Ministry of Housing, Communities & Local Government

Towns Fund Evaluation

Intervention-level Evaluation Annex

July 2026

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Contents

Annex A Intervention-level evaluation methodology

A.1 Impact evaluation questions

The impact evaluation questions, as outlined in Section 5.3 of the original evaluation feasibility report, are set out below:

1. **Sustainable economic growth:** to what extent has the Towns Fund led to long-term sustainable improvements in local economic growth (that continue to occur year after year)?
2. **Employment and skills:** to what extent has the Towns Fund led to improvements in local employment opportunities?
3. **Pride in and perception of place:** to what extent has the Towns Fund led to improvements in pride in place and perception of place?
4. **Local wellbeing and social mobility:** to what extent has the Towns Fund led to improvements in local wellbeing and social mobility?
5. **Physical and digital connectivity:** to what extent has the Towns Fund led to improvements in physical and digital connectivity?
6. **Local authority capabilities:** to what extent has the Towns Fund led to improvements in local strategic management capability?
7. **Differences in outcomes across different types of projects:** to what extent have the outcomes and impacts above differed across different types of projects?
8. **Differences in outcomes across different types of places:** to what extent have the outcomes and impacts above differed across different types of places?

A.2 Case study selection and profile

As part of the feasibility study, 20 case studies were selected (MHCLG, 2024). Of these, 10 were selected from Town Deals and 10 from the Future High Streets Fund.

The selection process was developed to ensure an appropriate range of projects was included to maximise the learning from the evaluation. Projects that completed (and were expected to yield outcomes) within the evaluation period were eligible for selection. At least one project was selected from each primary intervention theme defined by MHCLG. Projects were selected to ensure representation of different parts of England, of towns with a range of population sizes, and of projects with different levels of funding awards. Read Section 5.2 of the original evaluation feasibility report for more information on the case study project selection process.

Table A.1, Table A.2 (Town Deals), Table A.3, and Table A.4 (Future High Street Fund) summarise the metrics assessed as part of this review as they were at the time that the case studies were selected. The tables additionally include the latest data from the Index of Multiple Deprivation (IMD) as it is referred to in the case studies themselves.

Table A.1 Additional metrics on deprivation and local economic growth – Town Deals

Metric (area definition)	Norwich	Hereford	Kidsgrove	Redcar	Warrington
Index of Multiple Deprivation decile (BUA, 2025)[1]	20% to 30%	30% to 40%	20% to 30%	20% to 30%	40% to 50%
% Population aged over 65 (BUA, 2019)[2]	18%	18%	24%	20%	18%
% Population below the age of 16 (BUA, 2019)[2]	17%	19%	16%	19%	19%
GVA per head (LA, 2016)[3]	£26,136	£20,738	£16,291	£15,311	£31,597
% of individuals aged 16 to 64 with NVQ L3+ (LA, 2019)[4]	48%	55%	51%	49%	61%
Median Gross Weekly Pay (LA, 2019)[5]	£399	£407	£395	£387	£463
Female Health Expectancy at Birth (Region, 2019)[6]	62	67	64	60	65
Male Health Expectancy at Birth (Region, 2019)[6]	63	64	61	60	64
Funding per capita[A]	£125	£370	£1,084	£664	£126

Source: [1]*MHCLG 2025*; [2]*ONS 2021 – Understanding towns in England and Wales*; [3]*ArcGIS Open Data 2023*; [4]*Nomis 2023*; [5]*ONS 2023 – ASHE earnings and working hours*; and [6]*Census 2021*.

Note: *[A] Funding per capita includes all Towns Fund funding in a town. Where a town has both Future High Streets Fund and Town Deals funding, both are included.*

Table A.2 Additional metrics on deprivation and local economic growth – Town Deals

Metric (area definition)	Kirkby and Sutton (Ashfield)	Harlow	Mablethorpe	St Ives	Scunthorpe
Index of Multiple Deprivation decile (BUA, 2025)[1]	10% to 20%	20% to 30%	0 to 10%	10% to 20%	10% to 20%
% Population aged over 65 (BUA, 2019)[2]	24%	15%	42%	30%	18%
% Population below the age of 16 (BUA, 2019)[2]	16%	23%	11%	14%	21%
GVA per head (LA, 2016)[3]	£17,876	£23,099	£16,135	£17,040	£22,634
% of individuals aged 16 to 64 with NVQ L3+ (LA, 2019)[4]	48%	54%	59%	59%	46%
Median Gross Weekly Pay (LA, 2019)[5]	£451	£530	£390	£3687	£460
Female Health Expectancy at Birth (Region, 2019)[6]	62	66	61	63	60
Male Health Expectancy at Birth (Region, 2019)[6]	63	64	61	64	58
Funding per capita[A]	£1,085	£253	£3,132	£3,715	£389

Source: [1]MHCLG 2025; [2]ONS 2021 – Understanding towns in England and Wales; [3]ArcGIS Open Data 2023; [4]Nomis 2023; [5]ONS 2023 – ASHE earnings and working hours; and [6]Census 2021

Note: [A] Funding per capita includes all Towns Fund funding in a town. Where a town has both Future High Streets Fund and Town Deals funding, both are included.

Table A.3 Additional metrics on deprivation and local economic growth – Future High Streets Fund

Metric (area definition)	Northallerton	Loftus	Yeovil	Heanor	Sutton-in-Ashfield
Index of Multiple Deprivation decile (BUA, 2025)[1]	30% to 40%	0 to 10%	30% to 40%	10% to 20%	10% to 20%
% Population aged over 65 (BUA, 2019)[2]	26%	18%[A]	19%	19%	19%
% Population below the age of 16 (BUA, 2019)[2]	17%	23%[A]	19%	18%	19%
GVA per head (LA, 2016)[3]	£22,263	£15,311	£20,586	£21,192	£17,876
% of individuals aged 16 to 64 with NVQ L3+ (LA, 2019)[4]	66%	49%	52%	64%	48%
Median Gross Weekly Pay (LA, 2019)[5]	£421	£387	£459	£493	£451
Female Health Expectancy at Birth (Region, 2019)[6]	65	60	64	61	62
Male Health Expectancy at Birth (Region, 2019)[6]	66	60	63	61	63
Funding per capita[B]	£451	£1,358	£195	£354	£173

Source: [1]*MHCLG 2025*; [2]*ONS 2021 – Understanding towns in England and Wales*; [3]*ArcGIS Open Data 2023*; [4]*Nomis 2023*; [5]*ONS 2023 – ASHE earnings and working hours*; and [6]*Census 2021*.

Note: *[A] Data for Loftus is taken from the 2021 Census.*
[B] Funding per capita includes all Towns Fund funding in a town. Where a town has both Future High Streets Fund and Town Deals funding, both are included.

Table A.4 Additional metrics on deprivation and local economic growth – Future High Streets Fund

Metric (area definition)	Carlisle	Chatham	Blyth	Great Yarmouth	Woolwich
Index of Multiple Deprivation decile (BUA, 2025)[1]	10% to 20%	10% to 20%	10% to 20%	0 to 10%	10% to 20%
% Population aged over 65 (BUA, 2019)[2]	20%	14%	19%	19%	10%
% Population below the age of 16 (BUA, 2019)[2]	18%	22%	19%	20%	22%
GVA per head (LA, 2016)[3]	£23,774	£18,678	£16,140	£18,820	£15,950
% of individuals aged 16 to 64 with NVQ L3+ (LA, 2019)[4]	52%	55%	51%	35%	65%
Median Gross Weekly Pay (LA, 2019)[5]	£414	£461	£354	£409	£459
Female Health Expectancy at Birth (Region, 2019)[6]	66	63	62	63	63
Male Health Expectancy at Birth (Region, 2019)[6]	63	63	61	63	61
Funding per capita[A]	£386	£379	£780	£476	£368

Source: [1]MHCLG 2025; [2]ONS 2021 – Understanding towns in England and Wales; [3]ArcGIS Open Data 2023; [4]Nomis 2023; [5]ONS 2023 – ASHE earnings and working hours; and [6]Census 2021.

Note: *[A] Funding per capita includes all Towns Fund funding in a town. Where a town has both Future High Streets Fund and Town Deals funding, both are included.*

A.3 General methodology

The impact evaluation is split into 2 parts. These parts interact and support each other to explore the scale of any impacts and the reasons they have or have not occurred. They include:

- a programme-level evaluation
- an intervention-level evaluation

The programme-level evaluation aims to understand the Towns Fund's overall impact by assessing outcomes in funded areas relative to a comparator, using difference-in-difference (DiD) analysis.

The intervention-level evaluation complements the programme-level evaluation and has 2 key aims:

- to understand the intervention-level outcomes and validate the Theory of Change (ToC)
- to understand the relative importance of project factors and how they interact within local contexts to create observed changes in outcomes

To address the first aim, a Realist Evaluation framework is used to evaluate the outcomes of each intervention. This starts with a project-specific logic model (co-developed with the local authority and delivery partners), which is then used to prioritise the outcomes and mechanisms tested throughout the evaluation.

The results are then combined using a Qualitative Comparative Analysis (QCA) framework. The QCA systematically compares the Realist Evaluation findings across interventions and explores the factors and contexts associated with successful (or unsuccessful) interventions. In practice, this serves as a structured test of key hypotheses across the case studies to assess the drivers of successful outcomes, without making claims about statistical power. QCA was conducted only for pride in place due to the limited variation in other case-study outcomes across projects.

A.3.1 Realist Evaluation

A Realist Evaluation aims to understand what works, for whom, and in what circumstances by gathering evidence on the hypothesised causal mechanisms detailed in the individual intervention ToC. The Magenta book explores this more.

A key advantage of a Realist Evaluation is its flexibility across different data sources and its use when outcomes vary widely across projects. This matters for Towns Fund projects because interventions differ in type, scale, delivery, and local context.

Within the Realist Evaluation case studies, a core project was chosen as the basis for each case study. These projects were then grouped with other similar projects in the same town, where relevant, when those projects were expected to impact the same outcomes over the same time period. The project or group of connected projects in each town were assessed together and defined as an overall intervention.

There are 4 steps in the Realist Evaluation, repeated for each selected intervention. These are:

1. **Write hypotheses for the expected outcomes and mechanisms:** the evaluation team, local authority, and delivery partners co-develop a logic model and then draft 2 to 3 priority context-mechanism-outcome hypotheses, informed by the objectives for the project.
2. **Collect relevant primary and secondary data:** typically including local resident surveys, project monitoring and administrative data provided by the local authority and MHCLG, and secondary data.
3. **Run interviews and workshops to gather qualitative evidence:** to gather a deeper understanding of how the project and its implementation shaped take-up and experience, and to identify barriers and enablers that explain the project outcomes.
4. **Analyse the evidence against the written hypotheses:** evidence is synthesised from the various sources to explore the extent to which it supports the hypotheses.

The case study analysis focuses primarily on evidence of changes in outcomes. In some case studies, quantitative evidence of outcomes is more limited due to data availability or because it is too early for outcomes to emerge. In these cases, the case studies draw more heavily on quantitative data on immediate project outputs (such as the number of students enrolled in a programme or the extent of public realm improvements), in combination with qualitative evidence from stakeholder interviews.

STRENGTH OF EVIDENCE FRAMEWORK

A framework is used to assess the strength of the evidence for each hypothesis. The assessment is based on 4 factors: the quality of the evidence, the volume of evidence, the consistency of findings, and evidence on other possible drivers of impact. For ‘very strong’ evidence, all 4 factors must meet the standard shown in the row. For ‘strong’ and ‘medium’ evidence, either the quality or volume standard must be met, alongside the consistency and other driver standards. Evidence is rated ‘weak’ where one or more of the weak standards apply.

In practice, a quasi-experimental analysis was not feasible in the case studies due to a lack of robust data for appropriate comparison areas. The lack of quasi-experimental analysis in the case studies means that no evidence meets the very strong threshold.

For evidence to be very strong, it must meet all the following conditions:

- at least one methodology uses a quasi-experimental approach
- multiple different sources of validated evidence or analysis have similar findings
- all evidence points to the same finding
- no other substantive drivers of the outcome are identified (or are controlled for with quasi-experimental analysis)

For evidence to be strong, it must meet the following conditions:

- at least one methodology uses a quasi-experimental approach, or multiple different sources of validated quantitative and qualitative analysis have similar findings
- almost all evidence points to the same finding

- evidence on other drivers suggests a minimal effect on the outcome (or would affect a small proportion of participants only)

For evidence to be medium strength, it must meet the following conditions:

- the quantitative analysis is based on a before-and-after approach supported with multi-participant qualitative insights, or 2 pieces of post-intervention quantitative analysis with similar findings are supported with multi-participant qualitative insights
- most evidence points to the same findings
- other drivers are likely to impact the outcome, but less so than the Towns Fund intervention

Evidence is weak in cases where any of the following conditions are met:

- quantitative evidence is only indicative or absent, and qualitative fieldwork is inconclusive
- there are only 1 or 2 indicative sources of data
- findings are inconsistent
- other drivers are more likely to explain the impact

The outcome or mechanism is considered validated where evidence is very strong or strong, and mostly validated where evidence is medium strength. The outcome or mechanism is not validated when the evidence is weak.

A.3.2 Qualitative Comparative Analysis (QCA)

QCA supports the Realist Evaluation findings by systematically comparing pride in place outcomes across the case studies. It tests whether certain combinations of conditions, such as interventions or contextual factors, are more commonly present where pride in place improves.

It explores the relationship between conditions and outcomes using logical statements of necessity and sufficiency:

1. **Necessity:** the outcome only occurs when the condition is present, but the condition can be present without the outcome. For example, for a new business support programme to impact business growth, businesses must be aware of its existence. But awareness alone is not enough to ensure positive impacts.
2. **Sufficiency:** whenever the condition or combination of conditions is present, the outcome occurs, but the outcome can occur without the condition (for example, 100% is enough to pass an exam, but you can pass with less than 100%).

Given the small number of case studies, an 80% threshold was used as a pragmatic benchmark for identifying patterns that are close to ‘necessary’ or ‘sufficient’, rather than fully deterministic. This allows the analysis to identify patterns that hold in most cases, whilst recognising that a small number of exceptions may still arise due to context, timing, or measurement issues. This reflects similar boundaries used in existing studies, such as the Department for International Development’s Empowerment and Accountability Annual Technical Report 2016, which used a threshold of 90%.

Therefore, ‘close to’ should be interpreted as indicating an apparent relationship, but not one that is strong or well-enough evidenced in this sample to meet the conditions for necessity or sufficiency categorically.

Pride in place may be affected by the project, wider funding in the town, and the local context. This variation can be difficult to disentangle from individual case studies alone, especially when multiple factors are involved. QCA simplifies this cross-case comparison by identifying the presence (or absence) of common factors.

This approach aims to help validate and improve the understanding of the importance of different factors in fostering pride in place. The findings are not used as definitive proof of causality but rather as additional evidence supporting theorised impact pathways.

Other outcomes were assessed for the QCA but were deemed to have insufficient variation across the case study towns to yield meaningful results. For example, wellbeing improvements were only evidenced in 4 out of the 20 case studies.

OVERALL APPROACH

Given the sample size of the case studies, a manual QCA design was used to maximise interpretability. This approach focuses on clear, repeated, pairwise comparisons.

The maximum number of case studies available for any QCA comparison is 20. However, where the analysis requires follow-up survey data, this is limited to 16 cases, and where baseline survey data is needed, it is limited to only 10 cases. As a result, simple binary categories are used, and comparisons are limited to 2 conditions at a time to ensure sufficient variation for interesting and interpretable findings.

The approach includes 5 key steps:

1. **Define outcomes, conditions and hypotheses:** set a clear binary outcome to indicate pride in place improvements and specify the hypotheses (combinations of conditions) that are expected to be linked to improvement.
2. **Gather data:** ensure each case study has the required data and convert continuous or qualitative conditions to binary using distinct cut-offs (such as above or below the average) as per the definitions agreed in step one.
3. **Build truth tables:** for each hypothesis, create a truth table that shows the pride in place improvement rates for the 4 possible combinations of 2 conditions.
4. **Find solutions and repeat:** using a boundary of 80% as a screening threshold, identify necessity and sufficiency solutions. Repeat for the remaining hypotheses.
5. **Test sensitivity:** run tests to assess the resilience of the potential solutions found, by re-running the tests with alternative condition pairs and adjusting the condition threshold to see if the pattern holds.

QCA hypotheses and their associated conditions were defined after the Realist Evaluation of the case studies. The hypotheses focused on systematically testing the prevalence of emerging findings identified in the Realist Evaluation and on further exploring cross-condition correlations that are harder to identify in a single case study.

The QCA draws directly on the intervention-level case studies. These combine local surveys, qualitative interviews, and local or MHCLG administrative data.

PRIDE IN PLACE QCA SET UP AND RESULTS

QCA is used to systematically analyse the differences in factors between towns with evidenced improvements in pride in place and those without.

Improvements in pride in place are defined in a flexible method that prioritises survey evidence. The preferred measure assesses whether the town has shown a statistically significant increase in pride in place across survey indicators following project completion. Where baseline data are not available, follow-up survey evidence is used alongside a qualitative judgement of whether there is evidence of an improvement after project completion.

Table A.6 summarises the conditions and their definitions used in the QCA, including the alternative thresholds tested in sensitivity checks.

Table A.5 Conditions used in pride in place QCA analysis

	Main definition	Alternative definition
Visible regeneration[A]	True if the selected project focuses on regenerating the town centre, high street, or another focal point.	Not available
Consistent community engagement	True if local residents were generally positive about the amount of engagement in qualitative interviews.	True if all local residents were positive about the amount of engagement.
High deprivation	True if more than 20% of the town's Lower layer Super Output Areas (LSOAs) are in the 10% most deprived nationally.	True if the built-up area ranks within the 20% most deprived nationally.
Above-average funding per capita	True if Towns Fund funding per capita is above the average for the selected towns (£826).	True if Towns Fund funding per capita is above the median for the selected towns (£420).
Ongoing disruption	True if disruption is mentioned as an issue in stakeholder or resident interviews.	Not available
Funding mostly complete	True if at least 70% of Towns Fund funding had been spent by the time of the site visit.	True if at least 70% of all project-related funding had been spent at the time of the site visit.
Low baseline pride in place	True if at least one pride in place indicator measured in the baseline survey was lower than the England average.	Not available

Source: Frontier Economics.
Note: [A] Visible regeneration is false if the selected project is not focused on regeneration (for example, projects focused on physical connectivity or skills and employment) or if the selected project is focused on non-visible regeneration (for example, regeneration or redevelopment of an asset that is not in the town centre or high street).

A.4 Data sources for case studies

The case studies explored in this report include an analysis using a range of different sources to build evidence on the Realist Evaluation hypotheses. The 4 main sources of information are:

- qualitative interviews
- primary resident surveys
- monitoring data collected by MHCLG
- project- or area-specific data provided by local stakeholders

A.4.1 Qualitative interviews

Qualitative interviews were conducted with a range of stakeholders for each location. Table A.7 describes the number of interviews and the broad stakeholder groups.

Table A.6 Number and type of qualitative interviews conducted, by case study

Place	Number of interviewees	Local authority or local area contact	Project team	Business stakeholder	Beneficiaries
Carlisle	10	Yes	Yes	Yes	Yes
Heanor	7	Yes	Yes	Yes	Yes
Northallerton	10	Yes	Yes	Yes	Yes
Woolwich	34	Yes	Yes	Yes	Yes
Yeovil	16	Yes	Yes	Yes	Yes
Great Yarmouth	7	Yes	Yes	Yes	Yes
Blyth	13	Yes	Not Applicable	Yes	Yes
Chatham	6	Yes	Yes	Yes	Yes
Sutton-in-Ashfield (High Pavement)	5	Yes	Yes	No	Not Applicable
Loftus	9	Yes	Yes	Not Applicable	Yes
Redcar	9	Yes	Yes	Yes	Yes
Norwich	6	Yes	Yes	Yes	No
Ashfield (Enterprising Ashfield)	11	Yes	Yes	Yes	Yes
Scunthorpe	3	Yes	Not applicable	No	Not applicable
Hereford	8	Yes	No	Not Applicable	Yes
Harlow	9	Yes	Not Applicable	Yes	Not Applicable

Place	Number of interviewees	Local authority or local area contact	Project team	Business stakeholder	Beneficiaries
Mablethorpe	14	Yes	Yes	Not Applicable	Yes
Warrington	15	Yes	Yes	Not Applicable	No
St Ives	17	Yes	Yes	Not Applicable	Yes
Kidsgrove	10	Yes	Yes	Not Applicable	Yes

Source: Frontier Economics.
Note: 'Not Applicable' refers to cases where the stakeholder type was not relevant for the project. For example, 'Not Applicable' for business stakeholders means that the project was not targeted at business users or was not expected to affect them in the outcomes of interest directly.

A.4.2 Survey methodology

SURVEY RATIONALE

Surveys are a useful tool as they provide localised primary data on individual preferences and experiences. The intervention-level evaluation analysis is focused on exploring impacts at the town (or high street) level, using samples drawn from the town's Lower Layer Super Output Areas (LSOAs). The use of survey data enables consideration of outcomes that would otherwise be unavailable in secondary sources at the desired level of granularity. For example, the main secondary source of pride in place information is the Community Life Survey. The Community Life Survey sampled at least 500 adults per local authority in the years 2023/24 and 2024/25, and at least 10,000 adults in England in the years before 2023/24. However, this sampling approach would yield too few responses at the town level to support a robust analysis. Additionally, bespoke surveys can capture awareness and usage information about the project of interest for a wide set of potential beneficiaries, providing a robust source of this information.

The intervention-level evaluation primarily uses surveys for projects expected to result in changes in pride in place or local wellbeing. Other outcomes, such as business outcomes and employment and skills, are less suitable for survey collection, as they are already collected at a granular level by the UK government. In addition, these types of projects tend to focus on a small subset of the population, meaning a survey may underestimate the effect on certain individuals. The evaluation surveyed 16 of the 20 selected case study locations.

Surveys were administered at baseline (before project completion) and at follow-up, roughly a year after completion, in 10 towns. It was not feasible to carry out baseline surveys in the remaining 6 areas. The projects completed in these 6 areas before or at the very start of the evaluation period.

By collecting information at 2 time points, the analysis can identify changes over time and build the attribution narrative. To account for seasonality effects, survey deployment was designed so that the 2 surveys are deployed at the same time of year. In some cases, this was not possible due to project delays. As some projects had been completed by the start of the evaluation, baseline data were collected for 10 of 16 locations surveyed.

SURVEY DESIGN

Frontier Economics and BMG Research designed surveys with input from MHCLG and local authority representatives. Surveys include 3 sections:

1. Demographic information.
2. Standardised questions about the local area, taken from the Community Life Survey to ensure consistency, including questions on pride in place, wellbeing, and community engagement.
3. Project-specific questions varied for each survey but generally included questions to understand individual awareness and usage of, and satisfaction with, the project.

The survey sample was chosen based on the primary outcomes of interest, the town size, the availability and closeness of alternatives to the selected project, and other relevant geographical or contextual factors about the town. Generally, samples were selected as either a 5-mile or a 3.5-mile radius around the selected project, within which households are randomly sampled to take part in the survey.

For example, the sample for Kidsgrove included households within a 3.5-mile radius of the sports centre due to the proximity of alternative sports centres (3 centres within 5 miles) and the project's community-focused nature.

To increase the likelihood of sampling households that are the intended beneficiaries of the project, 60% of all sampled households were selected from within the town’s built-up area (BUA). In most samples, this constraint was not binding. However, when a town was located near larger towns or cities, this requirement reduced the likelihood of random oversampling from the nearby town, whose residents were not the project's immediate focus. Sample plans were reviewed and signed off by MHCLG and relevant local authority contacts.

SURVEY DEPLOYMENT

Based on the agreed sample plans, 1,600 private addresses were randomly sampled from the Royal Mail Postcode Address File. Addresses were selected randomly using a ‘1-in-n’ process via the Visual Basic for Applications (VBA) access software code script. A ‘1-in-n’ sample (also called Systematic Sampling) is a method in which you select every nth item from a list; for example, using a 1-in-10 sample to select 100 people from a list of 1,000 means picking every 10th person. This was deemed an appropriate number to meet the 250-response target for each location. Table A.8 (for the baseline survey) and Table A.9 (for the follow-up survey) show that all baseline and follow-up surveys met this target.

Sampled households then received a letter in the post, inviting them to complete the survey online (through a URL or QR code). Up to 4 household members aged 18 or older were invited to respond to the survey. A reminder letter was sent approximately 2 to 3 weeks after the initial one. The reminder letter included a paper version of the questionnaire that individuals could complete and return. Face-to-face survey collection was also used to boost response numbers.

Table A.7 Baseline survey responses for selected case studies

Town	Project completion date	Survey launch date	Responses
Heanor	July 2024	March 2024	263
Ashfield	November 2023 (High Pavement) March 2024 (Enterprising Ashfield)	March 2024	244
Harlow[A]	August 2024	March 2024	216
Chatham	October 2024	May 2024	255
Carlisle	September 2024	May 2024	287
Mablethorpe	September 2024	July 2024	361
Blyth	December 2024	September 2024	317
St Ives	April 2025	September 2024	348
Great Yarmouth	April 2025	September 2024	236
Woolwich	June 2025	October 2024	204

Source: Frontier Economics.
Note: No surveys were deployed in Norwich, Redcar, or Scunthorpe, as the projects were not expected to affect overall pride in place or wellbeing.
[A] The project in Harlow originally opened in August 2024 but closed again until August 2025.

Table A.8 Follow-up survey responses for selected case studies

Town	Project completion date	Survey launch date	Responses
Northallerton	June 2022	May 2024	389
Kidsgrove	July 2022	May 2024	259
Loftus	August 2023	September 2024	267
Yeovil	December 2023	October 2024	320
Hereford	December 2023	October 2024	365
Warrington	February 2024	February 2025	264
Heanor	July 2024	February 2025	285
Ashfield	November 2023 (High Pavement) March 2024 (Enterprising Ashfield)	February 2025	267
Chatham	October 2024	June 2025	268
Carlisle	September 2024	June 2025	262
Mablethorpe	September 2024	June 2025	336
Harlow[A]	August 2024	September 2025	266
Blyth	December 2024	September 2025	276
St Ives	April 2025	September 2025	301
Great Yarmouth	April 2025	September 2025	229
Woolwich	June 2025	September 2025	207

Source: Frontier Economics.
Note: No surveys were deployed in Norwich, Redcar, or Scunthorpe, as the projects were not expected to affect overall pride in place or wellbeing.
[A] The project in Harlow originally opened in August 2024, but closed again until August 2025.

A.4.3 Pride in place in England, from the Community Life Survey

Table A.10 sets out the core pride in place indicators covered in the case study surveys for England overall, drawn from the Community Life Survey.

