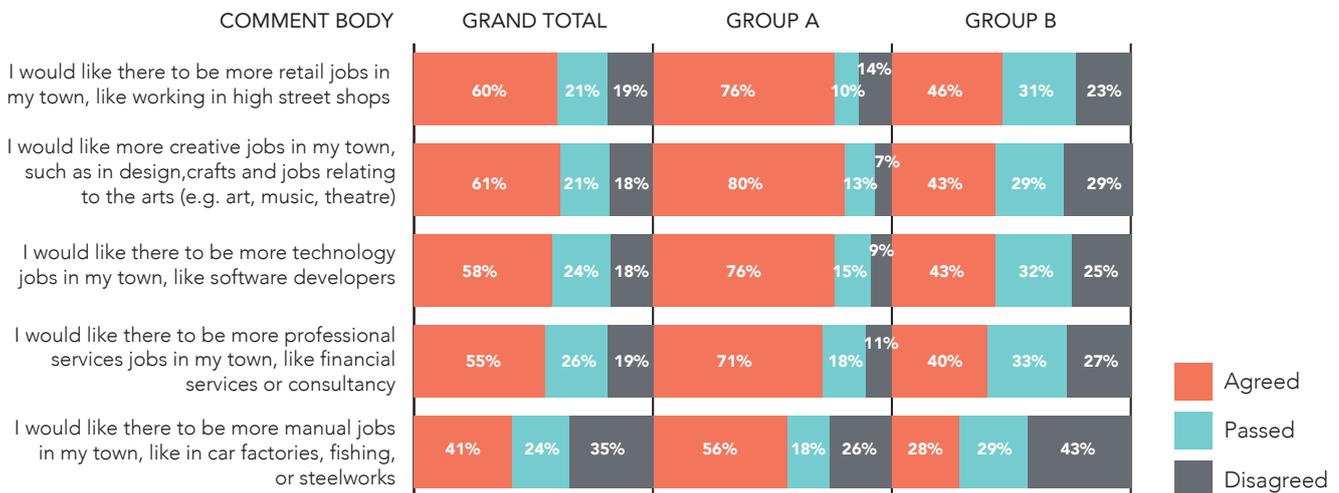


ATTITUDES TO DIFFERENT TYPES OF JOBS

Group A are positive about having more of any sort of job in their towns, while Group B are much more sceptical - no type of job coming to their town enjoyed majority support from Group B. However, all types of job enjoyed plurality or majority support from both groups with one exception - manual jobs. This debunks a stereotype around people who live in towns - this statement (submitted by researchers rather than participants) references types of manual

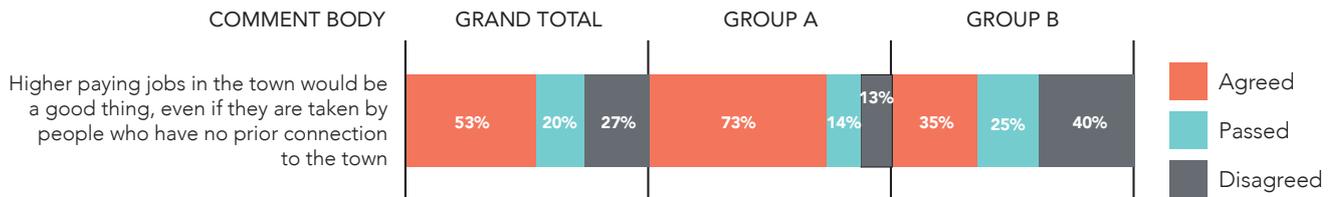
work commonly associated with nostalgic views about traditional industries which no longer sustain the high levels of employment they did generations ago - fishing, steelworks. The plurality of those in the more socially conservative, Leave-voting Group B actually oppose having more of this type of job in their town. (This may be because of a perception that these jobs may attract migrant workers, though further research would be required to establish whether this is the case.)

FIGURE 20



The plurality of people in Group B would also oppose higher paying jobs coming to their town if they were to go to people with no prior connection to the town, echoing again their opposition to increased diversity and concern about their town's identity.

FIGURE 21

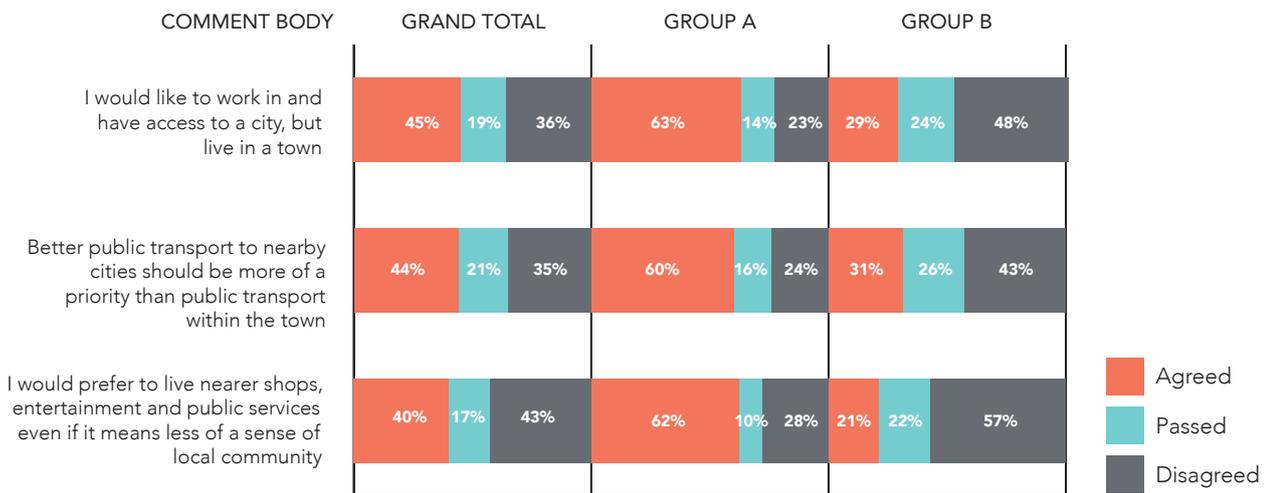


ATTITUDES TO AMENITIES, CITIES AND COMMUNITIES

Overall, people in towns are evenly split in a choice between living nearer to shops, entertainment and public services and fostering a sense of local community; Group A prioritise the former, Group B the latter.

The greater interest among Group A for access to amenities is also reflected in a greater enthusiasm for access to cities: six in ten agree they would like to work in and have access to a city, and would prioritise better public transport to nearby cities over public transport within the town, while by contrast, the plurality of Group B disagree on both measures.

FIGURE 22



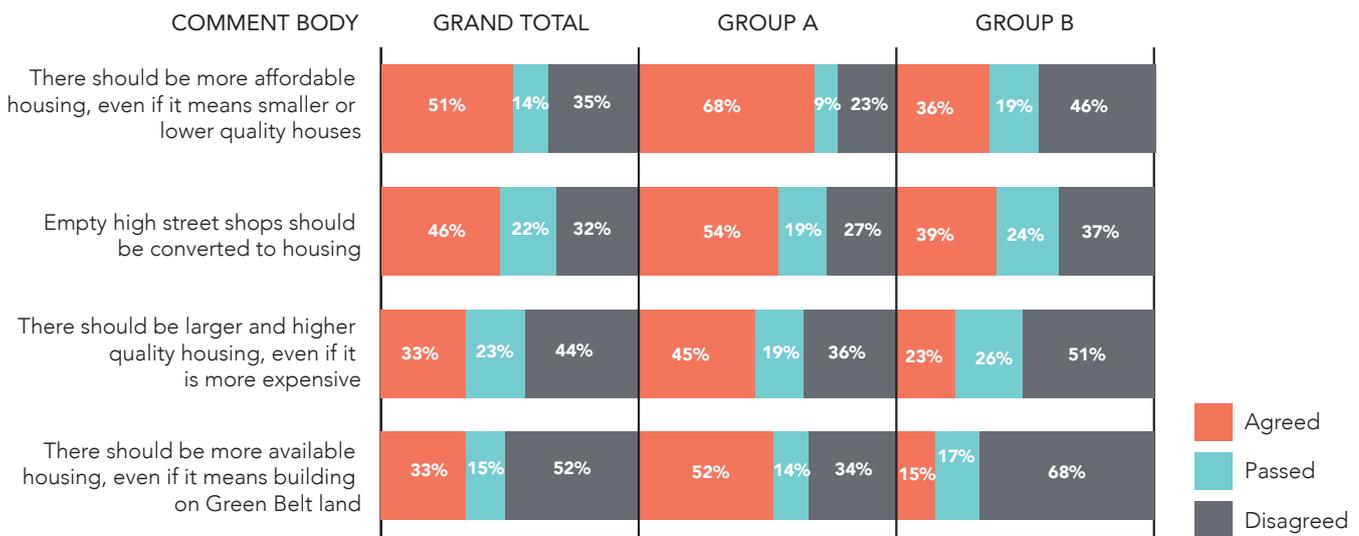
ATTITUDES REGARDING HOUSING

Most people in Group A support more housing regardless of any downsides identified by any given statement (if it was affordable but small or low quality; if it meant converting empty high street shops; if it was large and high quality but more expensive, or if it was built on Green Belt land).

The plurality or majority of Group B opposed more housing where trade-offs were incorporated into the statement in every case, with the exception of converting empty high street shops, on which they were evenly split.

Overall, affordable housing enjoys far greater support - even if it's smaller or lower quality - than better but more expensive housing or building on Green Belt land.

FIGURE 23



DEVOLUTION AND DESIRE TO BE INVOLVED IN DECISION MAKING

Different types of devolution and different policies to involve people in decision making have a varying ability to drive consensus. Clear majorities overall and in both clusters support the idea of having a greater say, of more members of the public being involved in council meetings, and of their towns having a standalone council to run its own business.

Things become more divisive when you zoom out to regional level devolution, or zoom in to look at what would be required of individuals in order for them to have a greater say. While there is a common consensus for devolving greater powers to towns, doing so at a regional level is more controversial - the plurality overall support this, but the plurality of Group B oppose it.

And people are much more likely to say they want to have a say than to be prepared to commit their spare time to making that happen - particularly among Group B. While 65% of Group B say they would like more members of the public to be involved in decision making, only 39% say they would be willing to commit to take part in discussions with other local people in their spare time in order to do so (it falls from 85% to 70% among Group A and from 74% to 53% overall).

FIGURE 24



DRIVERS VS CYCLISTS

The majority of people in towns support more cycleways and the plurality agree that cars should be banned in town centres: perhaps surprising given that we have seen town residents are more likely to be car users than average. Again, there is a division between the clusters - Group A are much more enthusiastic about both measures; Group B are evenly split regarding cycleways and the majority oppose banning cars in town centres.

FIGURE 25



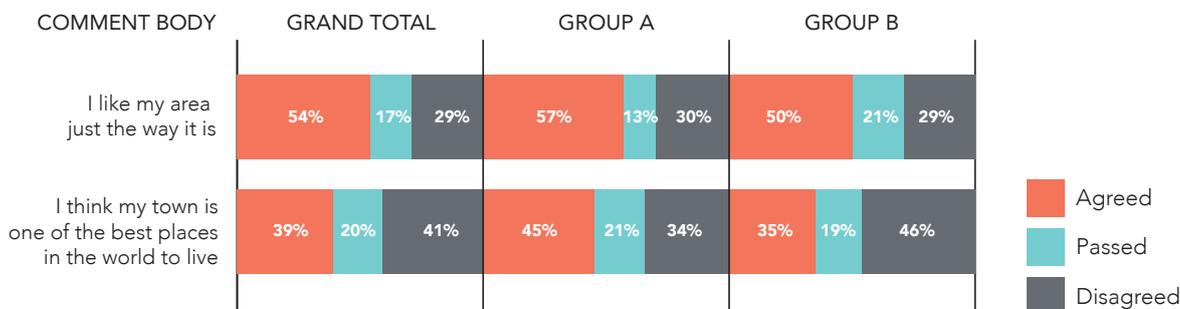
ENTHUSIASM ABOUT THEIR TOWN

Interestingly, given that Group B are more concerned about changes to the identity and character of their towns, Group A are actually more enthusiastic about where they live.

Despite their interest in increased diversity and greater appetite for change, 57% of Group A

say they like their area just the way it is, as opposed to 50% of Group B. And Group A are much more likely to think their town is one of the best places in the world to live - the majority of Group A agree, while the majority of Group B disagree. The reasons for this apparently counterintuitive finding are unclear, and invite further research.

FIGURE 26



AREAS OF CONSENSUS

In many ways, our towns are divided. In many areas, finding policies to unite these disparate groups as they consider their visions of the future of towns will be an extremely thorny challenge. However, there are some areas of consensus that can be used as a starting point for these difficult conversations.

PRIORITISE PROBLEM AREAS

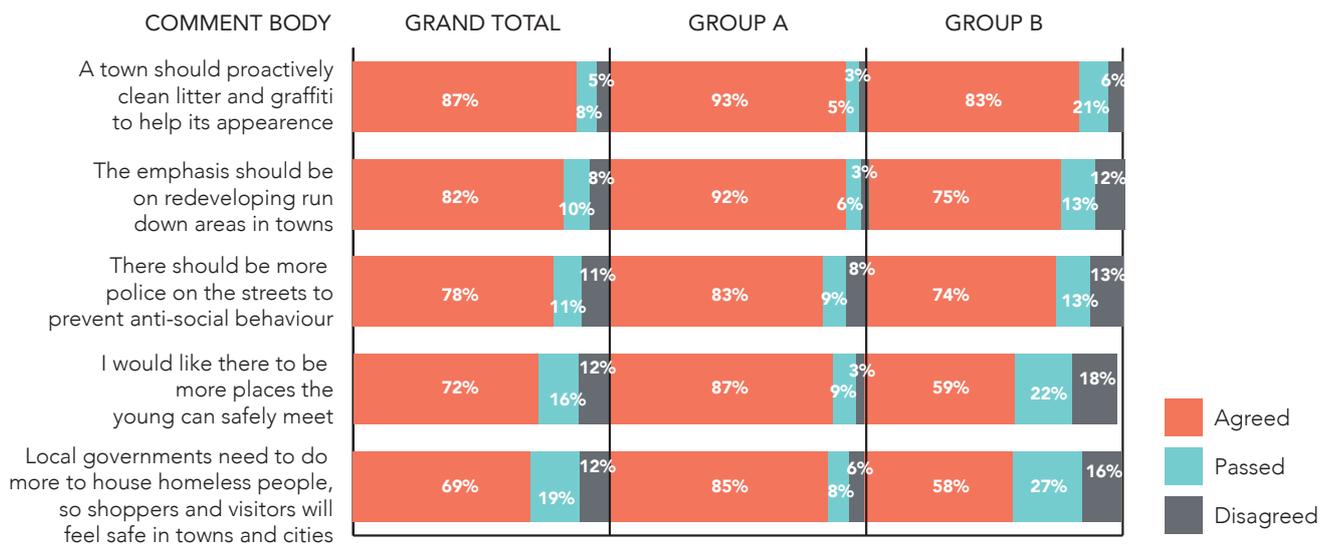
Majorities across the board support statements (all submitted by participants) to help deal with problematic behaviour and run down areas of the town as a priority: in cleaning litter and graffiti, "emphasising" the development of run down areas, putting police on streets to deal with anti-social

behaviour, providing spaces for young people to safely meet, and dealing with homelessness.

It should be noted that these statements do not provide specific solutions or potential downsides (e.g. higher taxes or requirements for greater amounts of spare time spent contributing to the community), but they are goals for what people uniformly would like the future of their towns to feature.

One particular statement is worth drawing out here in bringing together sentiments that can appeal to both sides of the spectrum: "Local governments need to do more to house homeless people, so shoppers and visitors will feel safe in towns and cities".

FIGURE 27



THE HIGH STREET

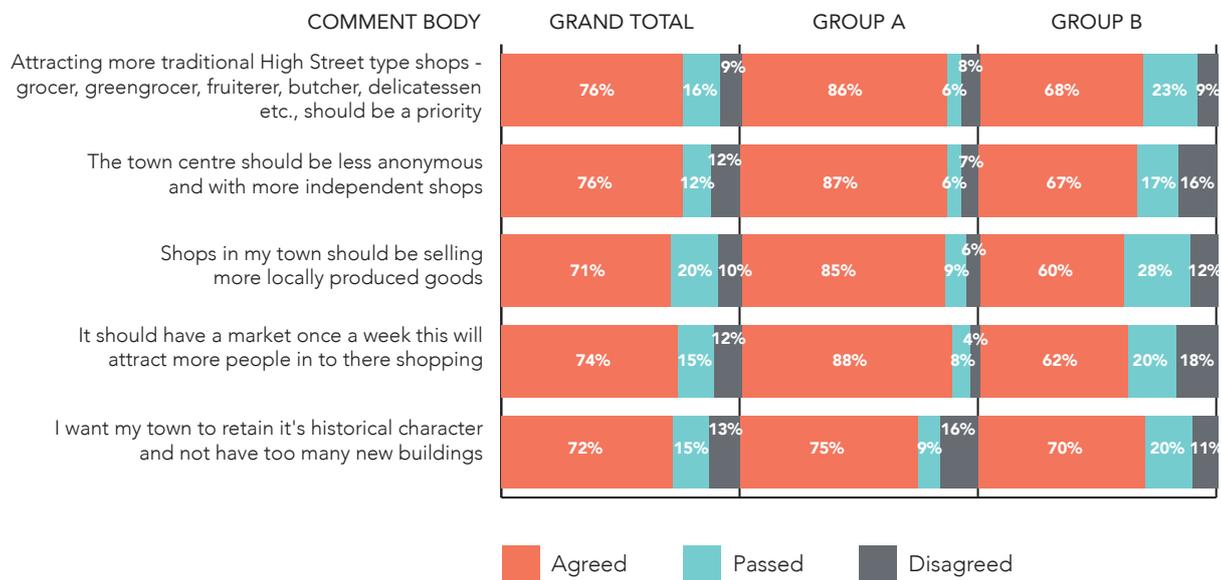
People want a traditional high street - and this is actually even more the case for Group A than the more conservative Group B. Specialist shops (butchers, greengrocers), independent shops selling locally produced goods, weekly markets, with buildings retaining their historic character, are all attractive prospects across the spectrum - again, all of the statements were submitted by participants.

It should be noted that the potential downsides or requirements that might be needed in order to make this viable are not tested. Would people

in towns be willing to shut down supermarkets if that would be required to make a traditional high street viable? We unfortunately do not have the answer (and even if the answer was yes in principle, it would remain to be seen if that was borne out in practice).

But it does highlight a potential goal that can bring people together - even if the high street of previous generations is a thing of the past, exploring what values and motivations underlie this desire, and what might be possible that meets elements of it, may be a fruitful area of further research.

FIGURE 28



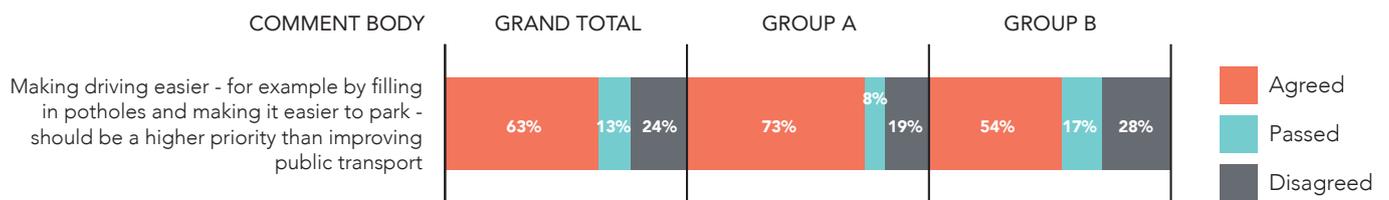
SURPRISING AREAS OF CONSENSUS

Some areas of consensus may seem surprising given what we found divided the population; these findings highlight that the attitudes of people in towns - and within the different groups - is nuanced and should not be stereotyped.

MAKING DRIVING EASIER SHOULD BE PRIORITISED OVER PUBLIC TRANSPORT

Despite Group A's enthusiasm for cities and public transport, as we've seen throughout this report, driving remains the priority. The majority across the board think making driving easier should be a higher priority than improving public transport, with Group A actually more enthusiastic about this than Group B.

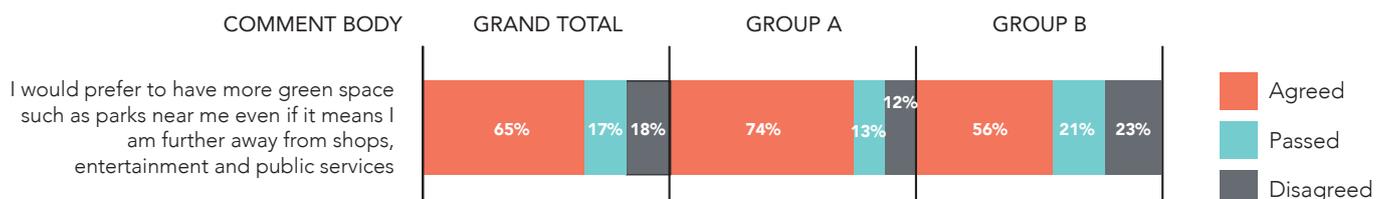
FIGURE 29



GREEN SPACES

We found above that Group A would prioritise closeness to shops, entertainment and public services, even if it meant less of a sense of community. Not so for green spaces, which were preferred to proximity to private and public amenities across the board. The coronavirus pandemic may have played a part here, with green spaces being a lifeline during lockdown for people otherwise trapped indoors.

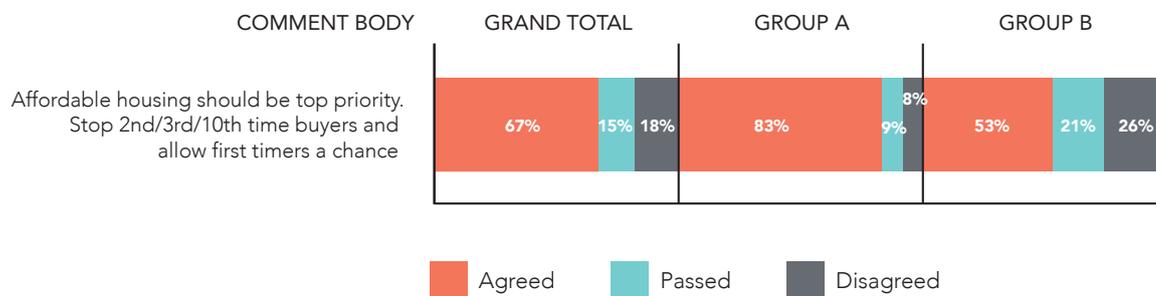
FIGURE 30



AFFORDABLE HOUSING

Finally, we saw above that Group B were less enthusiastic about building new housing when downsides were attached. They also skew older - and are thus more likely to be homeowners. Despite this, prioritising affordable housing and “stopping” buy-to-let purchasers to give first time buyers a chance is supported by the majority across the board. Group B are pickier about housing, but in principle are still in favour of affordable housing being built, and measures to help people struggling to buy their first home.

FIGURE 31



DIFFERENCES BY TOWN TYPE

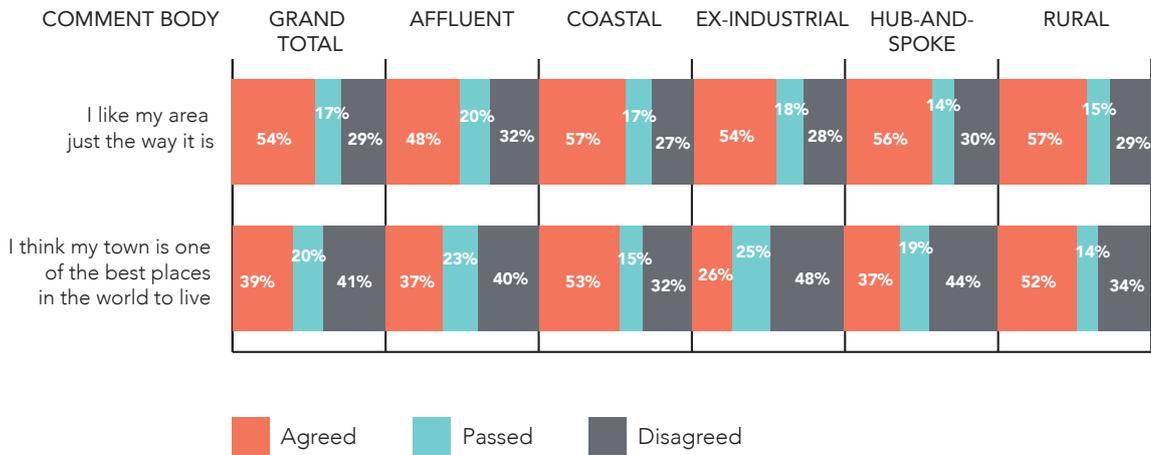
Our hypothesis going into this research was that different types of town would have different attitudes across different subjects. The results have shown something quite different - people in different types of towns share a similar balance of attitudes across the board.

The statement that showed by far the biggest difference in attitudes across town types was about whether the town they live in is “one of the best places in the world to live”.

Clear majorities of people in rural and coastal towns agreed with this statement, while those in hub-and-spoke and affluent towns were evenly balanced, and people in ex-industrial towns were nearly twice as likely to disagree as to agree.

Contrasting this with the proportion who say they “like their area just the way it is” makes this more puzzling. People in ex-industrial towns are no less likely to express satisfaction with the way their town is than average, and people in coastal and rural towns are only very slightly more likely to do so - nowhere near the difference we see when we ask if it’s one of the best places in the world to live.

FIGURE 32



A potential answer to this could be natural beauty - while in other questions respondents may be thinking about public and private amenities, local governance and demographic trends, when asked about their town as a place to be in, people may be more likely to consider the landscape around them. If you're in a town you otherwise might think is poorly run, ageing or changing too fast in the Lake District or the South Downs, if you interpret the question as being at least partially how beautiful your surroundings are, you may come up with a different answer (the reverse might be true of a well run but less aesthetically pleasing ex-industrial town).

For towns where the landscape is a natural asset, drawing greater focus to this and enabling the population to make the most of it may be an effective and eminently feasible way to enhance people's pride in, commitment to, and ultimately enjoyment of the town they live in.

CHAPTER 4

THE BUSINESS PERSPECTIVE

KPMG

The research findings outlined so far reveal a clear problem in towns: people living in them have different needs, and are divided on outlook, ambition and priorities for future development: a reminder that towns and their residents are by no means monolithic. There is no clear consensus on how to navigate a path towards future prosperity that satisfies both sides.