These measures do not change by a statistically significant amount year over year over the period covered by the case studies. In addition, between 2023/24 and 2024/25, there were no statistically significant changes in these measures for the individual local authorities where the case study projects were located. This provides a potential benchmark for the changes observed in the case studies.

Table A.9 Pride in place indicators, England

Question	2020/21	2021/22	2023/24	2024/25
Proportion of adults who were (were not) proud to live in their local area	Unavailable	Unavailable	59% (13%)	60% (13%)
Proportion of adults who agreed (disagreed) that they would still like to be living in their local area in 5 years	Unavailable	Unavailable	61% (21%)	61% (21%)
Proportion of adults who would (would not) recommend their local area to others as a good place to live	Unavailable	Unavailable	66% (13%)	66% (13%)
Overall satisfaction (dissatisfaction) with the local area as a place to live	79% (8%)	76% (8%)	74% (11%)	73% (11%)
The area has improved in the last 2 years	16%	14%	11%	11%
The area has got worse in the last 2 years	22%	21%	29%	30%

Source: Community Life Survey.

Annex B Additional case study evidence

B.1 Additional evidence from across the case studies

The main report sets out the intervention-level findings across case studies. This section includes additional details on some of the evidence informing the findings. It includes the following:

- detailed pride in place Qualitative Comparative Analysis (QCA) results
- survey representativeness across age groups and deprivation, which informed the assessment of survey findings presented below
- differences in changes in pride in place in the survey, split by age and deprivation

B.1.1 QCA results: Pride in place

The maximum number of case studies with pride in place assessments included in the QCA is 16 (out of 20). This relatively small number, plus the often uneven coverage across different combinations, means the results provide only indicative evidence of the conditions associated with pride in place improvements.

HYPOTHESIS 1: REGENERATION THAT IS VISIBLE AND COMBINED WITH STRONG ENGAGEMENT WITH THE COMMUNITY IS LIKELY TO BE ASSOCIATED WITH PRIDE IN PLACE IMPROVEMENTS.

Although the number of cases included in the assessment is limited, visible regeneration is a common feature in towns where pride in place improves. This pattern is strongest when regeneration is paired with consistently positive engagement.

Of the 16 towns included in the QCA, 14 include an assessment of community engagement. Across these towns, pride in place improvements are most commonly seen where there is both a completed regeneration project and consistent community engagement. This result is close to sufficient, as 80% of towns (4 in 5) with this combination saw an increase. This finding is robust to sensitivity tests. In fact, increasing the strictness of engagement categorisation strengthens the sufficiency claim.

Visible regeneration alone is close to a necessary condition. Five of the six towns with strong evidence of pride in place improvements involve the completion of a regeneration project focused on a town-centre focal point. This finding does not change when the sample is limited to just the cases with both baseline and follow-up data.

HYPOTHESIS 2: TOWNS WITH HIGH DEPRIVATION THAT RECEIVED ABOVE-AVERAGE FUNDING PER CAPITA ARE EXPECTED TO DISPLAY GREATER PRIDE IN PLACE IMPROVEMENTS

The distribution of cases across conditions is uneven, limiting the conclusions that can be drawn about this hypothesis. There is no clear association between a town's deprivation level, the amount of funding it received per capita, and whether it has seen pride in place improvements.

The limited variation across conditions is primarily because 9 of the 16 cases fall into the 'lower deprivation and lower funding' bucket. This means the evidence is not well balanced across the different combinations of deprivation and funding, so any apparent pattern should be treated cautiously.

There is some evidence that towns receiving lower per-capita funding experienced greater improvements in pride in place. However, this finding appears to be driven by the Future High Streets Fund providing lower average funding than Town Deals but being more likely to focus on regeneration-style projects. There is no clear causal link with the scale of funding itself.

This finding is also not robust to sensitivity testing. Changing the per-capita funding threshold to the median for the selected group (£420) makes the apparent relationship disappear. Under this new definition, all selected areas with high deprivation received funding per capita above the median, further limiting variation and interpretability.

HYPOTHESIS 3: ONGOING DISRUPTION IS EXPECTED TO BLOCK PRIDE IN PLACE GAINS, EXCEPT IN AREAS WHERE LARGE AMOUNTS OF FUNDING WERE COMPLETED AT THE TIME OF THE SITE VISIT

The evidence for this hypothesis is constrained by the distribution of cases. Although disruption is highlighted as an important qualitative theme, no clear pattern is found linking it to weaker pride in place outcomes.

The distribution of cases limits what can be concluded about whether distribution effects are mitigated as delivery advances. Of the 16 towns, 8 fall into the 'no disruption, mostly complete' category.

Perceptions of disruption mentioned in the qualitative interviews covered several issues. These included roadworks that caused delays and congestion, restricted pedestrian access (for example, when travelling to work or the shops), and noise and visual disruption in the town centre.

The relationship between ongoing disruption and pride in place is not strong enough to draw reliable conclusions. Of the 6 towns that displayed pride in place improvements, 2 appeared to have ongoing disruptions in the area at the time of the site visit. This suggests that the role of ongoing disruption is highly context-specific and hard to isolate from wider effects.

The preferred definition of funding completion (at least 70% of Towns Fund funding completed in a town) is close to necessary for pride in place. Of the 6 towns with positive improvements in pride in place, 5 (83%) had released over 70% of their funding. However, the evidence for a consistent relationship is weak because this finding is not robust when the definition is broadened to include all project-related funding, rather than just the Towns Fund contribution.

HYPOTHESIS 4: AREAS WITH LOW BASELINE PRIDE IN PLACE DISPLAY GREATER IMPROVEMENTS, ESPECIALLY WHEN RECEIVING HIGHER THAN AVERAGE FUNDING

Low baseline pride in place is associated with observed improvements in pride in place. However, the number of cases is too small and lacks sufficient variation to conclude how funding interacts with baseline conditions.

As this hypothesis relies on baseline data, the sample of cases included is limited to 10. With this smaller sample, there is limited spread across the baseline pride in place and per capita funding categories, with 6 out of the 10 cases falling into the ‘low baseline pride in place and low funding’ category. This constrains what can be concluded about the combined effect of the 2 conditions.

Despite these limitations, low baseline pride in place appears to be a key driver of observed improvements in pride in place. All 5 case studies with significant improvements in pride in place had below-average pride in place at baseline.

B.1.2 Survey representativeness

The assessment of survey representativeness covered 2 aspects:

- comparison of how closely the survey samples reflect the general area population based on Census data
- assessment of whether sampling imbalances (in particular changes in the sample make-up between baseline and follow-up) affect the validity of the results

SURVEY SAMPLING COMPARED TO CENSUS

Survey samples should be as representative of the general population as possible to ensure the findings accurately reflect the wider population. Over or under-representation of certain groups may result in misleading findings. For example, if a certain group is more satisfied with a project and is over-represented in the survey, this will bias the reported satisfaction levels upward.

Age was identified as a key area where representativeness may be an issue, since older people are typically more likely to respond to surveys. Table B.1 compares the proportion of the census population in each age group to the proportion of the follow-up survey respondents in each age group. This is reported for areas with the largest differences between the sample and the census, and is defined as areas where the proportion of people in any given age group differs by more than 10% from the census.

Across all areas, as expected, online responses were higher among groups aged 55 and above. To mitigate this difference, face-to-face fieldwork focused on collecting responses from younger residents, in particular those aged 18 to 34. However, the overall response rate among older groups remains higher than their proportion in the surveyed areas.

No weightings have been used in survey analysis to account for the under-representation of younger age groups. This approach was taken as re-weighting by age risked creating over- or under-representation across other measures. The surveys were also designed to focus on hyperlocal areas and to sample more heavily from the population immediately surrounding the projects. This means that a strict alignment with the census profile across the overall area was neither desirable nor achievable.

Instead of weightings, an assessment was conducted of the extent to which the reported changes in pride in place may be driven by survey composition. This is described in further detail later in this section.

There may be other implications of survey makeup. For example, if older groups are more likely to visit the project and have higher baseline pride in place, then it would not be possible to distinguish whether greater pride in place among frequent visitors was correlated with the project or driven by greater pride in place among older cohorts. This is particularly relevant for case studies where it was not possible to deploy baseline surveys. It is discussed in more detail in the interim report.

Table B.1 Summary of survey response differences by age group

Town	Census or survey	Aged 18 to 34	Aged 35 to 54	Aged 55 to 74	Aged over 75
Chatham	Census	28%	35%	28%	9%
Chatham	Follow-up	15%	32%	33%	19%
Carlisle	Census	26%	31%	31%	12%
Carlisle	Follow-up	18%	19%	42%	20%
Great Yarmouth	Census	24%	31%	32%	13%
Great Yarmouth	Follow-up	15%	18%	41%	23%
Harlow	Census	26%	36%	28%	10%
Harlow	Follow-up	14%	24%	38%	21%
Hereford	Census	25%	32%	30%	13%
Hereford	Follow-up	14%	25%	41%	19%
Kirkby and Sutton (Ashfield)	Census	25%	33%	30%	11%
Kirkby and Sutton (Ashfield)	Follow-up	13%	28%	41%	17%

Source: *Frontier Economics.*
Note: *No surveys were deployed in Norwich and Redcar because both projects focus on a specific subset of the population (college students).*

IMPLICATION OF DIFFERENCES IN SURVEY SAMPLING OVER TIME BY AGE AND DEPRIVATION FOR PRIDE IN PLACE CHANGES

The second element of survey representativeness considers how the survey makeup changes over time and the implications for reported findings. If there is a large change in the age and deprivation makeup of the survey between baseline and follow-up, reported changes in pride in place may be driven by changes in the survey's makeup. Areas with large differences in survey composition are assessed to consider the implications for pride in place results. The analysis focuses on pride in place, defined by the question ‘am I proud to live in my local area’.

Differences by age group

Table B.2 shows the areas with statistically significant changes in the proportion of respondents by age group between the baseline and follow-up surveys.

Harlow and Heanor both see increases in younger age groups, while Carlisle and Great Yarmouth see increases in older age groups. There is no statistically significant change for other age groups. No other areas show any statistically significant change.

In Carlisle, the reduction in younger respondents in the follow-up survey may lead to an overestimation of changes in pride in place, since this group reports low pride in place on average. For all other cases, there is no significant difference in pride and place between age groups, so there is no effect on the results presented.

Table B.2 Impact on analysis from changes in the age distribution between baseline and follow-up

Town	Statistically significant differences in the prevalence of age groups	Differences in pride in place at follow-up	Impact on survey analysis
Carlisle	There are fewer respondents in the 34 to 55-year-old group at follow-up (6.9%*).	Younger age groups tend to report lower pride in place on average.	Assessment will tend to overestimate changes in pride in place over time.
Great Yarmouth	There are fewer respondents in the 34 to 55-year-old group (7.4%*) and more respondents aged 75 and over (6.9%*) at follow-up.	No significant difference in pride in place between age groups.	No effect
Harlow	There are more respondents in the 34 to 55-year-old group at follow-up (7.2%*).	No significant difference in pride in place between age groups.	No effect
Heanor	There are more respondents in the 18 to 34-year-old group (11%**) and fewer in the 34 to 55-year-old group (9.4%**) at follow-up.	No significant difference in pride in place between age groups.	No effect

Source: *Frontier Economics.*
Notes: *Asterisks indicate significance: * p< 0.10, ** p<0.05, *** p<0.01.*

Differences by deprivation

Table B.3 shows the proportion of respondents in the most-deprived quintile for areas with a large change between baseline and follow-up. It was not possible to conduct full statistical testing, as the data were only available at aggregated levels due to data-sharing agreements.

Table B.3 Impact on analysis from changes in the deprivation distribution between baseline and follow-up

Town	Differences in the prevalence of the most deprived quintile	Differences in pride in place	Relevance for survey analysis
Ashfield	The most deprived quintile is more prevalent in follow-up (8 percentage point increase)	More deprived respondents tend to report lower pride in place	Assessment will tend to underestimate pride in place changes over time
St Ives	The most deprived quintile is more prevalent in follow-up (12 percentage point increase)	More deprived respondents tend to report lower pride in place	Assessment will tend to underestimate pride in place changes over time
Woolwich	The most deprived quintile is less prevalent in follow-up (12 percentage point decrease)	More deprived respondents tend to report lower pride in place	Assessment will tend to overestimate pride in place changes over time

Source: Frontier Economics.

In St Ives and Ashfield, more respondents were in the most-deprived quantile at follow-up than at baseline. The opposite is true in Woolwich. For other areas, the change was small (below 4 percentage points in all cases but typically around 1%).

More deprived residents typically report lower pride in place across all 3 areas. Therefore, the assessment of changes in pride in place will likely underestimate changes for St Ives and Ashfield and overestimate changes for Woolwich.

B.1.3 Differences in changes in pride in place, by age and deprivation

Changes in pride in place in the case studies are reported for residents overall rather than broken down by resident demographics due to the available sample sizes. This section briefly outlines how changes in pride in place varied by age and deprivation levels across the case studies. The analysis focuses on pride in place, defined by the question ‘am I proud to live in my local area’.

Given the small sample sizes and the broad grouping used, this analysis is descriptive and indicative only. It does not robustly test differential impacts.

DIFFERENCES IN CHANGES IN PRIDE IN PLACE BY AGE GROUP

Overall, there were no consistent differences in changes in pride in place across age groups, defined as individuals aged 55 and under or 55 and over. While younger respondents were slightly more likely to report increases in pride in place, there was significant variation across case study areas, and no clear correlation between age and the strength of pride in place changes. There were also no systematic differences in the level of pride in place across age groups across the areas.

The sample size limits the strength of these conclusions. The aggregation of age into 2 broad categories may mask variation within narrower age bands.

DIFFERENCES IN CHANGES IN PRIDE IN PLACE BY LEVEL OF DEPRIVATION

The level of pride in place is consistently higher for less deprived groups (the bottom 50% by deprivation level) than among more deprived groups. This pattern is observed across areas both at baseline and follow-up.

Pride in place increased more, on average, among more deprived groups between baseline and follow-up surveys. While there are some exceptions to this, the evidence points towards a narrowing of the gap in pride in place between more and less deprived residents in funded areas.

However, there are limitations to this analysis. Deprivation was aggregated into 2 broad categories: those in the top 50% most deprived and those in the top 50% least deprived. Analysis was also based on the deprivation level of the Lower layer Super Output Areas (LSOAs) where the respondent lived, rather than on individual respondents’ incomes or characteristics. This approach may mask variation within deprivation bands.

In addition, it was not possible to carry out full statistical significance testing for this comparison. Due to data sharing agreements, data on pride in place by deprivation level was only available aggregated by deprivation quartile, rather than at the individual respondent level required for full statistical significance testing.

Annex C Case study findings: Future High Street Fund

C.1 Carlisle: Devonshire Street

C.1.1 Key findings

THE PROJECT

Devonshire Street, located in Carlisle city centre, hosts a mix of food and drink establishments alongside a few other businesses. The project introduced outdoor seating and improved street planting and lighting to enhance the street's position as a restaurant and bar destination for visitors to the city centre. It also expanded the pedestrian space by reducing the number of lanes on the one-way street from 2 to one.

CHANGES IN PRIDE IN PLACE

There is medium-strength evidence that satisfaction with Devonshire Street has increased. Residents cited increased pedestrianisation, planting, and seating as key factors which have improved the appearance of the street. Negative views expressed by some residents were generally due to a desire for complete pedestrianisation.

There is strong evidence that resident satisfaction with local amenities and the town centre has improved. Both of these factors showed a statistically significant increase in the survey following the project competition. There is medium-strength evidence that this can be attributed in part to the project. In the survey, visitors to the street were more satisfied with local amenities than non-visitors. Qualitatively, residents reported Devonshire Street provides a high-quality food and drink offer distinct from the surrounding area.

Pride in place in Carlisle has not improved after project completion. There was a statistically significant decrease in the proportion of people who are proud to live in their local area. Wider pride in place measures did not change significantly. These changes appear to be related to wider factors in the local area rather than being attributable to Devonshire Street. The lack of a comparator means it is not possible to understand the impact on pride in place resulting from Devonshire Street specifically. It is possible that pride in place would have decreased further without the project.

CHANGES IN BUSINESS OUTCOMES

There is medium-strength evidence of increasing footfall on Devonshire Street. Qualitative evidence suggests that residents are more likely to visit the street following project completion. Outdoor seating at restaurants and bars was noted as an important contributor to footfall. Following project completion, footfall is increasing. However, footfall remains below the levels seen during 2022 and 2023. Devonshire Street is a small street within the town centre, so wider factors may be affecting footfall, including other regeneration works.

The vacancy rate of Devonshire Street has decreased, with 3 previously vacant units now filled. There may have been other factors that reduced vacancy rates, so these changes cannot be wholly attributed to the project.

Wider business outcomes, in particular, increased turnover, have yet to emerge. There is medium-strength evidence that these outcomes may be realised in the future, as businesses are able to attract more customers through outdoor seating.

C.1.2 Project context and hypotheses

Carlisle is a city located in North West England, within the Cumberland Council. It has a population of approximately 77,730 (ONS, 2024). There are areas of significant deprivation in the city. Carlisle is in the second decile of most deprived built-up areas nationally (MHCLG, 2025).

Carlisle was awarded £8.8 million from the Future High Streets Fund, spread across 4 projects. The focus of this case study is the enhancement of Devonshire Street, completed in August 2024, which received £2 million in funding from the Future High Streets Fund.

The pavement width on Devonshire Street was increased by reducing the road from 2 lanes to one and moving the bus stop to a nearby street. This left space for outdoor seating for both the public and customers at food and beverage establishments. Planting and improved lighting have also been installed, alongside sustainable drainage.

Based on the specific context relating to Carlisle and the Devonshire Street project and its expected outcomes and impacts, the following hypotheses were developed in collaboration with the local authority:

1. **Hypothesis 1:** Carlisle's town centre has not seen renovation and improvement work since the 1980s, so it may be seen as outdated (context). Renovating Devonshire Street will enhance the street's attractiveness (output). It will increase the offering in Carlisle, providing a 'cafe culture' and outdoor seating for the first time (mechanism). This is expected to increase perceptions of the street and satisfaction with local amenities (short-term outcome), as well as residents' pride in place (long-term outcome).
2. **Hypothesis 2:** Carlisle is a key retail and leisure centre for a large sub-region across Cumbria, south-west Scotland, and the Scottish Borders. However, many key retail chains have gone into administration, reducing the draw of Carlisle for those within its catchment (context). The renovation of Devonshire Street will provide seating outside food and beverage establishments and improve the attractiveness of the area (output). This will provide a unique offering on Devonshire Street within Carlisle and make using the street more enjoyable (mechanism). The changes are expected to encourage visitation and increase footfall on the street and across the wider town centre (short-term outcome). In the long term, it is expected to improve business outcomes, such as turnover and employment, in Carlisle (long-term outcome).

In addition to the baseline and follow-up surveys in Carlisle, an additional resident and business survey was deployed in November and December 2025 in collaboration with the local authority. The survey collected views on attractiveness, visitation, and business outcomes following the changes to the street. A total of 400 residents responded.

C.1.3 Emerging findings

EVIDENCE THAT THE RENOVATION OF DEVONSHIRE STREET HAS IMPROVED PRIDE IN PLACE (HYPOTHESIS 1)

There is medium-strength evidence that Carlisle residents are happy with the changes to Devonshire Street and of improved satisfaction with amenities, based on qualitative evidence from interviews and the resident surveys. There is also medium-strength evidence of improvements in satisfaction with amenities in the wider town centre, which can be partly attributed to the Devonshire Street project. Throughout this case study, the strength of evidence is assessed using the framework outlined in Annex A.

There is no evidence of an improvement in pride in place following the completion of the Devonshire Street project. There was a statistically significant decrease in pride in place in Carlisle following the changes to Devonshire Street (at the 1% level). Evidence suggests this is driven by wider renovation works and changes in Carlisle, causing ongoing disruptions and is not attributable to the project.

There are several regeneration projects in Carlisle funded by the Towns Fund and other non-Towns Fund sources. It is not possible within this evaluation to fully separate the effect of Devonshire Street from the other regeneration works in Carlisle. Changes in the local area may be driven by the collective effect of this wider portfolio of projects, rather than Devonshire Street alone.

Change in appearance and quality of Devonshire Street

Users are generally satisfied with Devonshire Street and find it attractive. In a supplemental resident survey conducted in Carlisle, which received responses from over 400 local residents, 64% reported that Devonshire Street was attractive, while only 8% found it unattractive. Evidence from the main resident survey was mixed but still points to users being satisfied with the street. In the resident survey, 44% of those who had visited the street reported being satisfied, compared to 21% who were dissatisfied.

There is medium-strength evidence of improved satisfaction with Devonshire Street following the redevelopment. The evidence is slightly mixed, but on balance, it suggests satisfaction with the street has improved.

Residents consistently reported that the appearance of the street had improved in the supplemental survey. Residents also reported they were much more likely to visit the street after the redevelopment. Of those who responded to the supplemental survey, 34% reported being more likely to visit the street following the renovation, while 11% were less likely to do so. Residents also highlighted their increased satisfaction with the street in qualitative interviews.

There was no clear reported change in overall satisfaction with Devonshire Street in the main resident survey. Similar proportions of residents reported being more or less satisfied with Devonshire Street following project completion (28% and 24%, respectively). The difference between this survey and the results of the supplemental survey and resident interviews may be due to the framing of the questions. In the supplemental survey, negative views were typically accompanied by comments about changes to road traffic on the street. The lack of change in satisfaction in the main survey may be attributable to this, but it is not possible to discern the reasons for the lack of satisfaction in the main survey itself.

The supplemental surveys, stakeholder interviews, and resident interviews identified the key factors in improving the appearance of the street as:

1. **Improved planting and seating.** Residents and wider stakeholders were positive about the planting, highlighting that it introduced a key change compared to before the renovations. The local authority noted that businesses on the street have contributed to its attractiveness by purchasing high-quality outdoor seating and signage.
2. **Increased pedestrianisation.** Stakeholders commented that the road now offers a more pleasant environment for visitors and workers. Some residents and businesses reported they would have preferred complete pedestrianisation.

Change in resident satisfaction with local amenities

Significantly more people are satisfied with the services and amenities in Carlisle town centre following the project's completion. In the follow-up resident survey, 43% of residents were satisfied with local amenities, compared to 34% at baseline (statistically significant at the 5% level). Similarly, there was a statistically significant increase in the proportion of people who think their town centre has improved in the past 2 years, from 5% at baseline to 13% at follow-up.

There is medium-strength evidence that these town-wide effects are at least partially attributable to the Devonshire Street project. Those who had visited Devonshire Street in the previous 12 months were more likely to be satisfied with services and amenities and to report that their area had improved. Respondents to the supplemental survey and participants in the qualitative interviews reported that Devonshire Street provides a different offering to other streets in Carlisle. Participants in the resident interviews were also much more positive about the changes to Devonshire Street than about the ongoing works in the wider town centre.

Changes in pride in place

Table C.1 presents the pride in place indicators for Carlisle. It demonstrates there is no evidence of improvements in overall pride in place in Carlisle to date.

Table C.1 Pride in place indicators: Carlisle

Question	Baseline[A]	Follow-up[A]	Follow-up: Visited Devonshire Street in the last 12 months[B]	Follow-up: Not visited Devonshire Street in the last 12 months[B]
Proportion of adults who were (were not) proud to live in their local area	69%*** (7%)**	55%*** (13%)**	50% (15%)	53% (10%)
Proportion of adults who agreed (disagreed) that they would still like to be living in their local area in 5 years	69% (14%)	68% (14%)	65% (16%)	62% (7%)
Proportion of adults who would (would not) recommend their local area to others as a good place to live	68% (11%)	72% (9%)	73% (11%)	58% (6%)
Overall satisfaction (dissatisfaction) with the local area as a place to live	80% (8%)	76% (12%)	74% (13%)	70% (15%)
The area has improved in the last 2 years	6%	10%	12%**	0%**
The area has got worse over the last 2 years	37%	31%	26%**	48%**
Proportion of adults who were satisfied (dissatisfied) with local services and amenities in their local area	64% (14%)	70% (9%)	73% (8%)	61% (18%)*
Sample size[C]	267 to 287	228 to 262	148 to 165	29 to 33

Source: *Frontier Economics.*

Notes: *Asterisks indicate significance: * p< 0.10, ** p<0.05, *** p<0.01*

[A] Statistical significance is tested between all respondents in the baseline and follow-up.

[B] Statistical significance is tested between follow-up respondents who have and have not visited Devonshire Street in the last year.

[C] Number of respondents may slightly vary across categories due to variations in individuals who have not responded to a question or responded 'Don't know', so a range is reported.

There was a statistically significant decrease in the proportion of people who are proud to live in their local area, from 69% at baseline to 55% at follow-up. There was no significant change in other core pride in place metrics.

The age composition of the survey changed between baseline and follow-up, with a smaller proportion of respondents aged 34 to 55 in the follow-up survey compared to baseline. This group typically reports lower pride in place on average, and so pride in place at follow-up may be overestimated compared to baseline. This strengthens the conclusion that there was no improvement in pride in place following the Devonshire Street project.

Resident surveys and interviews suggested 2 main reasons which may explain this decrease in pride in place. Neither of these was related to Devonshire Street:

1. Residents highlighted frustration with ongoing disruption from wider works in the town centre, and the appearance of some of the buildings, which are under redevelopment.
2. Residents also suggested that some of the decreases in pride in place may be related to some residents' perceptions of changes in the wider local area, such as disagreements in the local community regarding housing for asylum seekers.

The reduction in pride in place was concentrated among survey respondents who lived more than 2 miles from the town centre. This is consistent with the views reported in resident interviews that wider contextual factors, rather than the Devonshire Street project, were driving these changes.

EVIDENCE THAT THE RENOVATION OF DEVONSHIRE STREET HAS IMPROVED BUSINESS OUTCOMES (HYPOTHESIS 2)

There is medium-strength evidence of changes in leading indicators of improved business outcomes, such as footfall and vacancy rates on Devonshire Street and in the wider town centre. While it is not possible to attribute these changes solely to the project, the qualitative and quantitative data suggest that the project was an important contributing factor in the improvement in footfall.

There is no evidence of changes in longer-term business outcomes, such as business turnover or employment, to date.