But what do business leaders think about this? Do they recognise this divide in their towns? Are businesses themselves divided on the priorities for their town? And what would it take for them to invest further in their own towns?

We held a series of focus groups with businesses across the country to explore this further and find out precisely what those leading them think. Many agreed with the Polis findings that towns are divided and there exist few common priorities that unite Groups A and B enough to bring about real change in their area.

Our focus groups have given us a greater understanding of the challenges facing towns, particularly as they look to adapt to the post-Covid-19 landscape. These explored three areas in particular, which has suggested several emerging hypotheses. These are:

Further business investment is limited by a trust gap in towns. Business leaders say they feel held back by public investment decisions that fail to look beyond a single electoral cycle. They need to know

that they are investing in a place that will remain a priority for public investment for the foreseeable future – particularly on skills, digital infrastructure, and housing. Without tangible evidence of this, business leaders will continue to view their investment in some places as too high a risk.

We can't move forward on town investment until we understand the cause of public divisions. There are profound differences between Group A and Group B which, if left unresolved, could lead to either paralysis or continual reversals in public policy. Is it the case that Group A have more agency and flexibility to move elsewhere, and therefore are less risk averse? Or is it that Group B made an active choice to move to a place (or continue to live there) and their risk aversion is aimed at preserving the aspects of the place they chose at that time? Unless we better understand the agency and aspirations of both groups it will be impossible to find a way to address their fears and to try to find consensus on a way forward.

Public leaders – from politics and business – need to articulate two clear visions to gain public support. First, the vision they propose, and how it can be tailored to reassure Group B that some of their fears need not materialise. Second, to demonstrate to this group that the “do nothing” option is not the status quo, and that a place must adapt to preserve its essence in the face of social and economic trends. Business investment triggered by public investment may also help to reduce the trade-offs involved between Groups A and B.

These hypotheses reflect the conversations we had in our focus groups across a range of places. But more work is needed to test these early hypotheses. We plan to continue the conversation with the public, local business leaders and policymakers in more towns across the country over the winter 2020-21. In doing so, we will look to identify specific policy solutions aimed at bridging the divide in towns, finding a common ground for Groups A and B to support further investment, and providing the long-term certainty that businesses need to invest in towns across the country. We will look to report back in early 2021.

OUR ANALYSIS AND METHODOLOGY

We convened several focus groups of KPMG's clients to test the findings with regional business leaders. We wanted to know what it would take for them to invest in their town further – after all, additional government regional spend will only be truly effective if it supports jobs and employment.

As a firm with 22 offices across the country, KPMG's regional structure allowed us to get insights from different regions facing their own unique challenges and divisions. We met with over forty businesses in September and October 2020 in the East of England, East Midlands, West Midlands, South Yorkshire, North East Scotland and North East England to hear their views.

Our participants were from a range of sectors – from manufacturing, transport, retail, education and local government. Some were directly located in town in these regions, while others were city-based but with significant numbers of employees based in nearby towns.

At the focus groups, we presented the findings from the Polis research and asked for views on the results across policy areas, including job creation, housing, skills and governance. We also facilitated discussions on wider priorities for town regeneration and explored participants' views on potential policy solutions that could unite both groups in the research.

Discussions were held under the Chatham House rule, so we have not named participants and in

some cases have not directly quoted them, in order to preserve confidentiality. We have instead outlined the main themes that emerged.

BUSINESS REACTION TO POLIS FINDINGS

Business leaders agreed with almost all of the Polis findings. Few were surprised by the results and many participants agreed that they reflected challenges similar to their own towns: that residents are divided on priorities and long-term vision.

It quickly became clear that finding a way to unite our two groups – A and B – was one of the biggest challenges facing towns. Many believed that it was only once we fully understood the causes of these differences that we could focus on implementing long-term improvements in towns across the country.

There were nevertheless some areas of disagreement, particularly in relation to employment, where participants were surprised by the lack of support for creating new manual jobs in towns. This finding was in contrast to what many business leaders had observed in their own areas: a nostalgic desire to revitalise previously strong industries that had declined in recent years, particularly in some coastal towns where maritime industries remain in high esteem.

We explored three questions in particular with the focus groups to help shape our emerging hypotheses and identify a potential way forward for policymakers. These were:

- What are businesses' key priorities in towns?
- Why is there such a split in towns between Groups A and B?
- How do you unite Groups A and B in towns and get the whole community on side?

In the rest of this chapter, we explore these questions in more detail, setting out first what business told us in our focus groups, and our own hypotheses on the challenges facing towns and how to overcome them.

1. WHAT ARE BUSINESSES' PRIORITIES IN TOWNS?

What we heard from business:

- **Above all else, businesses need long-term certainty on public investment.** Deciding to invest or expand in a town requires businesses to take a long-term view. They aren't just looking at the here-and-now. Business leaders need to know that promises of public investment made today will translate into tangible, on-the-ground improvements in towns in several years' time, if they are to commit to plans to expand in the area.
- **Covid-19 provides an opportunity to revive towns.** In the short term, clear challenges remain for local businesses affected by the pandemic, and the economic contribution that many of these businesses make to their local area cannot be overstated. Yet the displacement caused by Covid-19, with more people staying local and working from home, may well increase the importance of towns and encourage a shift in amenities towards towns rather than cities. That presents a real opportunity to have a once-in-a-generation shift in investment towards areas that have often been neglected.
- **Permanent transport links create new investment, but there are risks on the horizon.** Many in the business community see improvements in transport infrastructure as key to unlocking growth in towns. They believe that connectivity between towns should be regarded as just as important as connections with cities to encourage young people to live, work and spend in their local towns. At the same time, some businesses are concerned that ongoing reluctance to use public transport during Covid-19 could result in less investment in public transport.
- **It's not enough to attract talent to towns – you need to incentivise talented people to stay there.** A town's skills base is vital for business and often heavily influences investment decisions. Many prefer to nurture their own talent through apprenticeships, to allow them to tailor their training for the skills needed in their business and operations, but require a strong talent pool in the first place to do so. If there is insufficient public investment in the town's wider infrastructure, including affordable housing and good schools, businesses risk failing to get a return on their own investment in young people, as they look to move elsewhere for a better quality of life.

Our emerging hypotheses:

There's a trust gap in towns among business leaders

There are questions as to whether business leaders in towns have the necessary trust in local or national politicians to deliver on their long-term policy commitments. They are sceptical of plans to deliver a bigger, brighter version of their town down the line as a result of years of broken promises from political parties of all colours.

They feel held back by the lack of certainty on future public investment. Some told us they have been based in their town for several years and have seen electoral promises come and go without making any real difference on the ground. They seek long-term certainty, even as we navigate a challenging post-Covid-19 landscape. They want local and national government to prioritise investment decisions in towns that cannot be reversed and that look beyond a single electoral cycle. Achieving this will be crucial for strengthening business confidence and may pave the way to them growing and expanding within their town.

Why? For business, choosing their location is a long-term investment. Although individual leases or employees may have a tenure of less than a decade, the corporate knowledge, culture and network of supplier relationships lasts longer than that. Businesses need to know that they are investing in a place that will remain a priority for public investment for the foreseeable future. As a prominent business leader told us, "we like big infrastructure projects like roads because they are hard to cancel. It shows us that central government is committed to a place."

Skills matter

Alongside infrastructure, skills will be an increasing priority for business in deciding where to base their operations. Business needs to have a ready source of skilled workers, or sufficiently good transport connections to attract them from a wider catchment area.

Places need to prove to would-be employers that they can produce and retain a vibrant stock of talent. Particularly when considering inbound investors from elsewhere in the UK or overseas, a town must be able to show it can offer a good quality of life – whether that is affordable housing,

a vibrant cultural scene, or easy access to local amenities.

In particular, they must be able to accommodate that talent through affordable, quality housing with supporting services such as schools, childcare and healthcare. Or, they must persuade other towns' residents to travel as frictionlessly as possible to the place of employment. This was underlined by one focus group participant who told us that he "would have moved to [a town] but couldn't trust the local A road, so I took my 500 jobs to the next town."

As we enter a post-Covid-19 world, digital infrastructure will also accelerate up that list of priorities. 1000Mb broadband is looking less like an aspiration and more like a 21st century entry ticket for towns wanting to attract future skilled professionals.

It is not just local and national government which can help towns realise these ambitions. Business can play a part too. They can help to "beat the trade-offs" that often stand in the way of resolving the differences between Groups A and B. In some cases, securing investment from private enterprise might provide the resources to meet the concerns of Group A and B in a way that is not possible using only the existing resources of a town. Understanding what it would take to attract such investment could be one of the most important pieces of intelligence for local leaders to gain.

2. WHY IS THERE SUCH A SPLIT IN TOWNS BETWEEN GROUPS A AND B?

What we heard from business:

- **Appetite for further investment varies depending on people's attitude to risk.** This is often, but not always, seen along generational lines by business. Our respondents felt that younger people in towns are still trying to find their community and want to see transformational projects and new amenities, while older generations are more inclined to hold on to what they know and are more risk averse.
- **Those who have lived in the town the longest may be the most resistant to change.** They may have seen amenities and services in the area come and go, in contrast to those who may have recently moved to the area and do not know otherwise. This may lead them to see the debate on investment through a lens of loss compared to newer residents who have never had access to these services.

- **People who are most resistant to change often stand to gain the most from further investment.** Public investment is held back by short-term local objections, predominantly from Group B, even though this extra spending (for example on transport infrastructure) can be a catalyst for securing improvements in other areas they prioritise (for example on affordable housing). As one leader noted: "I know many people were so fervently against a new local tram and campaigned against it, but those very same people now love it and use it every day. Some people are so against change even if it will benefit them."
- **If they don't have the support of the community, plans for investment will fail.** Extra cash alone cannot drive improvements in towns. Local leaders need to secure buy-in from local residents, and local businesses, in the first instance before pushing ahead with extra investment in the town.

Our emerging hypotheses:

The divisions in towns will need to be tackled if lasting change is to be made

There are clearly profound differences between Groups A and B which, if left unresolved, could make it more difficult to gain support for radical actions in towns. Should local leaders fail to secure a vision that meets the ambitions of Group A while easing the concerns of Group B, then we could see "paralysis" in which new ideas, investment or strategies never make the threshold of achieving sufficient support could be adopted. Or it could lead to "oscillation" in which an approach does, just, gain support but is reversed in future as administrations change, for example in local elections. That would only serve to further reduce business confidence to commit to their own long-term investments in a town.

The divisions are complex and not easily explained by factors such as age, wealth or education

Is there a way for local leaders to find a landing zone that meets the desires and concerns of Group A and Group B? The first step is to understand the causes of the differences. There is no straightforward answer to this. The divisions in towns are complex and many factors will be in play in creating this split between the two groups. Many of our participants suggested that the split was

along generational lines. This could be a factor, but there are many younger people in Group B. Age alone does not explain the divisions between the groups.

Are the differences due to agency? For example, do Group A welcome more change because they are less risk averse? Is this because they are more mobile or flexible? Perhaps they are able to try living somewhere and if it doesn't work for them, they have the wherewithal or the employment flexibility to move elsewhere.

At the same time, to what extent are Group B less mobile as a result of their housing tenure, family relationships, health or childcare support networks, or simply their deep affiliation for a place? Perhaps this is why they place such a premium on change being compatible with their view of their place?

Alternatively, is it the case that Group B are not trapped by their situation, but actively chose their place? They may have moved to the area because of how it was at the time of their choice – it had all they needed at that time, and it is why they are invested in preserving the aspects of the place they chose. Compare that to those who are new to the area and want to see change happen fast to fit their future work and lifestyle priorities.

Understanding the agency and aspirations of Groups A and B is critical to identifying a route to address their fears and try to find a consensus on a way forward. Given the importance of this, we plan to explore this further with the public and local leaders in the next few months.

3. HOW DO YOU UNITE GROUPS A AND B IN TOWNS AND GET THE WHOLE COMMUNITY ON SIDE?

What we heard from business:

- A meaningful conversation between residents and local decision makers is a necessary first step. It is not enough for a town to have a vision – it needs to speak to those who live in the community to understand how it can meet their ambitions and concerns. Too often this isn't happening, with local leaders struggling to get people to engage and communities sceptical of the value of their involvement.

- Local communities need to understand the impact of any new investment. They often feel bruised by broken promises that have been made over the years and grow wary of the political nature of decision-making. They need to be empowered with data on the current problem and potential impact of change, sitting alongside the town's vision, if they are to play an active part in shaping a town's future.
- Business needs to recognise the role it can play in finding a common vision. As local employers, businesses are part of the community and must step up beyond the boundaries of their normal operations. Business leaders must work alongside the community sector and local authority decision-makers to demonstrate the multiplier effect they can have on any initial public investment. The positive impact this can have on local people in the long term must be articulated clearly to local residents.

Our emerging hypothesis:

It's time to talk about trade-offs

The challenge facing leaders – whether they are political leaders, civil servants, entrepreneurs, employers, current or future investors – is to articulate two visions in an honest and compelling enough way to gain support for their proposals.

First, the vision they propose, and how it can be tailored to reassure Group B that some of the fears they have can be protected against.

Second, the counterfactual, or "do nothing option", is not the status quo. No place's economy can be preserved in aspic and, even if it could, this is not desirable. Leaders must show that sometimes our aspirations are incompatible with economic, social or technological trends. For example, an independent high street requires footfall and residents with disposable income, which in turn means attracting economically active newcomers and housing to a place.

Demographics are such that in the future, older cohorts may well need services to be available locally, or housing to be adapted in order to preserve their ability to simply continue to live an independent life within a place. As some things are always changing, a place must adapt in order to preserve its essence.

Choosing a strategy for a place requires a really honest assessment of the features and characteristics

Towns are competing with each other, whether actively or implicitly through attracting employers, public services or house price growth. And while towns can benefit from lessons learnt elsewhere, towns cannot rely on simply replicating another town's winning formula. What works in one place may not suit the geography or history or demographics of another. And towns must consider their neighbours' strategies too. The country simply does not have demand for 1,000 centres of experiential retail for example. The economies of scale of a theatre do not lend themselves to having one in every town. Some towns will need to find a new purpose for their town centre.

Where do we go from here?

Our research has highlighted some of the challenges facing our towns looking to adapt for the future. Our discussions with business leaders have helped us to understand why these exist and what can be done to resolve them.

The hypotheses we have set out are just that; they need to be tested further. We look forward to seeing the response to this report and continuing these conversations with business leaders throughout the country.

Our aim is to better understand the potential policy solutions that can help towns to unite behind a shared vision that meets the needs and concerns of both groups. We aim to produce a follow up report in early 2021 to set this out in more detail.

CHAPTER 5

WHERE NEXT FOR TOWNS?

DEMOS

We have seen the different issues facing towns and how people talk about them online. We have also heard directly from the public about what they want from their towns, identifying unifying and divisive ideas of what the future of towns could look like.

Drawing on these findings, in this chapter we consider the implications of our findings for national and local policymakers. Where there is a public consensus on the vision for future towns, our aim is to identify initial steps to bring that about. Where there are divides - and there are plenty regarding many fundamental questions relating to the future of towns - we identify how consensus might be reached. Our aim is not to set out a comprehensive policy agenda but to instead provide guidance on how that might be reached in a way that unites our towns.

HIGH STREETS

We saw in the previous chapter that there is consensus support among town residents for a high street centred on a specific type of retail: independent shops and traditional grocers selling local produce.

This poses a challenge. As has been widely acknowledged, the UK's high street retail sector was facing severe financial challenges even before the pandemic. Analysis by *The Guardian* found

that the average town centre in England and Wales lost 8% of its shops between 2013 and 2019.⁵ This was due to a wide range of factors, from the rise of out-of-town shopping centres to the boom in online retailing, as detailed by the High Streets Expert Panel convened in 2018.⁶ Emerging evidence suggests that Covid-19 has simply accelerated these trends.⁷

There is a risk that high streets in towns continue to deteriorate, creating the conditions for a dangerous downward spiral. Shops become vacant and stay vacant, attracting anti-social behaviour and blighting the local environment. This in turn makes them less desirable places to visit, spurring further decline. What's worse, we cannot expect there to be a process of natural 'creative destruction', in which high street retail landlords agree to take on new tenants at lower rents. In fact, as a 2019 report by Power to Change argues, many landlords face perverse incentives to keep their properties empty, rather than charging realistic and affordable rents, as doing so protects the book-value of their assets.⁸ It's clear that there is a need for intervention, but what form should it take?

Option A - patch

Policymakers could seek to patch: mitigating the downsides associated with the existing retail-dependent high street model. This could include regulation to empower local authorities to put unoccupied retail space back into use, inspired

5. Holder, J. 'High street crisis deepens: 1 in 12 shops closed in five years'. *The Guardian*, 30 January 2019.

Available at: <https://www.theguardian.com/cities/ng-interactive/2019/jan/30/high-street-crisis-town-centres-lose-8-of-shops-in-five-years>

6. High Streets Experts Panel. *The High Streets Report*. Ministry of Housing, Communities & Local Government, 20 December 2018. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/766844/The_High_Street_Report.pdf []

7. Grimsey et al. *Build Back Better: Covid-19 Supplement for town centres. The Vanishing High Street*. Available at: <http://www.vanishinghighstreet.com/wp-content/uploads/2020/06/Grimsey-Covid-19-Supplement-June-2020.pdf> [Accessed 19 November 2020]

8. Brett, W., Alakeson, V. *Take Back the High Street: Putting communities in charge of their own town centres*. Power to Change, 20 September 2019. Available at: https://www.powertochange.org.uk/wp-content/uploads/2019/09/PCT_3619_High_Street_Pamphlet_FINAL_LR.pdf [Accessed 19 November 2020]

by existing legislation that already enables local authorities to put an unoccupied property back into use as housing.⁹ This alone though is unlikely to be successful given the strength of the forces pushing against traditional high street retail outlined above. As a result, we believe it's likely some form of subsidy would have to be provided to at least some existing retailers to allow them to continue on the high street.

Most simply, local authorities could provide direct payments to high street retailers. This raises a number of immediate questions. Any scheme would have to adhere to state aid rules, though what these will look like post-Brexit is fairly uncertain. In addition, further research would need to be carried out to assess whether it is realistic to presume any subsidy regime could be afforded by local government, given current local government finance arrangements.

If support has to come from central government instead, this could bring a number of downsides. First, it could reduce the potential for towns to decide their own futures themselves, having to bend to the will of Whitehall. Second, it could reduce the resilience of place; all that is necessary for the subsidy to be cut or abolished is a change of heart by the subsidising agency and things would quickly fall apart.

Alternatively, subsidy in kind could be provided to existing high street retailers in towns through lower rent. Again, regulation could be used to introduce rent controls, though this might be difficult to achieve for political reasons.

Or local authorities themselves could become town centre landlords and provide space to retailers at a below-market rate. Indeed, this has been happening across the UK; councils have spent up to £7 billion in the past three years buying commercial property such as shopping centres.¹⁰ Whilst this brings with it some potential advantages - such as more local control and new revenue sources for the council - it could leave them financially exposed in the event of an economic downturn, as the National Audit Office warned in 2020.¹¹ Given the deterioration of the commercial property market since then, this highlights some of the very real

dangers facing councils seeking to play a more active role in their high street.

Option B - transform

Instead of trying to support the existing model, towns could look to new uses for the high street that could provide the same or similar benefits.

This could take the form of other non-retail businesses already prevalent on the high street playing a greater role: restaurants, gyms and coffee shops. Across many high streets these businesses are already important. And of course, many of these - particularly restaurants and pubs - face an existential crisis as a result of the Covid-19 pandemic. To let them go under would cause rank hardship and suffering for local communities; our conversation mapping exercise showed that restaurants, pubs and bars are the locus of the community in towns across the country, they are a source of pride and often the star attraction.

But there is a scope to go a lot further, with uses beyond traditional commercial activity being put at the heart of a renewed high street. Up and down the country, community businesses are playing a role in revitalising struggling high streets. Locally rooted and trading for the benefit of the local community, they bring the prospect of a more resilient and sustainable high street.¹² These could offer a real prospect for a sustainable future.

We could also reimagine the high street around new forms of work. Though many of us are increasingly working from home, this doesn't mean we don't have a desire to be around others; a study of UK employees found that increased social isolation is associated with home working.¹³ Once the immediate pandemic is through, this could lead to the creation of new co-working spaces on high streets.

There could also be a greater role played in the delivery of public services. Whilst many services are moving online, there is an increasing need for physical delivery of services. In particular, there remains significant and increasing demand for childcare services; we could expect these to play a greater role in the revitalised high street.

9. Department for Communities and Local Government. Guidance Note on Empty Dwelling Management Orders. Department for Communities and Local Government, 10 July 2006. Available at: <https://www.gov.uk/government/publications/empty-dwelling-management-orders-guidance>

10. Hammond, G., Pickard, J. 'Treasury set to curb property investments by councils'. Financial Times, 20 May 2020. Available at: <https://www.ft.com/content/d68e46f9-2f13-465f-beb3-466c4f2d8530> [Accessed 19 November 2020]

11. National Audit Office. 'Local authority investment in commercial property'. National Audit Office, 13 February 2020. Available at: <https://www.nao.org.uk/press-release/local-authority-investment-in-commercial-property/> [Accessed 19 November 2020]

12. Brett, W., Alakeson, V. Take Back the High Street. Available at: https://www.powertochange.org.uk/wp-content/uploads/2019/09/PCT_3619_High_Street_Pamphlet_FINAL_LR.pdf [Accessed 19 November 2020]

13. Beauregard, A., Basile, K., Canonico, E. Home is where the work is: A new study of homeworking in Acas - and beyond. ACAS/LSE Enterprise, 2013, p.45. Available at: <http://www.acas.org.uk/media/pdf/ft/2/Home-is-where-the-work-is-a-new-study-of-homeworking-in-Acas-and-beyond.pdf> [Accessed 19 November 2020]

Finally, the pandemic has highlighted the need to increase access to green space for many, particularly those without gardens themselves. In Paris, this is spurring residents to turn streets into gardens, and it is useful to consider whether similar approaches could work for our towns too.¹⁴

Weighing A and B

Of course, these are not mutually exclusive options: any town could seek a balanced strategy of patching in some areas and transforming in others.

The great strength of option A appears that, if successful, it is significantly less disruptive than option B and is in line with what the public appear, at least today, to want from their high street. Its great weakness is that the economic model underpinning it appears broken and, as a result, unlikely to survive without significant subsidy. This might not be a bad thing in and of itself. Indeed, if local people are willing to pay, say, a higher rate of council tax to subsidise the existing high street model, then we do not wish to argue against that.

In contrast, the great strength of option B is that it appears to be potentially more financially sustainable and future-proof; its great weakness is that it is relatively untested and could be unpopular with the public (although further testing would have to be undertaken to establish this).

Either way, it is clear that the best - and only - way to resolve these issues is through extensive local public engagement and participation. Given either model is potentially viable, the key is to understand whether the public are willing to make the necessary trade offs required. There are a raft of options to help facilitate this, given recent innovations in participatory and deliberative democracy. These range from in-person forms of engagement, such as citizens assemblies, to new forms of digital engagement.

While we are not prescribing a one-size-fits-all solution, we are certainly not shying away from delivering a firm message to town leaders. From the above discussion it is clear that 'do nothing' is not an option. Even if one wishes to preserve the high street in aspic, this will require significant intervention which could be politically difficult and expensive, probably both. These issues can only be resolved by town residents coming together to determine the future of their high street.

There is also a clear role for business in this process: they are part of the community with a clear stake in the local economy flourishing, and business leaders are likely to provide a useful perspective on the economic situation and needs of the area.

Recommendation 1: Town leaders engage their residents and local business leaders in an open, participatory conversation about the future of the high street. This should be informed by relevant economic analysis (see Recommendation 2) to ensure citizens are aware of the trade offs and costs associated with their desired high street model.

Furthermore, it is crucial that this process is underpinned by a rigorous economic assessment of the viability of retail and alternative substitute industries in that town. This is so important because, as we have argued throughout this report, towns are not a homogenous group, hence why it is so difficult to say exactly what the future of high streets should be in towns. For example, in some towns traditional retail may be doing rather well and need only marginal levels of support; in others it may be in terminal decline and require an enormous bailout to continue. That's why any discussions must be informed by a rigorous and impartial economic assessment of the various industries' prospects.

Recommendation 2: Processes to determine the future of the high street must be informed by a rigorous economic assessment of the potential, or lack thereof, for retail and substitute sectors in that town.

INVESTMENT

Investment in towns is a priority for the government, with £3.6 billion in funding set to be released through the Towns Fund.¹⁵ It is fair to say the processes to ensure this funding is allocated effectively and fairly could be improved.¹⁶

Ex-industrial towns in particular should be a priority, given issues of deprivation across multiple areas. Our evidence provides clear guidance on how this can be used to benefit and build confidence among businesses and the public alike: affordable housing and good schools to encourage talent to remain in the area; digital infrastructure such as 1000Mb broadband is increasingly a necessity to compete; investment in transport infrastructure is both

14. Kenny, R. 'Paris: A city that is turning streets into gardens'. BBC, 22 November 2018. Available at: <https://www.bbc.co.uk/news/av/stories-46275458> [Accessed 19 November 2020]

15. Berry, J., Jenrick, R. '100 places to benefit from new Towns Fund'. Ministry for Housing, Communities & Local Government, 6 September 2019. Available at: <https://www.gov.uk/government/news/100-places-to-benefit-from-new-towns-fund> [Accessed 19 November 2020]

16. Hanretty, C. 'ITF0001 - Selecting towns for the Towns Fund'. Public Accounts Committee, 5 October 2020. Available at: <https://committees.parliament.uk/writtenevidence/12468/pdf/> [Accessed 19 November 2020]

popular with the public and the sort of commitment to long term investment beyond a single electoral cycle that businesses are looking for - as well as widening the catchment area for skills (albeit with the caveat that we may expect a greater degree of remote working post-pandemic, though this is of course not applicable to many and perhaps most jobs).

We also note that investment (almost always) requires buy-in from the local population to be effective. This is very likely to be forthcoming - investment is (almost always) welcome - but engaging with people in towns and with local business leaders regarding how investment should be deployed will increase its efficacy both in the application of local knowledge and in public understanding of, and enthusiasm for, the project.

Recommendation 3: Central government investment in towns should be conditional on buy-in from the local community and business leaders.

COVID RECOVERY

What the economic and social aftermath of the pandemic will look like is highly uncertain at this stage. In the short term, the pandemic poses a severe challenge for many local businesses.