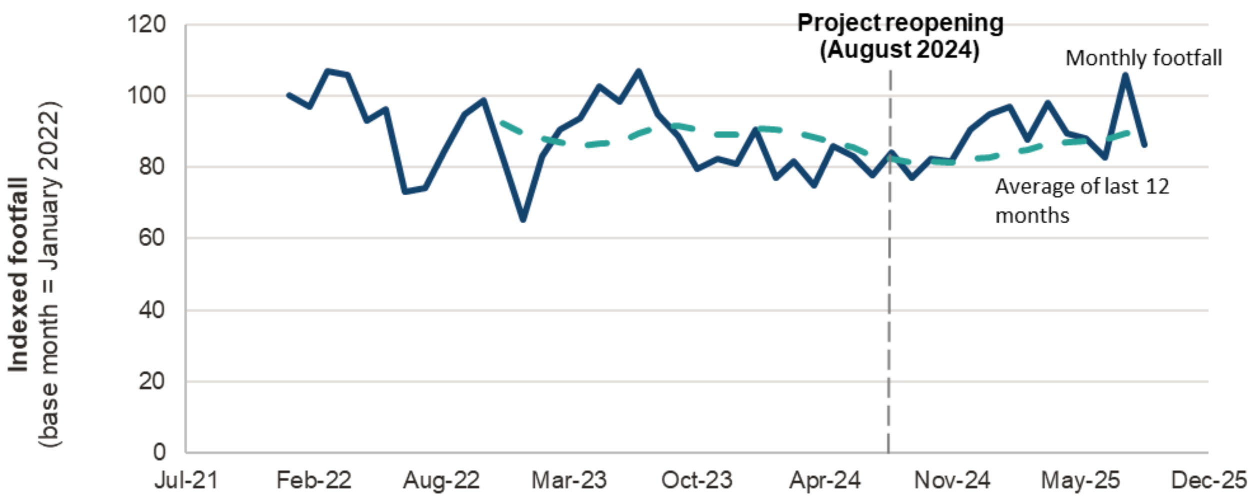
Changes in footfall

There is medium-strength evidence of increasing visitation to and around Devonshire Street following project completion. However, despite the post-project upwards trends, footfall remains below the 2022 and 2023 peaks. Data are not available for the pre-renovation period (the project began in July 2021), so it is not possible to compare with footfall before the project.

Figure C.1 shows that footfall has been trending upwards since project completion. There was an 11% year-on-year increase in September 2025. This is consistent with results from the supplemental resident survey, in which 35% of respondents reported being more likely to visit Devonshire Street as a result of the changes.

It is not possible to attribute these changes solely to the project, given the absence of a strong counterfactual in the case study. However, qualitative input suggests the project was an important contributing factor. Residents reported they were more likely to visit the street following the project, citing improvements in its appearance and its status as a food and drink destination. This is supported by footfall data and wider stakeholder and business interviews.

Figure C.1 Footfall on Devonshire Street



Source: Place Informatics.

Stakeholders, including one local business, noted an increase in footfall following the completion of the project. They reported an increase in use of the restaurant and bar outdoor seating and the public seating spaces on sunny days. They noted that it can be difficult to get a seat at restaurants and bars at weekends, as they are busy.

Stakeholders also commented on a broader demographic visiting the street. Before the renovations, they reported that the main users of the street were in their mid-20s and that it was typically busy only in the evenings. They reported that families are now also key visitors to the street and that it is increasingly busy on weekend afternoons.

There was no observable change in footfall in Carlisle town centre over the same period. Footfall in the town centre has remained similar since January 2022. A key goal of the Devonshire Street project was to give residents and tourists an increased reason to visit the town centre. However, there is ongoing disruption in the city centre as well as other completed projects. Devonshire Street is only one small street within Carlisle. It is not possible to understand the role that the Devonshire Street project has played in wider footfall.

Changes in vacancy rates

Vacancy rates on Devonshire Street fell following the announcement of the project. Overall, 16 of 17 commercial units are occupied (as of early 2026), and the final unit is under fit-out by a new tenant. In addition, 3 sites which had been vacant before the project are now full.

However, it is not possible to attribute these changes specifically to the Devonshire Street project. One of the businesses reported that its decision to open on Devonshire Street was unrelated to the redevelopment works. It is unclear whether the other 2 businesses' decisions to open on the street were related to the project. Vacancy rates are affected by many factors, so the improvements cannot be attributed solely to the project.

Residents were positive about the new businesses opening on the street, reporting that the new food options were increasing their interest in visiting the street and supporting its position as a food and drink destination. The types of businesses opening on the street align with the project's goals of creating a nightlife, restaurant-focused area.

Changes in wider business outcomes

There is no evidence of changes in turnover and employment. This is largely because of the time lag in the available data. Although the project was completed in August 2024, the latest Inter-Departmental Business Database data currently available covers only the period up to June 2025, providing less than a year of post-completion data. This is likely to be too soon for any quantitative changes in turnover or business type to be visible in the data set.

However, qualitative evidence suggests that some impacts may be observed in the long term. There are early indications of improved footfall, and businesses have been able to expand their outdoor space. Local stakeholders also highlighted that Devonshire Street is intended to complement wider works in the town centre, and that further impacts may be realised once other changes nearby (a new hotel and a new University of Cumbria campus) are completed.

Businesses located on or around Devonshire Street reported a significantly negative short-term impact on their revenues in the supplemental survey and interviews. This was driven by the disruption caused by the construction works on the street during the project.

C.2 Heanor: Heart of Heanor

C.2.1 Key findings

THE PROJECT

The Heart of Heanor project funded public realm improvements around Heanor's Market Place, the historic 'heart' of the town. It added enhancements to the appearance of the Market Place, including new planting and seating, and updates to the surrounding roads and crossing points. The project was completed in July 2024.

CHANGES IN PRIDE IN PLACE

There is strong evidence that the renovations have improved the quality of the public realm and that residents are satisfied with the changes. Residents attributed these changes to the improved look of the town centre and to easier access to shops and facilities. Stakeholders reported that business and community engagement was crucial for creating community support for the project and ensuring its success.

There is strong evidence of improvements in pride in place, although it is not possible to attribute these changes solely to the project. Improvements were greater for residents who had visited the town centre after the Market Place's completion. Some stakeholders and residents reported that, prior to the project, there was a perception of underinvestment in Heanor, which affected pride in place.

The absence of an adequate control group for comparison means it is not possible to draw a causal link between the improvements to the Market Place and the changes in pride in place. However, the timing of the increase in pride in place, the lack of evidence of wider changes in the area, and qualitative input from residents and stakeholders suggest that the project was an important contributor.

CHANGES IN BUSINESS OUTCOMES

Local residents and stakeholders suggested that the improvements to the Market Place have encouraged some local businesses to improve the appearance of their storefronts (for example, through new signage).

The vacancy rate fell slightly around the Market Place following the completion of the project, with all units occupied as of January 2025. However, it is not possible to attribute this change specifically to the project itself with the available evidence.

Evidence of footfall and dwell time changes is weak. There is no clear change in footfall in the quantitative data. While there was an improvement in dwell time in the town centre in July and August 2025, it is not possible to attribute these changes specifically to the project. Qualitative evidence is similarly mixed.

C.2.2 Project context and hypotheses

Heanor is a market town located in Amber Valley, Derbyshire. The population of Heanor was approximately 24,000 as of the 2021 Census (ONS, 2024). Heanor is located in an area of high deprivation (MHCLG, 2025).

Heanor received £8.6 million of Future High Streets Fund funding across 5 projects. The Heart of Heanor project received £1.2 million of funding from the Future High Streets Fund, with an additional £0.5 million from other sources. It involved the installation of new seating, planting, enhanced footpaths and crossing points, upgraded bus stops, a redesigned parking provision, road layout reconfiguring, and general improvements to the appearance of the paving in the Market Place. While the conversion of the former grammar school into a business and community hub is expected to yield outcomes similar to those of the Heart of Heanor project, it only officially opened in October 2025, after this case study was carried out.

Based on the specific context of the project and a logic model developed in collaboration with the local authority, the following key hypotheses were developed:

1. **Hypothesis 1:** The Market Place suffers from poor appearance and limited activities and shops (context). Redevelopment will improve the appearance and accessibility of the town centre, and the availability of events and opportunities for outdoor leisure and trading (mechanism). This is expected to improve resident satisfaction with the town centre (short-term outcome) and resident pride in place (long-term outcome).
2. **Hypothesis 2:** Economic activity in Heanor is lower than both the borough and national average, with a high rate of vacant units and business turnover (context). The Market Place redevelopment is expected to improve access to businesses in the town centre and attract visitors (mechanism). This will increase footfall and dwell time in the town centre (short-term outcome) and improve outcomes such as turnover and investment for local businesses (long-term outcome).

C.2.3 Emerging findings

EVIDENCE THAT THE RENOVATION OF THE MARKET PLACE HAS IMPROVED PRIDE IN PLACE (HYPOTHESIS 1)

There is strong evidence to suggest that the renovation of the Market Place has improved the quality of the public realm and increased resident satisfaction with the town centre. Throughout this case study, the strength of evidence is assessed using the framework outlined in Annex A.

Pride in place increased by a statistically significant amount from baseline to follow-up. Notably, the proportion of adults who were proud to live in their area increased from 42% at baseline to 54% at follow-up. While it is not possible to fully attribute these changes specifically to the Market Place, the evidence suggests the project is a strong contributor.

The Towns Fund and other non-Towns Fund sources fund several regeneration projects in Heanor. It is not possible within this evaluation to fully separate the effect of the Market Place project from the other regeneration works in Heanor. Changes in the local area may be driven by the collective effect of this wider portfolio of projects, rather than the Market Place project alone.

Change in resident satisfaction with Heanor town centre

Resident satisfaction with the town centre increased significantly following the project's completion. The proportion of residents who viewed Heanor town centre as attractive increased from 11% at baseline to 24% following project completion.

This was accompanied by a statistically significant increase (at the 1% level) in the proportion of residents who thought the town centre was improving over time. At baseline, only 8% of residents reported that the town centre had improved in the previous 2 years, compared to 24% in the follow-up survey.

The supporting quantitative and qualitative evidence, as well as the timing of the survey, supports that the Market Place redevelopment has contributed to this change.

Of the survey respondents who reported the town centre had improved in the previous 2 years in the follow-up survey, 84% attributed this to the ‘improved look’ of the town centre. Other commonly cited reasons for the improvement were that it was easier to access local shops and facilities and easier to find parking. These are also related to changes made by the project.

This is consistent with the results of a separate survey conducted by the local authority before and after the refurbishments (in February 2023 and October 2024), which the local authority shared with Frontier Economics. Residents scored the Market Place higher across a range of indicators, including aesthetics and quality, and reported that it better suited their needs.

Residents and local community groups were similarly positive in qualitative interviews. Although some residents expressed concerns about the changes to parking and reported ongoing issues with antisocial behaviour in the town centre, they generally said the works had improved the town centre's look and feel:

> *"People don’t shut their eyes now to come through. Probably their eyes are actually open because you look at it, and it does look lovely as you drive through."* ***Local community representative***

Council stakeholders reported that business and community engagement was crucial for creating community support for the project and ensuring its success. This engagement also helped ensure the space was accessible to groups with diverse needs, including those with visual impairments.

Change in pride in place

There is strong evidence that pride in place has increased in Heanor since the completion of the project. The evidence that this is primarily attributable to the Market Place refurbishment is more limited, but it suggests that this change is at least partially attributable to the project.

Table C.2 shows that all measures of pride in place included in the survey increased from the baseline to the follow-up survey. By comparison, there was no statistically significant change in pride in place measures in England or in the wider Amber Valley local authority over the same period in the Community Life Survey.

The majority of these changes were statistically significant. Notably, between baseline and follow-up, there was a statistically significant increase in:

- the proportion of adults who were proud to live in their local area, from 42% to 54%
- the proportion of adults who would recommend their local area as a good place to live to others, from 47% to 57%
- satisfaction with the overall area, from 64% to 75%

These changes in pride in place were larger among those who had visited the town centre in the previous 12 months, supporting a link between project completion and changes in pride in place.

Table C.2 Pride in place indicators: Heanor

Question	Baseline[A]	Follow-up[A]	Baseline: Visited the town centre in the past 12 months[B]	Follow-up: Visited the town centre in the past 12 months[B]
Proportion of adults who were (were not) proud to live in their local area	42%*** (24%)	54%*** (14%)	39%** (27%)***	51%** (15%)***
Proportion of adults who agreed (disagreed) that they would still like to be living in their local area in 5 years	58% (21%)	63% (16%)	55% (21%)	60% (17%)
Proportion of adults who would (would not) recommend their local area to others as a good place to live	47%** (25%)	57%** (15%)	40%** (29%)***	51%** (17%)***
Overall satisfaction (dissatisfaction) with the local area as a place to live	64%*** (19%)	75%*** (11%)	58%*** (23%)**	73%*** (14%)**
The area has improved in the last 2 years	4%	6%	4%	7%
The area has got worse in the last 2 years	52%***	38%***	54%***	38%***
Proportion of adults who were satisfied (dissatisfied) with local services and amenities in their local area	68%* (12%)	75%* (7%)	66%	72%
Sample size[C]	251 to 263	270 to 285	189	184

Source: *Frontier Economics.*
Notes: *Asterisks indicate significance: * p< 0.10, ** p<0.05, *** p<0.01*
[A] Statistical significance is tested between all respondents in the baseline and follow-up.
[B] Statistical significance is tested between follow-up respondents who have and have not visited the town centre in the last year.
[C] The number of respondents may slightly vary across categories due to variations in individuals who have not responded to a question or responded 'Don't know', so a range is reported.

Some stakeholders reported that the public investment in the town centre was helping to overcome local perceptions that Heanor was historically under-invested in and that it was “not worth spending money on”. Local community representatives and residents also noted in interviews that there was low pride in place in Heanor prior to the project.

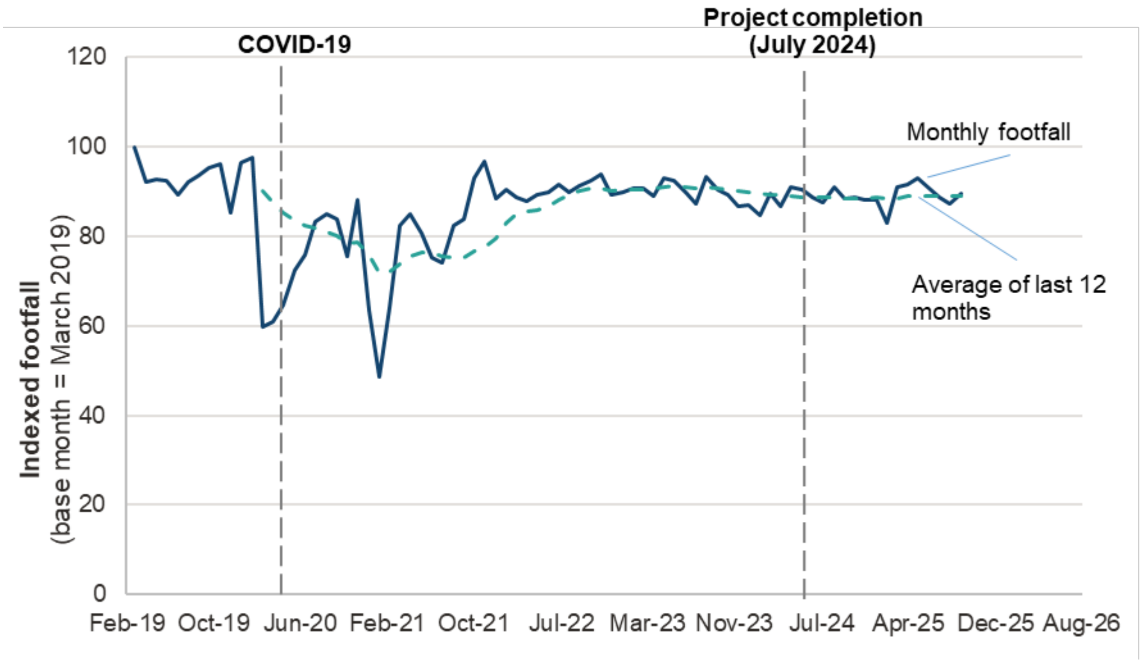
However, it is not possible to attribute all of these changes specifically to the Market Place redevelopment. Another potential driver of pride in place in Heanor over the period was the Tour of Britain cycling race, which passed through Heanor in September 2024. No other major drivers of changes in local pride were highlighted by local residents in interviews, and no other material regeneration projects were completed in the area over the case study period. Yet other unobserved factors, such as changes in perceptions of local economic conditions or in local services, may also be affecting pride in place.

EVIDENCE THAT THE RENOVATION OF THE MARKET PLACE HAS IMPROVED FOOTFALL AND LOCAL BUSINESS OUTCOMES (HYPOTHESIS 2)

Change in footfall and dwell time

Figure C.2 shows footfall in Heanor town centre between February 2019 and August 2025. Footfall was stable in Heanor town centre throughout the second half of 2024 and in 2025, with no clear change attributable to the project.

Figure C.2 Footfall in Heanor town centre



Source: Frontier Economics, based on Place Informatics.

However, stakeholders and residents reported in qualitative interviews that the project was expected to increase footfall and dwell time over time by improving the appearance and accessibility of the local area.

Stakeholders noted that the town centre was more accessible as a result of the increased pedestrianisation and changes to the surrounding roads and bus connections. There was a statistically significant increase in reported ease of travel following the project, with 68%

of residents reporting it was easy to travel around the town centre in the follow-up survey, compared to 54% at baseline.

Local residents and stakeholders also reported that the project was supporting new and improved events in the town centre, which is helping to drive visitation. There were 5 events held in the town centre in 2025, up from 3 events held in each of 2023 and 2024. The 2025 events included a creative festival and a family fun day, which had not been run in Heanor in previous years. While local community stakeholders noted that the availability of local funding limited how many events they could hold each year, they reported that the Market Place and town centre were better suited to hosting community events in general.

Dwell time in the town centre increased significantly in July and August 2025, rising 14% from the previous year. While it is not possible to attribute this change to the completion of the Market Place, the combination of the improved outdoor space created by the project and the warmer weather in summer 2025 may have played a role. Local residents also reported that the improved appearance of the town centre was encouraging increased dwell time:

> *"The aesthetic of it has made a big difference, it looks much better than, rather it just being a gigantic bus stop or a gigantic takeaway bin, because they used to just put things on the floor. It's much more conducive to want to sit and stay for a while. I think it's also pushed some of the shops that are around the market to improve their shop fronts."* ***Local community representative***

Changes in vacancy rates

Two previously vacant units were filled following the completion of the project, with all 17 units in the Market Place occupied as of January 2025. Community representatives noted that the number of market stalls in the Friday and Saturday outdoor market located in the Market Place had decreased, but that some additional independent shops had opened adjacent to the Market Place.

Local stakeholders and business representatives also reported additional investment in signage and shopfronts for several stores adjacent to the Market Place. Local stakeholders reported that the improvements to the Market Place encouraged this investment. However, the new signage was also facilitated through additional grant funding provided by the UK Shared Prosperity Fund. This suggests that wider investment in the area beyond the Towns Fund may also have contributed to the observed changes.

Stakeholders indicated that the regeneration work may be encouraging a higher quality retail offer in the town centre. However, it is not possible to attribute these changes specifically to the Market Place project.

Changes in wider business outcomes

Evidence of changes in wider business outcomes to date is limited. This is largely because of the time lag in the available data. The project was completed in July 2024, and the latest available Inter-Departmental Business Database data covers only the period up to June 2025. This provides less than a year of post-completion data, too soon for any quantitative changes in turnover or business type to be visible in the data set.

However, evidence of increased investment in the area and local stakeholders' expectations of future increases in footfall suggest that further changes may be realised.

Evidence of impacts on the outdoor market located in the Market Place is mixed. Market traders generally reported that their turnover had not improved as a result of the renovations. They expressed concern as to the availability of parking and electrical connections for their use in the redeveloped space. They also reported difficulties due to disruptions during the renovations and said they were still recovering from their effects.

C.3 Northallerton: Town Square

C.3.1 Key findings

THE PROJECT

The Town Square project delivered public realm improvements around the Northallerton Town Hall. Updates include upgraded space for events and markets, new seating, planting, wider pathways, and enhanced accessibility. The project was completed in June 2022. The connected Treadmills project transformed the former prison site into a mixed retail, leisure and office space. Future High Streets Fund funding contributed specifically to the new retail units and a cinema as part of the redevelopment. The works were finalised in May 2023.

CHANGES IN PRIDE IN PLACE

There is strong evidence that the Town Square and Treadmills projects improved the appearance of the public realm and the facilities available to visitors. Residents reported that the projects had improved the appearance of the town centre, as well as the leisure and retail options available (notably, the new Everyman cinema at Treadmills).

There is weak evidence of improvements in resident pride in place, although attribution to the projects is unclear. Residents' satisfaction with the projects is relatively high. This could be influencing the pride in place of visitors to the project site, which is higher than that of those who have not visited in the last 12 months.

However, it is not possible to draw a causal link between the projects and pride in place. This is due to the lack of baseline data or a robust counterfactual to control for the potential for wider factors to influence results.

CHANGES IN BUSINESS OUTCOMES

There is medium-strength evidence that footfall and dwell time have steadily increased since project completion. Footfall is now back to pre-COVID-19 levels, representing a faster recovery than a set of near comparator towns.

Evidence of wider business impacts remains weak. Many indicators show little change since project completion. While there was a reduction in vacancy rates following the project's completion, it is not possible to attribute this change specifically to the project.

C.3.2 Project context and hypotheses

Northallerton is a town of about 14,000 people (ONS, 2024) located in North Yorkshire. The wider North Yorkshire is relatively affluent (among the top 40% of least-deprived local authorities). However, Northallerton itself has areas of relatively high deprivation and is within the 40% most deprived built-up areas in England (MHCLG, 2025).

Hambleton District Council was awarded £6 million in Future High Streets Fund funding for Northallerton, spread across 3 projects. The Town Square project received £1.2 million from the Future High Streets Fund and £2.3 million from other sources. Treadmills received £4.8 million from the Future High Streets Fund and £7.6 million from other sources.

Based on the specific context of the projects and a logic model developed in collaboration with the local authority, the following key hypotheses were developed.

1. **Hypothesis 1:** Northallerton has a high proportion of adults over 65 years old, which shapes the existing town centre (context). The redevelopment of the Town Square and Treadmills is expected to improve the appearance of the town centre, the quality and variety of local amenities, and the availability of events (output). Because these developments are expected to appeal to a range of residents, especially younger adults (mechanism), this is expected to improve resident satisfaction with the amenities in the town centre and, eventually, improve resident and visitor perception of Northallerton and pride in place (longer-term outcome).
2. **Hypothesis 2:** Northallerton's high street offering is mainly retail-based and faces challenges from increasing vacancy rates (context). Because the redevelopment of the Town Square and Treadmills is expected to provide more attractive letting opportunities and to attract more residents and visitors to the town centre (mechanism), it is expected to improve vacancy rates and the quality of business on the high street (longer-term outcome).

C.3.3 Emerging findings

EVIDENCE THAT THE TOWN SQUARE AND TREADMILLS PROJECTS HAVE IMPROVED PRIDE IN PLACE AND PERCEPTION OF PLACE IN NORTHALLERTON (HYPOTHESIS 1)

There is strong evidence that the Town Square and Treadmills projects improved the appearance of the town centre and the availability of local facilities. Evidence collected from stakeholder interviews suggests that the changes have been well received, with users reporting improvements in the types of businesses in the town centre and greater flexibility in how spaces can be used. Throughout this case study, the strength of evidence is assessed using the framework outlined in Annex A.

Evidence of improvements in pride in place is weak. Survey responses suggest a correlation between the 2 projects and satisfaction with local amenities. However, without baseline information or a robust counterfactual, it is not possible to determine a causal relationship.

The Towns Fund and other non-Towns Fund sources fund several regeneration projects in Northallerton. It is not possible within this evaluation to fully separate the effects of the Town Square and Treadmills projects from those of the other regeneration works in Northallerton. Changes in the local area may be driven by the collective effect of this wider portfolio of projects.

Changes in the appearance of the town centre and the quality of amenities and events

The Town Square project delivered public realm improvements, including greening and upgrades to pedestrian paths and roads. Interviewed stakeholders and residents reported that these improvements increased the flexibility of how the space can be used. Residents noted a range of new events had been offered recently. This is consistent with council data that shows the number of events in the town square increased slightly following project completion. While the overall increase in the number of events is small, council stakeholders reported that these types of events would not have been possible previously and that the size and quality of pre-existing events had increased as a result of the project.

The Treadmills project also contributed to improved facility quality in the town, according to a range of local residents and stakeholders interviewed. The new Everyman cinema was highlighted as a particularly popular addition.

The qualitative stakeholder and resident input is consistent with quantitative evidence of strong, positive perceptions of the town centre in the resident survey. Of residents who responded to the survey (May 2024), 80% reported visiting the town centre at least once a week. A similar proportion reported finding the town centre either ‘very’ or ‘somewhat’ attractive.

Residents are more likely to find Northallerton town centre attractive if they have visited the town square recently. Those who visited in the last year were 42 percentage points more likely to agree than those who had not. This difference is significant at the 1% level. However, this is a correlation rather than a causal relationship, and it is not possible to measure the project's impact directly due to a lack of baseline data and a counterfactual. The sample of respondents who had not visited the town centre was also relatively limited and may not be representative.

Change in resident satisfaction with the town centre and local amenities

General satisfaction with Northallerton town centre is high. Satisfaction is particularly high among residents who reported visiting the town square or Treadmills in the last 12 months, according to the resident survey. This suggests a weak correlation between project visitation and individual satisfaction. However, due to a lack of baseline data, it is not possible to assess how this correlation has changed since the completion of the Town Square and Treadmills projects.

Satisfaction with the Town Square and Treadmills specifically is similarly high. The majority (59%) of residents report being satisfied with the redeveloped town square, and 26% of residents report that it improved in the 12 months to May 2024 (with only 8% saying it had got worse). Awareness of the Treadmills project is high among Northallerton residents, with 88% reporting that they have heard of the site. Among this group, 19% report that it improved in the 12 months to May 2024 (with only 3% saying it had got worse).

Changes in pride in place

Evidence of changes in wider pride in place is weak. Given the variety of wider factors that may affect pride in place and the lack of baseline data and a counterfactual, it is not possible to robustly assess whether these projects have had a causal impact on pride in place in Northallerton.

Table C.3 demonstrates that residents who had visited the town square or Treadmills in the last 12 months reported greater pride in place than those who had not visited during that period. This difference points to a correlation between the use of the square and pride in place. A number of these differences were significant at the 5% significance level.

However, without baseline data, it is not possible to determine the extent to which these differences have changed since the site was completed.