However, there is the potential for a once-in-a-generation shift in investment to towns if people continue to work remotely and become more likely to move out of cities. Towns should keep a close eye on trends with regard to work and shopping patterns, and look to encourage the establishment of facilities that might perpetuate investment - examples might include WeWork-style shared office spaces and the proliferation of restaurants and gyms away from cities and town centres catering for remote workers.

Recommendation 4: Local governments should look out for and encourage any post-pandemic trends towards investment in their area.

Many people feel the Covid-19 pandemic has led them to be more connected with their local communities: a poll conducted by Demos showed 38% of people feel relationships between people in their local community have improved due to the pandemic against 14% who think they have worsened.¹⁷ This is reflected in the way people spoke about their local communities online: a

disproportionate number of conversations about people's neighbours and community related to the pandemic, frequently with reference to mutual aid - helping those in need, or being helped in turn.

In many - indeed presumably most - cases, the informality and voluntary nature of the likes of mutual aid groups is a key part of their appeal, and any attempts to formalise them should be resisted. However, where such groups feel it would be beneficial to become more formal and official groups, this should be encouraged to help perpetuate the solidarity engendered by the shared trauma of the pandemic, and ensure solid foundations for ongoing support systems are not left to crumble.

Recommendation 5: Local governments should help mutual aid groups who wish to to establish themselves as more formal organisations (while remaining light touch).

IDENTITY

We saw in the previous chapter that Group A is consistently positive about attracting people from elsewhere (cities, other countries) to towns, while Group B is consistently negative. Relatedly, Group A is consistently positive about towns becoming more diverse, while Group B is consistently negative on this question. This poses a real challenge for towns: it appears that the two groups have fundamentally different and potentially irreconcilable visions of thriving future towns, driven by deep-rooted and conflicting value sets. As a result, we must consider what can be done to bridge this.

The immigration debate may offer some answers. We know that the British public are much more likely to support immigration when individuals are coming to the UK to study - and that the public also favours students remaining to work after their degrees.¹⁸ Similarly, support for immigration is higher when migrants are believed to be highly-skilled. An academic study found that British respondents to the European Social Survey overwhelmingly view work skills as an important criterion for accepting migrants into the UK, rather than other factors such as religious beliefs.¹⁹

This suggests that support for newcomers could be increased if framed in terms of the value of

17. Demos. What's Next? Priorities for Britain. Demos, 11 September 2020, p.7. Available at: <https://demos.co.uk/project/what-next-priorities-for-britain/>

18. Savanta ComRes. 'Universities UK - Public Perceptions of International Students'. Savanta ComRes, 4 September 2018. Available at: <https://comresglobal.com/polls/universities-uk-public-perceptions-of-international-students/> [Accessed 19 November 2020]

19. Heath, A., Richards, L. (2019) 'How do Europeans differ in their attitudes to immigration? Findings from the European Social Survey 2002/03 - 2016/17'. OECD Social, Employment and Migration Working Papers, OECD Publishing. No. 222. <https://www.oecd.org/berlin/publikationen/How-do-Europeans-differ-in-their-attitudes-to-migration.pdf>

the newcomers' skills and what they will bring to the area. However, establishing whether this hypothesis is borne out in towns will require further investigation.

Recommendation 6: Further research should be conducted to understand what motivations and values underlie attitudes regarding identity and diversity within towns, and how these can be reconciled.

We also know from the immigration debate that hostility to outsiders can be significantly ameliorated if citizens are exposed to personal contact with foreigners who reside in the country.²⁰ A similar academic study of British adults found that positive intergroup contact also predicted lower prejudice towards EU migrants.²¹ Division and prejudice are enabled by the absence of contact - town leaders must work hard to ensure that longstanding residents do interact with newcomers.

Recommendation 7: Town leaders should make the social integration of long standing residents and newcomers a priority.

JOBS

We have also seen that the public are divided over whether they want to see more jobs in their towns. Group A are positive about an increase in the number of any job type, while Group B are much more sceptical - no type of job coming to their town enjoyed majority support from Group B. This is somewhat surprising, given the extent to which jobs are generally perceived as a good thing; witness how politicians across the political spectrum make 'jobs, jobs, jobs' a rallying cry.

Though further research would be required to understand what is driving Group B's attitudes here, our initial hypothesis is that it could be Group B's general opposition to outsiders and newcomers to their town. As a result, one potential step could be to ensure that a proportion of new jobs at site are reserved for existing residents, though further research is needed to establish whether this would be effective.

Recommendation 8: Further research should be undertaken to understand what types of jobs town residents desire and what drives opposition to new jobs among some town residents.

HOUSING

We have seen that Group A support more housing regardless of any potential downsides associated with it in any given statement (if it was affordable but small or low quality; if it meant converting empty high street shops; if it was large and high quality but more expensive; or if it was built on Green Belt land). In contrast, Group B opposed more housing where trade-offs were incorporated into the statement in every case, with the exception of converting empty high street shops, on which they were evenly split. This suggests that efforts to turn empty high street properties into housing could be a consensus-building approach to getting more homes built in towns.

However, it's important to note that this is not necessarily a foolproof solution. First, the conversion of high street shops could be costly and inefficient: some housing experts note that many may be poorly suited to being homes (e.g. poorly insulated etc).²² Second, it could conflict with town leaders' other objectives, in particular the desire - as we have seen earlier in this chapter - for a thriving high street. It is clear that whilst this is a potential opportunity, there is the need for further consideration of the potential benefits and downsides.

Recommendation 9: A review should examine the potential for empty high street shops to be converted into homes, appropriately weighing the pros and cons.

Another point of consensus between the two groups is their strong support for prioritising affordable housing and "stopping" buy to let purchasers to give first time buyers a chance; a statement supported by a majority across the board. So while Group B are pickier about housing, they are (in principle) in favour of more affordable housing and measures to help first time buyers. This suggests that efforts should be made to ensure that more new homes in towns are affordable. The best route to this may be facilitating the building of more houses overall, though this is a complex area which we do not look to cover in detail within this report.

20. Pettigrew, T., Wagner, U., Christ, O. (2010) 'Population Ratios and Prejudice: Modelling Both Contact and Threat Effects'. *Journal of Ethnic and Migration Studies*. 36:4. Available online: <https://www.tandfonline.com/doi/abs/10.1080/13691830903516034>

21. Meleady R., Seger C., Vermue M. (2017) 'Examining the role of positive and negative intergroup contact and anti-immigrant prejudice in Brexit'. Preprint. Available at: <https://core.ac.uk/download/pdf/83923682.pdf> [Accessed 19 November 2020]

22. Gardiner, J., Clifford, B., Forth, A., Park, J. 'Permitted development rights: a solution to our dying high streets, or a permit for future slums?'. *Building*, 28 July 2020. Available at: <https://www.building.co.uk/focus/permitted-development-rights-a-solution-to-our-dying-high-streets-or-a-permit-for-future-slums/5107228>. article. [Accessed 19 November 2020].

Recommendation 10: Build support for new homes in towns, with the goal to facilitate an increase in the availability of affordable housing and homes for first time buyers.

It is also useful to consider what could be done to win over Group B and address their worries about new housing. Previous Demos research showed that opposition to housebuilding is often driven by a lack of provision for public services and infrastructure; a failure of the developer or council to properly engage local people; and poor design.²³ This suggests that addressing these concerns could reduce local opposition to housebuilding. Whilst these issues are complex and multifaceted, there is one important and reliable route towards addressing them: giving local people more control over housing decisions.

Recommendation 11: The government should use upcoming planning reform to empower local communities to shape housebuilding decisions in their local area.

DEVOLUTION AND LOCAL DECISION MAKING

Our Polis results show that clear majorities (overall and in both clusters) support the idea of having more of a say, of more members of the public being involved in council meetings, and of their towns having a standalone council to run its own business. In addition, there is much greater support in both

groups for devolution to towns than regions. This suggests that moves towards greater devolution to combined authorities - the government's intended direction of travel - should preserve to as great a degree as possible the autonomy of town-level decision making.

How might this work in practice? Targets and budgets for major policy areas could be set at a combined authority level, while decision makers at a town level would then have the opportunity to shape how those targets are reached in practice and how budgets are spent. For example, while housing targets for the town would be set at a combined authority level, town leaders would be able to decide where new homes go and their design. This would balance the need for a more unified decision making structure in local government with the clear desire of town residents to have important decisions made at a town level. This does effectively happen in some councils already, where area committees or similar are responsible for planning and a limited degree of discretionary spending.

Recommendation 12: The upcoming Devolution White Paper should, where possible, seek to preserve autonomy for town councils to implement decisions made at a combined authority level in the way they see fit.

23. Glover, B. People Powered Planning. Demos, 9 September 2019. Available at: <https://demos.co.uk/wp-content/uploads/2019/09/People-Powered-Planning.pdf>

ANNEX 1

DETAILED FINDINGS OF EVIDENCE AND STATISTICAL REVIEW

This annex provides further detail of the evidence and statistical review summarised in Chapter One.

AN INTRODUCTION TO DEFINITIONS

The Office for National Statistics (ONS) defines towns as any urban area with a population between 5,000 and 225,000.²⁴ Because this definition requires grouping medium sized places together it includes some places that do not have 'town' status, for example some villages and small cities.²⁵ This definition excludes any places within Greater London.²⁶

The Centre for Towns defines towns as places with at least 10,000 residents, as long as it is not a Core City (Birmingham, Bristol, Cardiff,

Edinburgh, Glasgow, Leeds, Liverpool, London, Manchester, Newcastle-upon-Tyne, Nottingham and Sheffield).^{27,28} The Centre for Towns definition of towns therefore includes several larger places that are not included in the ONS definition; Brighton, Bradford, Derby, Leicester, Plymouth and Stoke-on-Trent, for example. However, the ONS includes lots of urban settlements with populations between 5,000 and 10,000 residents that are not included in the Centre for Towns definition.

To define small, medium and large towns we have used the below definitions provided by the House of Commons Library. This was because of the ease of accessing the data and the helpful way in which different types of town and city are distinguished.

	Total population	Minimum population	Maximum population	Median population	Count
London	8,807,042				1
Core city	5,909,117	282,708	1,140,754	541,763	11
Other city	5,744,906	175,595	408,570	226,460	24
Large town	11,458,310	60,622	174,102	96,288	119
Medium town	10,168,583	23,815	59,947	35,852	270
Small town	9,295,884	6,806	24,913	12,919	674
Village or smaller	12,402,075	97	7,857	863	6,116

FIGURE 1. SUMMARY OF PLACE SIZE DEFINITIONS USED THROUGHOUT THIS REPORT

Source: House of Commons Library

24. Office of National Statistics. 'Understanding Towns in England and Wales: an Introduction'. Office of National Statistics, 9 July 2019. Available at: <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/articles/understandingtownsinenglandandwales/anintroduction> [Accessed 19 November 2020].

25. Ibid.

26. Ibid.

27. Centre for Towns. Launch Briefing. Centre for Towns, 30 November 2017. Available at: <https://www.centrefortowns.org/reports/launch-briefing> [Accessed 19 November 2020]

28. The Centre for Towns definition of a Core City is in turn taken from Pike, A. et al. Uneven Growth: Tackling City Decline. Joseph Rowntree Foundation, 29 February 2016. Available at: <https://www.jrf.org.uk/report/uneven-growth-tackling-city-decline> [Accessed 19 November 2020]

EXISTING TOWN TYPOLOGIES

In our review of the literature we identified a number of approaches to categorising different types of towns. These typologies will be useful for conducting analysis of towns, allowing us to break up this very broad overall category into more manageable chunks.

Depending on the precise definition used, around half of people in Britain today live in towns. This means that towns are necessarily a very broad category about which it will be difficult to generalise. To aid analysis we will therefore break the broad group of towns into a number of subcategories.

ONS - working vs residential/ higher deprivation vs lower deprivation

The income of residents in a town and the state of its local economy are not always directly correlated. This may be because of commuting patterns or the activity of non-workers. For example, a town could appear to have a poor local economy - e.g. low job density - but its residents could commute to highly paid work in a nearby town or city. Therefore, to understand the true state of a place it is important to look at workplace measures (e.g. job density) and residential measures (e.g. income).²⁹

Drawing on this insight, the ONS produces a four type characterisation of towns which combines a workplace and residential viewpoint, as shown in the chart (above right).

Alongside categorising towns according to their size, the Centre for Towns categorises towns according their context, putting towns into one of the following categories:³⁰

1. University towns and cities
2. New towns
3. Market towns
4. Former industrial towns
5. Commuter towns
6. Seaside/coastal towns

The definitions used for the Centre for Towns typology have many advantages, but do not lend themselves to analysis using the data sources we had identified.

	Explanation of definition	Examples
Lower deprivation working towns	Towns with a high level of job density, reflecting a high level of local jobs relative to working-age population, and a relatively low level of income deprivation among resident	Solihull, Guildford, Woking,
Higher deprivation working towns	Towns with a relatively high level of income deprivation and a high level of job density	Barrow-in-Furness, Totnes, Walsall
Lower deprivation residential towns	Income deprivation among residents is low and job density is low	Bishop's Waltham, Heswall, Ramsbottom
Higher deprivation residential towns	Job density is low and income deprivation among residents is high	Deal, Stainforth

FIGURE 2.
ONS FOUR TYPE
CHARACTERISATION OF TOWNS

Source: ONS

In order to understand the needs and experiences of different types of town, we developed a typology reflecting the characteristics of different town types.

The typology is based on the 2011 ONS Local Authority Area Classification.³¹ This is produced on the basis of a cluster analysis of 59 Census statistics. This grouped the whole of the UK into 8 supergroups, 16 groups and 24 subgroups. Our typology combines these to produce 5 types of area, and then looks at the towns within these areas.

Towns were split into the following categories:

- **Affluent towns:** towns of this type are more prosperous, older, and whiter than average, and over-index in rural areas.
- **Coastal towns:** towns defined by their coastal geography, they tend to be older than average.
- **Ex-Industrial towns:** towns whose traditional industries have disappeared. People here disproportionately work in manufacturing, but also face problems of unemployment and wider social issues, as we show.

29. Office of National Statistics. 'Understanding Towns in England and Wales: an Introduction'. Available at: <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/articles/understandingtownsinenglandandwales/anintroduction>. [Accessed 19 November 2020]

30. Warren, I., Houghton, J., Jennings, W., Gregory, M. The effect of the COVID-19 pandemic on our towns and cities. Centre for Towns, 23 April 2020. Available at: www.centrefortowns.org/reports/covid-19-and-our-towns/viewdocument/21 [Accessed 19 November 2020]

31. Office of National Statistics. 'Pen portraits for the 2011 Area Classification for Local Authorities'. Office of National Statistics, 24 July 2018. Available at: <https://www.ons.gov.uk/methodology/geography/geographicalproducts/areaclassifications/2011areaclassifications/penportraitsandradialplots> [Accessed 19 November 2020]

- **Rural towns:** towns in rural areas that are less well off than affluent towns and do not have a coastline.
- **Hub-and-spoke towns:** comparatively urban towns that are often satellite towns of bigger cities, or are hub towns with their own satellites. People in these towns are disproportionately from ethnic minority backgrounds.

Town type	Resident population	Percentage of town population	Number of towns	Examples
Affluent towns	7,319,084	24%	270	Guildford, Colchester, Stockport
Rural towns	5,958,123	19%	326	Hereford, Taunton, King's Lynn
Hub-and-spoke towns	6,065,360	20%	152	Huddersfield, Worthing, Sutton Coldfield
Ex-industrial towns	9,581,880	31%	345	Doncaster, Darlington, Chatham
Coastal towns	1,973,483	6%	89	Torquay, Newport, Scarborough

FIGURE 3.
SUMMARY OF DEMOS TYPOLOGY
FOR TOWN TYPE CLASSIFICATION

Below we review our town types focusing on literature and evidence across the following domains:

- Income
- Work
- Skills and education
- Demography
- Health
- Housing
- Social mobility
- Crime
- Transport

INCOME

Average income is a good measure of how well-off people are in a local area, allowing us to begin to understand the economic fortunes of people living in towns. As a measure of people's incomes, it is not necessarily a reflection of the job market or economy within a town because those living in towns may be commuting to work elsewhere, for example. However, this does not concern us: this report is focused on the experience of those living in towns and for many this will mean working elsewhere (i.e. not in their town).

The chart below shows the mean total household income after costs across different types of place in England, including housing costs.³² The advantage of using a measure of average income after costs is that it can give us a more accurate representation of disposable income, given costs - in particular housing costs - can vary significantly across the country.

32. Costs include housing costs, national insurance contributions, income tax payments, domestic rates/council tax, contributions to occupational pension schemes, all maintenance and child support payments.

We see that average incomes across all three town sizes are extremely similar, with larger towns marginally enjoying the highest average incomes in this group. The average income across all town sizes is substantially lower than London and slightly lower than villages, but significantly higher than non-London core cities and other cities. This suggests that, in average income terms, towns overall are not the best or worst off; they could be described as the 'squeezed middle'.

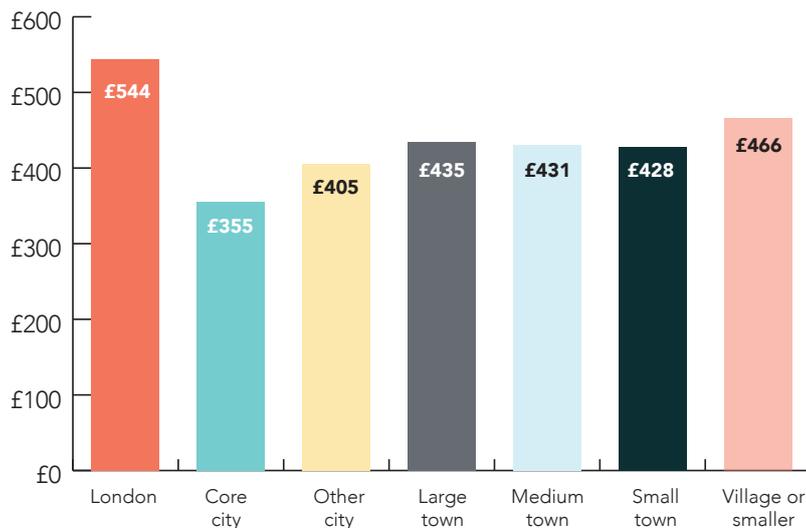


FIGURE 4.
AVERAGE NET WEEKLY INCOME AFTER COSTS BY PLACE SIZE
Source: ONS ³³

However, we see a different pattern emerging when considering different types of town. Here we see that affluent towns are, perhaps unsurprisingly, performing much better in terms of average income than all other types of town. We also see that ex-industrial towns are faring the worst of all town types. This highlights why it is important to dig deeper into the overall population of towns and consider different types of town.

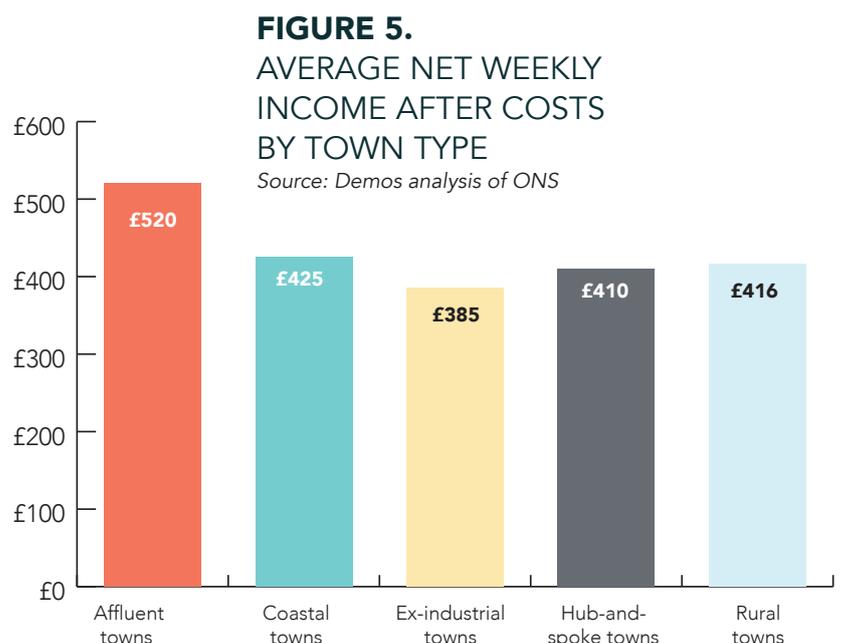


FIGURE 5.
AVERAGE NET WEEKLY INCOME AFTER COSTS BY TOWN TYPE
Source: Demos analysis of ONS

33. Office for National Statistics. 'ONS Model-Based Income Estimates, MSOA'. Office for National Statistics, 20 November 2019. Available at: <https://data.london.gov.uk/dataset/ons-model-based-income-estimates--msoa> [Accessed 20 November 2020].

It is also useful to consider changes in average incomes for people in towns to see how their economic fortunes have changed in recent times. From the table (Figure 6) we can see that towns have performed well in recent years, with incomes after housing costs across all town types growing faster than London and villages, but not as quickly as non-London core cities. It is important to note that the high performance of towns on this measure is likely to be due in part to lower housing cost increases (see later section in this chapter).

Building on the findings above, it is also useful to consider the proportion of jobs in different places paid less than the real Living Wage. In the analysis that follows it is important to bear in mind that we are discussing the proportion of jobs in a certain location that are paid less than the real Living Wage, not the proportion of those living in a certain location that are paid less than the real Living Wage (who may work elsewhere). As a result, it is not a perfect description of low pay of the residents of a place, though it is a useful indication given that we can expect a significant proportion of people to work in their place of residence.

We can see from the figure below that there are not significant geographical differences when considering villages, towns and cities. Small towns appear to be faring worse on this measure than larger towns, core cities and other cities, but only fairly marginally.

Place	Percentage change in average household income after housing costs, 2012 - 2018
London	3.9%
Core city (outside London)	9.1%
Large town	8.6%
Medium town	8.8%
Small town	9.2%
Village	7.6%

FIGURE 6.
CHANGE IN AVERAGE HOUSEHOLD INCOMES SINCE 2012

Source: Tom Forth ³⁴

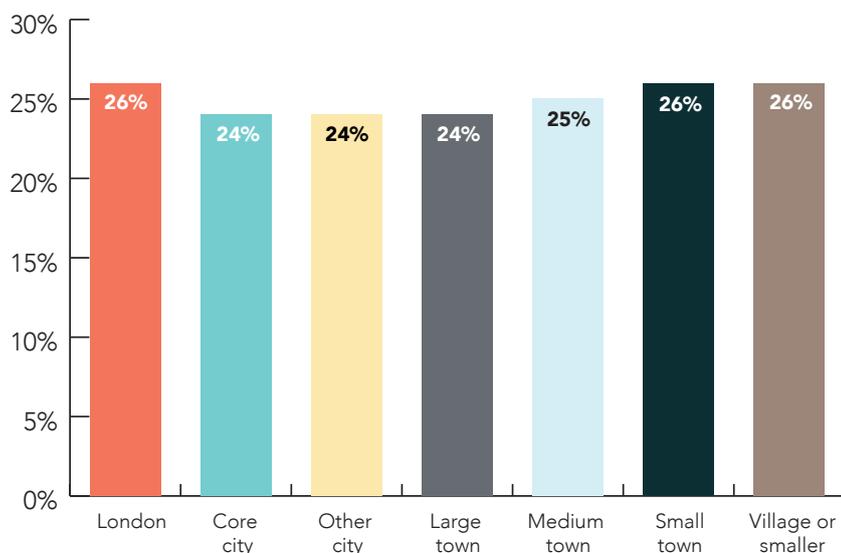


FIGURE 7.
PERCENTAGE OF JOBS THAT ARE PAID LESS THAN THE APPLICABLE LIVING WAGE FOUNDATION REAL LIVING WAGE BY PLACE SIZE

Source: Living Wage Foundation

34. Forth, T. 'Income in Towns'. Github, 6 March 2018. Available at: <https://github.com/thomasforth/incomeintowns/blob/master/GroupedTypeOfPlaceAndIncome.csv> [Accessed 19 November 2020]

However, we see starker differences opening up when considering different town types. As the chart below shows, jobs in coastal towns are significantly more likely to be paid less than the living wage than other types of town and, unsurprisingly, jobs in affluent towns are much less likely to be paid less than the living wage.

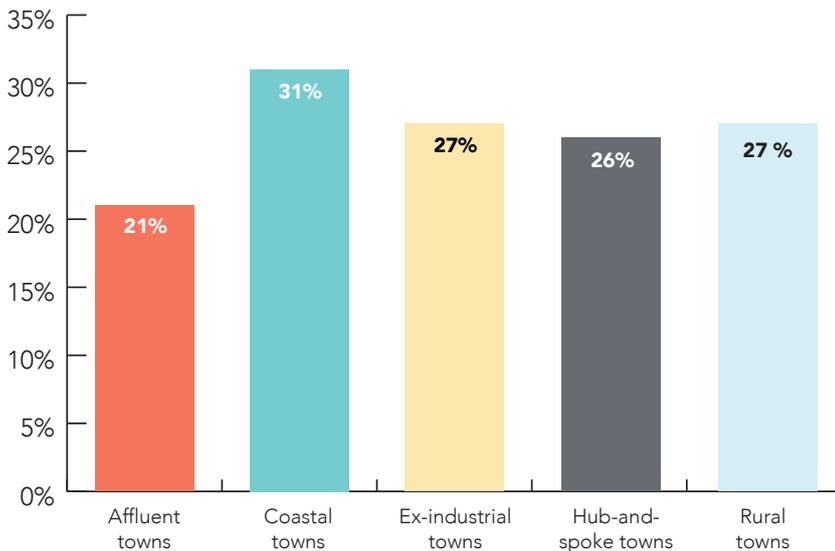


FIGURE 8. PERCENTAGE JOBS THAT ARE PAID LESS THAN THE APPLICABLE LIVING WAGE FOUNDATION LIVING WAGE BY TOWN TYPE

Source: Demos analysis of Living Wage Foundation

INCOME DEPRIVATION

Income Deprivation measures the proportion of a population experiencing deprivation relating to low income. As a result, it can give us a sense of poverty in a place, as opposed to average income which gives us a sense of overall affluence across the whole income distribution. This measure of deprivation includes those that are out of work and those that are in-work on low income.

As Figure 9 shows, towns of all sizes are more likely to be in the most deprived income quintile than villages, but less likely than cities. Furthermore, we can see quite clearly that larger towns are faring worse on this measure than both medium and smaller towns, suggesting that those living in larger towns may be more likely to be experiencing poverty as a result of low income.