Table C.3 Wider pride in place indicators

Question	Visited at least once a month in the last 12 months[A]	Visited Town Square at least once in the last 12 months[A], [B]	Not visited Town Square in the last 12 months
Proportion of adults who were (were not) proud to live in their local area	75% (2%)	76%** (2%**)	58% (8%)
Proportion of adults who agreed (disagreed) that they would still like to be living in their local area in 5 years	80% (7%)	80% (6%)	73% (9%)
Proportion of adults who would (would not) recommend their local area to others as a good place to live	82% (5%)	82%** (4%)	66% (9%)
Overall satisfaction (dissatisfaction) with the local area as a place to live	91% (3%)	91%** (2%)	78% (6%)
The area has got better (worse) in the last 2 years	14%*** (26%)	12% (26%)	3% (31%)
Proportion of adults who were satisfied (dissatisfied) with local services and amenities in their local area	78%***(7%)	76%** (8%)	58% (8%)
Sample size[C]	250 to 268	300 to 321	33 to 36

Source: *Frontier Economics.*
Notes: *Asterisks indicate significance: * p< 0.10, ** p<0.05, *** p<0.01*
[A] Statistical significance is tested between visitors and non-visitors (either in the month or in the last 12 months).
[B] Includes those who visited the town centre at least once a month in the last 12 months.
[C] Number of respondents may slightly vary across categories due to variations in individuals who have not responded to a question or responded 'Don't know', so a range is reported.

While it is not possible to assess the impact of the projects on pride in place using the available quantitative data, residents reported in qualitative interviews that the projects were positively affecting their views of the local area. They noted that the increased investment in the town centre had significantly improved its appearance and reported a view that it was helping to improve the mix of businesses and leisure options in the town centre. Residents reported that this was supporting their perceptions of Northallerton and their attachment to the town.

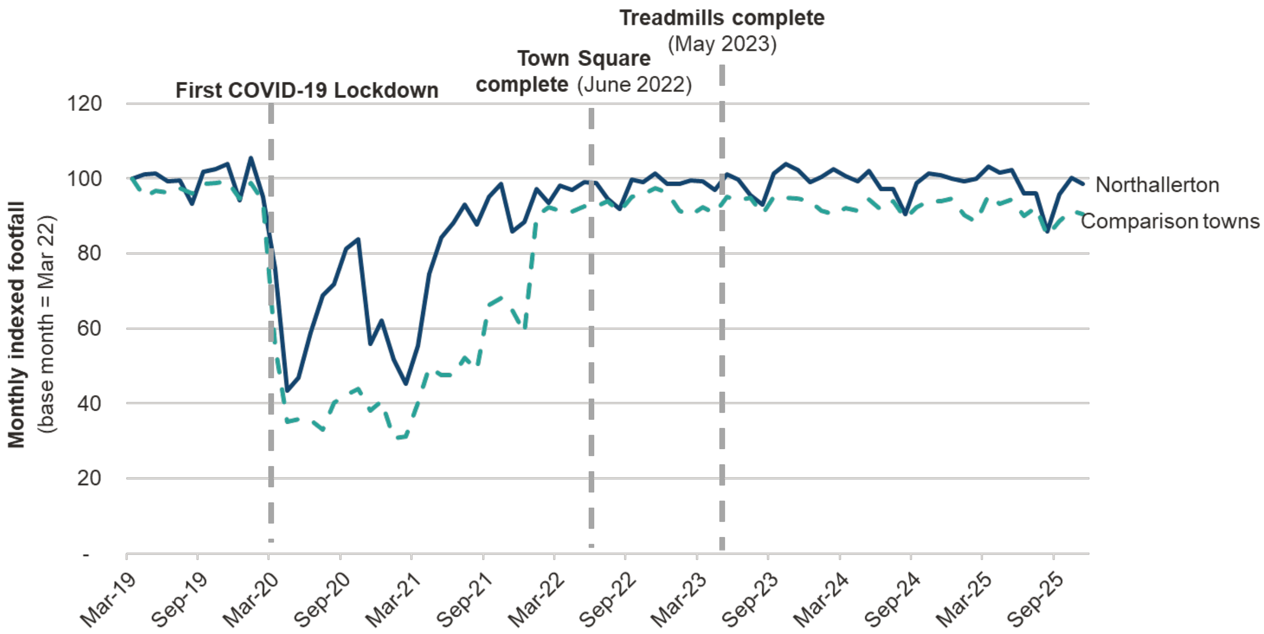
EVIDENCE THAT THE TOWN SQUARE AND TREADMILLS PROJECTS HAVE IMPROVED BUSINESS OUTCOMES

There is no evidence to date that the Town Square and Treadmills projects have affected longer-term business outcomes, such as turnover. However, evidence of improvements in short-term outcomes such as footfall and vacancy rates suggests improvements in these longer-term impacts may be realised in future.

Changes in the number of visits to Northallerton by residents and non-residents

There is medium-strength evidence of improvements in footfall and visitation to Northallerton. Figure C.3 shows that footfall in Northallerton town centre has been slowly increasing since the project was completed.

Figure C.3 Changes in Northallerton footfall compared to the comparator towns



Source: Footfall data collected by Place Informatics and shared by North Yorkshire Combined Authority.
Note: Monthly footfall is indexed such that March 2019 = 100. The comparison town is the average of the footfall for 4 nearby towns' high streets, including Thirsk, Bedale, Easingwold, and Stokesley. All of which are also located in North Yorkshire. They are smaller market towns when compared to Northallerton.

Monthly footfall in the town has now returned to pre-COVID-19 levels, according to data provided by Place Informatics. This recovery has been faster than the average for a group of similar towns in North Yorkshire. Stakeholders in Northallerton also reported an increase in footfall in the town centre following the completion of the projects, and some residents reported increased visits in qualitative interviews.

Average dwell time also increased slightly since the opening of the Town Square and Treadmills projects, according to data received from the local authority. Visits that lasted at least an hour increased from 24% to 29% between March 2022 and September 2023. Local stakeholders attributed this to additional seating in the town square, as well as to improvements in the retail offer in the town centre and at Treadmills.

Local authority data also suggest an increase in visits from non-residents. In 2023, the town received 124 coaches (81 more than in 2022), bringing 3,625 passengers and an estimated £62,000 in spending to the town.

The timing of these changes and comparison to this group of nearby town centres support that these changes are, in part, related to the Future High Streets Fund-funded projects. Interviewed stakeholders and local residents reported that the increased number of bars and restaurants in the town centre, as well as the Everyman cinema at Treadmills, were helping to drive additional visits to the town centre and improving the nighttime economy.

However, it is not possible to attribute this growth directly to the Future High Streets Fund projects, due to potential wider factors in the area that might be driving footfall, which these data do not control for.

Changes in business outcomes

There is currently weak evidence of changes in vacancy rates and business mix, based on data provided by the local authority and qualitative input from stakeholders and residents interviewed.

Vacancy rates in Northallerton have reduced by 4 percentage points since the opening of the Town Square and Treadmills projects. In January 2023, shortly after the Town Square project's completion, the town's vacancy rate was 10.4%. The latest available data suggests that vacancy rates were 6.4% in September 2025 (below the UK average of around 14%). At the time of the site visit, the Treadmills site had not been able to fill the retail units. However, updates provided by the local authority in early 2026 indicated that all units, except one, had now been filled or agreed. The remaining unit is being considered for use by the council.

Stakeholders felt that incoming businesses were of a high quality, offering more choice for local residents and diversifying the offering to include more food and beverage businesses. For example, one of the units at Treadmills was occupied by a good-quality pan-Asian restaurant. Interviewed stakeholders also noted that the Town Square development was seen positively by market traders, who benefited from improved access to power through new plug-in options (avoiding challenges with generators). It was observed that the market had been trading well and remained stable for a few years.

However, it is not possible to attribute the changes in vacancy rates or business mix (outside of the units at the Treadmills) specifically to the project. In particular, wider market trends and unobserved changes in the wider area may be affecting vacancy rates in Northallerton. It has not been possible to control for these within the case study fully.

There is no evidence of improvements in wider business turnover or growth to date. The Treadmills units were still being filled throughout 2025. As a result, it was not possible to robustly assess changes with the Inter-Departmental Business Database data, which only covers the period up to June 2025.

C.4 Woolwich: Beresford Square

C.4.1 Key findings

THE PROJECT

The public realm improvements to Beresford Square in Woolwich town centre include new seating, street lighting, and a water feature. The improvements also added a new events space, a new Market Pavilion building, a cafe, and accessible public toilets. The project was completed in June 2025. Other Future High Streets Fund projects supported further changes to the surrounding area.

CHANGES IN PRIDE IN PLACE

There is strong evidence that the renovations have improved the quality of the public realm and that residents are satisfied with the changes. Residents reported that Woolwich town centre is more attractive, and there is strong evidence that this is attributable to Beresford Square and the surrounding projects.

Local residents, including young people, reported they were more likely to spend time in Woolwich town centre because of the public realm improvements.

Quantitative data provide medium-strength evidence of improvements to pride in place. Residents reported improved pride in place across multiple metrics, but these changes are not statistically significant. The changes are not attributable to the project, and it is not possible to draw a causal link given the absence of an adequate control group for comparison. However, residents suggested that the Beresford Square regeneration has improved perceptions of Woolwich.

CHANGES IN BUSINESS OUTCOMES

Average dwell time in the affected area saw a year-on-year increase following project completion. There is evidence to suggest that some of this change is driven by the increased attractiveness and public facilities in Beresford Square.

There is no evidence of a change in footfall attributable to the Beresford Square project specifically. Data on footfall provide mixed evidence on whether footfall has been increasing. In addition, other changes, such as the opening of the Elizabeth line, have affected overall footfall in Woolwich over the same period.

Medium-strength evidence, based on qualitative input, suggests that the investments are encouraging further investment from local landowners and business stakeholders. Stakeholders reported that this is supporting a longer-term change in the business mix and reductions in vacancy rates in the area. However, they also noted that these investments are affected by wider factors beyond the funded projects.

C.4.2 Project context and hypotheses

Woolwich is a market town in the Royal Borough of Greenwich, London. As of 2024, around 120,000 people lived in the combined Greenwich and Woolwich area (ONS, 2024). The local authority is in the second decile of the most deprived authorities nationally (MHCLG, 2025).

Woolwich received £17 million of Future High Streets Fund funding across 5 projects. The Beresford Square project received £7.4 million of funding from the Future High Streets Fund, with an additional £9.7 million from other sources. The project involved the installation of new seating, street lighting, and tree planting, as well as a water feature, alongside the creation of a new permanent events space and a cafe with improved toilet facilities.

The Future High Streets Fund also funded improvements to the public realm along Powis Street (the high street) and the reopening of the historic Gatehouse adjacent to the square. The Gatehouse allows for easier access between Beresford Square and the Royal Arsenal development. Wider developments in Woolwich include a new leisure centre, new cultural facilities in Woolwich Works, and the opening of the Elizabeth line.

Based on the specific context of the project and a logic model developed in collaboration with the local authority, the following key hypotheses were developed:

1. **Hypothesis 1:** There is a sense of divide between Woolwich town centre and the recent redevelopment in the Royal Arsenal. The 2 are physically separated and represent very different communities. In addition, the historic assets around the market square are underutilised (context). The public realm improvements in and around Beresford Square are expected to enhance the attractiveness of the town centre (output). This will reduce the sense of divide between Woolwich and the surrounding areas (mechanism) and increase perceptions of Woolwich town centre (short-term outcome). This is expected to improve pride in place (long-term outcome).
2. **Hypothesis 2:** Woolwich town centre and high street have above-average vacancy rates, and the retail offer has been in decline in recent years. In addition, the divide between Woolwich town centre and the Royal Arsenal development means that high-income Royal Arsenal residents typically do not visit Woolwich town centre (context). Investment in Woolwich and the increased attractiveness of the town centre (mechanism) are expected to help increase investor confidence and footfall in the town centre (short-term outcomes). This will improve business outcomes in Woolwich, such as turnover and employment (long-term outcome).

C.4.3 Emerging findings

EVIDENCE THAT THE RENOVATION OF BERESFORD SQUARE HAS IMPROVED PRIDE IN PLACE (HYPOTHESIS 1)

There is strong evidence to suggest that the renovation of Beresford Square and its surroundings has led to an improved quality of the public realm and increased resident satisfaction with Beresford Square. There is medium-strength evidence that the renovation has supported broader satisfaction across the town centre. Throughout this case study, the strength of evidence is assessed using the framework outlined in Annex A.

There is medium-strength evidence of changes in pride in place, with some measures increasing between baseline and follow-up. However, in general, these changes are not statistically significant at the 10% level and may be overestimated due to changes in sample composition between baseline and follow-up.

The Towns Fund and other non-Towns Fund sources fund several regeneration projects in Woolwich. It is not possible within this evaluation to fully separate the effect of Beresford Square from the other regeneration works in Woolwich. Changes in the local area may be driven by the collective effect of this wider portfolio of projects, rather than the Beresford Square project alone.

The survey conducted in Woolwich includes residents in the Royal Arsenal development, as it falls within the survey's defined catchment area. It is not possible to differentiate these residents from those living in Woolwich town centre. However, there is a lower proportion of more-deprived residents in the follow-up survey, which may mean the survey results overestimate improvements. This is discussed further in Annex B.

Change in resident satisfaction with Woolwich town centre

There has been a statistically significant increase in satisfaction with Beresford Square and Woolwich town centre following the redevelopment.

Overall satisfaction with Beresford Square increased from 22% to 50% following project completion. Of those who responded to the follow-up survey, 56% reported being satisfied with the changes (compared to 12% dissatisfied), consistent with evidence from the qualitative interviews.

There was also a statistically significant increase in satisfaction with Woolwich market specifically (which sits within Beresford Square). Of those who responded, 33% reported being satisfied in the follow-up survey, compared to 23% at baseline. Finally, 27% of respondents reported that the market had improved in the year following the project's completion.

These perceived improvements in Beresford Square and Woolwich market were accompanied by an improved perception of Woolwich town centre as a whole. The proportion of residents reporting Woolwich town centre as attractive increased by a statistically significant amount, from 27% at baseline to 36% at follow-up. There was also a statistically significant increase in the proportion of residents who thought their town centre had improved in the last 2 years, from 8% at baseline to 29% at follow-up. Both relationships were stronger among those who visited Woolwich Market or Beresford Square.

Stakeholders and local residents reported in interviews that this increase in satisfaction with the wider town centre is at least partially attributable to changes made specifically to Beresford Square, providing medium-strength evidence of attribution. They noted in particular the importance of the:

- improved amenities and facilities around Beresford Square, in particular, the new water features, improved seating, and improved toilets
- additional higher-quality events that the renovation had enabled

This is consistent with evidence from the resident survey, where the most common reasons cited for satisfaction with changes to Beresford Square were that “the area looks more attractive and welcoming” (85%), “there are more places to sit and relax” (58%), and “the improved lighting and paving make it easier and safer to move around” (55%).

Local residents and stakeholders noted a noticeable increase in the number of families using the space in qualitative interviews. In particular, young people reported being more likely to use Beresford Square as a result of the renovations:

> *"I think people are consciously spending time there rather than passing through there. Kids played in the fountains all summer."* ***Local resident (not a young person)***

Since reopening, Beresford Square has hosted well-attended events that were positively commented on by residents in interviews. Residents felt that events were important in encouraging the use of the square. Local stakeholders reported that the changes have expanded the types of events that can be held in Woolwich town centre.

However, there have been multiple wider changes in Woolwich recently, including the opening of the Elizabeth line and Woolwich Works. Stakeholders noted these were likely to be affecting satisfaction with the town centre, meaning the increase is not attributable to Beresford Square.

Changes in pride in place

Table C.4 shows that pride in place in Woolwich increased following the completion of the Beresford Square project. However, the changes in most measures of pride in place were not statistically significant. In addition, a lower proportion of more-deprived residents in the follow-up survey suggests that the improvement in pride in place may be an overestimate, since more-deprived residents are likely to report lower pride in place. There were no statistically significant changes in pride in place at the national or local authority level between 2023/24 and 2024/25 (as set out in Annex A.4).

Table C.4 Pride in place indicators: Woolwich

Question	Baseline[A]	Follow-up[A]	Baseline: Visited Beresford Square in the past 12 months[B]	Follow-up: Visited Beresford Square in the past 12 months[B]
Proportion of adults who were (were not) proud to live in their local area	50% (19%)	58% (17%)	47%* (25%)	59%* (18%)
Proportion of adults who agreed (disagreed) that they would still like to be living in their local area in 5 years	52% (28%)	59% (22%)	57% (29%)	58% (20%)
Proportion of adults who would (would not) recommend their local area to others as a good place to live	52% (25%)	56% (20%)	52% (28%)	57% (19%)
Overall satisfaction (dissatisfaction) with the local area as a place to live	64% (21%)	72% (15%)	59%** (25%)**	74%** (14%)**
The area has improved in the last 2 years	19%**	29%**	23%	30%
The area has got worse in the last 2 years	41%***	28%***	40%**	26%**
Proportion of adults who were satisfied (dissatisfied) with local services and amenities in their local area	73% (12%)	76% (10%)	79% (7%)	80% (16%)
Sample size[C]	188 to 202	190 to 203	94 to 99	124 to 133

Source: *Frontier Economics.*
Notes: *Asterisks indicate significance: * p< 0.10, ** p<0.05, *** p<0.01*
[A] Statistical significance is tested between baseline and follow-up.
[B] Statistical significance is tested between visitors and non-visitors in the past 12 months.
[C] The number of respondents may slightly vary across categories due to variations in individuals who have not responded to a question or responded 'Don't know', so a range is reported.

Despite these caveats, the changes in pride in place and the larger changes observed for visitors to Beresford Square provide medium-strength evidence for improvements in pride in place.

The proportion of residents who were proud to live in their local area increased from 50% at baseline to 58% at follow-up, while the proportion of residents who were satisfied with their local area as a place to live increased from 64% to 72%. In the follow-up survey, there was a statistically significant increase in the proportion of residents who thought their area had improved in the previous 2 years, from 19% to 29%.

The evidence suggests that part of the change is likely driven by public realm improvements. It is difficult to attribute these changes specifically to the Beresford Square project. There was a statistically significant increase in pride in place among residents who had visited Beresford Square at follow-up, compared with those who had visited Beresford Square at baseline. The same change was not observed for residents who had not visited the square. However, the sample size for these subgroups is small, so the results should be interpreted with caution, as they may not be representative of all residents.

Similarly, stakeholders and residents suggested in the qualitative interviews that the Beresford Square regeneration was affecting perceptions of the local area by improving its attractiveness and amenities (as discussed above). However, they also noted that wider changes, such as the Elizabeth line, were likely to affect pride in place, both positively and negatively. Antisocial behaviour was a particular concern, with some stakeholders reporting that the improved seating in Beresford Square was shifting some antisocial behaviour from surrounding areas into the square. Antisocial behaviour included loitering and public drinking.

EVIDENCE THAT THE BERESFORD SQUARE PROJECT HAS IMPROVED BUSINESS OUTCOMES (HYPOTHESIS 2)

There is medium-strength evidence of improvements in short-term business outcomes and leading indicators of longer-term changes, such as dwell time. There are also indications of falling vacancy rates in the town centre to date, with further decreases expected in the future, which may be linked to the regeneration work.

Evidence of wider changes in business outcomes, such as turnover in Woolwich, is limited. However, there is evidence that further improvements in longer-term business outcomes may be realised in future.

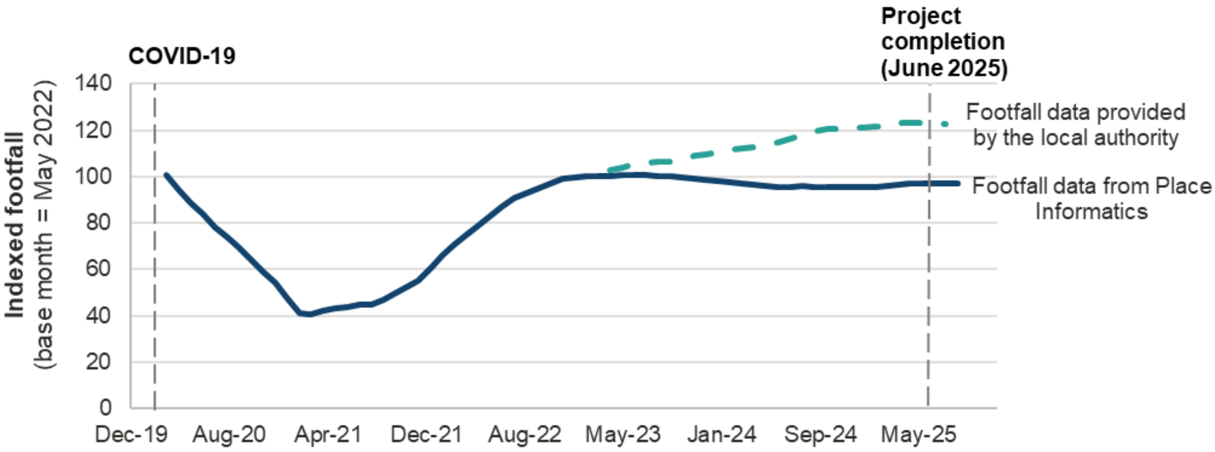
Similar to pride in place impacts, business outcomes in Woolwich are being supported by several projects, and these should therefore be considered collectively rather than on their own.

Changes in footfall and dwell time

The evidence that Beresford Square has had a material impact on overall footfall in Woolwich town centre is weak. Qualitative evidence is mixed, and there is no quantitative evidence supporting an impact on footfall. However, Beresford Square is part of a portfolio of wider regeneration projects in the area, and is primarily expected to affect footfall by complementing this wider set of projects. This means that an observable impact on footfall due specifically to Beresford Square was not necessarily expected over the evaluation period, as the wider regeneration in the area is ongoing.

Figure C.4 summarises footfall across 2 separate data sources, Place Informatics (as used for other case studies) and data provided by the local authority. Place Informatics data suggest that footfall has been relatively stable in Woolwich town centre in recent years. Local authority data show a general upward trend. These 2 sources of footfall are collected using different techniques and cover slightly different areas of the town. Since neither data source shows a change in footfall since the completion of the Beresford Square project, this strengthens the conclusion that the project has not had a material impact on footfall.

Figure C.4 Footfall in Woolwich



Source: Frontier Economics, based on Place Informatics and data provided by the local authority.
Note: Local authority data comes from the Greater London Authority High Street Data.

Qualitative views on the impact of the project on overall local footfall were mixed. Some market stall operators in the market adjacent to Beresford Square reported an increase in footfall following the project's completion, while others reported no change. In the resident survey, respondents reported visiting Beresford Square more often. However, they did not report any change in their visits to Woolwich town centre (despite being more satisfied with it, as evidenced above). Local stakeholders and residents also repeatedly highlighted other changes in the wider area (such as the new Elizabeth line) as more important drivers of overall footfall than Beresford Square.

On the other hand, there was an increase in dwell time following the completion of the project. In July, August, and September 2025, dwell time in Woolwich town centre increased year-on-year by 31%, 22%, and 20%, respectively.

While it is not possible to attribute this entirely to the project, there is strong evidence that at least part of it is driven by improvements to the square. The increase in dwell time was observed immediately after the project's completion in July 2025, and dwell time had remained steady prior to July. In addition, qualitative evidence suggests that the renovations have increased the use of Beresford Square. Stakeholders and residents reported that people were spending more time in Beresford Square, for example, to play in the fountains or eat lunch. This was attributed to the increased amenities (such as seating and fountains) and improved attractiveness, which created a more welcoming environment.

The increase in dwell time (but not overall town centre visitation as measured by footfall) is consistent with Beresford Square's position as a through route for journeys in the town centre, which has become more of a destination following the changes.

Changes in vacancy rates

Vacancy rates in Woolwich town centre have fallen since the end of 2021. Based on data provided by the local authority, vacancy rates peaked at 13.5% in December 2021 and fell to 7.1% in August 2025 (below the London average of 8.6%). A local landowner reported an increase in both demand and rents over recent months, suggesting this downward trend may continue.

Local landowners noted in interviews that the high street was on an upward trajectory and that a high-quality public realm would be attractive to their tenants. They also noted the importance of other developments in the area, including the Elizabeth line. Similarly, the owner of a food and drink business opening in the area reported that the regeneration of Beresford Square had affected their decision to open, but that the Elizabeth line was also a key factor.

Qualitative input from local stakeholders and businesses suggests that the Future High Streets Fund is helping create the conditions for new business investment and reducing vacancy rates. As part of the planning phase, the local authority met with landowners to check whether the redevelopments would encourage investment:

> *"It's probably the most important money that's been spent on Woolwich, in terms of knitting it all together and creating a cohesive public realm journey."* ***Local authority stakeholder***

Several investments in Woolwich town centre, expected to reduce vacancy rates further, may have been influenced by the regeneration work. However, they cannot be attributed directly to the Towns Fund projects. Local authority stakeholders emphasised that beyond reducing vacancy rates, these investments were expected to improve the quality of the business mix in the town centre. In particular:

- development has begun in 2 sites adjacent to Beresford Square, shortly after the beginning of the renovation work around Beresford Square
- a pub on the corner of Beresford Square, with 2 floors of hostels, was closed down and is now being renovated into service hotel rooms and a ground-floor restaurant
- a building adjacent to the square, which previously hosted offices and a Poundstretcher shop, is being converted into studio apartments, a restaurant, and office space

Local landowners did not attribute the wider investments and changes in the area directly to the public realm work, noting the importance of other developments, including the opening of the Elizabeth line. However, they reported that a high-quality public realm would be attractive to their tenants and would support the wider changes in the area.

Changes in wider business outcomes to date

There is no evidence of changes in wider business outcomes, such as employment and turnover, to date. The project was completed in June 2025, and the latest Inter-Departmental Business Database data currently available covers only the period up to that date. Therefore, no post-completion data are available to assess the change. Quantifiable changes would be unlikely to have materialised to date in any case. However, evidence of increased investment in the area and upcoming business openings suggests that further improvements may be realised in the future.

There is mixed evidence of impacts on the market adjacent to Beresford Square. Market traders generally reported that their business outcomes had not improved as a result of the renovations. Some reported positive impacts, whilst others reported negative impacts. All market traders reported difficulties due to disruptions during the renovations and said they were still recovering from their effects.

C.5 Yeovil: Borough and High Street

C.5.1 Key findings

THE PROJECT

The Borough and High Street project introduced greater pedestrianisation, widened footpaths, and added new seating, lighting, and trees along Yeovil's High Street. It also delivered an enhanced public realm and additional pedestrian space in the Borough and on adjacent Middle Street West. The Borough and High Street project was completed in December 2023, while works on Middle Street West were completed in June 2024. Both projects form part of the ongoing Yeovil Refresh regeneration programme.

CHANGES IN PRIDE IN PLACE

Evidence of improvements in perceptions of the town centre is weak. In general, residents and business stakeholders report that the completed works improved the look and feel of the town centre. However, residents also reported ongoing disruption from the wider regeneration works. This disruption was reported to affect both footfall and perceptions of the town centre, as it made it more difficult to travel around Yeovil and negatively affected the appearance of areas still under construction.

There is no evidence of improvements in pride in place in Yeovil. A high proportion of residents reported that the town centre had become less attractive. Pride in place remains low, with no discernible differences between more and less regular visitors to the town centre. Interviewed stakeholders and residents had linked this to the ongoing construction and disruption in the town centre. The wider regeneration still underway is likely to delay the realisation of any positive pride-in-place effects.

CHANGES IN BUSINESS OUTCOMES

Evidence of improvements in footfall and business outcomes in Yeovil is weak. Although residents agree that the completed works improved the look of the town centre, the ongoing construction created disruption. It contributed to declining footfall in the period around project completion (with Yeovil experiencing a steeper decline than the wider region).

Local business stakeholders also reported negative short-term effects but highlighted a positive longer-term role for the regeneration in strengthening investment confidence and supporting business retention. Realisation of wider business benefits is likely to be delayed until construction across the wider regeneration programme is completed and disruption diminishes.

C.5.2 Project context and hypotheses

Yeovil is a town of around 52,000 people in Somerset (ONS, 2024), in the South West of England. The Somerset local authority is among the top 50% most deprived areas in England (MHCLG, 2025).

Somerset Council received nearly £10 million from the Future High Streets Fund, spread across 5 projects. The Borough and High Street project received £1.3 million in funding from the Future High Streets Fund and an additional £0.3 million from other sources. The Future High Streets Fund also funded the nearby Middle Street West improvements, which are expected to deliver similar outcomes. Middle Street West received £1.5 million from the Future High Streets Fund and £0.4 million from other sources.

The Borough and High Street project introduced greater pedestrianisation, widened footpaths, and added new seating, lighting, and trees along the High Street. It also delivered an enhanced public realm and additional pedestrian space in the Borough. Middle Street West borders the eastern edge of Yeovil High Street. It was pedestrianised as part of the regeneration work, and new tree planting and bench seating were added to Middle Street West.

Both projects form part of the wider Yeovil Refresh regeneration programme, a series of regeneration works in the Yeovil town centre. This work began in 2019 and was still underway at the time of the site visit for this case study in early 2025. The local authority expected works to continue for several more years.

Based on the specific context relating to Yeovil and the Borough, High Street and Middle Street West projects, 2 main hypotheses were developed:

1. **Hypothesis 1:** Yeovil's civic and cultural spaces are in decline (Yeovil Future High Streets Fund Business Case 2020) (context). The redevelopment of the High Street, Borough, and Middle Street West will improve the appearance and accessibility of the town centre (output). By improving the appeal of central spaces and the satisfaction of residents with the town centre and local amenities (mechanism), the development is expected to increase residents' perception of Yeovil and pride in place (longer-term outcomes).
2. **Hypothesis 2:** Yeovil's town centre has lost many important shops in recent years, leading to high vacancy rates and low footfall (context). By improving local amenities and events (output), the redevelopment of the High Street, Borough, and Middle Street West is expected to improve community spirit and attract more residents and visitors to the town centre (mechanism). The resulting improvements in footfall and dwell time (short-term outcomes) are expected to improve outcomes such as turnover and employment for local businesses (longer-term outcomes).

C.5.3 Emerging findings

EVIDENCE THAT THE PROJECTS HAVE IMPROVED PRIDE IN PLACE (HYPOTHESIS 1)

Evidence of improved perception of the town centre due to the Borough and High Street project is weak, and there is no evidence of improved pride in place. Throughout this case study, the strength of evidence is assessed using the framework outlined in Annex A.

The local community and business stakeholders agreed that the completed projects had improved the look and feel of the town centre. However, they noted that ongoing disruption from regeneration work and a perceived lack of communication about the changes led to negative overall perceptions among the local community. These barriers are likely to delay the realisation of some benefits until the wider regeneration work is completed and the disruption to the town centre diminishes. There was no observable improvement in pride in place in Yeovil following the completion of the project. However, the lack of baseline data meant it was not possible to assess this robustly.

In addition, there are several regeneration projects in Yeovil funded by the Towns Fund and other non-Towns Fund sources. It is not possible within this evaluation to fully separate the effect of the Borough and High Street project from the other regeneration works in Yeovil. Changes in the local area, or lack thereof, may be driven by the collective effect of this wider portfolio of projects, rather than the Borough and High Street project alone.

Change in the appearance and quality of the high street area

Evidence of improvements in satisfaction with the town centre is weak. Interviewed stakeholders and residents were positive about the appearance of the completed works on the High Street and Middle Street West. However, they were more negative about the overall appearance of the high street area due to ongoing disruption and construction. Satisfaction with the appearance and overall quality of the town centre was also low in the resident survey, consistent with qualitative evidence from interviews.

Stakeholders and residents engaged through the workshops reported that the regeneration work was a positive for Yeovil overall and that the completed works on Yeovil High Street and Middle Street West had improved the look and feel of the area. These improvements in appearance were mainly attributed to enhanced pedestrianisation and new streetscaping and seating. However, they consistently reported that they did not feel the community was adequately involved in co-creating the projects and that communication had been a barrier to their reception.

Community stakeholders also highlighted the ongoing disruption caused by the regeneration works, which is having a negative effect on the town centre in the short run. The disruption and the length of time the area has been under construction have led to numerous complaints from the public and local businesses. Local authority stakeholders suggest this is a temporary concern, as the project is part of a much larger, longer-term package of regeneration investment in the area. Overall, these negative short-run disruptions are likely to delay the longer-term improvements in perceptions expected from the projects.

This is consistent with the evidence from the resident survey. Of respondents who visited Yeovil Town Centre at least once a week, 15% reported Yeovil Town Centre had become more attractive over the past 2 years, while 69% reported it had become less attractive. Similarly, more than half of respondents reported dissatisfaction with the services and amenities in their town centre, compared with roughly a fifth who were satisfied. Satisfaction with shops and retailers was somewhat higher, with over half of respondents reporting that they were satisfied with the shops and retailers in their local area.

Change in pride in place

Table C.5 shows that the overall pride in place in Yeovil appears relatively low. There is no evidence of an overall improvement in pride in place in Yeovil to date.

Table C.5 Wider pride in place indicators, Yeovil

Question	Visited the town centre at least once a month in the last 12 months[A]	Visited the town centre at least once in the last 12 months [A], [B]	Not visited the town centre in the last 12 months
Proportion of adults who were (were not) proud to live in their local area	49% (14%)	50% (14%)	Not Applicable
Proportion of adults who agreed (disagreed) that they would still like to be living in their local area in 5 years	63% (20%)	63% (19%)	Not Applicable
Proportion of adults who would (would not) recommend their local area to others as a good place to live	52% (19%)	54% (20%)	Not Applicable
Overall satisfaction (dissatisfaction) with the local area as a place to live	73% (15%)	73% (16%)	Not Applicable
The area has improved in the last 2 years	8% (36%)	7% (37%)	Not Applicable
Proportion of adults who were satisfied (dissatisfied) with local services and amenities in their local area	62% (11%)	60% (12%)	Not Applicable
Sample size[C]	225 to 247	277 to 307	<10

Source: Frontier Economics.
*Note: Asterisks indicate significance: * p< 0.10, ** p<0.05, *** p<0.01*
[A] Statistical significance is tested between visitors and non-visitors (either in the month or in the last 12 months).
[B] Includes those who visited the town centre at least once a month in the last 12 months.
[C] Number of respondents may slightly vary across categories due to variations in individuals who have not responded to a question or responded 'Don't know', so a range is reported.

The lack of change in pride in place is consistent with the evidence set out above, which shows that the short-term disruption from ongoing construction in wider regeneration projects is negatively affecting residents' perceptions of the overall Yeovil town centre.

Only around 7% of residents reported that their local area had improved in the 2 years leading up to the resident survey, while 36% reported it had worsened. Half of the residents reported being proud to live in their local area, while 14% were not. There were no discernible differences across respondents who visited the town centre more or less frequently, with only one statistically significant result. The sample size of respondents who had not visited the town centre is too limited to report.

The intended impacts of the Towns Fund projects in Yeovil are closely linked to the reasons residents report being proud (or not proud) of living in their local area. This suggests that the High Street, Borough, and Middle Street West projects may have a greater impact on pride in place in the future once the wider portfolio of Yeovil Refresh projects is completed.

The main reasons residents were proud to live in their local area were that it is a safe place to live and the nearby green and natural spaces. The main reasons given for a lack of pride were the lack of shops and local facilities, and the fact that the area was run-down. The overall aim of the Towns Fund projects in Yeovil (and the Yeovil Refresh) is to improve the area's appearance and the quality of shops and facilities, in line with the reported barriers to pride in place identified in the resident survey.

There is some indication that the projects may have marginally increased antisocial behaviour in the town centre. However, the overall impact of this antisocial behaviour appears limited, and it remains a limited concern. Interviewed stakeholders noted that adding seating and making the town centre a more appealing place to stay had led to increased loitering and drinking there. However, while 40% of respondents to the resident survey reported experiencing or witnessing antisocial behaviour in the past 12 months, only 22% viewed it as a problem in their local area. This finding is broadly in line with the Crime Survey for England and Wales (CSEW) statistics over the same period, suggesting the overall effect of antisocial behaviour is marginal.

EVIDENCE THAT THE PROJECTS HAVE IMPROVED LOCAL BUSINESS OUTCOMES (HYPOTHESIS 2)

Overall, evidence that business outcomes have improved is weak. While residents agreed that the completed regeneration projects had improved the look and feel of the town centre, the ongoing construction work appears to have been a barrier to the usage of the town centre. However, there is some quantitative evidence that footfall in the town centre had begun to improve as the wider regeneration works in the area were completed, as well as qualitative evidence of improvements in vacancy rates and the business mix.

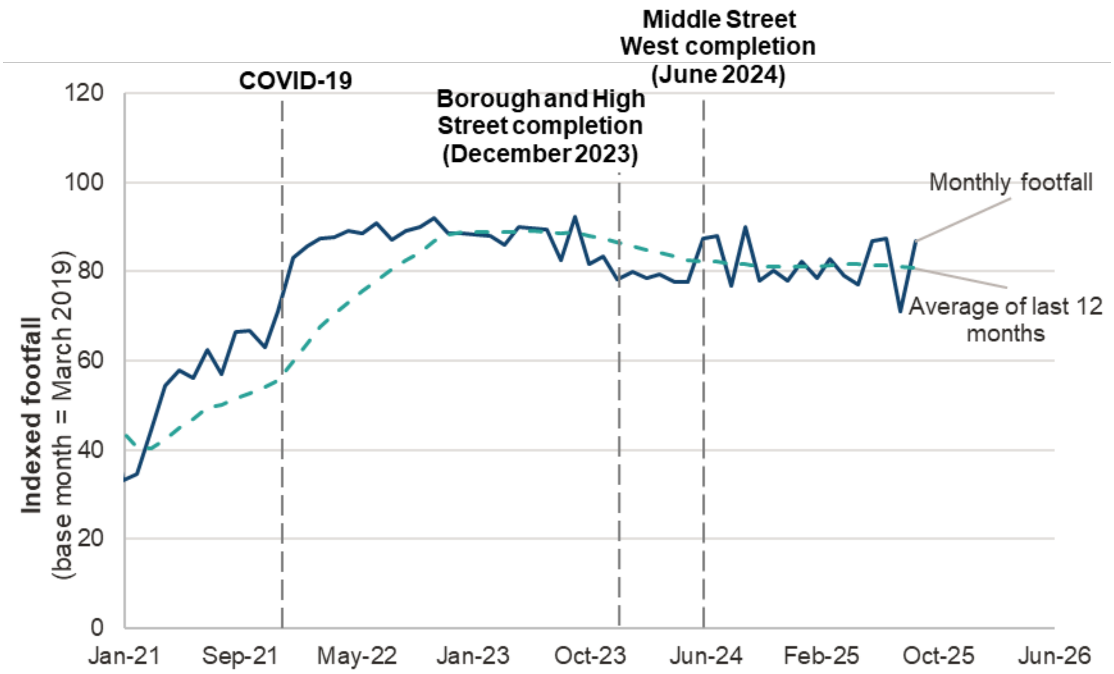
Changes in footfall

Evidence of improvements in footfall is weak. Footfall in the town centre was on a downward trend both before and in the year after the completion of the Borough and High Street project.

Local stakeholders noted that the construction work had been ongoing for an extended period and had affected most areas of the town centre. This created barriers to accessing different streets, affected the look and feel of the area, and appears to be linked to a continued decline in footfall on the high street. They highlighted that this was amplified by a perceived lack of communication, with residents unsure of when the disruption would end.

Figure C.5 shows that footfall in Yeovil town centre remained relatively flat in the year following the completion of the projects and was trending downwards before their completion.

Figure C.5 High Street Footfall, Yeovil and Region



Source: Frontier Economics, based on Place Informatics.

Place Informatics data is consistent with data supplied by the Somerset council from a footfall counter on Silver Street (adjacent to the projects), which showed footfall declined both immediately before and after the projects' completion.

Changes in vacancy rates

There is weak evidence of improvements in vacancy rates in the town centre linked to the projects. Interviewed stakeholders reported reductions in vacancy rates and improvements in business mix in Yeovil town centre, attributing this to improved business confidence. However, quantitative evidence remains limited to date, and council stakeholders reported that vacancy rates in the town centre remained high as of early 2026.

Business stakeholders reported a perception that the regeneration works were improving investment confidence and business retention. They also reported that the wider regeneration work had been a positive tool during leasing conversations, both with existing and potential tenants, as it points towards investment in the town centre. While vacancy rates on the High Street remain an issue, in particular due to the closure of major storefronts such as Beales and Wilko (which closed nationally in 2023), local stakeholders reported that overall vacancy rates had remained relatively stable over time, with smaller independents replacing the larger national stores.

Local stakeholders reported that the regeneration work has helped to attract some new, high-quality businesses to Yeovil. They gave the example of the Barolo Lounge, which opened in April 2024 on the main part of the street affected by the Borough and High Street project. They also reported a perception that had Yeovil not received the Future High Streets Fund funding for the regeneration work, it would be in a much worse place, and that the guiding principle of centralising the retail and shopping area was a key positive aspect of the wider regeneration work. They indicated that the completion of the Triangle (a public square on Middle Street) and the regeneration of the Glovers Walk building would be the next major tests of the wider regeneration's success.

Changes in wider business outcomes

There is limited evidence of changes in turnover and employment. This is largely because of the time lag in the available data. Although the project was completed in March 2024 and business outcomes might have been expected to begin materialising at the time of writing, the latest Inter-Departmental Business Database data available only covers the period up to June 2025. This provides less than one year of post-completion data, which is likely too soon for quantitative changes in turnover or business type to be visible in the data set. In addition, much of the wider regeneration work in the town centre continued beyond March 2024, limiting the likelihood of changes in turnover and employment.

Input from business stakeholders has been mixed. While business stakeholders were positive about the long-term effects of the projects on business confidence and investment in the town centre, they reported that the disruption from the construction works had a negative effect on short-term outcomes and on perceptions of the area. They also indicated that communication had been a barrier, introducing a high degree of uncertainty about when the work would be completed and when the disruption would end. As a result, the realisation of business outcomes and other benefits may be delayed until the wider regeneration work is complete and the disruption to the town centre diminishes.

C.6 Great Yarmouth: Market Place

C.6.1 Key data and findings

THE PROJECT

The Market Place redevelopment in Great Yarmouth included rebuilding the existing covered market alongside wider improvements to the Market Place in the town centre. The local library was also relocated to a vacant department store overlooking the Market Place as part of the project. This newly renovated building (The Place) also houses a local college and council services.

CHANGES IN PRIDE IN PLACE

There is strong evidence that residents' perceptions of town centre attractiveness and satisfaction with town centre services and amenities increased following project completion. Quantitative and qualitative evidence suggest that this is driven, at least in part, by the project. There are many more library users, satisfaction with the covered market has increased, and residents were positive about the conversion of a large vacant store into the library.

There is medium-strength evidence of an increase in pride in place in Great Yarmouth, although it is not possible to attribute this specifically to the project. There was a significant decline in the proportion of residents reporting they were not proud to live in their local area. Across other individual pride in place measures, pride in place typically improved, but was not statistically significant for most measures.

It is not possible to attribute these changes directly to the project due to the absence of an adequate control group for comparison. Local stakeholders noted that negative local perceptions of Great Yarmouth mean that material pride in place changes would not be expected in the short run.

CHANGES IN BUSINESS OUTCOMES

Evidence of increases in both dwell time and footfall is strong. Both saw a year-on-year increase following project completion. Input from stakeholders in the qualitative interviews suggested that there has been higher footfall in the town centre, in particular due to the relocation of the library and the new college.

There is no evidence of longer-term changes in wider business outcomes to date, such as business turnover and employment. Qualitative evidence suggests increased turnover for food traders, but not for retail stalls. However, increased dwell time and footfall provide medium-strength evidence that improvements in wider business outcomes may be realised in the future.

The changes in dwell time, footfall, and food trader turnover appear to be at least partly attributable to the project. Visitors to the library, college, and council services bring footfall to the town centre. They have driven increased usage of the food traders on the market.

C.6.2 Project context and hypotheses

Great Yarmouth is a seaside town located in Norfolk. It had a population of around 29,000 as of 2021 (ONS, 2024). Great Yarmouth is the eighth most deprived built-up area in England, with almost 3-quarters (71%) of Lower Layer Super Output Areas in the most deprived decile (MHCLG, 2025).

Great Yarmouth was awarded £13.7 million from the Future High Streets Fund. One of the three funded projects was the Market Place project, which was completed in May 2025. The Market Place project received £13.1 million in funding from the Future High Streets Fund, with another £6.7 million from other sources.

There were 3 main elements of the project:

- regeneration of the covered market
- wider public realm improvements, including tree planting, improved lighting and signage, and new street furniture
- the relocation of an existing library, council services, and college to a vacant department store in the market (The Place)

Based on the specific context relating to Great Yarmouth and the Market Place project and its expected outcomes and impacts, the following hypotheses have been developed:

1. **Hypothesis 1:** Great Yarmouth town centre encompasses some of the most deprived wards in the country. Its existing market structure was deemed not fit for purpose by local authority stakeholders during interviews. In addition, the previous site of a department store in the centre of town had been vacant and run-down for some time (context). The renovations are expected to improve the appearance of Great Yarmouth town centre and the amenities on offer (mechanism), thereby changing people's satisfaction with the town centre, local services, and amenities (short-term outcome). This will help to improve resident pride in place in Great Yarmouth (long-term outcome).
2. **Hypothesis 2:** Great Yarmouth town centre has suffered from a reduction in footfall, despite being a historic town and its seafront being a popular tourist destination (context). The increased attractiveness and amenities in the town centre (output) will attract residents to the town centre and encourage them to visit (mechanism), increasing footfall (short-term outcome). This is expected to improve the outcomes of local businesses, such as turnover and employment (long-term outcome).

C.6.3 Emerging findings

EVIDENCE THAT THE MARKET PLACE PROJECT HAS IMPROVED PRIDE IN PLACE (HYPOTHESIS 1)

There is strong evidence that perceptions of the town centre and satisfaction with local services and amenities improved following project completion. The evidence strongly suggests that at least part of these improvements is attributable to the project's changes. Throughout this case study, the strength of evidence is assessed using the framework outlined in Annex A.

There is medium-strength evidence of improved pride in place, with a significant improvement on one measure and insignificant improvements on the other measures. Despite these changes, pride in place remains relatively low in Great Yarmouth.

The Towns Fund and other non-Towns Fund sources fund several regeneration projects in Great Yarmouth. It is not possible within this evaluation to fully separate the effect of the Market Place project from the other regeneration works in Great Yarmouth. Changes in the local area may be driven by the collective effect of this wider portfolio of projects, rather than the Market Place project alone.

Change in resident satisfaction with the town centre

There is strong evidence that residents are more satisfied with the appearance of Great Yarmouth town centre following the project's completion.

Between baseline and follow-up surveys, there was a significant increase in both the proportion of residents reporting the town centre as attractive and being satisfied with the covered market. This is consistent with the qualitative evidence from stakeholder interviews.

In interviews, 23% of residents viewed the town centre as attractive following project completion, compared with 15% at baseline. This difference is statistically significant at the 5% level. Satisfaction with the covered market increased from 17% to 24% following project completion. Residents were more likely to answer that it was clean and well organised. In addition, there was a significant increase in the proportion reporting that their area had improved in the previous 2 years (18% at follow-up compared with 4% at baseline).

The available evidence from stakeholders strongly suggests that this is at least partially attributable to the changes made as part of the project. Stakeholders and local residents were particularly positive about the conversion of the vacant Palmers department store into The Place, noting it removed a high-profile vacancy in the town centre. Overall, 63% of visitors to the library reported that it had improved since moving to The Place, and wider stakeholders reported that the renovated building and co-located services were positively contributing to the look and feel of the town centre.

Views on the changes to the overall Market Place (which includes the market square) were less positive overall. In qualitative interviews, stakeholders and local residents reported that the renovations created a more spacious, easily accessible market square. However, survey evidence does not indicate increased satisfaction with the Market Place. There was no change in overall satisfaction with the Market Place between baseline (22%) and follow-up (23%). A higher proportion of residents reported being dissatisfied (33%) than satisfied (24%) with the changes to the Market Place. Reasons cited were a lack of variety among traders (which did not change due to the project) and the area's continued run-down appearance. The survey evidence may reflect factors outside the project, for example, residents' expectations about what the project was seeking to achieve.

Changes in satisfaction with town centre services and amenities

Residents’ satisfaction with town centre services and amenities increased between the baseline and follow-up survey. Only 23% were satisfied at baseline and 50% dissatisfied, compared with 37% satisfied and 38% dissatisfied at follow-up. The 13-percentage-point increase in satisfaction (and a similar magnitude decrease in satisfaction) is statistically significant at the 1% level.

Evidence from local stakeholders and residents suggests the projects are contributing to the satisfaction with town centre services and amenities through:

1. **Larger and more varied events.** The works have resulted in a larger event space. The local authority is hosting a broader range of events, for example, working with the local radio station to hold music events.
2. **The relocation of the library and conversion of a large vacant unit into The Place.** There has been no material change in the services offered by the library since its relocation. However, the Future High Streets fund has increased satisfaction by relocating services to a larger, more accessible, higher-quality building. It has also allowed college services and local council services to be co-located in this central location.

Visits to the library have increased significantly following the move. There were 3 times as many library visitors in the 5 months following the move as in the same period the previous year (88,000 compared to 27,000). New members also nearly quadrupled over this period (from 500 to 1900). In the resident survey, 40% of library visitors reported that the frequency of their visits to the Great Yarmouth library had increased since the relocation, compared with 21% who said their visits had decreased.

Library stakeholders attributed this increase entirely to the move to a new location, noting that before the move, many residents were unaware of the library and were unlikely to use other libraries:

> *"It's a big improvement, everyone says. [The library is] easier to access, it's light and airy, there's great staff. There's a wonderful children's library and one for business studies."* ***Library stakeholder***

Local stakeholders noted some remaining issues with town centre amenities that may be affecting residents' views, but funded projects may help address them in the future. They reported that while there has not yet been a direct impact on the retail offer in the town centre, this may change as the wider portfolio of regeneration projects is completed.

Changes in overall pride in place

There is medium-strength evidence of an increase in pride in place in Great Yarmouth. It is not possible to attribute these changes specifically to the changes to the Market Place or The Place.

Table C.6 summarises the change in pride in place. Pride in place improved across all measures between the baseline and follow-up surveys. Only one of these changes was statistically significant: the proportion of people who disagreed with "I am proud to live in my local area" decreased from 22% to 14%. By comparison, there was no statistically significant change in pride in place measures in England or in the wider local authority over the same period in the Community Life Survey.

Table C.6 Pride in place indicators: Great Yarmouth

Question	Baseline[A]	Follow-up[A]	Baseline: visited the Market Place in the last 12 months[B]	Follow-up: visited the Market Place in the last 12 months[B]
Proportion of adults who were (were not) proud to live in their local area	53% (22%)**	59% (14%)**	56% (21%)	59% (16%)
Proportion of adults who agreed (disagreed) that they would still like to be living in their local area in 5 years	60% (22%)	63% (19%)	63% (21%)	62% (22%)
Proportion of adults who would (would not) recommend their local area to others as a good place to live	53% (26%)	60% (20%)	57% (25%)	59% (21%)
Overall satisfaction (dissatisfaction) with the local area as a place to live	69% (17%)	75% (12%)	69% (18%)	74% (13%)
The area has improved in the last 2 years	3%	4%	3%	3%
The area has got worse in the last 2 years	54%	50%	54%	48%
Proportion of adults who were satisfied (dissatisfied) with local services and amenities in their local area	75% (6%)	74% (8%)	74% (7%)	71% (10%)
Sample size[C]	216 to 236	208 to 229	185 to 204	156 to 170

Source: *Frontier Economics.*
Notes: *Asterisks indicate significance: * p< 0.10, ** p<0.05, *** p<0.01*
[A] Statistical significance is tested between baseline and follow-up.
[B] Statistical significance is tested between visitors and non-visitors in the past 12 months.
[C] Number of respondents may slightly vary across categories due to variations in individuals who have not responded to a question or responded 'Don't know', so a range is reported.

The reasons given for pride in place in Great Yarmouth typically align with the whole of England and were similar between baseline and follow-up. Residents highlighted that it is a safe area to live in, and that people are respectful and friendly.

Some stakeholders commented that the changes to the town centre are unlikely to have a material impact on pride in place in the short run. They felt that such impacts would take time to materialise, particularly given the negative perception that many people have of Great Yarmouth. This aligns with survey findings.

Interviews with local residents and stakeholders highlighted cleanliness and antisocial behaviour as issues in Great Yarmouth, which may be affecting pride in place. The local authority has established a clear maintenance strategy to ensure that it remains an attractive area following the renovations, which may support longer-term pride in place improvements. One stakeholder perceived a reduction in antisocial behaviour in the covered market because it was now more open and lighter, making it more difficult to conceal such behaviour. Despite this work, one resident still felt that antisocial behaviour was a concern and deterred people from visiting the town centre, particularly at night.