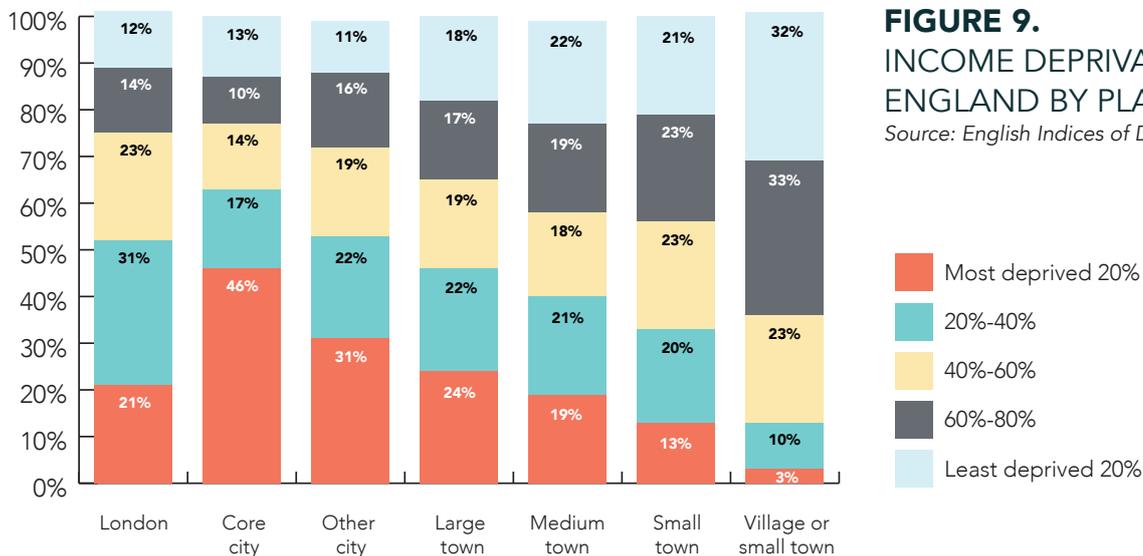


FIGURE 9. INCOME DEPRIVATION IN ENGLAND BY PLACE SIZE

Source: English Indices of Deprivation 2019

Analysing levels of deprivation in different types of town provides a yet more detailed picture. Here, it appears that hub-and-spoke and ex-industrial towns face significant challenges relating to income deprivation, with 30% and 29% of hub-and-spoke and ex-industrial towns respectively falling into the most income deprived quintile. As we will see elsewhere in this chapter, it is a very different story for affluent and rural towns, with just 6% and 11% of affluent and rural towns respectively falling into the most income deprived quintile, with a very large 36% of affluent towns falling into the least income deprived quintile.

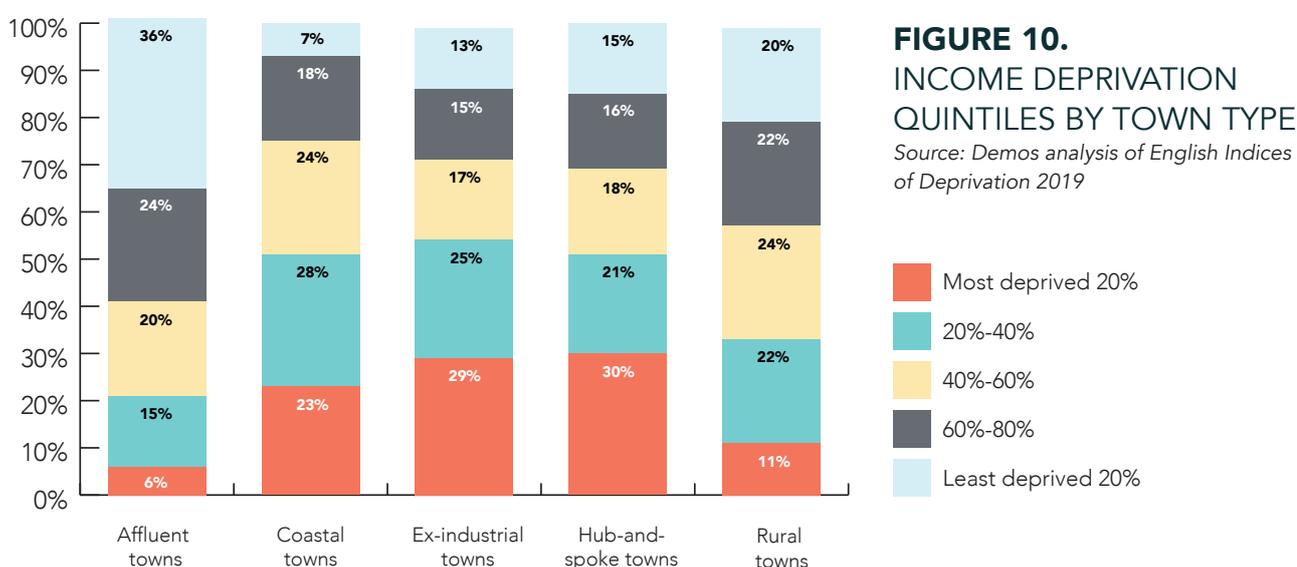


FIGURE 10.
INCOME DEPRIVATION
QUINTILES BY TOWN TYPE
Source: Demos analysis of English Indices
of Deprivation 2019

WORK

Self-employment

Covid-19 has highlighted the particular challenges that many self-employed workers face, in particular a lack of financial security. Previous Demos research has shown how some self-employed people face real challenges relating to low pay, high income volatility and poor access to affordable credit.³⁵ It is therefore useful to understand whether self-employment is more prevalent in towns than everywhere else.

As Figure 11 shows, towns tend to have a slightly lower rate of self-employment than villages or

cities. But a different picture emerges when considering different types of town. As we can see from Figure 12, workers in coastal towns are significantly more likely (16.8% versus 12.6%) than the national average to be self-employed, with workers in rural towns slightly more likely to be self-employed (14.6% versus 12.6%). Given we know that a significant minority of the self-employed face major financial challenges - such as lack of income when ill, difficulty saving for the future and barriers to accessing financial products such as mortgages³⁶ - a disproportionate number of workers in coastal towns, and rural towns to a lesser degree, could be adversely affected by these issues.

35. Glover, B., Lasko-Skinner, R., Berry, A. The Liquidity Trap: Financial Experience and Inclusion in the Workforce. Demos, 20 November 2019. Available at: <https://demos.co.uk/wp-content/uploads/2019/11/Liquid-Workforce-Digital-Final.pdf>. [Accessed 19 November 2019]

36. Department for Business, Innovation & Skills. Understanding self-employment BIS Enterprise Analysis research report. Department for Business, Innovation & Skills, 14 February 2016. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/500305/understanding-self-employment.pdf [Accessed 19 November 2020]

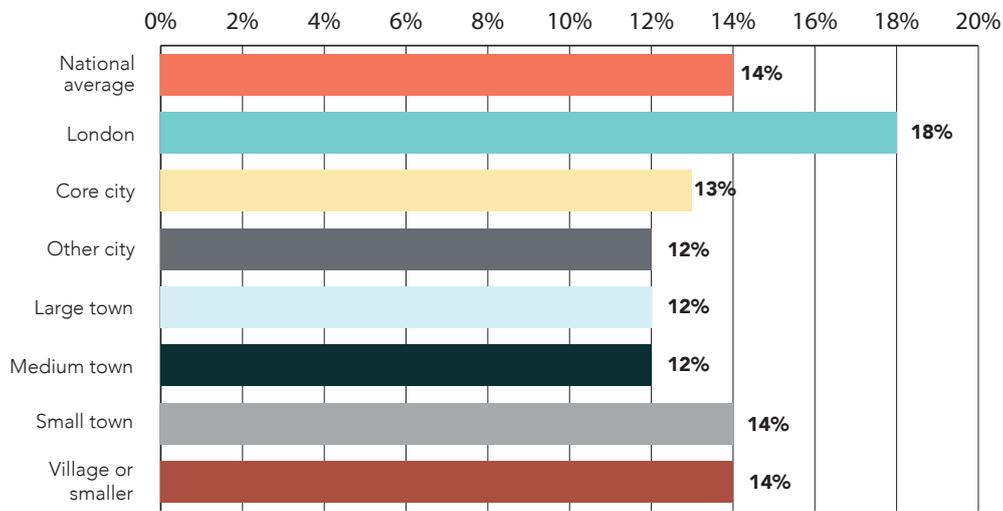
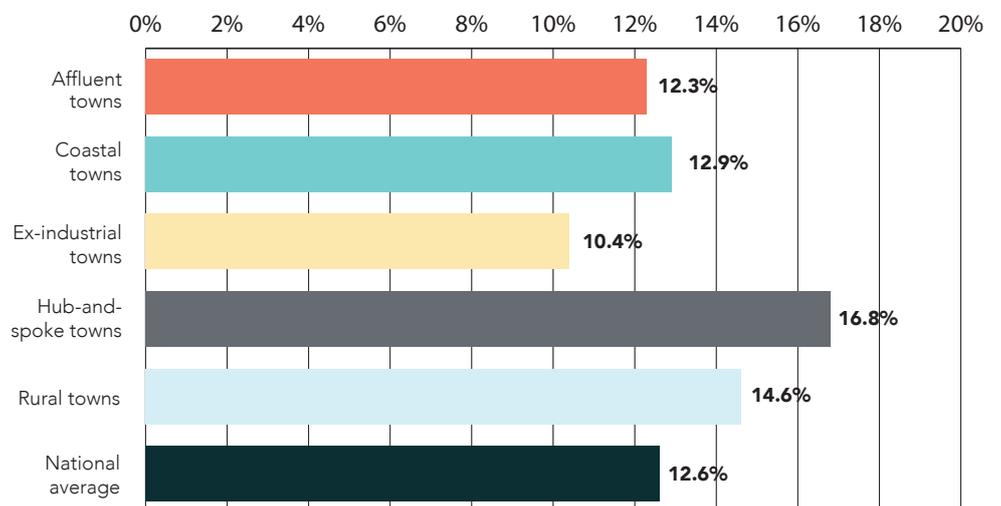


FIGURE 11.
PERCENTAGE OF
WORKERS THAT WERE
SELF-EMPLOYED IN
2019 BY PLACE SIZE

Source: Demos analysis of Labour
Force Survey

FIGURE 12.
PERCENTAGE OF
WORKERS THAT WERE
SELF-EMPLOYED IN
2019 BY TOWN TYPE

Source: Demos analysis of Labour
Force Survey



Exposure of jobs to automation

It is increasingly recognised that we are entering a fourth industrial revolution, with technologies such as artificial intelligence fundamentally reshaping our labour market.³⁷ In particular, it is argued that we are witnessing increased automation of job roles, a phenomenon that is only likely to increase in the future.

This is not likely to affect all parts of the UK evenly. This is because some job roles that are more susceptible to automation are much more likely to be found in some places more than others. It is therefore pertinent to examine which parts of the UK are more likely to be affected by automation and, in particular, whether towns appear more likely to be affected.

Drawing on recent research from the think tank Onward below, we see that towns are much more likely to fall into the top ten local authorities that are most exposed to risk of automation, with seven of the top ten local authorities covering areas primarily classified as towns. In contrast, there are just two towns in the ten local authorities least exposed to risk of automation. This could be of some concern for town leaders, suggesting their workers may be more likely to be displaced by automation in the future.

However, it is important to flag that the extent to which automation has a negative impact on communities will depend on the employment opportunities and support that are made available to those that are disrupted by automation. Indeed, if appropriate and effective retraining programmes are in place, automation could be a boon for workers. Some of the lowest paid roles may no longer exist, but with the right support workers in these sectors may be able to unlock more highly skilled, better paid work. It is clear that automation is a risk as well as an opportunity; the extent to which it is one or the other will likely depend on the context of the local labour market and the degree of employment support and training on offer to displaced workers.

FIGURE 14. LOCAL AUTHORITIES THAT ARE THE LEAST EXPOSED TO AUTOMATION RISK, BY PROPORTION OF RESIDENTS AFFECTED

Source: Onward analysis of ONS data and 2011 census

Place	Share of employment at risk of computerisation	Primary classification of Local Authority
Corby	53.2%	Medium town (87.8%)
Boston	52.6%	Medium town (65.4%)
Kingston-upon-Hull	52.2%	City
Stoke-on-Trent	51.7%	City
Sandwell	51.6%	Medium town in Conurbation (48.6%)
Blaenau Gwent	51.6%	Small town (65.3%)
North east Lincolnshire	51.5%	Large town (55.4%)
Great Yarmouth	51.2%	Medium town (40.7%)
Fenland	51.1%	Small town (45.3%)
Middlesbrough	51.1%	City

FIGURE 13. LOCAL AUTHORITIES THAT ARE THE MOST EXPOSED TO AUTOMATION RISK, BY PROPORTION OF RESIDENTS AFFECTED

Source: Onward analysis of ONS data and 2011 census;
Demos analysis of ONS classification

Local authority	Share of employment at risk of computerisation	Primary classification
City of London	35%	Core City
Richmond upon Thames	39%	Core City
Kensington and Chelsea	39%	Core City
Westminster	39.5%	Core City
Camden	39.6%	Core City
Wandsworth	40.4%	Core City
Islington	40.4%	Core City
Elmbridge	40.7%	Medium Town in Conurbation
Hammersmith and Fulham	40.8%	Core City
St Albans	40.8%	Large Town

37. Schwab, K. The Fourth Industrial Revolution. World Economic Forum, 11 January 2016.
Available at: <https://www.weforum.org/about/the-fourth-industrial-revolution-by-klaus-schwab> [Accessed 19 November 2020]

Employment deprivation

Employment deprivation is a measure of the proportion of a local population that are involuntarily excluded from work. This includes those that would like to work but are unable to due to unemployment, illness, disability or caring responsibilities. Figure 30 shows that large towns are the most likely of all town sizes to fall into the most employment deprived quintile. This suggests that large towns face significant challenges relating to exclusion from the labour market and work, though less of a challenge than core cities and other cities.

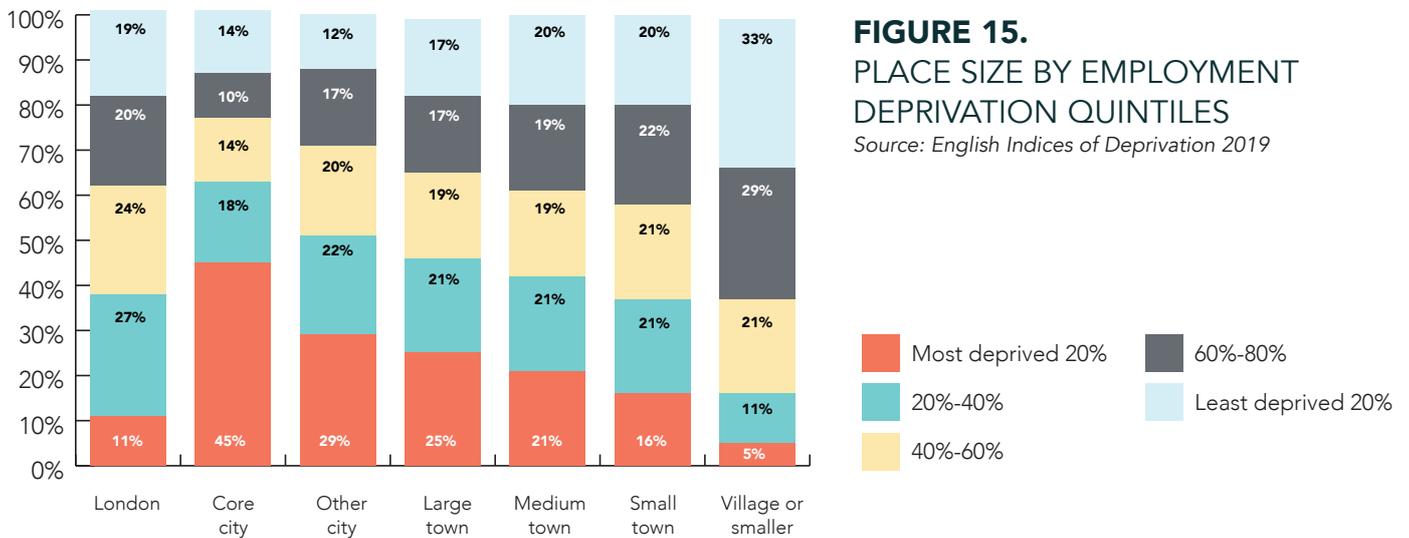


FIGURE 15.
PLACE SIZE BY EMPLOYMENT DEPRIVATION QUINTILES

Source: English Indices of Deprivation 2019

From the chart below we can see that ex-industrial, coastal and hub-and-spoke towns appear likely to face significant challenges relating to employment deprivation, with 34% of ex-industrial towns, 30% of coastal towns and 30% of hub-and-spoke towns falling in the most employment deprived quintile.

This suggests these places are likely to have a disproportionately high number of people that are involuntarily out of work, bringing with it a range of social challenges.

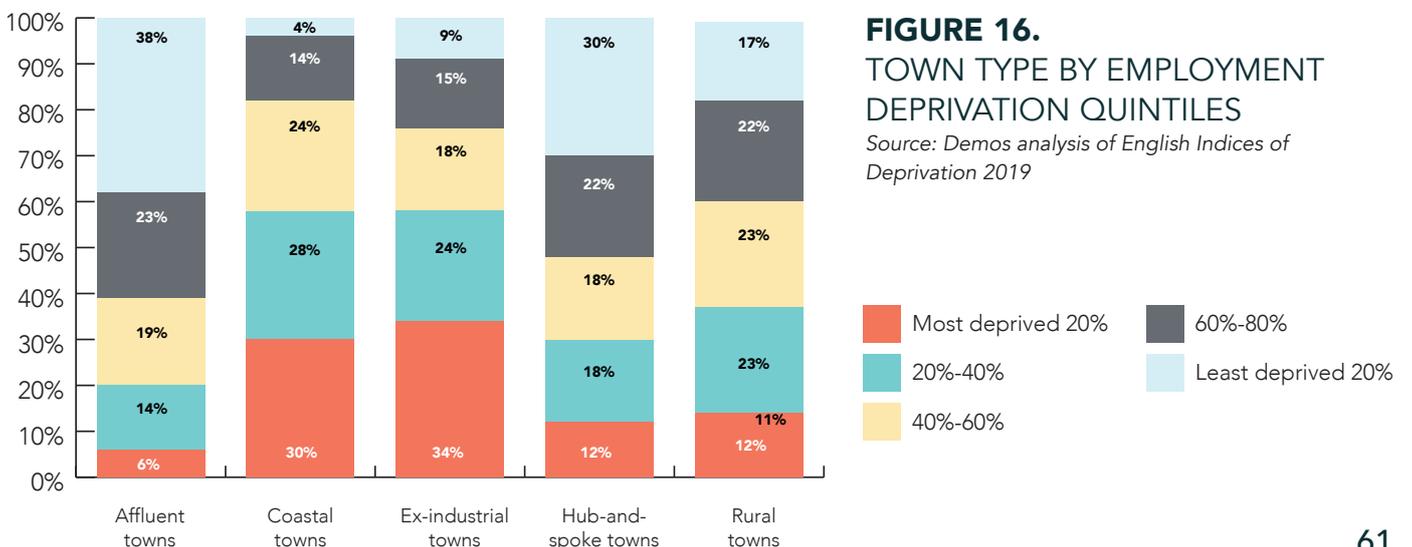


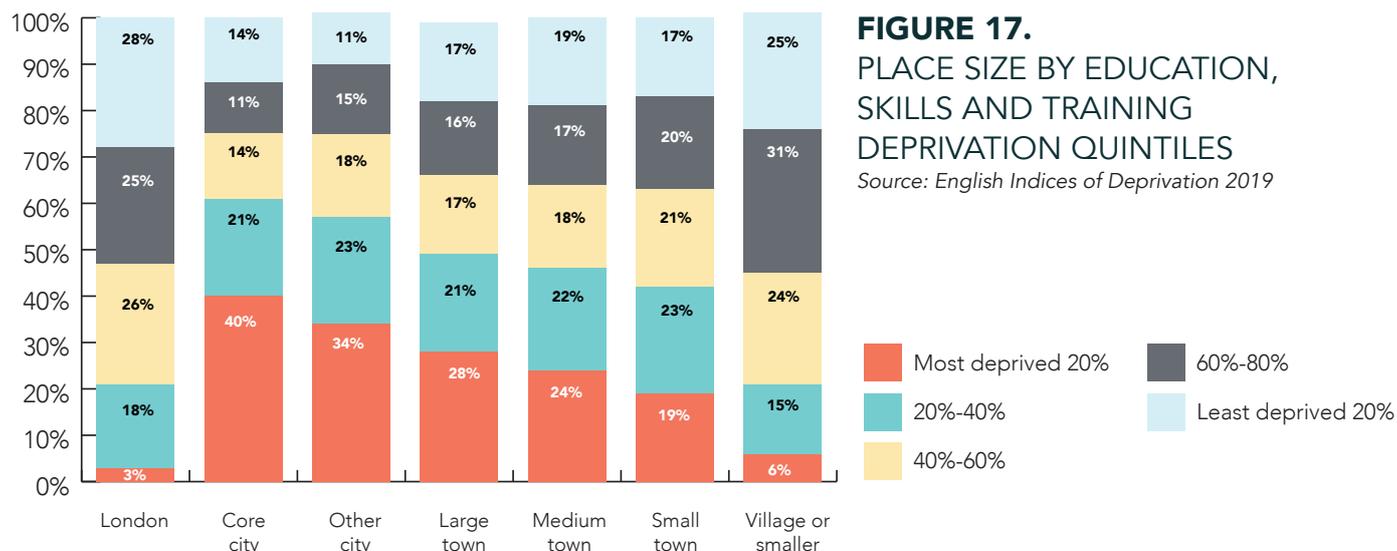
FIGURE 16.
TOWN TYPE BY EMPLOYMENT DEPRIVATION QUINTILES

Source: Demos analysis of English Indices of Deprivation 2019

EDUCATION AND SKILLS

It is also useful to understand the skill level of those living in towns. Skills are important for a place because they are one of the best predictors of economic performance.³⁸ They also matter for individuals: on average skilled workers have higher wages than unskilled workers.³⁹

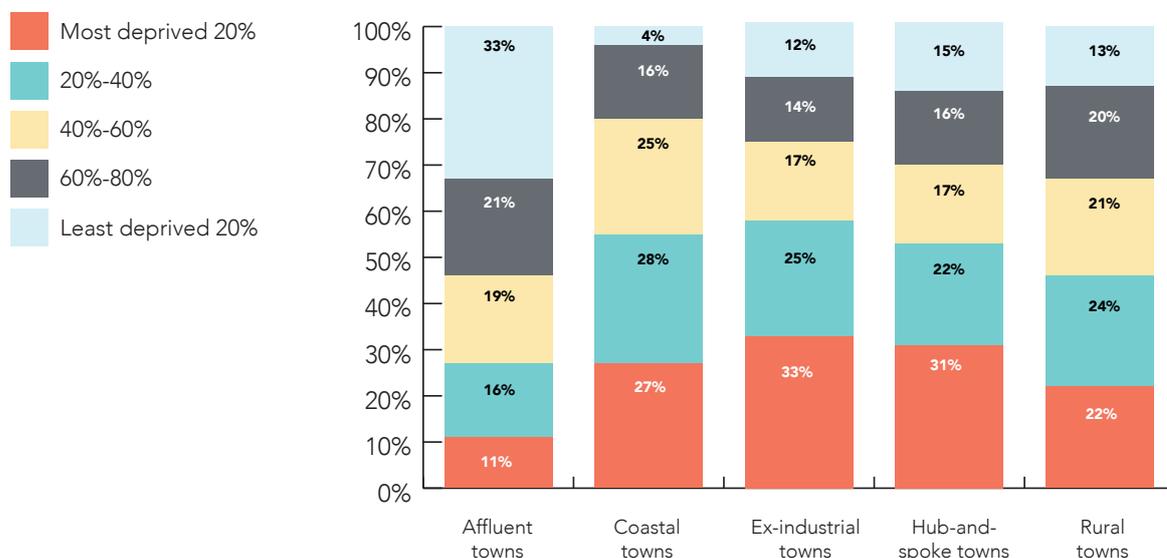
Education, Skills and Training Deprivation measures educational and skills attainment in a local area. It is a broad measure that covers the skill level of children, young people and adults. As the chart below shows, large towns appear to be faring poorly compared to other sized towns, and are more likely to appear in the worst quintile. However, they are faring much better on this measure than core cities or other cities.



However, we see a more detailed picture emerging when considering different types of towns. Here we see that ex-industrial towns and hub-and-spoke towns fare significantly worse than other types of towns, closely followed by coastal towns. Again, affluent towns perform significantly better on this measure.

FIGURE 18.
TOWN TYPE SIZE BY EDUCATION, SKILLS AND TRAINING DEPRIVATION QUINTILES

Source: Demos analysis of English Indices of Deprivation 2019



38. Swinney, P. 'Why skills should be the primary focus of any industrial strategy'. Centre for Cities, 7 September 2017. Available at: <https://www.centreforcities.org/reader/skills-primary-focus-industrial-strategy/why-skills-are-important/>. [Accessed at 19 November 2020]

39. Broecke, S. 'Do skills matter for wage inequality?' IZA World of Labour, February 2016. Available at: <https://wol.iza.org/articles/do-skills-matter-for-wage-inequality/long>. [Accessed 19 November 2020]

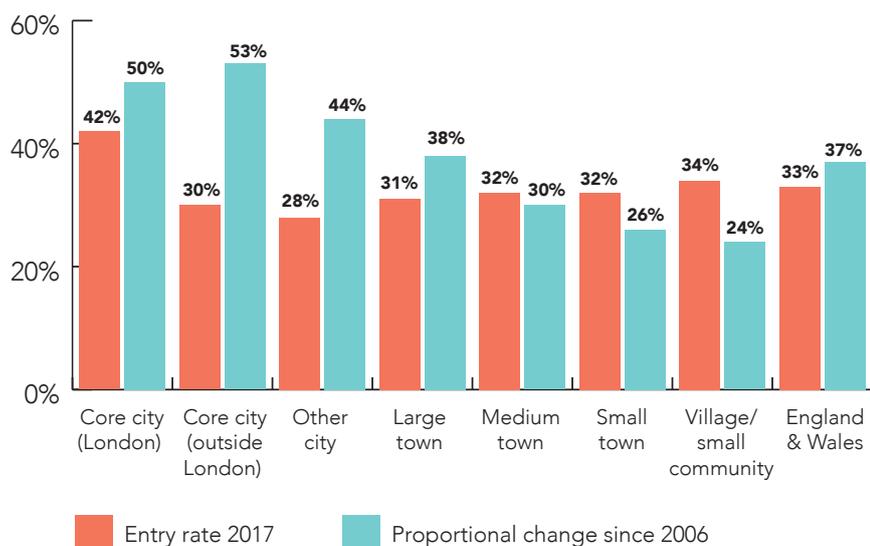
It is also useful to consider the proportion of young people that progress to university. This is important because we know that attending university is associated with significantly higher lifetime earnings.⁴⁰ It is also associated with a range of non-economic benefits; the OECD has shown that graduates are more satisfied with their life than non-graduates.⁴¹

As the chart below illustrates, there is relatively little difference between different sized towns in terms of the proportion of their 18 year olds progressing to university. Towns perform worse than villages and London but better than non-London core cities and other cities. Again, we see that towns are middle of the pack.

However, we see a different pattern when considering the rate of change in the higher education entry rate at age 18. Medium and small towns saw significantly below the national average rates of increase in the higher education rate since 2006, with smaller towns significantly losing out (26% increase versus a national average of 37%). If this trend persists we would expect towns to fall below the national average for their proportion of 18 year olds progressing to university. Policy makers must consider what can be done to ensure this fate is avoided; we consider what steps can be taken in this report.

FIGURE 19.
HIGHER EDUCATION ENTRY RATE AT AGE 18, ENGLAND AND WALES

Source: House of Commons Library⁴²



40. Walker, I, Zhu, Y. The Impact of University Degrees on the Lifecycle of Earnings: Some Further Analysis. Department for Business, Innovation and Skills, 15 August 2013. Available at: <https://www.gov.uk/government/publications/university-degrees-impact-on-lifecycle-of-earnings> [Accessed 19 November 2020]

41. OECD. Education at a Glance 2011: OECD Indicators. OECD Publishing, 13 September 2011. Available at: https://www.oecd-ilibrary.org/education/education-at-a-glance-2011_eag-2011-en?jsessionid=1ucfhfiwdqnpd.x-oecd-live-01 [Accessed 19 November 2020]

42. Baker, C. Cities, towns and villages: Trends and inequalities. House of Commons Library, 21 June 2018. Available at: <https://commonslibrary.parliament.uk/insights/trends-and-inequalities-in-cities-towns-and-villages/> [Accessed 19 November 2020]

The chart below examines the significant variation in the higher education entry rate at 18 seen between different town types. We can see that there appears to be a significant issue in ex-industrial towns and coastal towns, with the higher education entry rate in coastal towns 6 per cent lower than the national average - a significant gap. This suggests that those living in coastal towns may face significant barriers to accessing higher education, affecting their life chances.

However, in Figure 21 we can see that there has been an above average increase in the higher education entry rate since 2006 in ex-industrial towns. If this trend continues we might expect the gap in the higher education entry rate between ex-industrial towns and the national average to be closed. More concerningly, whilst rural towns see a higher education entry rate close to the national average today, these places have seen significantly below average increases since 2006. This suggests that unless action is taken to boost the higher education entry rate in these places, the position of rural towns in this respect may decline in years to come.

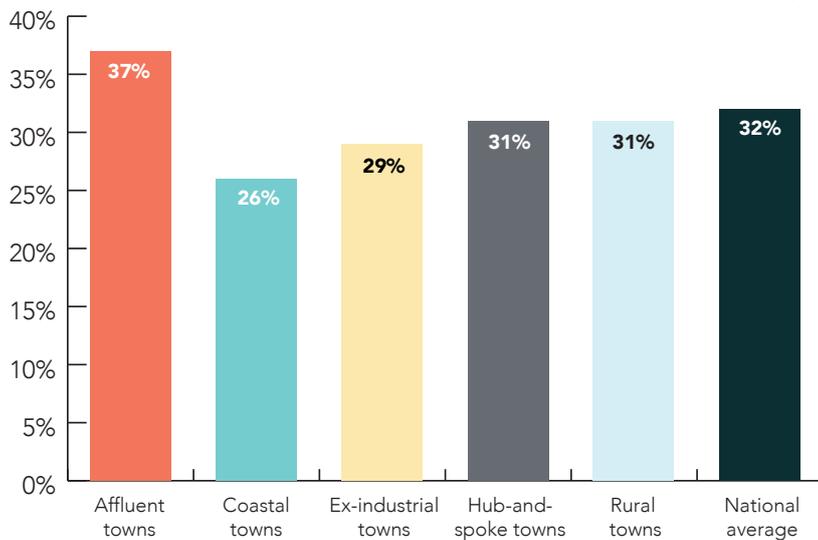
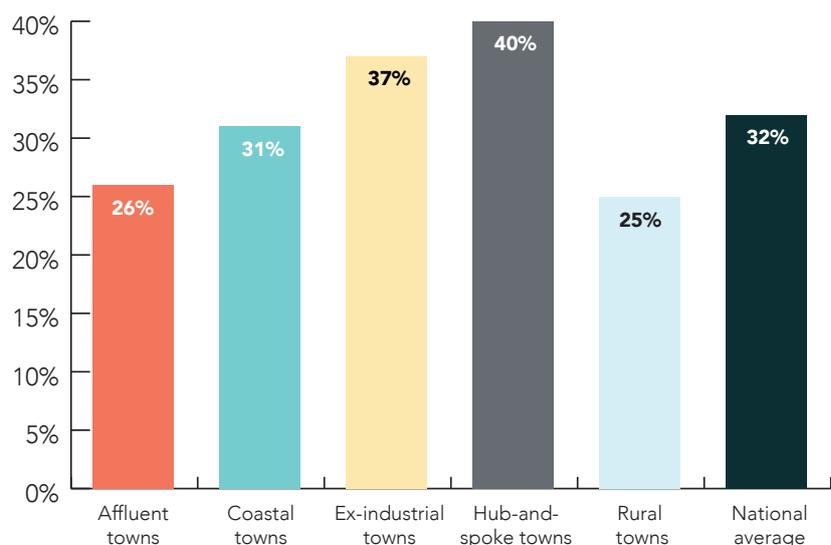


FIGURE 20.
HIGHER EDUCATION
ENTRY RATE AT AGE 18 BY
TOWN TYPE, ENGLAND
AND WALES

Source: Demos analysis of UCAS 2017
End of Cycle data

FIGURE 21.
INCREASE IN HIGHER
EDUCATION ENTRY RATE
AT AGE 18 FROM 2006
TO 2017 BY TOWN TYPE,
ENGLAND AND WALES

Source: Demos analysis of UCAS 2017
End of Cycle data



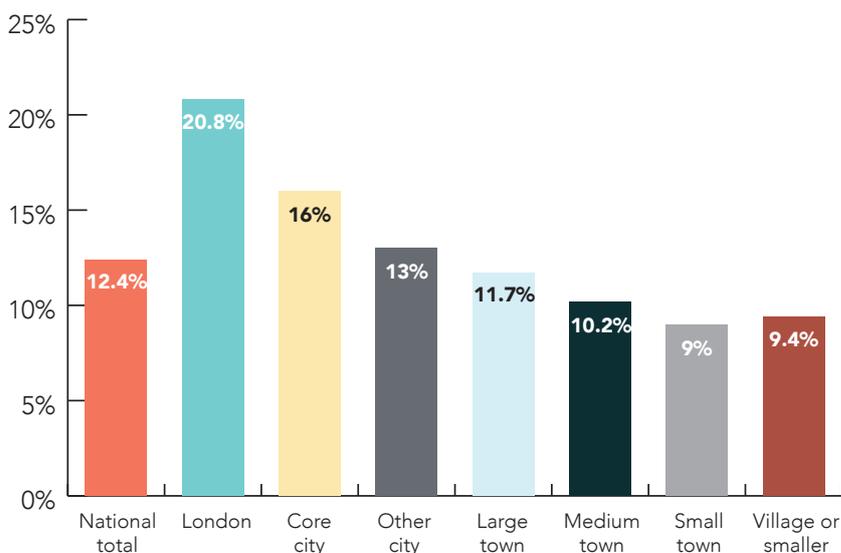
DEMOGRAPHY

Population growth

Population growth matters because a declining population within a place can lead to a wide range of socioeconomic challenges, such as a higher unemployment rate.⁴³ As we can see from the chart below, all sizes of town have experienced lower growth rates than all city types. This is driven by much lower international migration to towns than cities, though towns have seen more net inward migration than cities in recent years.⁴⁴

FIGURE 22.
PERCENTAGE GROWTH
IN POPULATION BY PLACE
SIZE IN ENGLAND AND
WALES, 2002-2018

Source: ONS mid-year estimates



As shown by the chart below, affluent and rural towns have seen population growth rates close to the national average between 2002 - 2018. However, the picture looks very different for ex-industrial towns, who have experienced a

significantly lower than average population growth rate over this period and, to a lesser extent, coastal towns. This suggests that ex-industrial and coastal towns may be failing to attract people to their area, in comparison to other places.

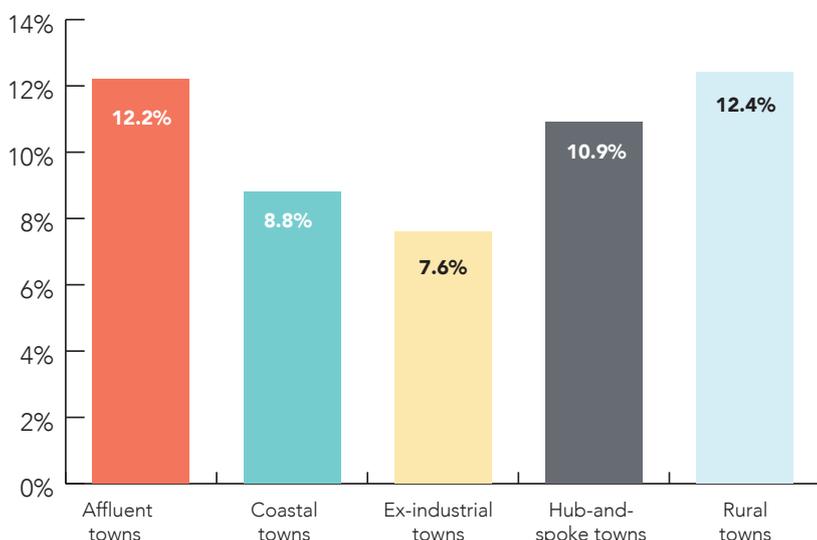


FIGURE 23.
PERCENTAGE GROWTH IN
POPULATION BY TOWN
TYPE IN ENGLAND AND
WALES, 2002-2018

Source: Demos analysis of ONS mid-year estimates

43. Martinez-Fernandez, C., Weyman, T. Demographic Change and Local Development: Shrinkage, Regeneration and Social Dynamics (Highlights). OECD, 28 November 2012. Available at: https://www.oecd.org/cfe/leed/Demographic_changes_highlights.pdf [Accessed 19 November 2020]

44. Baker, C. Cities, towns and villages: Trends and inequalities..

However, as explored by the chart below, there appears to be a much stronger correlation between the population growth rate of different places within the regions than within the same type of place across regions. This suggests that regional dynamics are more likely to be behind population changes than the type of place (e.g. whether a town or a city).

That being said, it is still important to flag that towns in some regions seem to face specific population challenges. Large towns in the North East, for example, saw the biggest decline (-7%) in population between 1981 and 2011; a large figure against a backdrop of significant national population growth over this period. The population of Welsh towns has also grown at a much slower rate than their core city (Cardiff), suggesting a shifting demographic balance in that region.

Region/country	Small Towns	Medium Towns	Large Towns	Core Cities
Scotland	3%	2%	0%	-4%
North East	1%	3%	-7%	3%
North West	5%	1%	2%	1%
Yorkshire and the Humber	9%	9%	6%	5%
Wales	9%	10%	7%	25%
West Midlands	18%	7%	9%	4%
East Midlands	14%	20%	21%	17%
East of England	26%	19%	20%	N/A
South West	28%	28%	24%	13%
South East	25%	24%	23%	24%

FIGURE 24.
INCREASE/DECREASE IN POPULATION BETWEEN 1981
AND 2011 BY TYPE AND REGION (GREAT BRITAIN)

Source: Centre for Towns

Ageing

How different places age is of vital importance for public policy. As the Resolution Foundation has described, “demographic divergence means growing differences in demand for social care services, with this demand mapping increasingly poorly onto councils’ existing revenue-raising potential”.⁴⁵ This means that local policy makers

faced with a rapidly ageing population are likely to face significant challenges.

But as the Centre for Towns rightly highlights, a more youthful population in a locality has its own policy demands. This might include “the resourcing of mental health provision for young people, a diverse and affordable housing supply, leisure activities and a functioning commuter transport

45. McCurdy, C. Ageing, fast and slow: When place and demography collide. Resolution Foundation/Intergenerational Centre, October 2019, p.45. Available at: <https://www.resolutionfoundation.org/app/uploads/2019/10/Ageing-fast-and-slow.pdf> [Accessed 19 November 2020]

network".⁴⁶ Understanding the changing age profiles of different areas is therefore vital to making informed policy decisions.

As the chart below illustrates, towns have many more older people than cities, though fewer than villages. They also have significantly fewer people of working age than cities.

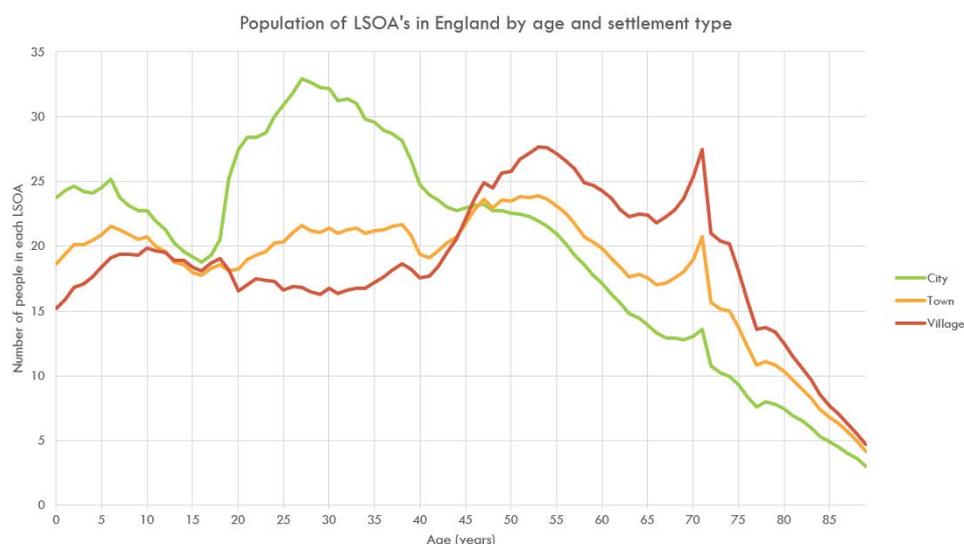


FIGURE 25.
AGE PROFILE ACROSS DIFFERENT PLACES (ENGLAND)

Source: Demos analysis of Mid-2018 ONS estimate

Looking across time, the table below shows that since 2006 all town sizes have aged more than core cities and other cities, which have not experienced any increase in their median age during this period. Smaller towns have aged more than medium towns and larger towns, suggesting that size matters: smaller places are ageing more than bigger places. If this demographic divergence continues it could result in increased difficulties for towns. Local taxation revenues could be squeezed whilst demand for public services such as social care increases.

Category	Median Age change between 2006 and 2016 (years)
London	0
Core City (outside London)	0
Other City	0
Large Town	+1
Medium Town	+2
Small Town	+3
Village or Small Community	+4

FIGURE 26.
AGEING BY PLACE SIZE, GREAT BRITAIN

Source: House of Commons Library

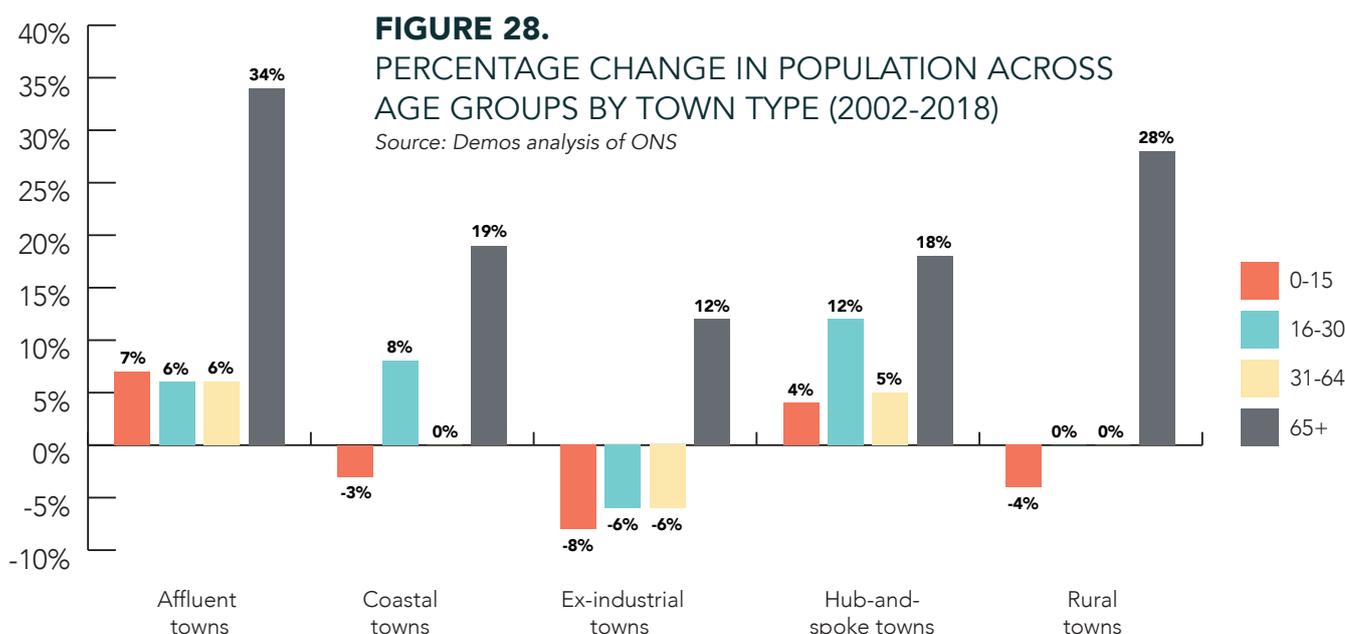
46. Warren, I. The ageing of our towns. Centre for Towns, 1 January 2018, p.4. Available at: <https://www.centrefortowns.org/reports/the-ageing-of-our-towns>. [Accessed 19 November 2020]

The table shows the speed at which different town types have aged on average over the last 16 years. Rural towns have aged the most over this period, with a five year increase in the median age between 2002 and 2018. Coastal towns have also seen a significant ageing over this period, albeit from a much higher base; this means the median age in coastal towns is now fast approaching fifty. These significant increases in the median age could be putting a strain on local services for older people in rural and coastal towns.

It is also useful to examine how the size of different age cohorts have changed over time. As we can see from the chart below, the older population of all town types has increased significantly since 2002, reflecting wider national demographic trends. However, there have been significant differences in the type of change seen in younger age groups.

	Median age in 2002	Median age in 2018	Change
Affluent towns	38	41	+ 3
Rural towns	39	44	+ 5
Hub-and-spoke towns	37	38	+ 1
Ex-industrial towns	38	40	+ 2
Coastal towns	43	47	+ 4

FIGURE 27.
AGEING BY TOWN TYPE, GREAT BRITAIN
Source: Demos analysis of ONS



Affluent towns and rural towns have seen the largest absolute increase in the size of their elderly populations. However, this is likely to feel very different in rural towns given these places have seen decreases or stagnation in the size of all age groups younger than 65. Concerningly, rural towns have seen a 4% fall in the number of people aged under 16. This could be driven by movements of young families away from rural towns.

Hub-and-spoke, ex-industrial and coastal towns have all seen smaller yet still significant increases in the size of their older populations. However, the data looks particularly concerning for ex-industrial towns. Though they have seen the lowest percentage increase in older populations of all town types, they are the only town type to see significant decreases in the size of all younger age groups between 2002 and 2018.

The picture for coastal towns is more mixed. Significant increases in the population aged between 16 and 30 could be injecting a new youthful dynamism to these already old places (see Figure 29 above). However, the decline in the size of the population under the age of 16 could be a cause for concern and, indeed, be related to a burgeoning millennial population in these places (who tend to have children later in life). The demographic picture for hub-and-spoke towns looks more encouraging, with healthy increases in all younger age groups.

The series of charts below provide further detail on how the age profile of different town types has shifted since 2002. They show that all towns have experienced ageing, as we know from Figure 28 above, but that they have experienced this differently.

These charts also reveal a few specific phenomena. For example, we can see that hub-and-spoke towns have enjoyed an increase in the size of their 18-30 population, which appears to be driven by students moving to universities in these places around the age of 18. We can also see that coastal towns have seen an influx of those in their 20s, as discussed above.



FIGURE 29. PERCENTAGE OF THE POPULATION OF EACH YEAR OF AGE IN AFFLUENT TOWNS
 Source: Demos analysis of ONS

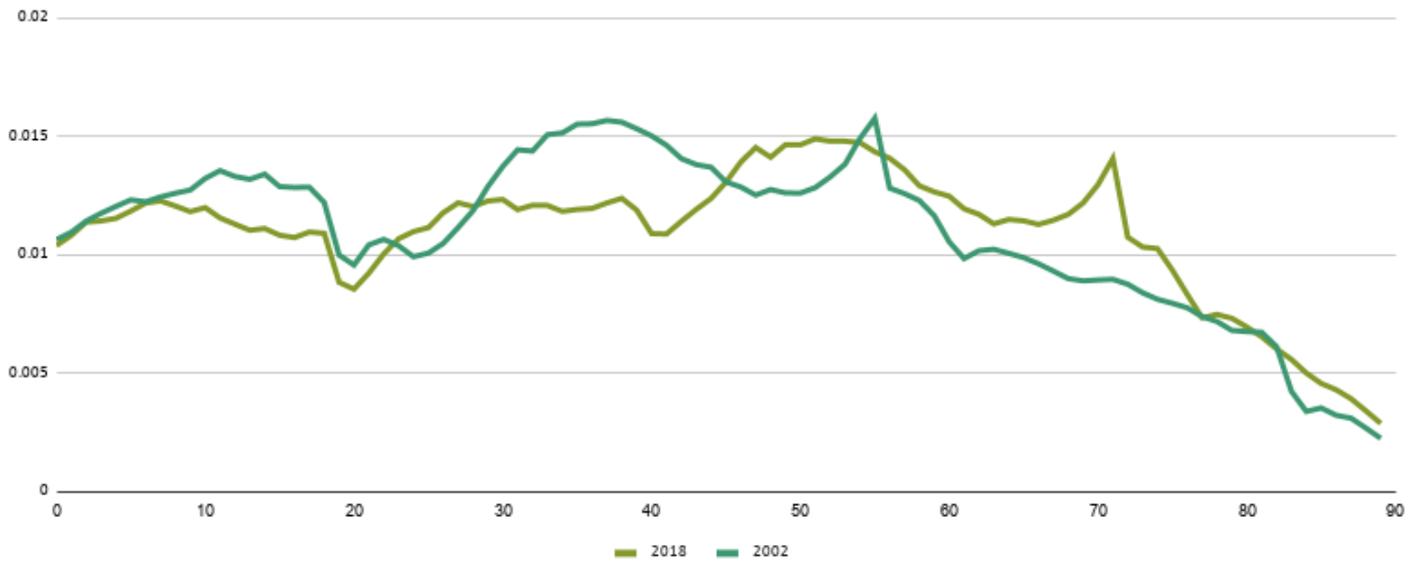


FIGURE 30.
 PERCENTAGE OF THE POPULATION OF EACH YEAR OF AGE IN RURAL TOWNS
 Source: Demos analysis of ONS

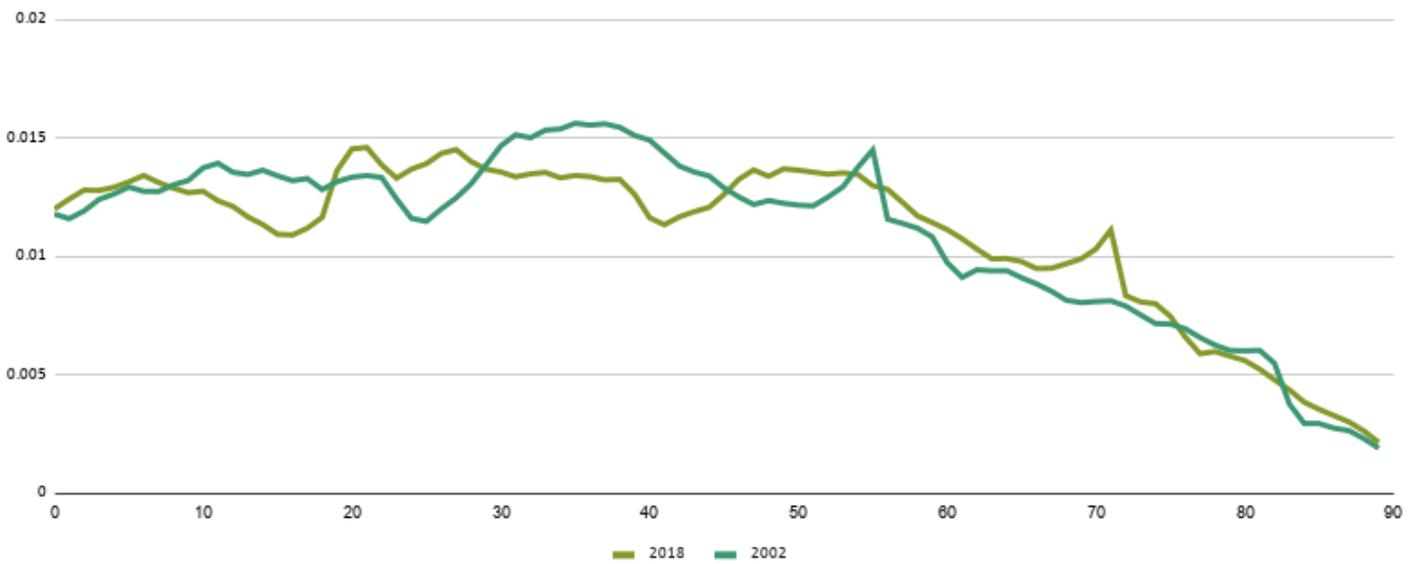


FIGURE 31.
 PERCENTAGE OF THE POPULATION OF EACH YEAR OF AGE IN HUB-AND-SPOKE TOWNS
 Source: Demos analysis of ONS