EVIDENCE THAT THE MARKET PLACE PROJECT HAS IMPROVED BUSINESS OUTCOMES (HYPOTHESIS 2)

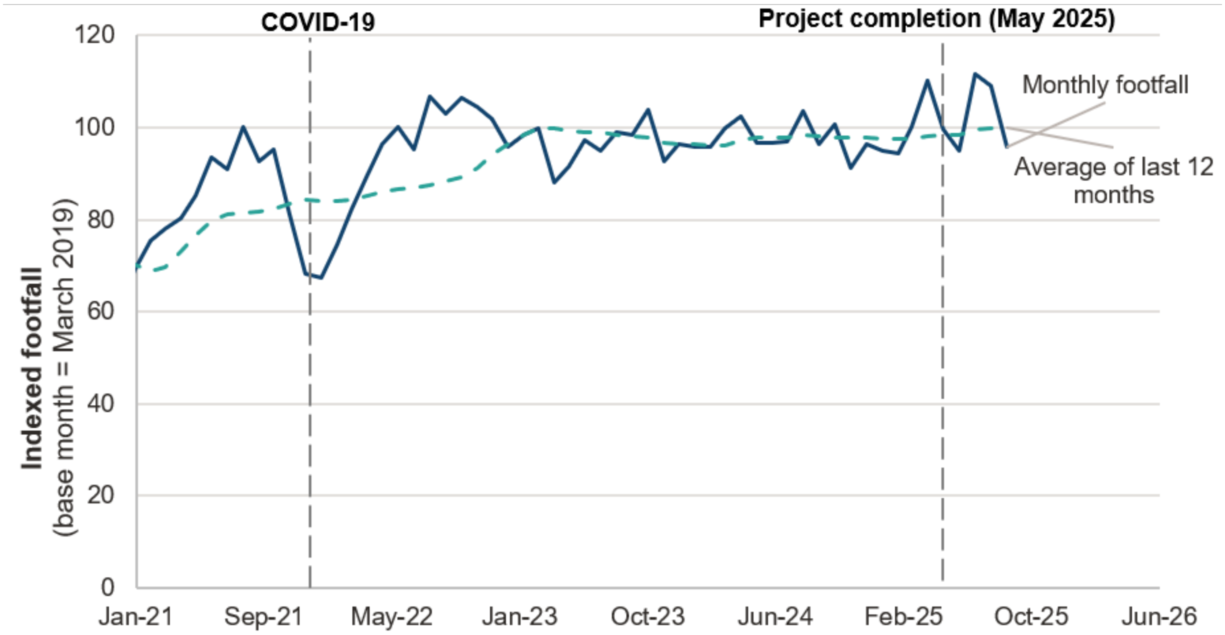
There is strong evidence of increased footfall and some indications of improvements in dwell time in the town centre following project completion. In addition, turnover among food stalls in the market has increased. The evidence suggests that the Market Place project is contributing to these changes, although it is not possible to attribute these changes specifically to the project.

There is no evidence that longer-term changes in business outcomes have emerged to date. This is consistent with expectations in the logic model.

Change in footfall in the town centre

Figure C.6 shows that year-on-year footfall increased following project completion, although it is not possible to attribute this solely to the projects.

Figure C.6 Footfall in Great Yarmouth



Source: Frontier Economics, based on Place Informatics.

Footfall increased by 8% in May 2025 and by 15% in July 2025. Interviewed stakeholders reported that footfall had increased across all demographic groups, and that the town centre was busier following project completion. There was also a significant increase in dwell time in the town centre following project completion, which had been stable since 2020. Dwell time increased by 45% and 39% in July and August 2025, respectively, compared to the previous year.

Wider factors outside of the Towns Fund projects may be driving some of this increase. This includes non-Towns Fund regeneration work and improvements in the weather in summer 2025. It was not possible to fully control for this within the case study. However, the evidence suggests that increased visitation to the Market Place and The Place also contributes to these changes.

In particular, there were 78,000 visits to the library in the first 5 months of opening, a 3-fold increase over the same period before the renovation. Users of the college and council services also bring footfall to the town centre. While some of these visitors may have visited the town centre regardless, this still suggests that The Place is driving increased visits there.

Changes in wider business outcomes

It is too early to robustly assess changes in overall turnover, business mix, and employment in the town centre. There is no evidence of changes in these wider, long-term outcomes to date.

The project was completed in May 2025 (when The Place opened), meaning only one month of post-project data is available in the Inter-Departmental Business Database (which only covers the period up to June 2025). Quantitative changes in turnover or business type are not expected to be realised over this period.

Qualitative evidence from stakeholder interviews suggests that there have been some limited impacts on market stalls to date. Local market stakeholders noted an increase in turnover for food traders (but not other retail stalls) following the renovations. This may be driven by the increase in students and library visitors at The Place. Some market traders have been offering student discounts.

Local stakeholders reported that the mix of businesses within the covered market has not changed, with an ongoing waitlist for market stalls both before and after the renovation. The council noted that they work to ensure a good mix of businesses remains within the market, and that this has not been affected by the renovation.

The Place has filled a large, previously vacant retail unit. However, there is no evidence of reduced vacancies across other units in the town centre.

C.7 Blyth: The Link

C.7.1 Key findings

THE PROJECT

The Link project delivered road, pedestrian and cycling improvements along Bridge Street. Bridge Street is the main route between Blyth Quayside (a popular waterfront destination) and the town centre. The works aimed to improve connectivity for a wide range of users, create safer access, and improve pride in place. The project was completed in December 2024.

The Link connects Quayside with the marketplace in the town centre. Northumberland County Council also received Towns Fund funding to construct a new landmark cultural venue, known as the Market Pavilion, in the existing marketplace. It includes a new 3-screen theatre, a cafe and bar area, and a multipurpose space. Public realm improvements to the marketplace accompanied the project. The work aimed to improve pride in place and community participation in Blyth town centre. The project was completed in August 2025.

CHANGES IN PRIDE IN PLACE

There is strong evidence that the Link and Market Pavilion projects improved the look and feel of Bridge Street and the town centre. Stakeholders describe clear visual improvements, and the share of residents who consider the town centre attractive increased following project completion.

Overall pride in place did not increase significantly following the completion of the projects. However, short time frames since project completion and ongoing disruption in the area mean it is too early to assess these longer-term impacts.

Frequent visitors to the Link report significantly greater pride in place than infrequent visitors at the follow-up survey. This provides early evidence of a correlation between project use and pride in place.

CHANGES IN FOOTFALL, VACANCIES AND BUSINESS MIX

There is medium-strength evidence that The Link has improved connectivity between the Quayside and the town centre. Residents particularly mentioned in interviews that the project delivered greater accessibility from improved pavements and dedicated cycle paths.

This evaluation, conducted less than a year post-completion of the Link and only 2 months after the completion of the Market Pavilion, is too early to assess whether this will translate into sustained improvements in footfall, vacancy rates, or business mix.

CHANGES IN ACTIVE TRAVEL

There is strong evidence that the project delivered new, high-quality walking and cycling infrastructure on Bridge Street. As evidenced by a mixture of quantitative and qualitative sources. However, although residents reported increased use of Bridge Street by people walking and cycling during interviews, survey results do not show higher walking or cycling more widely, with no change in reported cycle usage between baseline and follow-up.

Delays to the completion of the wider cycle network and a lack of supporting infrastructure, such as secure bike parking, were suggested as potential barriers in interviews with local stakeholders. The local authority mentioned plans to connect these networks, but a timeframe is not known.

C.7.2 Project context and hypotheses

Blyth is an industrial port located in Northumberland. As of 2024, the town had a population of approximately 42,000 people (ONS, 2024). The Northumberland local authority is in the 50% most deprived areas in England (MHCLG, 2025).

Northumberland County Council was awarded a total of £90 million towards the Energising Blyth regeneration programme across the Future High Streets Fund, Town Deals and Levelling Up funding. £11.1 million was awarded as part of its Future High Streets Fund, spread across 4 projects. The Link received £1.7 million of this funding, with an additional £1.1 million from other sources.

Blyth town centre has faced long-running challenges linked to low footfall, rising vacancy rates, and weak private sector confidence. The Future High Streets Fund business case highlights a physical disconnect between the Quayside and the town centre, which was negatively affecting footfall.

The Link was designed to strengthen access to Blyth town centre. It upgraded a stretch of Bridge Street, which connects the marketplace in the Blyth town centre to the Quayside waterfront. Upgrades included widening pavements, improving cycle paths, and public realm enhancements such as adding greenery and seating.

A new Market Pavilion was also funded in part by the Future High Streets Fund. It provides a new cultural and community venue in the centre of Blyth and includes upgrades to the surrounding marketplace. The Market Pavilion opened in August 2025, one month before the deployment of the follow-up survey in Blyth. It received £7.4 million in Future High Streets Fund funding and £9.1 million from other sources.

Given the overlap in geography, delivery timing, and expected outcomes, the following sections are treated as arising jointly from the Link and Market Pavilion projects, particularly for pride in place. Both projects aimed to improve the look and feel of key parts of the town centre and strengthen the experience of visitors and residents. This means it is not possible to cleanly separate how far changes in perceptions reflect the Link, the Market Pavilion, or both. As the Market Pavilion opened only one month before the follow-up survey, the findings are likely to capture immediate reactions to the new venue rather than longer-term effects on pride in place, participation, or town centre use.

The local context and a logic model, developed in collaboration with the local authority, were used to develop the following hypotheses:

1. **Hypothesis 1:** Lack of investment in the public realm has left parts of Blyth looking run-down, discouraging visits and leading shoppers to prefer nearby towns with more attractive and better-maintained centres (context). The Link project improves the look and feel of the main route between the Quayside and the town centre by upgrading footpaths, surfacing, signage, and lighting (output). Because the changes improve the look and feel of the street, making it more welcoming (mechanism), it is expected to improve resident and visitor satisfaction with the town (short-term outcome), supporting pride in place (long-term outcome).
2. **Hypothesis 2:** Blyth has experienced declining footfall and rising vacancy rates, alongside a growing physical and economic disconnect from the more successful Quayside area (context). The Link is expected to make the town easier to access (mechanism), leading to increased footfall (short-term outcome) and contributing to an improved business mix, reduced vacancy rates, and increased investor confidence in the area (long-term outcome).
3. **Hypothesis 3:** Active travel use in Blyth is low (context). The Link delivers dedicated cycle routes, improved footways, and reroutes the coastal cycle route through the marketplace (output). Because routes become safer and more direct (mechanism), walking and cycling trips into the town centre are expected to increase (short-term outcome).

C.7.3 Emerging findings

EVIDENCE THAT THE RENOVATIONS TO THE LINK HAVE IMPROVED PRIDE IN PLACE (HYPOTHESIS 1)

There is strong evidence that the core public realm improvement was well-received by residents. Stakeholders and residents consistently described an uplift in the look and feel of Bridge Street, particularly the new lighting and greenery. Throughout this case study, the strength of evidence is assessed using the framework outlined in Annex A.

There is medium-strength evidence that these projects have improved resident satisfaction and perceptions of the town centre. Survey indicators show improvements in perceptions of town centre attractiveness, from a low baseline. However, evidence of wider pride in place changes is weaker at this stage.

In addition, there are several regeneration projects in Blyth funded by the Towns Fund and other non-Towns Fund sources. It is not possible within this evaluation to fully separate the effect of the Bridge Street project from the other regeneration works in Blyth. Changes in the local area, or lack thereof, may be driven by the collective effect of this wider portfolio of projects, rather than the Bridge Street project alone.

Change in resident satisfaction with the Link and Blyth town centre

There is strong evidence that the Link and Market Pavilion projects were well received by local people and are related to general improvements in the quality of the public realm in Blyth.

Project stakeholders and local representatives felt the Bridge Street area was more attractive following the works, particularly the new festoon lighting and greenery. They highlighted how the updates emphasised the area's culture and heritage through the use of materials and local artwork:

> *"The appearance of the town centre is much better. It was starting to be very kind of run-down. People did seem to have quite negative opinions of Blyth...certainly the appearance and people's opinions since the work's been completed, it's starting to turn."* ***Local resident***

Residents reported positive views about the Bridge Street changes in the survey, on average. Overall, 34% of residents were fairly or very satisfied with the changes, compared with 25% who were fairly or very dissatisfied.

Residents who were satisfied primarily attributed this to improvements in the appearance of the area around Bridge Street (67%). Some also highlighted the improvements of the cycling and pedestrian routes (26%).

However, residents who were dissatisfied commonly reported that the project had worsened their journey between Quayside and Blyth town centre (34%), and were equally likely to say that the project had also worsened the appearance of the area around Bridge Street.

These contradictory findings appear to be due to other ongoing work on Bridge Street that is unrelated to the project. At the time of the survey, work was underway to build a new graduate learning facility in place of an old shopping centre. In addition, further updates were in progress to the roundabout at the end of Bridge Street, where it connects with Quayside. This additional disruption is expected to influence resident satisfaction with the Link.

The proportion of residents who considered Blyth town centre attractive increased from 6% at baseline (September 2024) to 21% after project completion (September 2025). This difference is significant at the 1% level. Perceptions of the town centre as unattractive significantly decreased from 78% to 53% over the same period. Given the timing of the surveys relative to the completion of the 2 projects and their consistency with stakeholder input, there is relatively strong evidence that some of this improvement can be attributed to the Link and Market Pavilion projects.

Stakeholders also linked the improvements to increased opportunities for events. They noted that the improved marketplace and Pavilion created more flexibility for activities in and around the town centre and encouraged more people to visit.

Changes in pride in place

The evidence to date of the effect of the Link and Market Pavilion projects on pride in place in Blyth is weak. Table C.7 summarises the changes in these indicators between baseline and follow-up. There were modest improvements in reported pride in place following the completion of the projects, based on the resident survey. However, many changes are not statistically significant at the 10% level.

Table C.7 Pride in place indicators: Blyth

Question	Baseline[A]	Follow-up[A]	Follow-up: Visits The Link at least once a month[B]	Follow-up: Visits The Link less than once a month[B]
Proportion of adults who were (were not) proud to live in their local area	49% (21%)	50% (18%)	55%** (15%)	42%** (22%)
Proportion of adults who agreed (disagreed) that they would still like to be living in their local area in 5 years	59% (22%)	65% (13%)	67% (10%)	67% (15%)
Proportion of adults who would (would not) recommend their local area to others as a good place to live	45% (30%)	47% (22%)	46% (22%)	48% (21%)
Overall satisfaction (dissatisfaction) with the local area as a place to live	60% (26%)	64% (18%)	62% (16%)	66% (18%)
The area has improved in the last 2 years	9%**	15%**	16%	10%
The area has got worse in the last 2 years	49%*	42%*	45%	40%
Proportion of adults who were satisfied (dissatisfied) with local services and amenities in their local area	60%** (19%)***	68%** (14%)***	72%* (13%)	63%* (15%)
Sample size[C]	298 to 317	252 to 275	114 to 126	105 to 114

Source: *Frontier Economics.*
Notes: *Asterisks indicate significance: * p< 0.10, ** p<0.05, *** p<0.01*
[A] Statistical significance is tested between baseline and follow-up
[B] Statistical significance is tested between visitors and non-visitors in the past 12 months.
[C] Number of respondents may slightly vary across categories due to variations in individuals who have not responded to a question or responded 'Don't know', so a range is reported.

While stakeholders and local representatives felt it was too early to assess pride in place impacts, they expected these to build over time if the town successfully sustains momentum, attracts more businesses, and uses the improved spaces for events and activities. Pride in place and satisfaction also tended to be higher among those who visit the Link, which suggests the projects may be having some effect on overall pride in place.

EVIDENCE THAT THE RENOVATIONS TO THE LINK HAVE IMPROVED BUSINESS OUTCOMES (HYPOTHESIS 2)

It is too early to assess footfall and business outcomes, given the short period since project completion and continued disruption in the town centre. However, there is medium-strength evidence that the project improved connectivity between Quayside and the town centre. Over time, these connectivity improvements may support increases in footfall, but this has yet to be observed in the available data.

Change in footfall on the Link and Blyth town centre

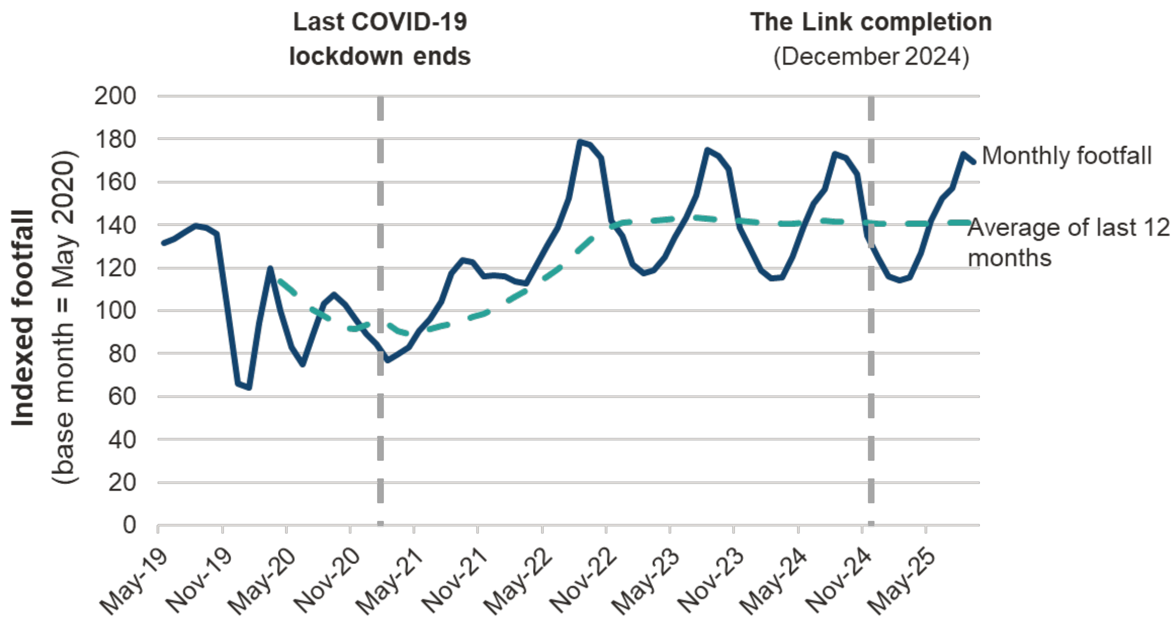
There is weak evidence that the Link has driven measurable changes in town centre footfall so far. This is despite medium-strength evidence supporting improvements in access to and connectivity in Blyth town centre.

Stakeholders indicated that Blyth feels more connected as a result of the Link project, supported by the improved pavements and cycle path. It was noted that this improves access between the town and Quayside, which will hopefully encourage more people to visit the town centre and use the facilities in the area.

Residents report that the project links well with other improvement schemes happening across the town. They note that cyclists and pedestrians can now easily stay on one path when linking through to other parts, such as the local train station.

There is no evidence yet of these changes influencing wider town centre footfall patterns. Figure C.7 presents monthly footfall in Blyth between May 2019 and May 2025.

Figure C.7 Footfall in Blyth



Source: *Frontier Economics, based on Place Informatics.*

The smoothed footfall trend suggests that Blyth experienced a strong recovery in footfall after the COVID-19 lockdowns, but that this had largely plateaued from late 2022 onwards. The Link was completed more than a year later (December 2024). The timing does not strongly suggest that the project drove this longer-term recovery trend, even though footfall in Blyth town centre was 22% higher in September 2025 than in 2019.

Stakeholders emphasised that disruption during delivery was a key barrier. Northumberland County Council received both Town Deals and Future High Streets Fund funding for Blyth, along with other government funding. As a result, there were many renovations ongoing in the town at the same time.

Consequently, footfall in the town decreased during the delivery period, with some residents choosing to shop in other towns. The works also negatively impacted local traffic and congestion, with public transport punctuality and perceived reliability significantly impacted.

Changes in business outcomes

Evidence of business outcomes is weak at this stage. The project was completed in December 2024, and the latest available Inter-Departmental Business Database data covers only the period up to June 2025. This means there are only 6 months of post-completion data, which is likely too soon for any quantitative changes in turnover or business type to be identifiable.

There was no measurable change in the number of active businesses on Bridge Street between the years 2021 and 2025, according to data provided by the local authority. This suggests there has not yet been a clear change in the overall number of businesses in the area. However, a small number of interviewed residents reported perceived improvements in the types of businesses available. They cited examples such as a new specialist coffee shop and art venue. These comments relate to the mix of businesses, rather than the total number present, and there is no evidence that they reflect a wider trend.

It is not possible to attribute these changes specifically to the Link, given the short time frame since project completion and the influence of wider market conditions and other changes taking place in the town centre.

Stakeholders generally felt it was too early for changes in vacancy rates or business mix from the projects. They saw the Link as necessary enabling infrastructure, but not sufficient to shift business outcomes at pace. This aligns with the wider business case logic, which anticipates that sustained change depends on the combined impact of multiple interventions that increase reasons to visit, improve perceptions of safety and vibrancy, and strengthen linkages to the Quayside economy.

EVIDENCE THAT THE RENOVATIONS TO THE LINK HAVE IMPROVED ACTIVE TRAVEL USE (HYPOTHESIS 3)

There is strong evidence that the project delivered improved walking and cycling infrastructure on Bridge Street. This includes dedicated cycle lanes, widened pavements and other public realm improvements such as planting and seating.

Evidence of a wider shift towards walking and cycling (active travel) is weak. Stakeholders reported increased use of Bridge Street by walkers and cyclists, and a better experience for those using the route. As Bridge Street is a major route into the town, changes in transportation mode on Bridge Street are expected to be reflected in broader town reports on walking and cycling. However, this is not reflected in the resident survey, which finds no change in reports of using active travel to access Blyth town. In stakeholder interviews, potential barriers to active travel uptake include network gaps and a lack of supporting infrastructure.

Change in walking and cycling accessibility and use

Evidence of active travel behaviour change is weak. The survey results do not show an increase in walking or cycling into the town centre. However, local stakeholders and cyclists indicated a perceived future potential for growth as the network is completed and supporting infrastructure improves.

Stakeholders reported that cycling increased on Bridge Street following the delivery of the dedicated cycle route. They noted that cycling infrastructure was limited before the project's completion and that the new route makes cycling feel safer.

Stakeholders also reported increased walking in interviews, although they could not quantify it. Several highlighted the value of seating along the route, particularly for older people. They described this as enabling people to break up longer walks between the waterfront and the town centre.

The resident survey does not find evidence of increased walking or cycling for trips into the town centre. No residents reported travelling by bike to the town centre during their last visit at follow-up, and 19% reported walking. This compares with 2% and 27% at baseline, respectively.

There are several plausible reasons for this mismatch between qualitative and survey evidence:

- stakeholders noted that the wider network is not yet complete, and that there is still more to do to connect routes cleanly
- several stakeholders flagged that a lack of safe cycle storage, particularly near the station and key destinations, can discourage cycling even when routes improve
- behaviour change may take time, especially where perceptions of safety, convenience, and connectivity depend on multiple linked improvements rather than one corridor

C.8 Chatham: Innovation Hub

C.8.1 Key findings

THE PROJECT

The Innovation Hub (Hub) in Chatham is an office and co-working space, located in a previously vacant unit in a shopping centre in the town centre. It also provides events, networking, and wider business support to its users.

CHANGES IN BUSINESS AND ECONOMIC OUTCOMES

There is strong evidence that the Hub has created high-quality office space. Awareness of and satisfaction with the Hub are high. Users and stakeholders attributed this to the high-quality facilities and central location.

However, there is no evidence that the space is well used, as current occupancy rates are below the expectations set out in the initial business case. The reason for the lower-than-expected occupancy rates despite high awareness and satisfaction remains unclear. The limited evidence available from users suggests that price may be an issue.

There is strong evidence that business support offered within the Innovation Hub has been well utilised and received positive feedback. Without the Future High Streets Fund, these services would likely be located in another co-working space. Stakeholders felt that the Future High Streets Fund has enabled a move to a more accessible, high-quality location, increasing utilisation of the support.

Evidence available to assess the impact on businesses in Chatham or on the growth of businesses using the space is limited. Improved business and economic outcomes, such as increased business turnover, economic diversification, and job creation, are not yet expected to materialise. The facilities opened in October 2024, approximately one year before this case study.

CHANGES IN PRIDE IN PLACE

The Innovation Hub has reduced vacant space in Chatham’s main shopping centre. Stakeholders expect the Innovation Hub to improve perceptions in the future, but there is no evidence that this has directly changed residents’ perceptions of the town centre to date.

There is medium-strength evidence of improvements in pride in place in Chatham, although this can only be partially attributed to the project. Pride in place improvement is much larger among those who visit the town centre than among those who do not. However, the lack of a robust comparator group and the relatively limited sample of respondents who had visited the town centre mean it is not possible to draw a causal link. In addition, the Innovation Hub is just one project contributing to improvements across the town centre.

C.8.2 Project context and hypotheses

Chatham is a town in Medway, Kent. It had a population of around 77,000 as of 2021 (ONS, 2024). Chatham is in the most deprived decile across England. Almost one in 5 Lower layer Super Output Areas (19%) in Chatham are in the most deprived decile in England (MHCLG, 2025).

Medway Council was awarded £9.5 million by the Future High Streets Fund for 6 projects in Chatham. The Innovation Hub (also known as Ascend Co-working) received £2.5 million of this funding, with a further £1.4 million coming from external sources. The project was completed in October 2024.

The Innovation Hub is an office and co-working space, created by repurposing vacant retail units on the first floor of Chatham's Pentagon Shopping Centre. Users can rent permanent private office space or permanent desks in a co-working area, or use hot desks on an ad hoc basis via memberships or day passes. The Innovation Hub hosts events and networking opportunities, and a council-funded business support scheme.

Based on the specific context relating to Chatham and the Innovation Hub and its expected outputs and outcomes, the following hypotheses have been developed:

1. **Hypothesis 1:** Chatham has a high proportion of retail businesses and of commuters, who travel into London rather than working in the area (context). The Innovation Hub provides high-quality workspace for businesses and access to business support and networking opportunities (output). Improved use of these spaces and networking events (mechanism) will encourage more businesses to stay or locate in Chatham (short-term outcome). This is expected to increase inward business investment into Chatham and increase business diversity (long-term outcome).
2. **Hypothesis 2:** The Pentagon Shopping Centre is located in the centre of Chatham but has high vacancy rates due to the decline of retail (context). The Innovation Hub creates a high-quality space and reduces vacant space in the town centre's shopping centre (output). Alongside other regeneration work, the improved look and feel of the town centre (mechanism) will increase residents' pride in place (long-term outcome).

In addition to the baseline and follow-up surveys in Chatham, a third survey was deployed to Innovation Hub users, in collaboration with the local authority and delivery partner. The survey collected information on the use of the Innovation Hub, satisfaction with the Hub and reasons for locating in the Hub. These responses are used to complement wider qualitative interviews with Hub users and are not reported separately due to sample size.

C.8.3 Emerging findings

EVIDENCE THAT THE INNOVATION HUB HAS INCREASED BUSINESS DIVERSITY AND INWARD INVESTMENT IN CHATHAM (HYPOTHESIS 1)

There is strong evidence that residents are aware of the Innovation Hub and that users are satisfied with the quality of the facilities. Throughout this case study, the strength of evidence is assessed using the framework outlined in Annex A.

Occupation rates remain below expectations. It is too early to assess changes in wider business outcomes such as turnover and employment. These changes are only expected to materialise in the long term.