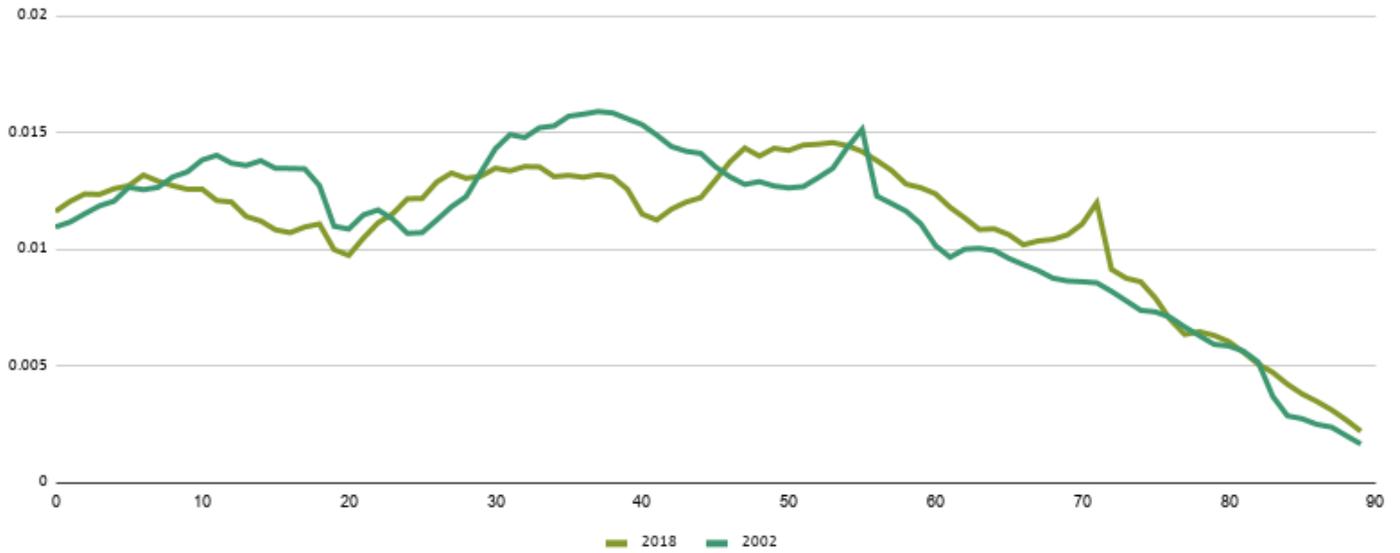


FIGURE 32.
 PERCENTAGE OF THE POPULATION OF EACH YEAR OF AGE IN EX-INDUSTRIAL TOWNS
 Source: Demos analysis of ONS

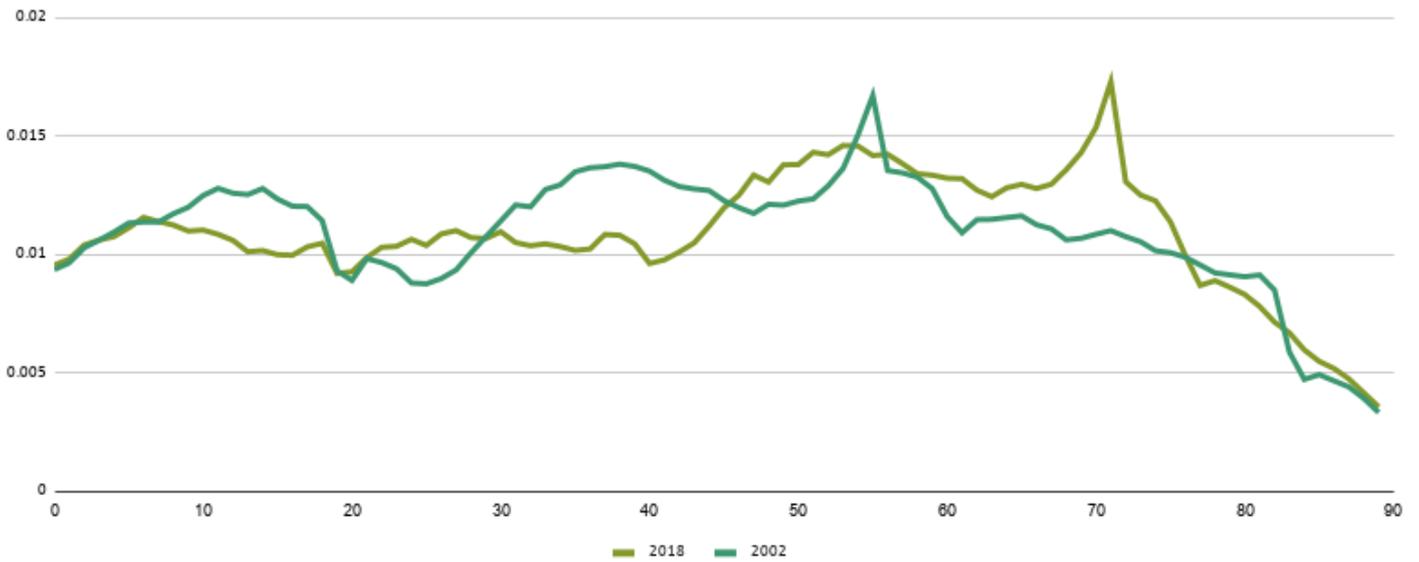


FIGURE 33.
 PERCENTAGE OF THE POPULATION OF EACH YEAR OF AGE IN COASTAL TOWNS
 Source: Demos analysis of ONS

HEALTH

Having considered the economic performance of towns and the changes in their population, it is vital that we consider the health - both physical and mental - of these places. Health matters both intrinsically and instrumentally. If we are in poor health it is difficult for us to lead our lives as we see fit.

The Health Deprivation and Disability Domain of the English Indices of Multiple Deprivation measures the risk of premature death and the impairment of quality of life through poor physical or mental health.⁴⁷ The chart below shows us that large towns are most likely to be in the worst health deprivation quintile of all town sizes, though less likely than core cities and other cities. This suggests that a high number of large towns are likely to have serious health problems. However, medium and small towns appear to have better health than cities, though significantly worse than villages.

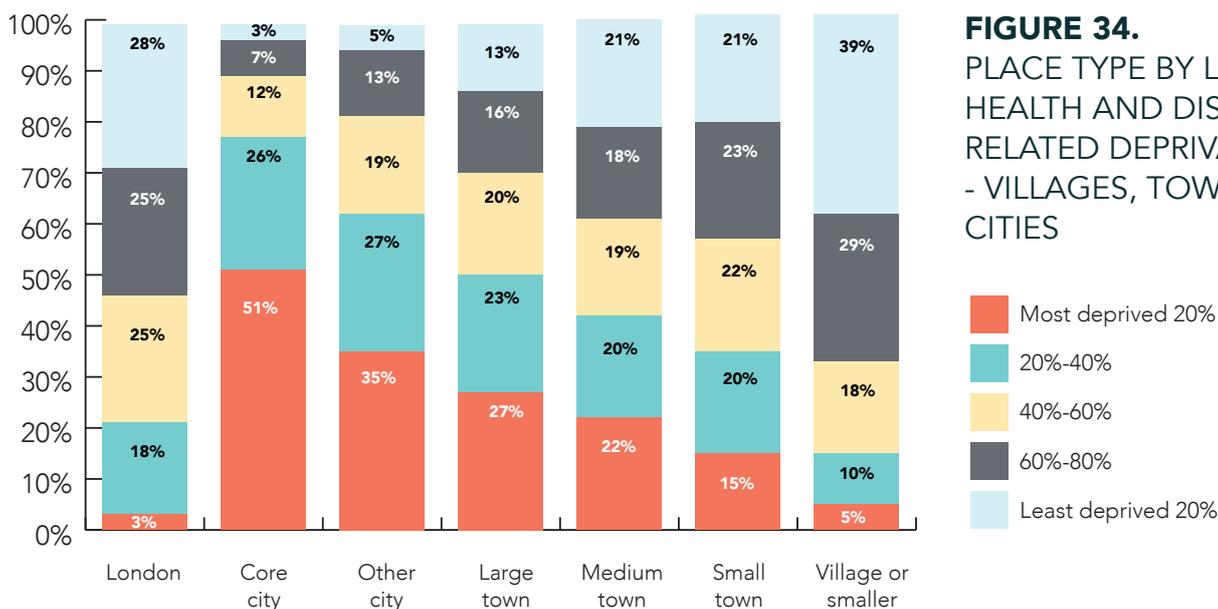


FIGURE 34.
PLACE TYPE BY LEVEL OF HEALTH AND DISABILITY-RELATED DEPRIVATION - VILLAGES, TOWNS AND CITIES

By looking across different town types in Figure 35 below, we again see a more nuanced picture emerging. We can see that affluent towns are faring extremely well, with 43% of people in affluent towns falling in the least deprived quintile of places in England - the highest score across any geography we examined. Similarly, rural towns appear to be faring well on this measure, though not quite as well as affluent towns.

We see a very different picture emerging when considering ex-industrial and hub-and-spoke towns, where 37% and 33% of residents in these places respectively fall within the most deprived 20% of places in England. This is a worse score than for any of the generalised town sizes considered in Figure 34 above, though it should be flagged that it is some way off the health deprivation challenges seen in core cities.

47. Ministry of Housing, Communities & Local Government. IMD - Health Deprivation and Disability - score in England. Ministry of Housing, Communities & Local Government, 26 September 2019. Available at: https://lginform.local.gov.uk/reports/lgastandard?mod-metric=3906&mod-area=E92000001&mod-group=AllRegions_England&mod-type=namedComparisonGroup [Accessed 19 November 2020]

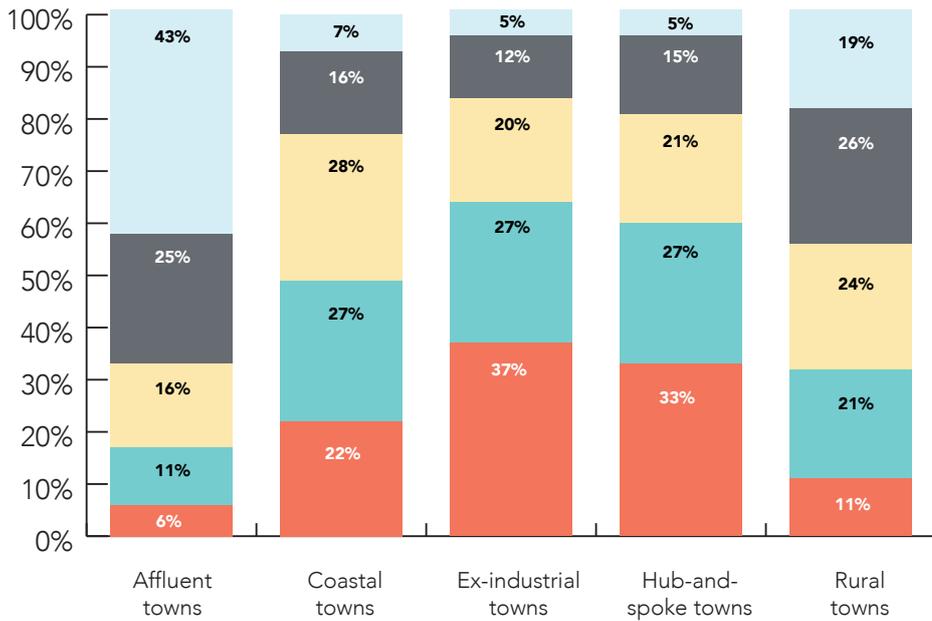
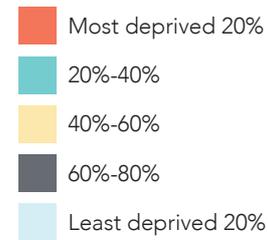


FIGURE 35.
PLACE TYPE BY LEVEL OF HEALTH AND DISABILITY-RELATED DEPRIVATION BY TOWN TYPE
Source: English Indices of Deprivation 2019



HOUSING

It is widely recognised that Britain faces a housing crisis, with the government for some time now openly acknowledging that our housing market is “broken”.⁴⁸ But is there evidence of a housing crisis in our towns and, if so, what does it look like?

As we can see from the figures below, house price increases over the last decade across all town sizes have been close to the national average, with small and medium towns seeing below average increases in house prices. This suggests that towns are not experiencing issues relating to housing affordability at the same scale as London, which is unsurprising.

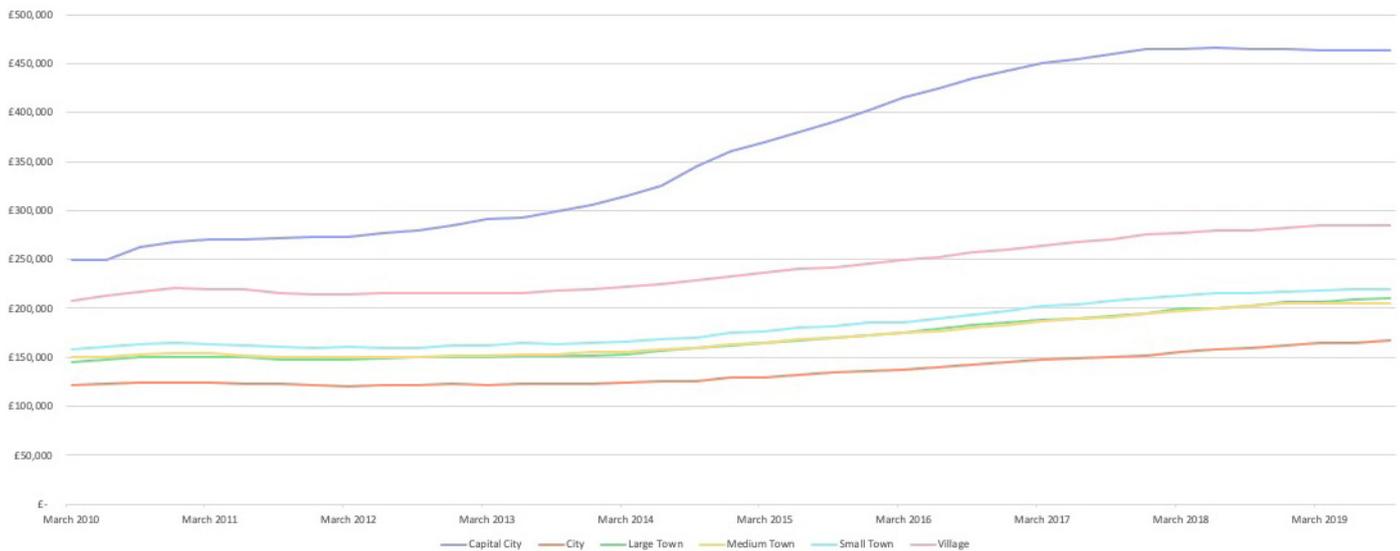


FIGURE 36.
MEDIAN PRICE PAID FOR RESIDENTIAL PROPERTIES ACROSS DIFFERENT PLACES, ENGLAND
Source: ONS

48. Ministry of Housing, Communities and Local Government. Fixing our broken housing market. Ministry of Housing, Communities and Local Government, 7 February 2017. Available at: <https://www.gov.uk/government/publications/fixing-our-broken-housing-market>. [Accessed 19 November 2020]

	Percentage change (%)
London	42%
City	26%
Large Town	28%
Medium Town	25%
Small Town	25%
Village	22%
All	28%

FIGURE 37.
CHANGE IN MEDIAN PRICE
PAID FOR RESIDENTIAL
PROPERTIES IN ENGLAND
(2010 - 2019)

We see a different picture emerging when considering house price changes in different town types. As shown by the chart below, affluent towns have experienced a significant increase in house prices over the last decade, with house price growth in these places far outstripping other town types. Whilst this might be expected to benefit longstanding homeowners living in affluent towns, it could be causing a significant squeeze on living standards for low income renters and new arrivals in these places.

It is also worth flagging that house prices in coastal towns remain relatively high compared to other town types. Given that coastal towns appear to have a particularly high concentration of low paid jobs, as we saw earlier in this chapter, residents in these places could face significant barriers to housing access.

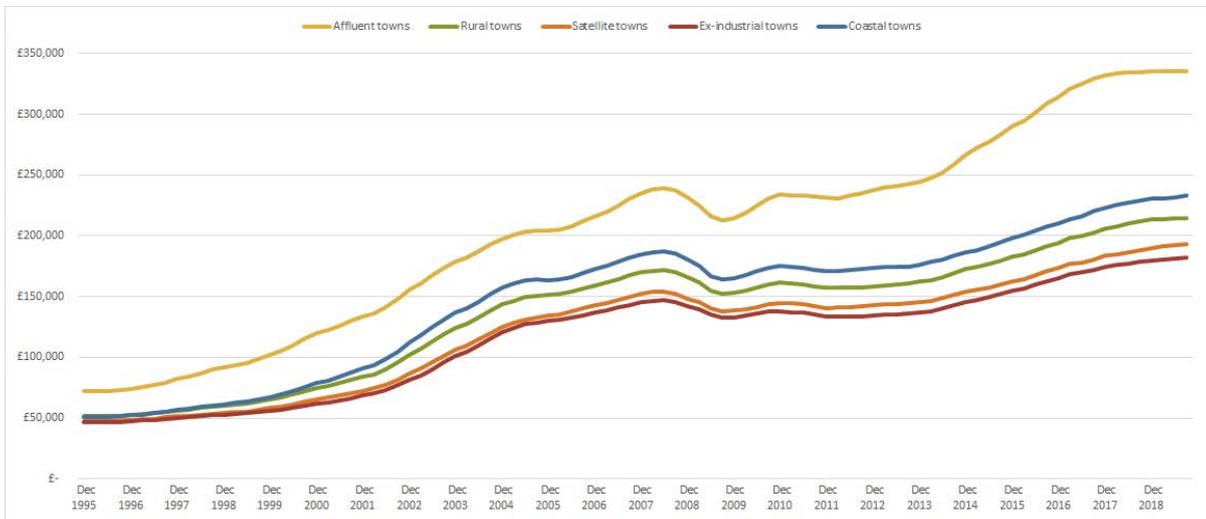


FIGURE 38.
MEDIAN PRICE PAID FOR RESIDENTIAL PROPERTIES
ACROSS DIFFERENT PLACES, ENGLAND, QUARTERLY
DATA POINTS, YEAR ROLLING AVERAGE - TOWN TYPE
Source: ONS

CRIME

Crime is damaging not only to victims (and culprits), but also to wider society. It can lead to community decline through increasing a desire to move for residents, weaker attachment of residents to their community and less neighbourhood satisfaction. For these reasons it is important to understand whether towns are facing specific challenges relating to crime and, if so, which towns appear to be the most affected.

Using the Index of Multiple Deprivation crime score, which measures the risk of personal and material victimisation at a local level, we can see that larger towns face more of a crime challenge than medium and small towns, with these towns more likely to fall into the most deprived 20%. However, it is important to flag that the crime challenge even in large towns appears significantly less acute than in core and other cities.

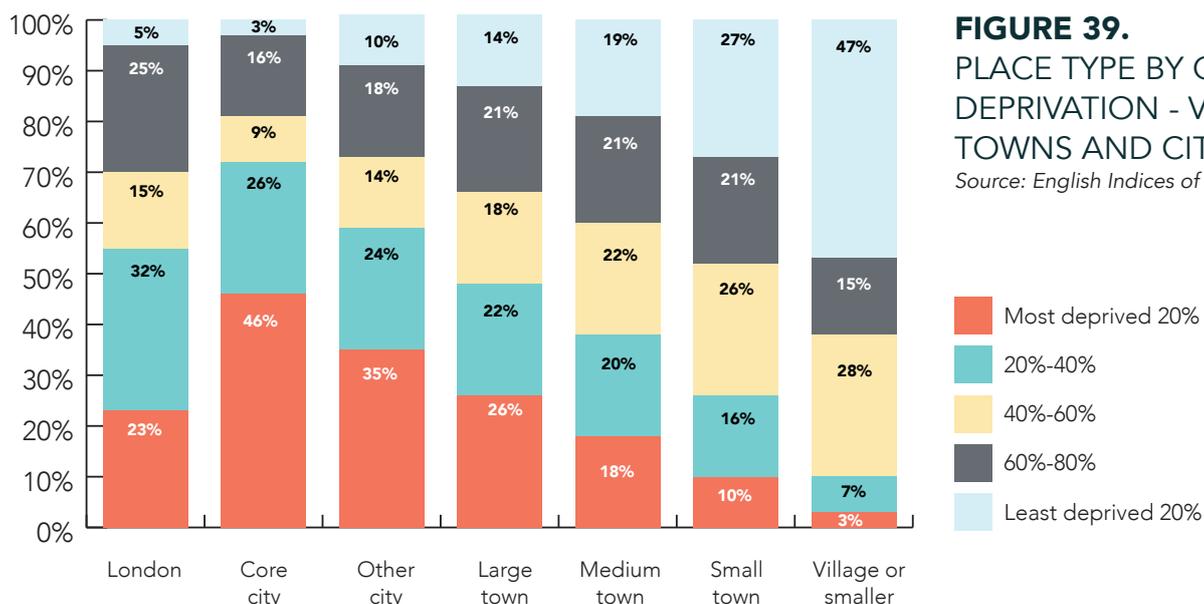


FIGURE 39.
PLACE TYPE BY CRIME DEPRIVATION - VILLAGES, TOWNS AND CITIES
Source: English Indices of Deprivation 2019

When comparing different types of town, as in the chart below, we see a more nuanced picture emerge. We can see that hub-and-spoke towns and ex-industrial towns face much greater challenges relating to crime than other types of town, with rural and affluent towns seeing a significantly more rosy picture. However, again it is important to flag that, despite the challenges in hub-and-spoke and ex-industrial towns, these towns are less likely to fall into the worst quintile for crime than other and core cities.

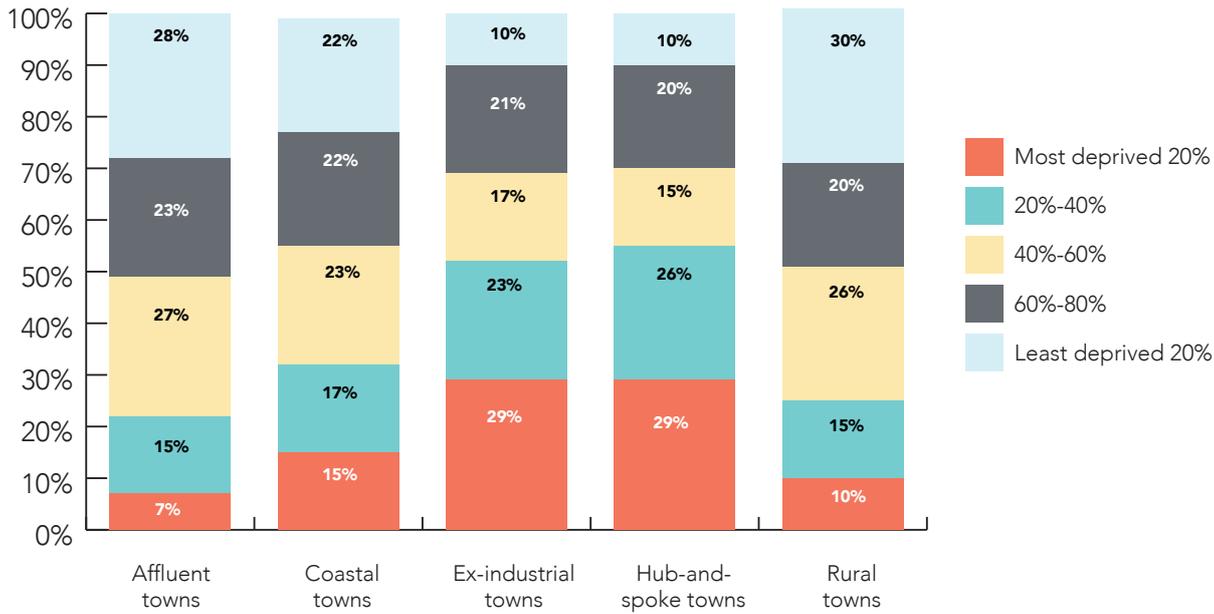


FIGURE 40.
CRIME DEPRIVATION BY PLACE TYPE

Source: *English Indices of Deprivation 2019*

SOCIAL MOBILITY

Social mobility describes the link between a person’s occupation or income and the occupation or income of their parents. As set out by the Government’s Social Mobility Commission, “where there is a strong link, there is a lower level of social mobility. Where there is a weak link, there is a higher level of social mobility.”⁴⁹ Social mobility is generally viewed as positive across the political spectrum and something that should be encouraged.

If it were possible, we would look at real social mobility outcomes, comparing the incomes or occupations reached by people from disadvantaged circumstances. However this data does not exist at local levels for the UK. Where it does exist it is also, necessarily, a lifetime out of date. However, we can look at the local inputs into social mobility. These take two main forms, educational outcomes for those from poorer backgrounds and outcomes achieved by adults living in the area.⁵⁰

The Social Mobility Index does not track individuals through their life but instead measures the influences a place has on life chances. It is therefore necessarily limited as a measure of true social mobility (which would require tracking individuals throughout their life). Using the House of Commons Library’s version of the Social Mobility Index we can see how different places affect the life chances of the people living there.

In the chart below we can see that, amongst towns, large towns perform worse than medium and small towns. All towns, on average, perform worse than London - which does exceptionally well on this measure, due to a range of London-specific factors - and villages, but better than other and core cities. Again, it appears that towns are middle of the pack.

49. Social Mobility Commission. ‘About us’. Social Mobility Commission. Available at: <https://www.gov.uk/government/organisations/social-mobility-commission/about> [Accessed 19 November 2020]

50. Social Mobility Commission. Methodology for the social mobility index. Social Mobility Commission, 16 June 2016. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/496103/Social_Mobility_Index.pdf [Accessed 19 November 2020]

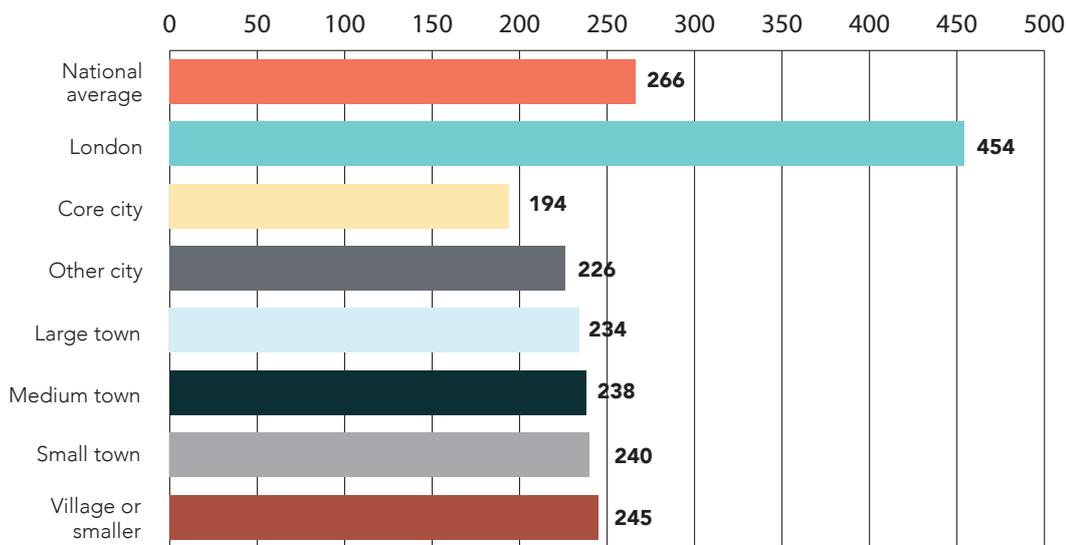


FIGURE 41.
SOCIAL MOBILITY INDEX - OVERALL RANK BY PLACE TYPE
(HIGHER IS MORE SOCIALLY MOBILE)

Source: House of Commons Library

However, analysing social mobility through the lens of our typology reveals different patterns. We can see that coastal towns fare particularly poorly in terms of conditions for social mobility, scoring significantly worse than any other town type. This suggests that policy makers should urgently consider what can be done to improve the conditions for social mobility in coastal towns.

Rural towns see the second lowest score on this measure, an uncharacteristically poor performance given this grouping has fared relatively well across the range of metrics analysed in this chapter. This suggests that taking steps to improve the main inputs to social mobility should be a priority for policy makers considering how to improve the lot of rural towns.

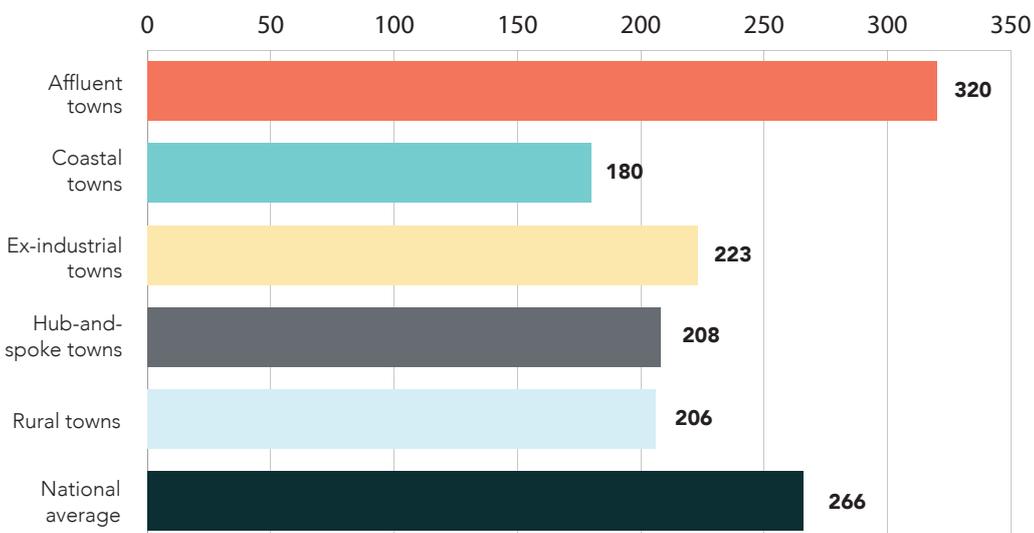


FIGURE 42.
SOCIAL MOBILITY INDEX - OVERALL RANK BY TOWN TYPE (HIGHER IS MORE SOCIALLY MOBILE)

Source: House of Commons Library

TRANSPORT

It is useful to look at use of different transport modes in towns compared to everywhere else. This can tell us about what life is like for people living in towns and reveal issues relating to public transport provision.

From the chart below we can see that residents of towns are much less likely to travel to work via public transport than residents of cities, with only around one in ten town residents commuting to work via public transport compared to more than one in five core cities residents and more than half of London residents. This could suggest that public transport provision is poorer in towns than cities. It could also, however, be a reflection of different levels of car ownership; if car ownership is higher in towns, this will reduce the attractiveness of public transport for residents.

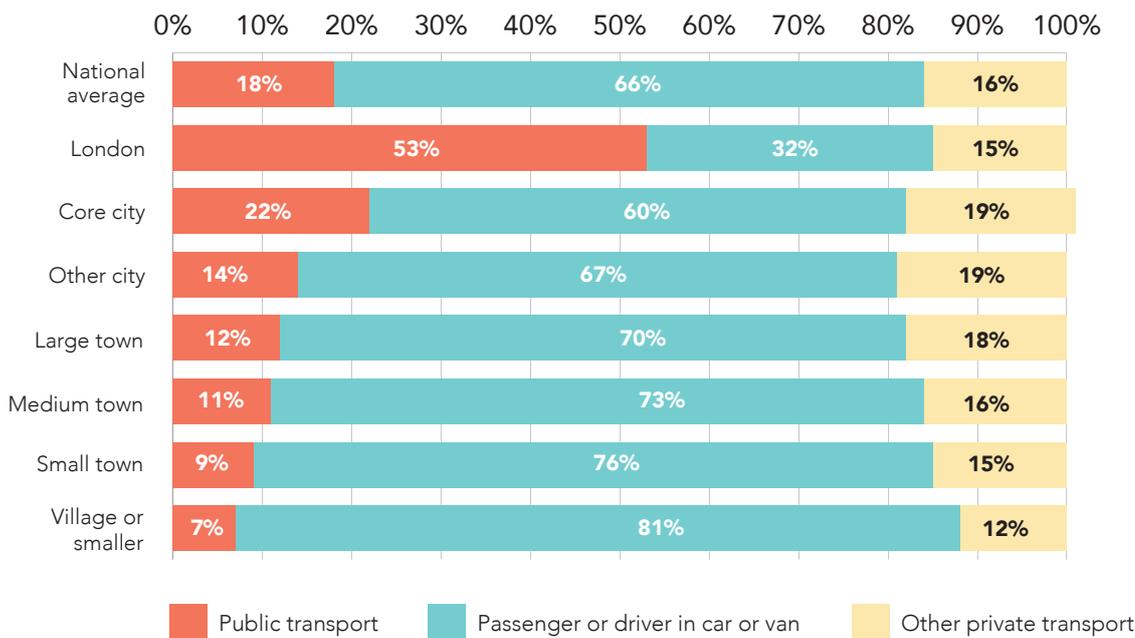


FIGURE 43.
MEANS OF TRANSPORT TO WORK, ENGLAND AND WALES - BY PLACE SIZE ⁵¹
 Source: House of Commons Library, using Census 2011 data

51. Public transport is defined by the House of Commons Library as "Underground, metro, light rail, tram" plus "train" plus "Bus, minibus or coach". Other private transport is "Taxi" plus "Motorcycle, scooter or moped" plus "Bicycle" plus "On foot".

We can gain a better understanding of transport usage across places by looking at different town types. Coastal towns and rural towns appear to have - by some margin - the lowest usage of public transport for travel to work, with just 7% and 6% of residents respectively in these places using public transport compared to a national average of 18%. This could suggest that these places face significant issues with respect to public transport provision, though further research would be required to establish this more conclusively.

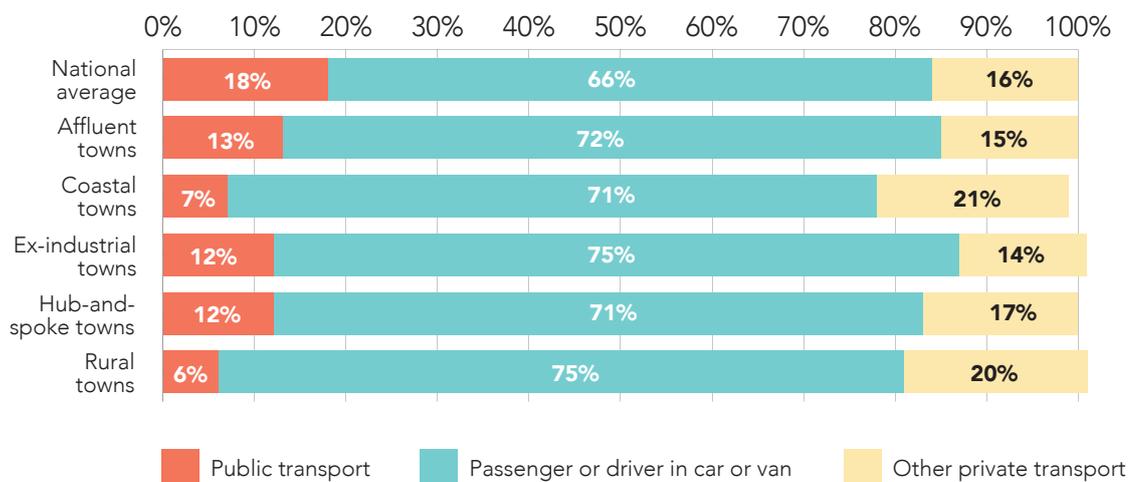


FIGURE 44.
MEANS OF TRANSPORT TO WORK, ENGLAND AND WALES - BY TOWN TYPE

Source: House of Commons Library, using Census 2011 data

From the chart below we can also see that residents of ex-industrial and hub-and-spoke towns are more likely than average to use buses to travel to work. The bus sector has been significantly hit by funding cuts in recent years than other modes of transport, with a large number of routes lost and significant fare increases.⁵² This means that residents of ex-industrial towns and hub-and-spoke towns could be disproportionately affected by higher transport costs and a poorer service.

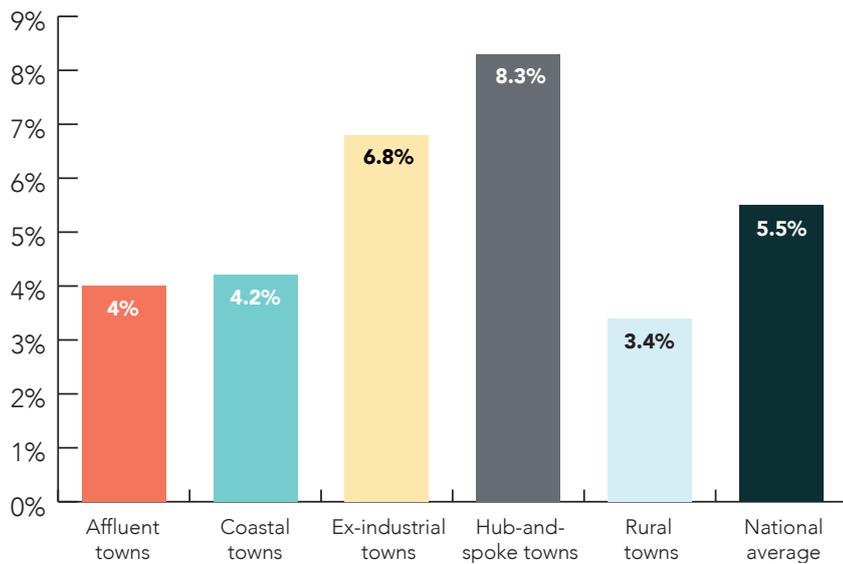


FIGURE 45.
MEANS OF TRANSPORT TO
WORK - BUS USE, ENGLAND
AND WALES - BY TOWN TYPE

Source: House of Commons Library, using
Census 2011 data

52. Campaign for Better Transport. 'Charity reveals extent of bus funding cuts, and how new funding settlement could reverse the decline'. Campaign for Better Transport. Available at: <https://bettertransport.org.uk/future-of-bus-funding-oct-2019>. [Accessed 19 November 2020]

ANNEX 2

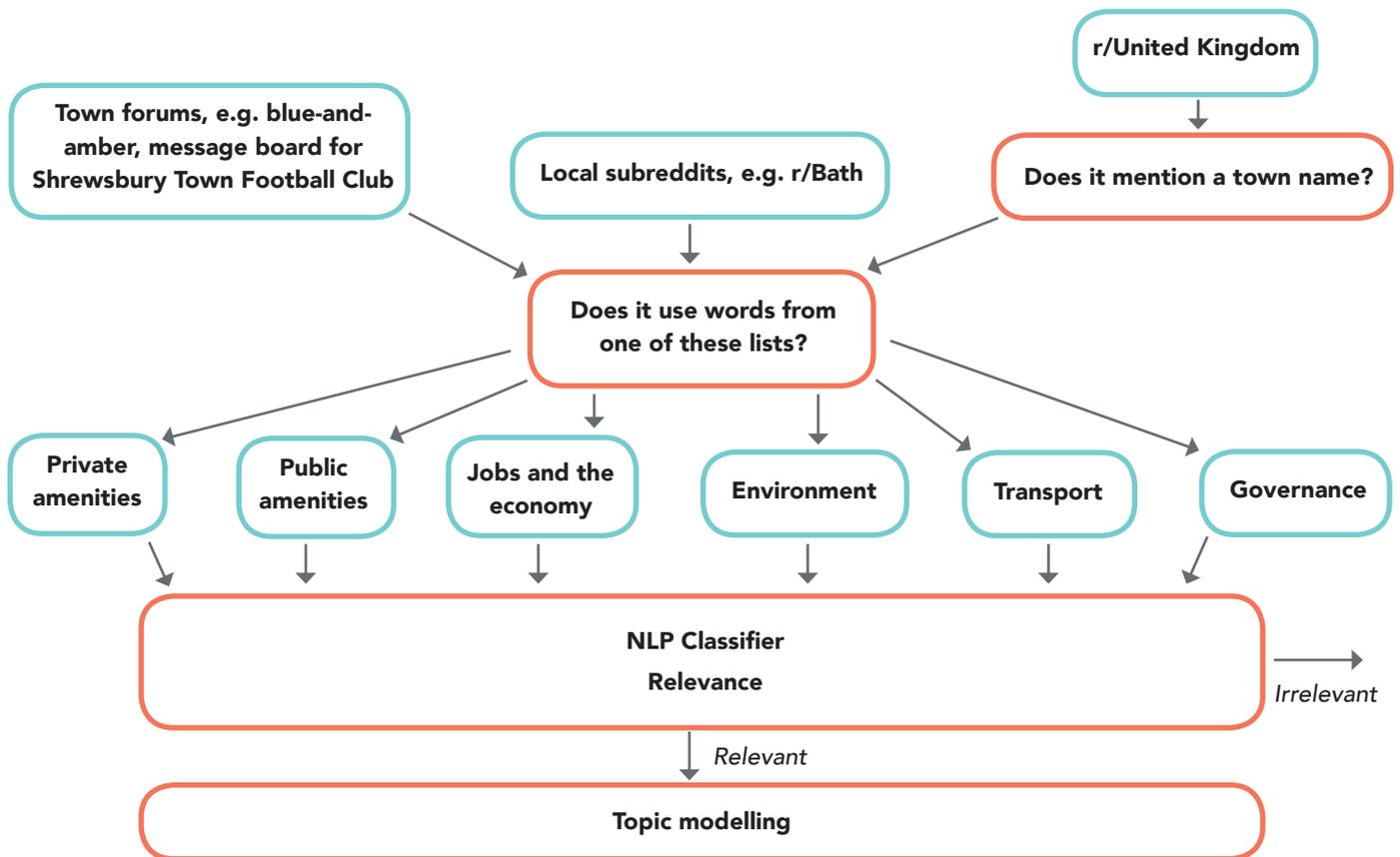
CONVERSATION MAPPING: A DETAILED VIEW

We wanted to use online conversations to understand how people talk and feel about their towns. This method was designed to capture discussion of local issues and discussion of living in a town. Ideally, we wanted evaluative statements, either comparing the town where the person lives to a nearby city or village, or talking about things they really like, or dislike, about their town.

We used Method52, a social media analysis tool developed by Demos in partnership with the University of Sussex, to collect posts and comments from different online spaces dedicated to local town discussions.

Some of these sources were subreddits, for example r/Doncaster which is "A reddit for Doncaster (Donny). Post whatever you like as long as it is somehow relevant to the Doncaster". Some of them were online messageboards, like blue-and-amber, which is to "Discuss everything STFC and other general topics". The "off-topic" sections of such football forums for small town-based teams, were found to be a rich source of discussion of local issues. Finally we also drew in data from r/unitedkingdom, searching for occurrences of a list of town names within posts and comments. These sources were selected as they represent informal (but nevertheless moderated) spaces which allow a wide range of conversation to take place, and give us a detailed view of the ways in which towns are discussed online.

Reddit posts and comments were collected through the platform's official API, with forums collected through a series of automatic web scrapers. For each source, a review was first undertaken to establish that there were no restrictions, within terms of service or otherwise, placed on this type of collection by the site, and forums which used a robots.txt file or similar method to disallow web scraping were not considered for collection.



DEMOGRAPHICS

Given the pseudonymity of discussion pages on the internet, it was not possible for us to control for demographic bias in our dataset. Neither Reddit nor the local football forums are nationally representative. An academic's review of the demographic research on Reddit found:

*"Analyses of Reddit's user demographics show that approximately 90% of users are under the age of 35, with a mean age of 24.7 years.^{53,54,55} In terms of gender distribution, there is some disagreement between older studies, which found a large majority of male users, and newer studies, which generally found either a smaller difference or a near equal representation of both genders^{56,57}."*⁵⁸

Only 8.2% of Reddit's users are from the UK, and further demographic breakdowns of UK-based Reddit users do not exist to our knowledge. But if the overall demographic data is true of Reddit's UK users too, then a mean age of 24.7 years is significantly younger than the UK median age of 40 years.⁵⁹ Evidence is sparse, but an informal poll of 1682 out of 332,000 users of r/unitedkingdom, one of our data sources, was conducted 4 years ago by reddit user u/surveyperson12. Respondents to that poll had a median age of 18 - 25. Additionally, 88% of respondents were male and 74% supported remaining in the European Union.⁶⁰

This process gave us 209,593 posts and comments in total. While it was not possible to ascertain at scale the dates on which forum posts and comments were created, our Reddit collection

53. Bogers, T., & Wernersen, R. (2014). How "Social" are Social News Sites? Exploring the Motivations for Using Reddit.com. In iConference 2014 Proceedings (p. 329-344). doi:10.9776/14108
54. Duggan, M., Smith, A. '6% of Online Adults are reddit Users'. Pew Research Center, 3 July 2013. Available at: <https://www.pewresearch.org/internet/2013/07/03/6-of-online-adults-are-reddit-users/> [Accessed 19 November 2020]
55. Reddit Originals. 'Who in the world is reddit? Results are in...' Reddit, 12 September 2011. Available at: <http://www.redditblog.com/2011/09/who-in-world-is-reddit-results-are-in.html> [Accessed 19 November 2020]
56. Dou, W., Cho, I., ElTayeb, O., Choo, J., Wang, X., & Ribarsky, W. (2015). DemographicVis: Analyzing demographic information based on user generated content. In 2015 IEEE Conference on Visual Analytics Science and Technology (VAST) (pp. 57-64). IEEE. Retrieved from <http://doi.org/10.1109/VAST.2015.7347631>
57. Reddit. (2015b). Audience and demographics. Retrieved February 29, 2016, from <https://reddit.zendesk.com/hc/en-us/articles/205183225-Audience-and-Demographics> (Archived at: <http://www.webcitation.org/6ffMscqLT>)
58. Shatz, I. (2017) 'Fast, Free, and Targeted: Reddit as a Source for Recruiting Participants Online', Social Science Computer Review, 35(4), pp. 537-549. doi: 10.1177/0894439316650163.
59. Clement, J. 'Distribution of Reddit.com traffic 2020, by country'. Statista, 13 October 2020. Available at: <https://www.statista.com/statistics/325144/reddit-global-active-user-distribution/> [Accessed 19 November 2020]
60. u/surveyperson12. '/r/unitedkingdom demographic and opinion survey RESULTS'. Reddit, 13 September 2015. Available at: https://www.reddit.com/r/unitedkingdom/comments/3ks4er/runitedkingdom_demographic_and_opinion_survey/ [Accessed 19 November 2020]

spans the time period between March 2011 and June 2020, with a skew towards the last few years - 40% of the Reddit data was sent since August 2018.

LABELLING BY THEME

There were 6 particular themes of life in towns that we were interested in:

1. **Private amenities** refers to privately owned spaces in towns that people use. Language that would classify a post or comment under this theme includes: 'pub', 'corner shop', 'grocery store', 'jewellers'.
2. **Public amenities** refers to publicly owned spaces and services that people use. Language that would classify a post or comment under this theme includes: 'schools', 'policing', 'parks'.
3. **Jobs and the economy** includes comments about employment, the quality of jobs, discussion of the wider economy and personal finances. Language that would classify a post or comment under this theme includes: 'living wage', 'credit card', 'private sector', 'businesses'.
4. **Community and neighbours** aims to collect discussion of the people in our town and how we feel about them. Language that would classify

a post or comment under this theme includes: 'neighbour', 'community', 'landlord', 'noise', 'anti-social behaviour'.

5. **Transport** aimed to collect discussion of various means of getting from A to B. Language that would classify a post or comment under this theme includes: 'bus', 'motorbikes', '60mph'.
6. **Local governance** is all about the local council. Language that would classify a post or comment under this theme includes: 'council', 'Cllr', 'Mayor'.

In order to categorise at scale we needed a list of words that people were likely to use when discussing each theme. We drew up initial word lists for these from a group brainstorming session and then added relevant related terms (eg. "buses" from the suggestion "bus"). Then we applied those lists and an analyst went through and read a random selection of posts and added more words to each list as posts used them. In this sense our word lists "branched out" from our prima facie thoughts of what was relevant based on the reality of online discussion.

This is a sample of our word lists. Full lists are included in appendix 3:

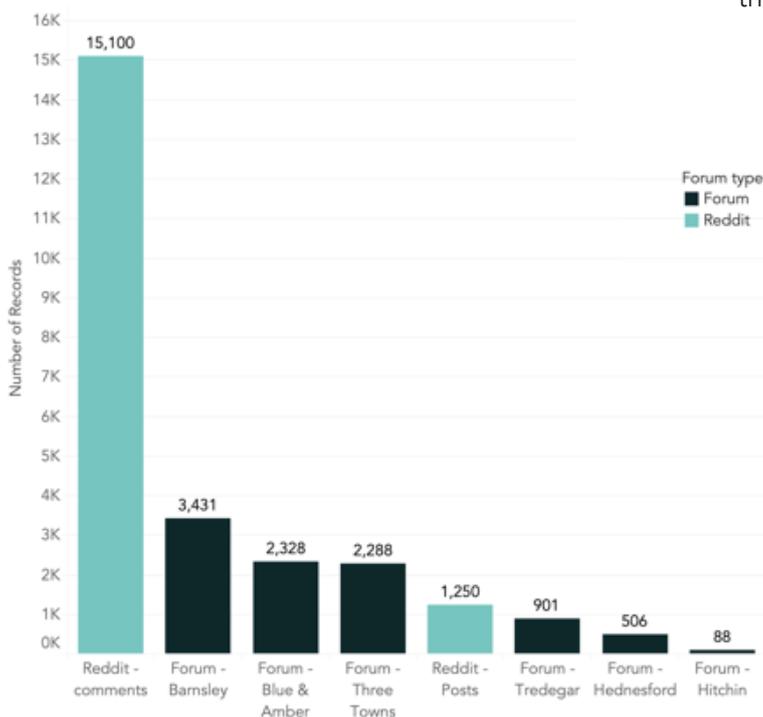
1. Private amenities	2. Public amenities	3. Jobs and the economy	4. Environment	5. Transport	6. Local governance
pub	schools	jobs	neighbour	commuter	council
cafe	policing	wages	community	parking	local authority
cornershop	post office	zero hours	landlord	cycling	mayor
restaurant	parks	unemployment	neighbourhood	pedestrians	councillor
independent shops	library	hiring	dog poo	bus	cllr
bakery	youth clubs	loan shark	noise	motorway	(various misspellings of councillor)

Once we filtered our sample, to include only posts that used words from our classifier lists, our total number of posts and comments was 52,470 - around a quarter of the original set. Transport and private amenities had far more posts in them than any other theme and local governance had fewer.

1. Private amenities	2. Public amenities	3. Jobs and the economy	4. Environment	5. Transport	6. Local governance
14,680	3,560	9,280	5,990	16,060	2,900

Clearly, the number of documents collected for each list will be affected by the relative popularity in language of each word within that list. To ensure these word lists reflected the language used within the dataset, we followed an iterative process whereby: i) an initial list of terms was put together, drawing from the literature review above; ii) posts and comments matching one of these terms were analysed to draw out further characteristic language within them, and to determine which terms produced primarily irrelevant results; iii) these newly discovered terms were added to the keyword lists and the process was repeated.

For local governance, the relatively low number of posts and comments is due to the narrowness of what we were looking for, but even then it seems surprising that only 1% of the discussion on sites dedicated to local discussion referred to the local authority at all.