Change in access to, and use of, high-quality office space in Chatham

There is strong evidence of high awareness of and satisfaction with the Innovation Hub:

1. More than a third of residents (36%) are aware of the Innovation Hub, according to the resident survey. Awareness was particularly high among business owners (11 of 17, 65%).
2. Users reported they were satisfied with the Innovation Hub. They noted factors such as the central location and proximity to transport links, the high-quality finish, and the access to networking opportunities as reasons for using the Hub.

Local authority stakeholders noted that the delivery partner played a key role in the design of the space, ensuring it was fit for purpose and well-suited to the needs of businesses. The delivery partner partnered with a company experienced in designing similar spaces.

The Innovation Hub is providing an additional offering in Chatham. This suggests that any use of the Innovation Hub is likely to be additional rather than displacing use at other sites. The alternative workspaces in Chatham are either at full capacity, target different industries, or are not well-located. The Innovation Hub focuses on technology sector businesses, in line with broader aspirations for Chatham and Medway. There is only one alternative co-working space for businesses in this sector with capacity in Chatham. It is located on the outskirts of the town and is difficult to access by public transport.

Current usage rates of the Innovation Hub are below expectations, despite the high awareness of the facilities in Chatham. Occupancy was approximately 25% as of August 2025, below the business case expectations (45% to 50%) over the same period. The price of the Innovation Hub (roughly twice that of alternatives) is a likely driver of this low occupancy rate. However, local stakeholders expect usage to increase in the future, as the site is currently located between 2 construction sites.

Changes in business support in Chatham

There is strong evidence that the business support scheme hosted within the Innovation Hub is well-used. By the time the case study was carried out, 226 appointments had been held. This significantly exceeded the initial target of 50 appointments. Sectors supported include hairdressers, food production, and technology.

There is strong evidence that the scheme is well-received by users. All beneficiaries engaged through the case study were very satisfied with the services offered. There is medium-strength evidence that the scheme has supported business growth based on individual case studies of success. For example, one recipient business was supported in its application for £1.5 million in seed funding. Another was reported to have gained new commercial customers through the support. One recipient secured £5 million in investment and now employs between 15 and 20 people as a result of the support.

It is not possible to attribute all the impacts of the business support scheme specifically to the Towns Fund, as the scheme was also funded directly by the local authority. Prior to the project, other co-working spaces were used to host the support services. However, there is evidence that the Towns Fund has enhanced this offering. Stakeholders highlighted the Innovation Hub's accessible location, which enables greater use of its services. They also noted that the Hub is finished to a higher standard, making it a more ‘aspirational’ place for people to work.

Changes in the number of businesses, inward investment and business diversity

There is no quantitative evidence of changes in business numbers and diversity. The latest Inter-Departmental Business Database data available only covers the period up to June 2025. The project was completed in October 2024, providing less than 9 months of post-completion data. This is likely to be too soon for quantitative changes to be identifiable in the data set.

The available qualitative evidence on changes in business creation, diversity, and investment is mixed. Several businesses reported in interviews and the business survey that they would otherwise have located elsewhere in Chatham, suggesting there has not been an additional impact on business location to date. However, one business reported that the available networking opportunities had supported its growth.

EVIDENCE THAT THE INNOVATION HUB HAS IMPROVED PRIDE IN PLACE (HYPOTHESIS 2)

The Innovation Hub has transformed a previously vacant space in the town centre. There is medium-strength evidence from the survey data that visitors to Chatham town centre have seen an increase in pride in place, and weak evidence of an improvement in residents’ pride in place more broadly. However, it is not possible to attribute these changes solely to the project, due to a lack of a strong counterfactual. These changes are unlikely to be a direct result of the Hub alone and are instead due to wider projects underway across the town centre. It is not possible within this evaluation to fully separate the effect of the Innovation Hub project from the other regeneration works in Chatham (both Towns Fund- and non-Towns Fund-funded). Changes in the local area may be driven by the collective effect of this wider portfolio of projects.

Changes in the attractiveness of the town centre

There is no evidence in the survey that residents’ overall perceptions of Chatham town centre have changed since the project's completion. Perceptions of the attractiveness of the town centre remain low in Chatham. Whilst current perceptions remain unchanged, qualitative evidence from stakeholder and business interviews suggests that the Innovation Hub may support improvements in perceptions over time.

Stakeholders reported that the Innovation Hub transformed a previously vacant unit within the main shopping centre into a space which is now attractive from the outside. Businesses were similarly positive about the appearance and quality of the space in the interviews and survey. Combined with the development of a health centre next door (also funded by Future High Streets Fund), this has helped to improve the attractiveness of the top floor of the main shopping centre.

Stakeholders felt that the changes created an “aspirational” feel and hoped that they could change the perception of Chatham. They also commented that the Innovation Hub provides additional event space within Chatham.

It was not possible to isolate the specific contribution of the Innovation Hub from the impact of wider changes, such as the nearby health centre, due to the lack of a strong counterfactual. As a result, it is not possible to draw a causal link between the Innovation Hub and increased pride in place.

Change in resident pride in place

Table C.8 sets out the pride in place indicators in Chatham. There is medium-strength evidence of an increase in pride in place among visitors to the town centre in Chatham, with statistically significant increases across multiple measures. However, it is not possible to attribute these changes specifically to the Innovation Hub. The sample size of visitors who responded to the survey was also relatively limited and may not be fully representative of all residents who visit the town centre.

Table C.8 Pride in place indicators: Chatham

Question	Baseline[A]	Follow-up[A]	Baseline: Visited Chatham town centre at least once a month[B]	Follow-up: Visited Chatham town centre at least once a month[B]
Proportion of adults who were (were not) proud to live in their local area	46% (30%)*	48% (23%)*	35%*** (33%)**	57%*** (20%)**
Proportion of adults who agreed (disagreed) that they would still like to be living in their local area in 5 years	48% (37%)*	51% (29%)*	38%** (44%)***	56%** (21%)***
Proportion of adults who would (would not) recommend their local area to others as a good place to live	46% (28%)	51% (25%)	39%** (20%)**	57%** (28%)**
Overall satisfaction (dissatisfaction) with the local area as a place to live	57% (24%)	61% (27%)	51% (31%)	61% (26%)
The area has improved in the last 2 years	6%	5%	10.5%	10.5%
The area has got worse in the last 2 years	56%	51%	60%	55%
Proportion of adults who were satisfied (dissatisfied) with local services and amenities in their local area	76% (14%)	69% (12%)	66% (14%)	74%(15%)
Sample size[C]	234 to 254	235 to 259	95 to 104	71 to 82

Source: *Frontier Economics.*
Notes: *Asterisks indicate significance: * p< 0.10, ** p<0.05, *** p<0.01*
[A] Statistical significance is tested between baseline and follow-up.
[B] Statistical significance is tested between visitors and non-visitors in the past 12 months.
[C] Number of respondents may slightly vary across categories due to variations in individuals who have not responded to a question or responded 'Don't know', so a range is reported.

There is weak evidence of an increase in pride in place among residents of Chatham overall, regardless of whether they visited the town centre. Pride in place increased across all measures between the baseline and follow-up surveys. However, these changes are generally not statistically significant. By comparison, there was no statistically significant change in pride in place measures in England or in the wider local authority over the same period in the Community Life Survey.

Respondents who visited Chatham town centre at least once a month experienced a much stronger increase in pride in place, significant at the 5% or 1% level across all indicators. This suggests that the completed regeneration projects in the town centre are helping to drive improvements in pride in place.

For example, 57% of visitors to the town centre were proud to live in their local area following project completion, compared to 35% at baseline. At baseline, those who had visited Chatham had lower pride in place and were more dissatisfied with the local area than those who did not. The opposite was true at follow-up. This provides indicative evidence that improvements in pride in place are driven by changes in the town centre, of which the Innovation Hub is part. However, the small sample sizes for these subgroups mean that strong conclusions cannot be drawn from this evidence.

As with town centre perceptions, the lack of counterfactual means it is not possible to isolate the specific contribution of the Innovation Hub. The pride in place changes will be at least partly driven by wider changes in Chatham town centre, including those at the health centre.

C.9 Sutton-in-Ashfield: High Pavement House

C.9.1 Key findings

THE PROJECT

The High Pavement House project in Sutton-in-Ashfield refurbished a disused office building just off the central high street. It created 3 linked offers in one site: office units for small businesses, a purpose-built space for Inspire College, and a MakerSpace for residents. The MakerSpace is a community-run multi-use workshop.

CHANGES IN RESIDENT SATISFACTION WITH TOWN FACILITIES

The redevelopment has increased the supply of local workspace, learning space, and creative facilities. The project has delivered its planned outputs.

Evidence of changes in satisfaction with local facilities is weak. It is too early to assess the MakerSpace's role in increasing the uptake of new skills and hobbies.

Office unit take-up has been moderate. The council confirmed that uptake was sufficient to cover its costs, as of May 2025. Stakeholders said interest had stalled, citing competition from nearby business space and slow market demand.

Stakeholders reported positive tenant feedback on quality and value for money. However, this evidence is anecdotal and based on a small group.

Survey evidence suggests that resident pride in place and satisfaction with their local area increased. However, this does not appear to be related specifically to High Pavement House, given the limited visibility and reach of the project at this stage, the delayed opening of the MakerSpace, and the wider regeneration activity taking place across Ashfield.

CHANGES IN LOCAL SKILLS AND EMPLOYMENT

The move of Inspire College into High Pavement House has improved the quality and accessibility of provision. Stakeholders said it is a more central and attractive venue, and the only option available that kept all courses on one site. They also felt that Inspire may have relocated from Sutton in the absence of these premises.

Early data suggest increased demand at the college following the move, mainly among adults. Intake of 16- to 18-year-olds was only marginally higher, but attendance and retention improved following the move.

Inspire has been in the new premises for less than a year, which limits adequate before-and-after comparisons. Evidence on wider student outcomes is still developing and remains weak at this stage.

Stakeholders expect benefits to grow, including through new childcare provision (from September 2025) and rising demand for construction, brickwork, and health and social care courses. Inspire also reported some oversubscription to courses, and the council and college are exploring how to free up more learner space within the building.

C.9.2 Project context and hypotheses

Sutton-in-Ashfield is a market town located in Ashfield, Nottinghamshire. As of 2024, around 37,000 people lived in Sutton-in-Ashfield (ONS, 2024). The local authority is in the 25% most deprived authorities nationally (MHCLG, 2025).

The Ashfield District Council was awarded £6.2 million from the Future High Streets Fund, spread across 4 projects. The High Pavement House project was allocated £1.6 million to support the renovation of a large vacant office building. This funding was matched with £1.5 million from 3 other sources. The building was repurposed to offer mixed-use facilities, including office units available for local businesses to rent, a MakerSpace for local hobbyists and craftspeople, and the co-location of Inspire College, which provides vocational and adult education opportunities. The project was completed in November 2023, although the MakerSpace was not opened to the public until late 2025.

The council worked to identify businesses and partners to locate in the building, and the revenue generated was used to support the MakerSpace, following consultation with local residents about what they wanted and by observing similar spaces nearby. The MakerSpace was intended to increase the sense of community and collaboration, fostering the development of new skills and wellbeing. A long-term aim was for people using the MakerSpace to progress to renting business units at the facility.

Based on the specific context relating to Sutton-in-Ashfield and the High Pavement House project, the following hypotheses have been developed:

1. **Hypothesis 1:** Sutton-in-Ashfield has limited local arts provision and a shortage of start-up space (context). The High Pavement House project converted a vacant site near the town centre into a MakerSpace and affordable office units (output). Better visibility and outreach are expected to increase take-up and support progression from hobbies to enterprise (mechanism and short-term outcome). Over time, this is expected to improve satisfaction with local amenities (medium-term outcome).
2. **Hypothesis 2:** The area has persistent low educational attainment and limited suitable space for vocational and adult learning (context). The High Pavement House project enabled Inspire College to relocate to a more central, purpose-built site (output). Improved access and higher-quality facilities (mechanism) are expected to increase enrolment, attendance, and completion (short-term outcome), leading to improvements in local skills and employment (long-term outcome).

C.9.3 Emerging findings

EVIDENCE THAT THE HIGH PAVEMENT HOUSE PROJECT HAS IMPROVED RESIDENT SATISFACTION WITH TOWN FACILITIES (HYPOTHESIS 1)

There is strong evidence that the redevelopment of High Pavement House increased the supply of local workplace, learning, and creative facilities. Throughout this case study, the strength of evidence is assessed using the framework outlined in Annex A.

The project has delivered its planned outputs. However, it is too early to assess whether the MakerSpace is affecting local skills or satisfaction, as it opened later than expected. As a result, evidence on changes in the uptake of skills and hobbies, and in satisfaction with local facilities, is weak.

Interest in the office units has been moderate, with some early take-up. Stakeholders reported positive feedback from current tenants on quality and value for money. However, this evidence is qualitative and reflects the views of a small group. The evidence on wider changes in satisfaction with local facilities remains weak.

In addition, there are several regeneration projects in Sutton-in-Ashfield funded by the Towns Fund and other non-Towns Fund sources. It is not possible, within this evaluation, to fully separate the effect of the High Pavement project from the other regeneration works in Sutton-in-Ashfield. Changes in the local area may be driven by the collective effect of this wider portfolio of projects, rather than the High Pavement project alone.

Change in the provision of and satisfaction with local facilities: office space

The High Pavement House project included the full interior refurbishment of a disused office building just off the central high street. The redevelopment included 3 purpose-built elements: office spaces for small businesses; classrooms, workshops and lab space for Inspire College; and a MakerSpace.

Of the 13 office units created by the project, 7 were rented out as of May 2025. This level of occupancy is sufficient to cover the facilities' costs, according to the council. Although not required to cover costs, the local authority attempted to fill the remaining units. This process was challenging and linked to slow broadband speeds and competition from alternatives, including a nearby business park with larger units, according to local stakeholders.

Tenants include a range of business sizes and types, including a health and social care provider, an estate agent, and a holistic therapies company.

Overall, qualitative feedback on the office spaces was positive, with tenants reporting they are impressed with the quality, accessibility, and overall value for money of the building:

> *"A couple of the tenants have said that they're really impressed with the quality, and the parking and the location, and feel it's really good value for money having a business unit here. So, while the cost might be market value, I think there's a feeling of where it is and the spec it is and the cost of it and the 3 months free makes it a very attractive business proposition."* ***Project stakeholder***

Change in the provision of and satisfaction with local facilities: MakerSpace

The MakerSpace was a key element of the original project design. It offers a range of opportunities and machinery for residents to draw upon and learn from, including woodwork, textiles, metalwork, Computer Numerical Control machines, and a podcast studio.

However, it is too early to assess its impact on the local area. This is due to initial delays that meant the MakerSpace was not open at the time of the site visit and only began accepting memberships in September 2025.

Delays were largely due to 2 key challenges. Firstly, stakeholders found that the initial choice to set up the programme as a Community Interest Company made it hard for the council to manage or steer disagreements among volunteers. They are looking to move to a Charitable Incorporated Organisation structure to enable a 2-tiered system, giving trustees overall responsibility for decision-making.

Secondly, stakeholders commented that the project would have benefited from revenue funding to support a specific staff member in managing the initial setup and delivery period.

The MakerSpace aims to increase the number of people taking up crafts and hobbies over time and to strengthen local creative skills. Stakeholders felt that this would provide opportunities for people to grow and develop businesses, as well as to improve people’s wellbeing through participation. However, these are anticipated outcomes rather than evidenced impacts at this stage, as the MakerSpace only began accepting memberships in late 2025:

> *"Getting people who feel despondent and disengaged, to get engaged and feel valuable, that's for me is the most valuable thing."* ***Project partner***

Change in wider pride in place

The Ashfield area demonstrates strong and significant improvements in pride in place. The resident survey shows that the proportion of respondents who agreed they were proud to live in their local area increased from 37% at baseline (March 2024) to 44% at follow-up (February 2025). This difference is significant at the 10% level. A similar improvement was found among respondents who agreed they would recommend their area as a good place to live.

However, the improvements in pride in place are not specifically attributable to the High Pavement House project. Instead, the changes are likely to reflect wider funding and changes ongoing in the Ashfield area. Ashfield received a significant amount of regeneration funding from the Towns Fund and other sources, including the Levelling Up Fund and UK Shared Prosperity Fund. This includes the transformation of the Sherwood Observatory, which has had a significant impact on local residents' perception of the area.

Compared to the more limited size, usage, and awareness of the High Pavement House, stakeholder insights suggest that pride in place changes is more likely attributable to the more visible and relatively larger portfolio of Future High Streets Fund and Town Deals funding in Ashfield.

EVIDENCE THAT THE HIGH PAVEMENT HOUSE PROJECT HAS IMPROVED STUDENT OUTCOMES IN SUTTON-IN-ASHFIELD (HYPOTHESIS 2)

The movement of Inspire College into High Pavement House has improved the quality and accessibility of education. Early feedback and local data indicate a large increase in adult learners and improved attendance and retention of younger learners. However, at the time of the site visit, Inspire had been in the new premises for less than a year, so evidence on wider student outcomes is developing and remains weak at this stage.

Change in the quality and accessibility of Inspire College

Prior to the refurbishment, Inspire College operated out of another Ashfield location. Stakeholders said the decision to move to High Pavement House was to provide a more central and attractive venue for their learners. They reported that it was the only option that would keep all the courses on a single site, rather than splitting the provision across locations. Inspire were also able to design elements of the rebuild to ensure the facilities were fit for purpose.

College stakeholders felt that the college may have had to consider moving out of Sutton, if not for the refurbishment of High Pavement House.

Stakeholders were overall very positive about the new premises, noting that the venue's accessibility, quality, and convenience had led to an increase in learner numbers. Inspire was also able to broaden its education offer as a result of the project, according to college stakeholders. This includes new 16 to 18 provision in catering, early years childcare, and a wider adult learning programme (such as flower arranging, reflexology), as well as functional skills courses in maths and Excel.

Following the relocation, adult learner enrolment increased by over 450%, from 43 in 2023/24 to 242 in 2024/25. This was the primary driver of increased uptake at the college. The intake of 16- to 18-year-olds remained relatively stable compared to previous years. However, stakeholder input suggested that these students' class attendance had improved as a result of the move:

> *"It's been a huge success, numbers are up, our attendance by young people has improved by about 16% from this time last year. So making the move from Eastbourne House to the new facility has improved the level of service … and we've got adult learners as well, which we did not have at Eastbourne House."* ***Project partner***

A key enabler of this element of the project was the positive partnership between the District Council and Inspire, who worked together to find the appropriate space. Inspire was particularly positive about the process of designing the renovations at High Pavement House to meet the college's bespoke needs:

> *"I've never known a partnership to be better, and I've worked in Greater Manchester, Oldham, Leeds. Nottinghamshire, and particularly Ashfield have the best partnership between Further Education, Higher Education, the District Council, the 3rd Sector, and then employers. It's an optimistic place to work."* ***Project partner***

Changes in local skills and employment in Sutton-in-Ashfield

At the time of the site visit in March 2025, Inspire had been operating from the premises for less than a year. This limits the scope for comprehensive before-and-after comparisons, meaning it is too early to assess long-term outcomes. However, there is medium-strength evidence that the improved premises are supporting early indicators of skills development, including higher demand and better engagement among current and prospective Inspire learners.

The large increase in scope to offer adult classes also presents an opportunity to upskill people in Ashfield. Conversations with the Inspire team confirmed that roughly 20% of the adult learning courses offered included accreditations, which can support progression into further study or employment.

Stakeholders expect the programme's benefits to continue. They reported increased applications for construction, brickwork, and health and social care provision, and anticipated demand linked to the planned childcare provision starting in September 2025.

In response to oversubscription in certain courses, Inspire and the council are exploring whether office units could be used for the college's corporate functions to release more learner space.

C.10 Loftus: Duncan Place

C.10.1 Key findings

THE PROJECT

Duncan Place was previously the site of the Family Hub, which provided integrated family services, alongside spaces for youth and community services. The site was renovated and expanded to include library services and a new activity and sports hall. The renovation was completed in August 2023.

CHANGES IN WELLBEING

Use of the local library increased following its relocation to Duncan Place, and satisfaction with the facilities is high. Stakeholders attribute this to the quality of the facilities and the benefits of collocating multiple services.

There is no evidence of a change in the usage of family services, and evidence of a small negative change in youth services usage. This negative impact was attributed to the new sports hall being inappropriate for some uses and limitations on its out-of-hours usage by local youth.

Average wellbeing was higher for more frequent visitors to Duncan Place across a range of indicators. However, it was not possible to assess if Duncan Place has contributed to overall improvements in local wellbeing in Loftus due to a lack of baseline data or a control group. This finding is also based on a relatively small sample of Duncan Place users who responded to the survey. As a result, while it is statistically significant, it may not be fully representative of all users.

CHANGES IN PRIDE IN PLACE

There is some weak evidence of improvements in pride in place. More frequent visitors to Duncan Place report higher levels of pride in place across a range of indicators. However, the number of statistically significant differences is limited, and the sample size of respondents who visited Duncan Place is small.

It is not possible to attribute a causal shift visitors’ pride in place to Duncan Place, given the lack of counterfactual and baseline, and the influence of wider contextual changes across the town.

C.10.2 Project context and hypotheses

Loftus is a town of about 4,000 people (ONS, 2024) located within the Redcar and Cleveland local authority area. The local authority is within the 20% most deprived in England (MHCLG, 2025).

Redcar and Cleveland local authority was awarded £5.8 million in Future High Streets Fund funding for Loftus, spread across 6 projects. Duncan Place received £1.7 million in funding from the Future High Streets Fund and £0.5 million in funding from other sources. The Future High Streets Fund also provided £1.1 million for improvements to the adjacent Coronation Park, which received a further £0.2 million from other sources.

Prior to the extension and renovation of the space, Duncan Place was the site of a Family Hub and of wider youth and community services. As part of the renovation, the site has been updated and extended to include local library services. This relocation has led to the construction of 2 extensions to the existing building: a new entrance and library area, and a new activity and sports hall. The renovated facility was completed in August 2023.

Coronation Park is next to Duncan Place, bordering on its main entrance. As part of the regeneration work, enhancements were made to the park. This includes additional pedestrian pathways, updates to the park entranceways and green spaces, and a feature wall to more prominently display the entrance to the park and Duncan Place.

Based on the project's specific context and a logic model developed in collaboration with the local authority, the following key hypotheses were developed:

1. **Hypothesis 1:** Loftus is located in an area with very high levels of deprivation and many other socio-economic difficulties, including low literacy rates (context). The Duncan Place development is expected to improve the capacity, quality, and usage of library services, as well as to collocate council services (output). By creating a nice-looking place that people want to visit and making it easier to navigate across services (mechanism), it is expected to increase visits to Coronation Park and Duncan Place and usage of the library and other services (short-run outcome). In the longer term, this is expected to improve residents’ wellbeing (longer-term outcome).
2. **Hypothesis 2:** Loftus is the most economically underperforming centre within Redcar and Cleveland and lacks “identity and purpose” (Loftus Future High Streets Fund Business Case 2020) (context). By increasing the cultural offerings and appearance of central Loftus in ways that appeal to a range of residents (mechanism), the Duncan Place development is expected to improve resident satisfaction with amenities in the town centre and, eventually, pride in place (outcome).

C.10.3 Emerging findings

EVIDENCE THAT DUNCAN PLACE HAS IMPROVED LOCAL WELLBEING (HYPOTHESIS 1)

There is strong evidence that the redevelopment of Duncan Place and the adjacent Coronation Park led to an improved visitor experience and improved the quality and appearance of library services in Loftus. Overall usage of library services in Loftus also appears to have increased since the completion of Duncan Place, although it remains below its pre-COVID-19 level. Throughout this case study, the strength of evidence is assessed using the framework outlined in Annex A.

Evidence of improvements in overall wellbeing is weak. A lack of baseline data makes it difficult to assess changes in wider wellbeing metrics in Loftus. While there is an observed correlation between higher life satisfaction and visitation to Duncan Place among local residents, this is based on a relatively small sample size of visitors.

In addition, there are several regeneration projects in Loftus funded by the Towns Fund and other non-Towns Fund sources. It is not possible within this evaluation to fully separate the effects of the Duncan Place and Coronation Park projects from those of the other regeneration works in Loftus. Changes in the local area, or lack thereof, may be driven by the collective effect of this wider portfolio of projects.

Changes in the quality of the facilities

Interviewed stakeholders, library users, and respondents to the resident survey reported that the quality of library facilities had improved and that they are satisfied with the new facilities. While the number of library users who responded to the resident survey was relatively limited (72), the consistency of findings across multiple sources provides strong evidence that the quality and appearance of the library have improved.

Since the renovation, interviewed stakeholders from Duncan Place, the local council, and the local community have reported that the new building has become more welcoming to visitors and that the overall quality of the library has improved. They attributed this to the more open layout of the library itself, particularly in the children's and family spaces. Local beneficiaries were particularly positive about the ease with which it was now possible to coordinate and carry out a range of activities in Duncan Place, due to the new expanded facilities. They reported that some of these activities would not have been feasible in the previous library or Duncan Place before its renovation. This includes, for example, new photography and writing groups and the 'Summer of Arts' event.

This finding is consistent with the follow-up resident survey conducted in Loftus. This survey found that of those who had visited Duncan Place since it reopened, 73% were satisfied with the centre, compared with only 3% who were dissatisfied. Moreover, over 60% of visitors reported that the library had improved since relocating to Duncan Place, with only 10% reporting that it had got worse. While overall community feedback on the new library facilities was positive, stakeholders indicated that, in some instances, further consultation could have enhanced the facilities further.

Feedback from local stakeholders on changes to the family and youth services facilities was more mixed. Aside from some additional space for a clinic and health visitors, stakeholders at the Family Hub reported no material change in the facilities. Stakeholders also reported that the new sports facilities in the activities hall were not fit for purpose. This was a result of the environmentally friendly design of the new space, which made it impossible to play certain sports without damaging the facilities, and of changes to the security alarm system, which restricted the hours at which youth services could operate.