Documents in collection by source

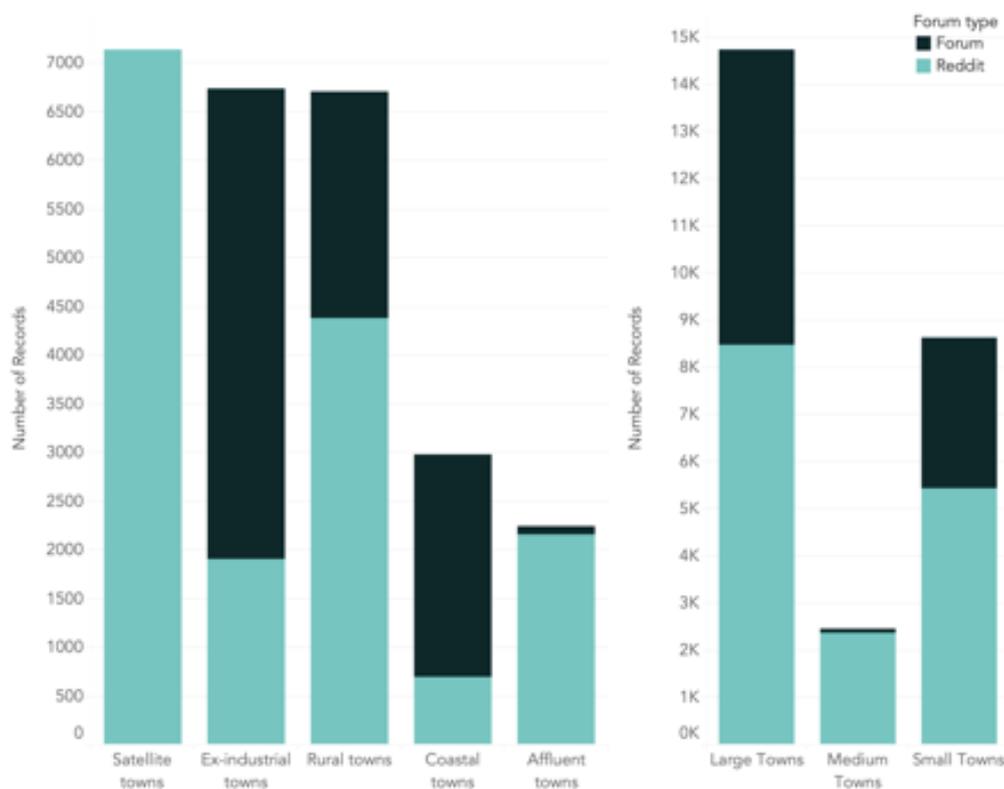
Note that, while this dataset seems to be dominated by Reddit comments, these are drawn from a range of subforums on the site - those from local towns, and those within national subforums which mention local towns. To illustrate this, we

Classification for relevance

After filtering the dataset to those posts and comments which contained a relevant keyword, Method52 was used to remove from our dataset posts which were irrelevant to the discussion of towns - for example, discussions of football, or national news items. To achieve this within our large dataset, analysts trained a Natural Language Processing (NLP) algorithm to distinguish between relevant and irrelevant content. While we found that it was occasionally difficult for human analysts to make a decision on whether a given post was relevant to discussion around towns, this algorithm was able to label relevant documents correctly with an accuracy of 83%. A full description of the training process, along with full scores, is included in an annex to this document.

Once trained, the classifier was applied to the entire dataset, and labelled 25,892 comments and posts as relevant to discussion of towns - 25% of the keyword set. These were divided as follows:

show below the division of our incoming data by typology and size of town. Notably, this shows that many more posts across both sources were gathered for large and small towns, with medium towns less likely to be represented; will a similar reduction in posts from coastal and affluent towns.



Collection by town type and size

The keyword and classification process described above left us with 10% of the initial collection which we could be confident was relevant to discussion of towns. At over 2.4 million words, however, this was still far too large to analyse manually - for context, Shakespeare's complete works come in at 884,647 words.⁶¹ To help us explore the themes present in each topic, we use cluster analysis through the software IRaMuTeQ. This pulls out the frequency with which words are used together, and from there works out common combinations of words. This iterative process ends up building up a "location" for each word and set of clusters of words that are frequently used together.

In the graphs featured in Chapter Two, the different clusters of words are represented by colour and the place each word occupies on the X and Y axis is determined mathematically according to how frequently the word is used with the words around it. The closest words are the ones most frequently used together. For instance, for the private amenities theme, the word "fish" and the word "chips" are used together frequently and are only

rarely used separately, therefore the two words are right next to each other.

The size of a word represents either the frequency with which the word is used, or how characteristic the word is of the cluster. Both are valuable, so we have used both for our analysis. However we have only included the graph that we felt best helped interpretation in this report. The graphs are labelled either "Frequency" or "Characteristic" to indicate which it is. A "Characteristic" word here means a word that is used frequently by one cluster but rarely by other clusters. For example, the graph used for the transport theme is a "Characteristic" graph. On this graph the word "Road" is quite small, even though it is the most used word in the pink cluster. This is because the word is frequently used throughout all the clusters, often in the context of a name of a street, eg. "Mill road" or "Narborough road".

Sometimes two clusters are very close to each other, as word location is determined by which words are frequently used together, this indicates that they are very similar.

61. Spevack, M. A complete and systematic concordance to the works of Shakespeare. George Olms, 1980. Available at: https://hamnet.folger.edu/cgi-bin/Pwebrecon.cgi?BBID=54389&_ga=2.151652476.452539180.1606140087-1114367662.1606140087 mentioned in: Folger Shakespeare Library. 'Shakespeare FAQ'. Folger Shakespeare Library. Available at: <https://www.folger.edu/shakespeare-faq#:~:text=According to Marvin Spevack's concordances,884%2C647 words and 118%2C406 lines.> [Accessed 19 November 2020]

These Correspondence Factor Analysis (CFA) graphs are an excellent way to get a quick overview of the textual corpus, but they are not perfect. Some words are missing, not because they are not present in the cluster, but because their correct position is overlaid by another word. Generally this is only a few words per graph, but it does mean that the absence of a term, for example the supermarket "Tesco" from the light blue cluster in private amenities, does not, in itself, mean the term was not present in our discussion. Only that it was less frequent or less characteristic, depending on the type of graph, than the words around it. This is to say that these graphs are a very good, but imperfect, representation of the clusters.

Another tool the cluster analysis gives us is the ability to find the posts most characteristic of each cluster. The software cannot work out the meaning of a post, but it can tell us that the key words in these posts are frequently used together. The strength of this is that it gives us confidence that we are not cherry-picking our quotes, that they are somewhat representative of our dataset.

The final interpretational note is that IRaMuTeQ has an internal English dictionary which identifies the part of speech of lots of frequently used words. It uses this to set to the side frequently used words which are unlikely to be useful to us like "some", "the", "and", "next" etc. Without this, our graphs would be full of adverbs, pronouns and the mechanical parts of speech rather than what is valuable for analysis.

IRaMuTeQ was developed by Pierre Ratinaud: it can be downloaded, for free, from iramuteq.org

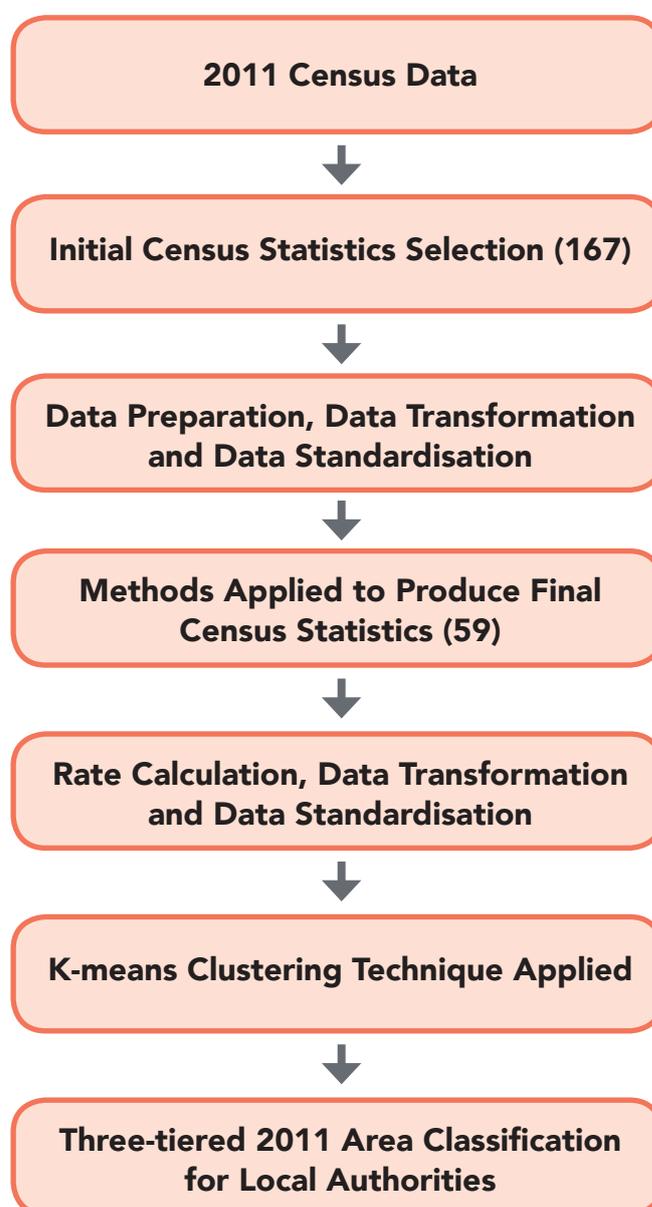
METHOD

APPENDIX 1: THE TYPOLOGY

The Demos typology of towns is based upon the 2011 Area Classification for Local Authorities by the ONS. This Appendix explains how we derived our typology from it.

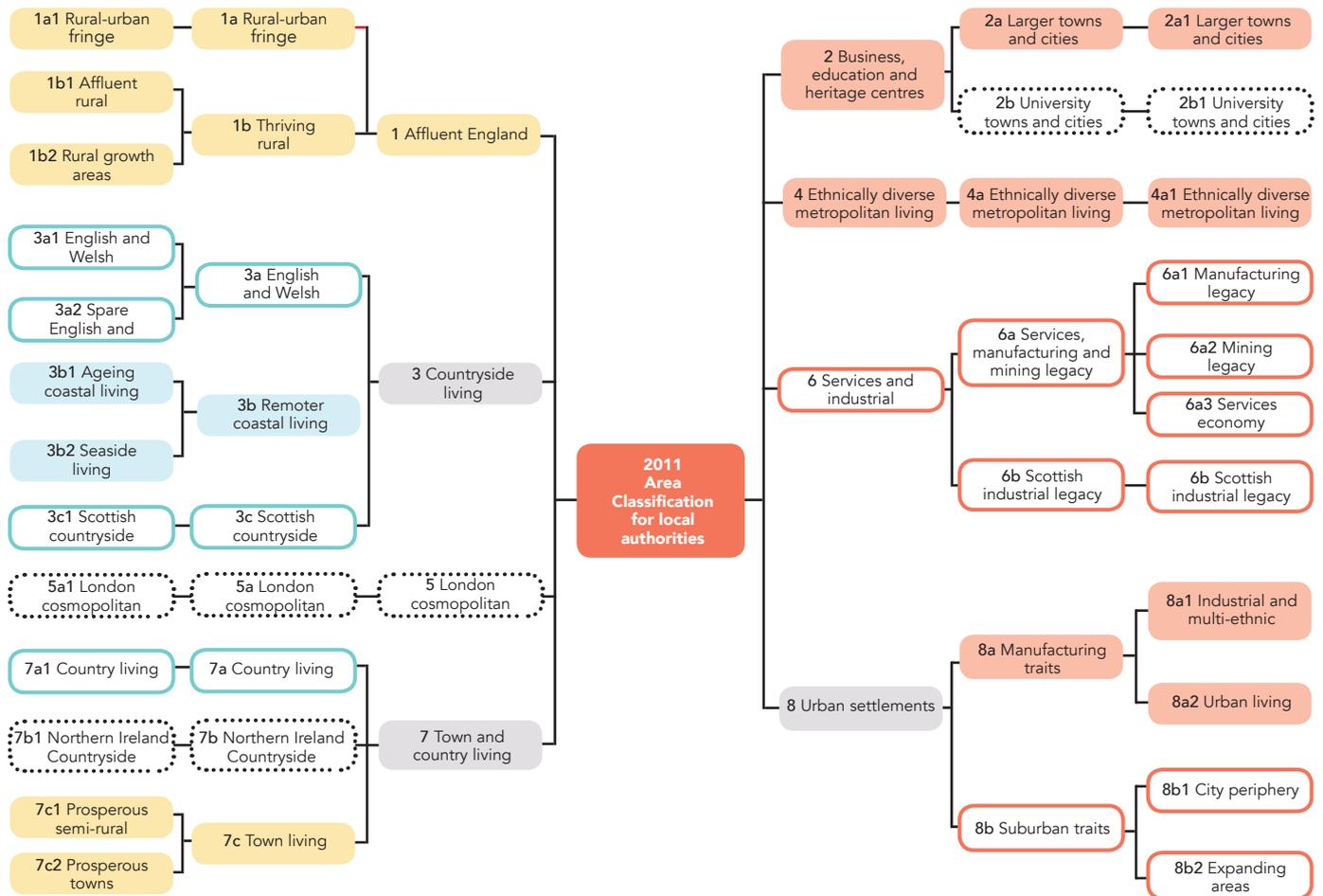
The ONS produced this figure to explain the process for creating the 2011 area classifications.⁶² In essence, they used 59 census variables to identify the most similar local authority areas and grouped them together into 8 supergroups. Here are a random sample of these variables to help explain what it is based on:

1. Percentage of persons aged 0 to 4 years
2. Percentage of persons who are Black/African/Caribbean/Black British
3. Percentage of households who own or have shared ownership of property
4. Percentage of households who live in a semi-detached house or bungalow
5. Percentage of households with no children
6. Percentage of employed persons aged between 16 and 74 years who work in the education sector
7. Percentage of persons aged 16 years and over whose highest level of qualification is Level 1, Level 2 or Apprenticeship
8. Percentage of persons providing unpaid care
9. Number of persons per hectare
10. Percentage of persons aged between 16 and 74 years who walk, cycle or use an alternative method to get to work



62. Office of National Statistics. 'Methodology and variables'. Office of National Statistics, 24 July 2018. Available at: <https://www.ons.gov.uk/methodology/geography/geographicalproducts/areaclassifications/2011areaclassifications/methodologyandvariables>. [Accessed 19 November 2020]

They then repeated the cluster analysis to get 16 groups and then again to get 24 subgroups. This produced a three-tiered hierarchy of which groups of local authorities were most similar to each other. This produced a classification which we can visualise like this.



The ONS then produced pen portraits, which described the characteristics of the group in English and radial plots which illustrated the 59 census variables of each subgroup.⁶³

We discarded London Cosmopolitan, which covers twelve Inner London boroughs, and Northern Ireland Countryside (Northern Ireland being beyond the scope of this project).

This left us with 22 groups, which we then categorised using the hierarchy, the pen portraits

and the radial plots. It is worth noting that the name of an ONS subgroup is unimportant, whilst its position in the hierarchy is important. So for example, the Service Economy subgroup is more similar to the Mining Legacy or the Manufacturing Legacy subgroup than it is to the Industrial and Multi-ethnic subgroup, which is why Service Economy is categorised as Industrial Towns in our typology, and not as, say, Hub-and-spoke Towns.

63. Office of National Statistics. 'Pen portraits for the 2011 Area Classification for Local Authorities'. Office of National Statistics, 24 July 2018. Available at: <https://www.ons.gov.uk/methodology/geography/geographicalproducts/areaclassifications/2011areaclassifications/penportraitsandradiplots>. [Accessed 19 November 2020]

DEMOS Typology	ONS Subgroup
Affluent towns	1b1 Affluent rural
Affluent towns	7c1 Prosperous Semi-rural
Affluent towns	7c2 Prosperous Towns
Affluent towns	1b2 Rural Growth Areas
Affluent towns	1a1 Rural-Urban Fringe
Coastal towns	3b1 Ageing Coastal Living
Coastal towns	3b2 Seaside Living
Industrial towns	6a1 Manufacturing Legacy
Industrial towns	6a2 Mining Legacy
Industrial towns	6b1 Scottish Industrial Legacy
Industrial towns	8b1 City Periphery
Industrial towns	8b2 Expanding Areas
Industrial towns	6a3 Service Economy
Rural towns	7a1 Country Living
Rural towns	3a1 Older Farming Communities
Rural towns	3c1 Scottish Countryside
Rural towns	3a2 Sparse English and Welsh Countryside
Hub-and-spoke towns	4a1 Ethnically Diverse Metropolitan Living
Hub-and-spoke towns	8a1 Industrial and Multi-ethnic
Hub-and-spoke towns	2a1 Larger Towns and Cities
Hub-and-spoke towns	8a2 Urban Living

The University Towns and Cities subgroup was also excluded. This contained just 7 local authorities, dominated by cities - Brighton and Hove, Cambridge, Kingston Upon Thames, Manchester, Nottingham, Oxford and Reading. Where there were areas designated as towns within these local authorities, with the cities excluded, there was not a common theme that could reasonably characterise them together.

The next step was to remove all the Villages, Cities, and people living somewhere smaller than a village from our typology. We took each subgroup and used Built Up Areas (BUA) and Built Up Areas Sub Divisions (BUASD) lookups from The Open Geography portal, also by the ONS, to work out how the population of these groups broke down between Villages and smaller, Towns, and Cities. BUAs “follow a ‘bricks and mortar’ approach, with areas defined as built-up land with a minimum area of 20 hectares (200,000 m²), while settlements within 200 metres of each other are linked. Built-up area sub-divisions (BUASD) are also identified to provide greater detail in the data, especially in the larger conurbations.”⁶⁴

We then ran a best-fit lookup from the output areas of the 2011 Census to the BUAs to find out who lives where.⁶⁵ Using a best-fit lookup we were able to work out how many people lived in each BUA and from there to classify the BUAs as either Village, Town, or City. Some people don’t live in a built-up area at all, so we combined them with Village to create “Village or smaller” as a category.

At this point, we had a list of the towns in each local authority, their type and the population of each town, and the local authorities grouped together into five different types. We had our typology.

64. Office for National Statistics. 2011 Built-up Areas - Methodology and Guidance. Office for National Statistics, 28 June 2013. Available at: <https://www.ons.gov.uk/peoplepopulationandcommunity/housing/articles/characteristicsofbuiltupareas/2013-06-28> [Accessed 19 November 2020]

65. A Beginners Guide to UK Geography (2019) v1.0

METHOD

APPENDIX 2: NATURAL LANGUAGE PROCESSING AND THE NLP CLASSIFIER

Building algorithms to categorise and separate documents formed an important part of the research method for this paper. This responds to a general challenge of social media research: the data that is routinely produced and collected is too large to be manually read.

Natural language processing classifiers provide an analytical window into these kinds of datasets. They are trained by analysts on a given dataset to recognise the linguistic difference between different kinds of data, in this case between posts and comments left on forums. This training is conducted using a technology called 'Method52', developed by the project team to allow non-technical analysts to train and use classifiers. For this project, a classifier was built to determine whether a document was relevant to a town, using Method 52's web-based user interface to proceed through the following phases.

PHASE 1: DEFINITION OF CATEGORIES

The formal criteria explaining how documents should be annotated is developed. Practically, this means that a small number of categories – between two and five – are defined. These will be the categories that the classifier will try to place each (and every) document within. The exact definition of the categories develops throughout the early interaction of the data. These categories are not arrived at a priori, but rather iteratively, informed by the researcher's interaction with the data – the researcher's idea of what comprises a category will often be challenged by the actual data itself, causing a redefinition of that category. This process ensures that the categories reflect the evidence, rather than the preconceptions or expectations of the analyst. This is consistent with a well-known sociological method called 'grounded theory'.

PHASE 2: CREATION OF A GOLD-STANDARD TEST DATASET

This phase provides a source of truth against which the classifier performance is tested. A number of documents (usually 150, but more are selected if the dataset is very large) are randomly selected to

form a gold standard test set. These are manually coded into the categories defined during Phase 1. The documents comprising this gold standard are then removed from the main dataset, and are not used to train the classifier.

PHASE 3: TRAINING

This phase describes the process wherein training data is introduced into the statistical model, called 'mark up'. Through a process called 'active learning', each unlabelled document in the dataset is assessed by the classifier for the level of confidence it has that the document is in the correct category. The classifier selects the documents with the lowest confidence score, and these are presented to the human analyst via a user interface of Method52. The analyst reads each document, and decides which of the pre-assigned categories (see Phase 1) that it should belong to. A small group of these (usually around 10) are submitted as training data, and the NLP model is recalculated. The NLP algorithm then looks for statistical correlations between the language used and the meaning expressed to arrive at a series of rules-based criteria, and presents the researcher with a new set of documents which, under the recalculated model, it has low levels of confidence for.

PHASE 4: PERFORMANCE REVIEW AND MODIFICATION

The updated classifier is then used to classify each document within the gold standard test set. The decisions made by the classifier are compared with the decisions made (in Phase 2) by the human analyst. On the basis of this comparison, classifier performance statistics – 'recall', 'precision', and 'overall' - (see 'classifier performance', below) - are created and appraised by a human analyst.

PHASE 5: RETRAINING

Phase 3 and 4 are iterated until classifier performance ceases to increase. This state is called 'plateau', and, when reached, is considered the practical optimum performance that a classifier can reasonably reach. Plateau typically occurs within 200-300 annotated documents, although it depends on the scenario: the more complex the task, the more training data that is required.

PHASE 6: PROCESSING

When the classifier performance has plateaued, the NLP model is used to process all the remaining documents in the dataset into the categories defined during Phase 1, using rules inferred from data the algorithm has been trained on. Processing creates a series of new data sets – one for each category of meaning – each containing the data considered by the model to most likely fall within that category.

PHASE 7: POST PROCESSING ANALYSIS:

After documents have been processed, the new datasets are often analysed and assessed using a variety of other techniques.

CLASSIFIER PERFORMANCE

No NLP classifier used on this scale will work perfectly. To assess whether it was robust enough to be used in this report, the classifier trained and used here was measured for accuracy. In each case, this was done by:

1. Randomly selecting 100-300 documents to comprise a 'gold standard'.
2. Coding each of these documents by hand, conducted by an analyst.
3. Coding each of these documents using the classifier.
4. Comparing the results and recording whether the classifier got the same result as the analyst.

There are three outcomes of this test. Each measures the ability of the classifier to make the same decisions as a human in a different way.

Recall

Recall is a measure of the correct selections that the classifier makes as a proportion of the total correct selections it could have made. If there were 10 relevant documents in a dataset, and a relevancy classifier successfully picks 8 of them, it has a recall score of 80%.

Precision

Precision is a measure of the correct selections the classifier makes as a proportion of all the selections it has made. If a relevancy classifier selects 10

documents as relevant, and 8 of them actually are indeed relevant, it has a precision score of 80%.

Overall F Score

The 'overall' score combines measures of precision and recall to create one, overall measurement of performance for the classifier. All classifiers are a trade-off between recall and precision. Classifiers with a high recall score tend to be less precise, and vice versa.

LABEL	PRECISION	RECALL	F-SCORE	LABELLED
Relevant	0.820	0.835	0.828	104
Irrelevant	0.671	0.646	0.658	87
Acc.	0.771			

METHOD

APPENDIX 3:

THEME WORD LISTS

This is the full list of terms that would count a post or comment in one of our themes. The initial section, in blue, is our a priori list based on our expectations of what we would find. The second section, in red, is our a posteriori list based on reading random samples of the data.

1. Private amenities	2. Public amenities	3. Jobs and the economy	4. Community and neighbours	5. Transport	6. Local governance
Privately owned spaces in towns that people use	Publicly owned spaces and services that people use	Comments about employment, the quality of jobs, discussion of the wider economy and personal finances.	Discussion of the people in our town and how we feel about them.	Discussion of various means of getting from A to B.	What do people think about local government
pub	playgrounds	unemployment	antisocial behaviour	commuting	council
cafe	Schools	jobcentre	yobs	commuter	left behind
cornershop	school field	jobcenter	graffiti	parking	councillor
restaurant	parks	on benefits	noise	cycling	councillors
independent shops	football pitches	hiring	gangs	pedestrians	local authority
bakery	basketball courts	good jobs	neighbours	bus	
takeaway	green spaces	living wage	neighbour	buses	
coffee shop	youth clubs	job opportunities	dog poo	traffic	
gentrified	leisure centre	proper jobs	community	trains	
venue	library	zero hours	House prices	station	
book shop	a&e	job for life	Landlords	roadworks	
bar	social care	closing down	standard of living	road closed	

1. Private amenities	2. Public amenities	3. Jobs and the economy	4. Community and neighbours	5. Transport	6. Local governance
Privately owned spaces in towns that people use	Publicly owned spaces and services that people use	Comments about employment, the quality of jobs, discussion of the wider economy and personal finances.	Discussion of the people in our town and how we feel about them.	Discussion of various means of getting from A to B.	What do people think about local government
tearoom	local police	job center	rent	cycle paths	council
diner	bobby on the beat	job centre	pride	travel	left behind
high street	speeding	dole	heritage	journey	councillor
deli	playgrounds	recruiting	deface	drive	councillors
chain	play ground	decent jobs	neighbourhood		local authority
market	play grounds	unemployed	neighborhood		
outlet	school yard		neighbor		
supermarket	school yards		neighbors		
store	play equipment		landlord		
coffee room	school fields		landlord		
bookshop	football pitch		landlords		
venues	basketball court		community		
pubs	basketball pitch				
faces	basketball pitches				
cornershops	cricket pitch				
corner shop	cricket pitches				
corner shops	cricket field				
cafes	cricket fields				
	tennis court				
	tennis courts				
	PCSO				
	a and e				
	accident and emergency				

1. Private amenities	2. Public amenities	3. Jobs and the economy	4. Community and neighbours	5. Transport	6. Local governance
comic book store	policing	furlough	accomodation	motorway	cllr
Café	classroom	economy	acommodation	motorways	councilors
newsagents	classrooms	allowed to reopen	accommodation	road	councilor
news agents	teaching	bankrupt	acomodation	roads	mayor
newsagent	teachers	bankrupcy	drunks	railway	local authority
news agent	education	bankruptcy	drunkenness	train	
Gym	educating	jobs	day trip	lorry	
Gyms	homework	wages	day trippers	scooter	
wetherspoons	post office	the public sector	daytripper	scooters	
woolworth	postoffice	redundancies	daytrippers	motorbike	
woolworths	post offices	recession	tourism	motorbikes	
supermarket	postoffices	economic depression	tourists	mph	
supermarkets	cybercrime	ubi	tourist	40mph	
Asda		debt	day triper	50mph	
Aldi		loan shark	day tripers	30mph	
Tesco		loan sharks	relocated	20mph	
Shop		credit card	moving house	60mph	
Shops		credit cards	removal company	70mph	
hair dresser		can't afford to	moved from	mile per hour	
hairdresser		inflation	neighbour	mile ph	
hair dressers		deflation	neighbours	resurfacing	
hairdressers		inflationary	neighbourhood	cyclist	
barber		deflationary	neighbourhoods	cyclists	
barbers		interest rates	neighborhood		
grocery		interest rate	tenants		
groceries		workers	tenents		
hospitality		businesses	tennants		
sweet shop		business	tennants		
sweetshop		buisnesses			
sweet shops		buisness			
sweets shop		taxes			
sweets shops		tax			
sweetshops		private sector			
waitrose		trade union			

1. Private amenities	2. Public amenities	3. Jobs and the economy	4. Community and neighbours	5. Transport	6. Local governance
jewellers		unions			
jewelers		breadline			
milkman		apprenticeships			
milk man		apprentice			
milk woman		apprentise			
milk float		apprenticeship			
milkwoman		apprentiseship			
milkfloat		apprentices			
sainsbury's		apprentises			
		subsidise			
		subsidy			
		subsidies			
		subsidys			
		ecomony			

DEMOS

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