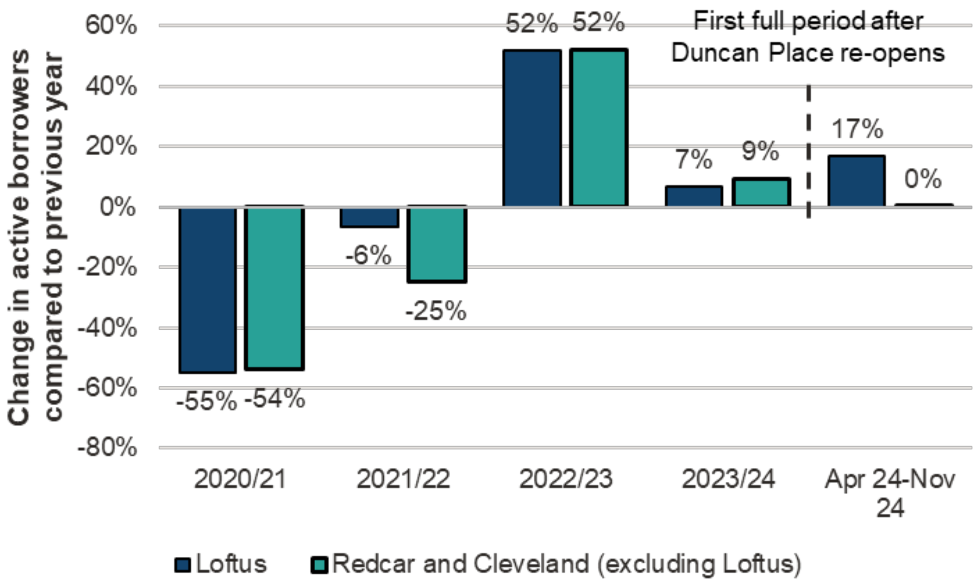
Changes in the usage of library services at Duncan Place

There is strong evidence that the project has increased usage of the local library, based on library usage data, the resident survey, and input from library stakeholders. According to local stakeholders, issues with the old library led to one of the lowest usage rates in the wider region. Staff at the Loftus library indicated that, between reopening in August 2023 and July 2025, library usage had increased noticeably, although overall usage had not returned to pre-COVID-19 levels.

The survey of the local area, conducted in September and October 2024, found that 29% of respondents had visited Duncan Place since it reopened in August 2023. Of these visitors, 62% had used the library. Overall, this suggests that approximately 18% of local residents visited the library since it reopened.

Figure C.8 shows that the number of active borrowers has increased noticeably since the completion of Duncan Place. There were 480 active borrowers during the period from 1 April to 30 November 2024, a 17% increase from the entire 2023/24 period. This was the largest increase for any library in the Redcar and Cleveland area. Overall visitation also increased over the same period, rising from 8,115 (August 2022 to July 2023) to 11,266 (August 2023 to July 2024). While visits declined slightly from August 2024 to August 2025 to 9,394, they remained above the pre-move figures.

Figure C.8 Change in active borrowers at libraries in Redcar and Cleveland



Source: Frontier Economics, based on data provided by Redcar and Cleveland libraries.
Note: Data for April to November 2024 compares this partial period to the total number of active borrowers for the period from 1 April 2023 to 31 March 2024. Data provided by Redcar and Cleveland libraries covered 13 libraries in the Redcar and Cleveland local authority.

It is possible that some of this increased usage is being driven by users shifting away from other libraries in the area. However, the combination of the distance to libraries in other towns and the lack of public transportation options means that overall displacement is expected to be low. The nearest alternatives are located more than a 10-minute drive away, in other towns. Residents and library users interviewed for this report indicated that while some people travel between libraries in different areas, the physical links between these libraries are generally limited. Links are particularly limited for residents without access to personal vehicles, due to limited public transportation options.

Local stakeholders (including local residents) indicated that the positive effects on library usage and satisfaction were driven by the collocation of multiple services. This collocation improved the visibility of the various services at Duncan Place and brought in users who might not otherwise have used the library (such as young people). Increased usage was also supported by the new activities provided at the library.

Changes in the usage of family and youth services at Duncan Place

There is no evidence of an improvement in the usage of family services. Interviewed family services providers reported no increase in visits to family services since the redevelopment. The only additional service offered at the Family Hub is a new midwifery clinic, whose usage was reported to be limited as of October 2024.

Although there is no evidence of increased usage, family services stakeholders reported synergies from having the library and family services in close proximity. They also reported expected benefits for child and adult literacy for users of the family hub, as it is now easier to refer people to library services.

Youth services appear to have been negatively affected by the redevelopment of Duncan Place. Changes to the facilities resulted in the new activities hall being unsuitable for some sports and in limitations on its out-of-hours use. Some youth services have also relocated to another venue in Loftus, as a result of the closure during the refurbishment. Overall, this contributed to a drop in attendance at youth services compared with comparable facilities in the region. Local stakeholders reported that these negative changes could have been reduced or avoided with additional consultation to ensure the facilities were fit for purpose for youth services.

Despite the decline in youth service usage, stakeholders also noted positive benefits for youth services resulting from the collocation with library services. They expected benefits from this in the longer term, in particular through reductions in antisocial behaviour.

Overall changes in local wellbeing

While there is some evidence that the projects may be affecting health and wellbeing in Loftus, overall, evidence of impacts at this stage is weak.

Table C.9 shows that wellbeing indicators were consistently higher among visitors to Duncan Place compared with non-visitors, particularly among more frequent visitors. In particular, the differences in wellbeing between those who had visited Duncan Place at least once a month since reopening and those who had not were statistically significant, at the 10% level across a range of indicators. However, this is based on a relatively small sample size of respondents who had visited Duncan Place. As a result, while the difference is statistically significant, it may not be fully representative of all visitors.

Table C.9 Wellbeing indicators, Loftus

Question	Visited Duncan Place at least once a month since opening[A]	Visited Duncan Place at least once since opening[A], [B]	Not visited Duncan Place since opening[C]
Overall, how satisfied are you with your life nowadays?	8.2*	7.8	7.4
Overall, to what extent do you feel the things you do in your life are worthwhile?	8.5*	8.0	7.7
Overall, how happy did you feel yesterday?	8.3*	7.8	7.4
Overall, how anxious did you feel yesterday?	2.3	2.5	2.9
Number of respondents[D]	23 to 24	71 to 72	178 to 180

Source: Frontier Economics.
Note: Wellbeing indicators are based on an 11-point scale, where 0 corresponds to 'Not at all [satisfied/anxious…]', and 10 is 'Completely [satisfied/anxious…]'. The table reports a weighted average of respondents' answers.
*Asterisks indicate significance: * p< 0.10, ** p<0.05, *** p<0.01*
[A] Statistical significance is tested between visitors (in the past month or 12 months) and non-visitors.
[B] Includes those who visited Duncan Place at least once a month in the last 12 months.
[C] Includes those who have not heard of/do not know of the Duncan Place.
[D] Number of respondents may slightly vary across categories due to variations in individuals who have not responded to a question or responded 'Don't know', so a range is reported.

Taken as a whole, results suggest a relationship between visitation and higher levels of wellbeing. However, this is a weak correlation rather than a causal relationship. Non-visitors may differ from visitors and have systematically lower personal wellbeing for other unobserved reasons. For example, people with higher wellbeing may be more likely to visit Duncan Place, rather than the visits to Duncan Place causing higher individual wellbeing.

EVIDENCE THAT DUNCAN PLACE HAS IMPROVED OVERALL PRIDE IN PLACE (HYPOTHESIS 2)

Evidence of improvements in pride in place in Loftus is weak. While there is a correlation between visits to Duncan Place and greater pride in place, it is weak, and the differences are generally not statistically significant. It is also not possible to draw a causal relationship between the redevelopment of Duncan Place and any improvements, due to the lack of a baseline or comparison group.

Table C.10 shows that a greater proportion of visitors to Duncan Place reported higher pride in place than non-visitors. Pride in place was also higher for more frequent visitors. While most of these differences were not statistically significant, satisfaction with the local area, local services, and amenities was significantly higher among those who have visited Duncan Place at least once a month since its reopening. Taken as a whole, the consistent nature of the relationship suggests a weak correlation between higher pride in place and visits to Duncan Place. However, the limited sample size of respondents who had visited Duncan Place means this should be treated cautiously.

Table C.10 Wider pride in place indicators, Loftus

Question	Visited Duncan Place at least once a month since opening[A]	Visited Duncan Place at least once since opening[A], [B]	Not visited Duncan Place since opening[C]
Proportion of adults who were (were not) proud to live in their local area	79% (8%)	67% (14%)	63% (13%)
Proportion of adults who agreed (disagreed) that they would still like to be living in their local area in 5 years	78% (4%)	75% (10%)*	68% (18%)
Proportion of adults who would (would not) recommend their local area to others as a good place to live	61% (9%)	61% (18%)	62% (13%)
Overall satisfaction (dissatisfaction) with the local area as a place to live	88%* (4%)	71% (13%)	73% (14%)
The area has got better (worse) in the last 2 years	17% (35%)	19% (35%)	16% (27%)
Proportion of adults who were satisfied (dissatisfied) with local services and amenities in their local area	83%** (8%)	70% (14%)	62% (15%)
Sample size[D]	23 to 24	69 to 73	175 to 181

Source: Frontier Economics.
*Notes: Asterisks indicate significance: * p< 0.10, ** p<0.05, *** p<0.01*
[A] Statistical significance is tested between visitors (in the past month or 12 months) and non-visitors.
[B] Includes those who visited Duncan Place at least once a month in the last 12 months.
[C] Includes those who have not heard of/do not know of the Duncan Place.
[D] Number of respondents may slightly vary across categories due to variations in individuals who have not responded to a question or responded 'Don't know', so a range is reported.

However, it is not possible to assess whether Duncan Place has increased overall pride in place for users or for the wider community. While visiting Duncan Place more frequently is correlated with higher individual wellbeing, this may be because people with greater pride in place are more likely to visit Duncan Place, rather than Duncan Place affecting individual wellbeing. A range of wider factors beyond Duncan Place may also be driving pride in place. For example, broader changes in the local area can influence the appearance, employment opportunities, and cost of living.

Annex D Case study findings: Town Deal

D.1 Redcar: Clean Energy Education Hub

D.1.1 Key findings

THE PROJECT

The Clean Energy Education Hub (The Hub) is a newly built training facility at Redcar and Cleveland College. It provides qualifications and apprenticeships in construction, engineering, and maintenance with a particular focus on green and clean energy skills. The project was completed in May 2023 and was ready for the 2023/24 academic year.

CHANGES IN LOCAL EMPLOYMENT AND SKILLS

There is strong evidence that The Hub led to an improvement in the quality of the facilities and training offered in the local area.

There is also strong evidence that students and other stakeholders are satisfied with the new offering. Key drivers of this success are the tailoring of education to local industry needs, strong business engagement, and hands-on student experience in modern facilities.

Enrolment in engineering and construction courses at the college has grown since The Hub opened. Most of this increase reflects the take-up of new courses not previously offered at Redcar and Cleveland College, rather than growth in existing courses. Enrolment was particularly high for the new BP and Balfour Beatty Scholarship programmes.

Evidence on wider employment opportunities created is weak at this stage. As only 2 academic years have passed since its opening, post-graduation destination information is not yet available. However, students had high expectations of their employment options. The BP and Balfour Beatty Scholarship programmes provided additional financial and employment benefits for some students.

D.1.2 Project context and hypotheses

Redcar is a town of about 38,000 people (ONS, 2024), located in North Yorkshire. It is located in an area of high deprivation. Redcar and Cleveland is within the top 20% most deprived local authorities in England (MHCLG, 2025).

Redcar and Cleveland Borough Council was awarded £25 million in Town Deals funding, spread across 5 projects. The Hub received £2.4 million from the Town Deal, with an additional £0.75 million from the college. Its key aim was to provide specialist industrial training and skills, support employment opportunities, and boost the low levels of economic activity and skills in Redcar (Town Deal application).

The Hub is a newly built 333m^2 training facility at Redcar and Cleveland College, connected to the existing engineering wing. The Hub provides practical learning in construction, access, and maintenance. It includes a carbon capture rig, as well as equipment for training in electric vehicle charging, solar PV installation, heat pump installation, and wider mechanical and electrical training.

The Hub is used to provide training for Level 2 and Level 3 diplomas for 16- to 18-year-olds and for those aged 19 and above, T Levels, and apprenticeships offered at Redcar and Cleveland College. This includes welding, electrical installations, and engineering diplomas; T Levels in construction, engineering, and manufacturing; and apprenticeships for installation and maintenance electricians and domestic heating technicians.

Based on the specific context of the project and a logic model developed in collaboration with the local authority, the following key hypothesis was developed:

1. **Hypothesis:** Unemployment in Redcar is high compared to the national average, and the market skills base is a key weakness compared to local growth figures (context). The Hub will provide additional high-quality education, training, and facilities in clean energy manufacturing and engineering (outputs). Because these skills are expected to be suited to the needs of local employers (mechanism), the Hub is expected to increase interest and enrolment in its courses, improving the level and quality of local skills (outcome).

In the longer term, changes in the level and quality of local skills are expected to improve local economic growth and residents' incomes by ensuring local residents have the right skills to fill high-skill job vacancies. Existing evidence (for example, research carried out by the Institute for Government, 2022) suggests that skills improvement should be expected to boost productivity and incomes. However, as this is not possible to assess given the project's recent completion date, it has not been explicitly considered.

D.1.3 Emerging findings

EVIDENCE THAT THE CLEAN ENERGY EDUCATION HUB HAS IMPROVED LOCAL EMPLOYMENT AND SKILLS

As an early-stage enabling intervention, The Hub is expected to show its strongest evidence in the delivery of facilities, new course provision, and theory-consistent pathways into skills and employment, rather than in wider employment outcomes, which are not yet observable.

Enrolment in Engineering, Electrical, Plumbing, and Gas courses has more than doubled since The Hub’s completion, from 61 in 2022/23 to 137 by 2025/26. Most of this increase is driven by enrolment in courses which were previously not offered at Redcar and Cleveland College.

Stakeholders, including students and businesses, were very positive about the quality of the facilities and training offered at The Hub.

Stakeholders identified a few key enablers supporting the project’s current and expected future outcomes:

1. **Engagement and consultation of local businesses in designing the facilities:** to help design the facilities and programmes to ensure that they are fit for purpose.
2. **Recruitment of teachers with industry experience:** to help ensure courses were well-suited to business needs.
3. **The flexibility of the facilities developed:** to ensure that they can be updated as industry needs change.

Changes in the quality of the training and facilities

There is strong evidence that the quality of the facilities at Redcar and Cleveland College has increased as a result of The Hub. This assessment is based primarily on consistent qualitative evidence from college stakeholders, students and local businesses, alongside clear evidence that the new facilities and equipment were delivered as intended. Throughout this case study, the strength of evidence is assessed using the framework outlined in Annex A.

When designing and delivering The Hub, the local authority and college stakeholders aimed to ensure that the education offering was tailored specifically to local industry needs. This included industry input on the equipment (much of which is gifted by local industry partners) and the training programmes offered. Examples of partners include BP, Parker Hannifin, Sembcorp, and Northern Renewables. In particular, BP donated £60,000 in specialist equipment to the Hub, while Parker Hannifin and Northern Renewables each made £5,000 in-kind equipment contributions.

The continuity of these relationships and collaborations was identified as a key enabler of The Hub's success in stakeholder interviews. In particular, project delivery partners emphasised that these relationships helped ensure that students could develop high-quality, industry-ready skills.

Updates to the Hub and its programmes are informed by a clean energy employers’ forum, which meets once a term, enabling the college to continue to understand upcoming employer needs. The courses have also been designed to simulate a real working environment as much as possible, for example, by having students communicate with walkie-talkies and train on simulated rigs.

Teachers at The Hub are largely drawn from industry. This ensures they can provide training suited to local employers’ needs. Local business stakeholders reported that this hands-on approach to training and the use of practical instructors are key parts of The Hub’s value and one of the key factors that set it apart.

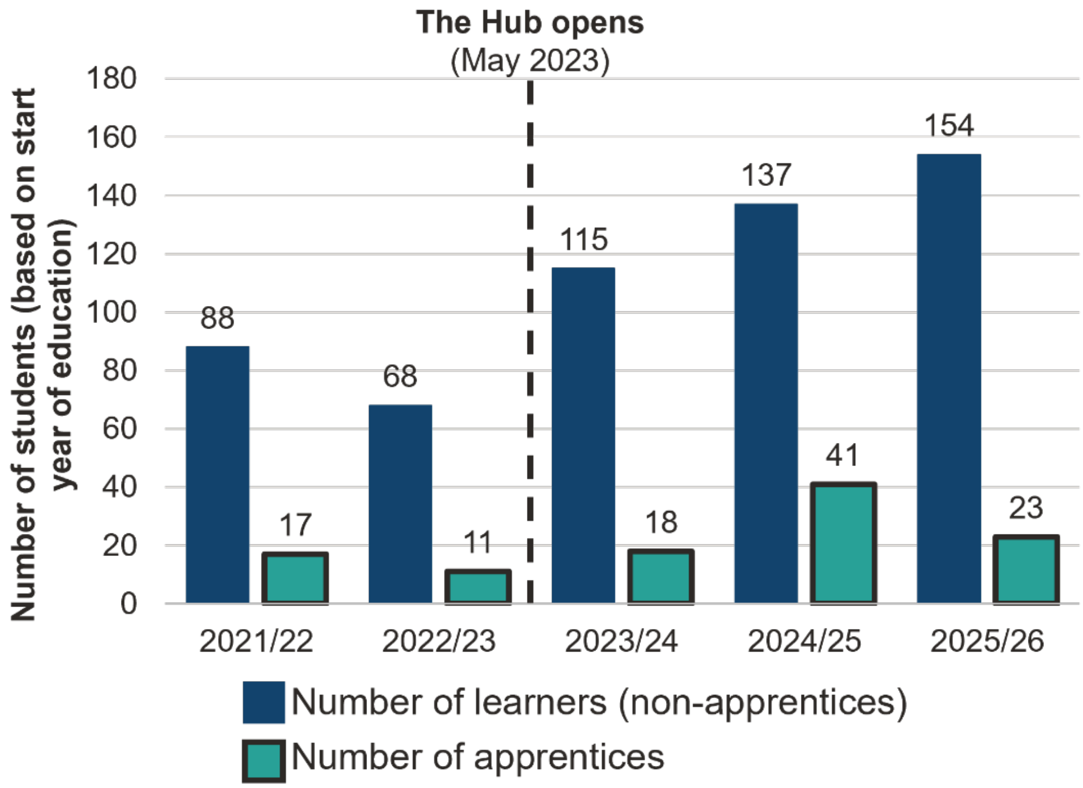
Satisfaction with the new facilities is high and appears to be consistent across a range of stakeholders interviewed, including college stakeholders, students, and local businesses. A key driver of this satisfaction was the strong involvement of local employers in shaping the facilities, equipment and course offer.

Changes in student enrolment and local skills provision

There is strong evidence that The Hub has increased enrolment and attainment in new Engineering and related courses. Students report that the practical skills gained are helping them develop industry-level competencies and have increased their confidence in their future job prospects.

Enrolment in courses that use The Hub has increased noticeably since it opened in May 2023. Figure D.1 shows that the total enrolment in the 2023/24 academic year was 133, up from 79 in 2022/23. Enrolment rose again in 2024/25, where it remained stable for the 2025/26 academic year (just below 180).

Figure D.1 Enrolment in courses used by the Clean Energy Education Hub

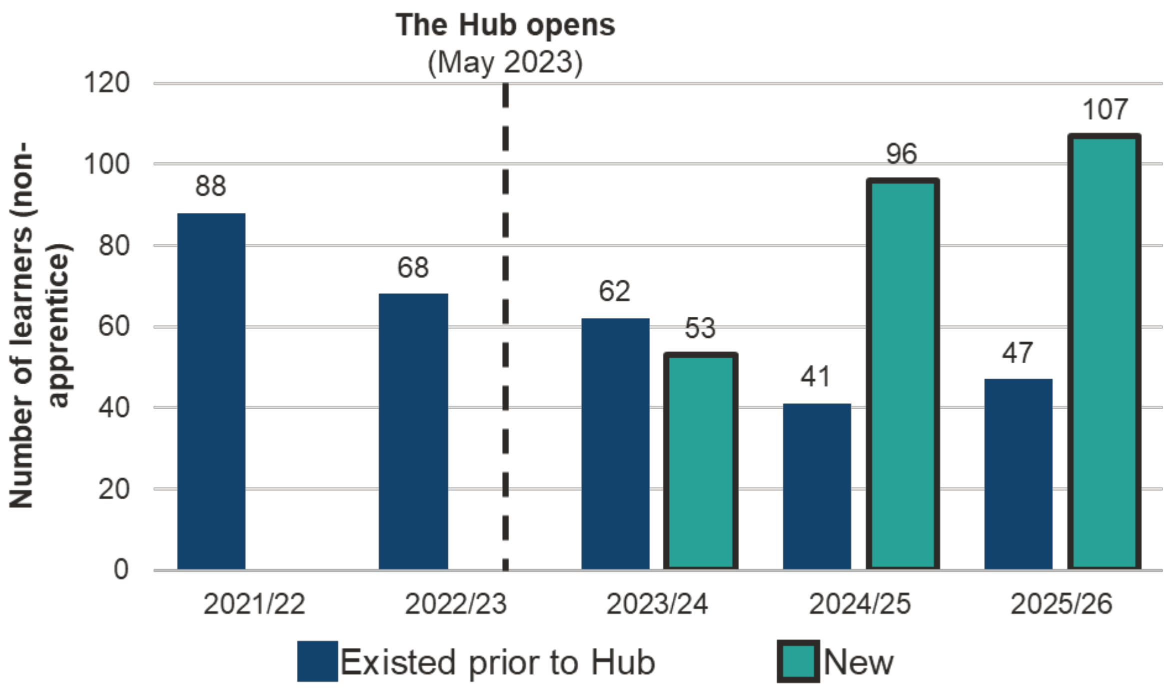


Source: Frontier Economics, based on data provided by Redcar and Cleveland College.
Note: Student numbers are based on the academic year in which they began their education.

Stakeholders also highlighted an increase in applications to study at Redcar and Cleveland College, with a particularly large increase in engineering applications.

Enrolment appears to be driven by courses that were unavailable at Redcar and Cleveland College prior to the construction of The Hub. Figure D.2 shows that in 2024/25, 96 students enrolled in courses that were not available before the construction of the new facilities.

Figure D.2 Enrolment by whether the course existed prior to the construction of the Clean Energy Education Hub (non-apprentices only)



Source: Frontier Economics, based on data provided by Redcar and Cleveland College.
Note: Includes only non-apprentice learners.

This includes the BP Scholarship programme; the Clean Energy Technician course; the Level 3 Fabrication and Welding course; and T Levels in gas engineering, maintenance, and installation. While some of these may overlap with previously provided courses that no longer exist in their original forms, they were not offered prior to the completion of The Hub facilities.

The 2025/26 academic year continues this trend. The most popular courses include the Level 3 Engineering programme and the new Balfour Beatty Scholarship, which provide specific training on welding and pipefitting.

Completion rates are higher for the new courses offered at The Hub than for the existing programmes. All of the 25 BP Scholars from the 2023/24 intake completed the programme, and the achievement rates of new apprenticeship programmes exceeded the national average (61% in 2023/24, compared to the national average of 55%). In 2024/25, 97% of the 73 students aged 16 to 18 studying Engineering courses completed the year. This exceeded the national average of 92%.

Compared with the new courses, completion rates in existing courses are lower. In 2023/24, the average completion rate of all 16-to-18 courses that use The Hub was 79%. New courses, particularly those in Engineering and the BP or Balfour Beatty Scholarships, were oversubscribed. This may suggest that the new courses attract more motivated and higher-achieving students, or are otherwise more engaging, encouraging retention and completion.

College stakeholders and student beneficiaries highlighted the importance of the BP Scholarship programme, particularly for enrolling and retaining learners. Beyond the financial support provided by the scholarship, some beneficiaries reported that potential future employment benefits were a key factor in their decision to enrol at The Hub:

> *"I applied to Redcar and Cleveland College obviously because of the BP scholarship. It opens doors and it has got a lot of publicity and it helps you get apprenticeships in the future." Student at Redcar and Cleveland College.*

Students' confidence about their future job prospects has increased as a result of The Hub. Students specifically mentioned the value of working 'hands-on' with the equipment. They felt this better prepared them for the industry and provided insight into jobs they did not previously consider attainable.

The BP Scholarship is helping to increase enrolment of female students in engineering and manufacturing courses, according to college stakeholders. Half of the 2024/25 BP scholarship cohort identifies as female. The college noted that they had created a specific recruitment drive to encourage female students to enrol, highlighting the BP Scholarship as part of it.

D.2 Norwich: Advanced Construction and Engineering Centre

D.2.1 Key findings

THE PROJECT

The Advanced Construction and Engineering (ACE) Centre and the Digi-Tech Factory are education facilities at City College Norwich. They provide new equipment and classes focused on digital, engineering, and manufacturing skills. These are Town Deal projects located at the City College Norwich. The Digi-Tech Factory opened in October 2021, and the ACE Centre opened in February 2023.

CHANGES IN THE LEVEL OF QUALITY OF LOCAL ADVANCED SKILLS

There is strong evidence that the project has delivered its key outputs. The refurbishment of the ACE Centre and the extension of the Digi-Tech Factory have increased both the amount of space available and the quality of the learning environment for students at City College Norwich. Stakeholders report greater capacity to deliver new courses, higher course quality, and improved ability to attract students and business partners.

There is medium-strength evidence of an increase in the number of students being taught. The facilities are well used, with Digi-Tech learner and apprentice numbers exceeding the expectations set out in the investment plan.

However, the evidence of an overall increase in advanced skills in Norwich is weak, and it has not been possible to assess the additional impact of the projects or the extent to which students are being displaced from other courses with the available data.

CHANGES IN BUSINESS OUTCOMES

There is weak evidence of increased business engagement and collaboration as a result of the projects, although additionality cannot be assessed with the available evidence. Interviewed college stakeholders reported that the facilities allowed them to form new business partnerships and deepen collaborations with existing partners. Business and college stakeholders also reported that engagement with businesses throughout the course and facility design process was a key part of project success.

It is not possible to assess the extent to which the projects have improved actual business outcomes (such as productivity or revenues) or addressed skills shortages in Norwich, due to limits in the available data and expected time lags in these impacts.

D.2.2 Project context and hypotheses

Norwich is a city of about 206,000 people (ONS, 2024) located in the East of England, in an area of relatively high deprivation. The Norwich local authority is within the 30% most deprived in England (MHCLG, 2025).

Levels of education, skills, and training are relatively low in Norwich compared with the rest of England, with 36% of the local population in the top decile of Lower layer Super Output Areas in England (in terms of education-related deprivation as of 2019).

Norwich City Council was awarded more than £25 million in Town Deal funding across 8 projects. The ACE Centre received £3.1 million in Town Deal funding. The Digi-Tech Factory received £1.5 million in Town Deal funding, with another £9.9 million from other sources.

The Digi-Tech Factory is a new building at City College Norwich which provides modern, industry-standard skills facilities, including 12 Digital Studios and 5 e-labs. The facility is home to the college's digital, construction, engineering, and manufacturing T Level pathways and is used to embed digital skills in other programmes. The ACE Centre involved a refurbishment of an existing unit on the college campus. It contains a dedicated lab for automated engineering and manufacturing, the region's first motor vehicle training facility, a new learning environment for advanced construction training, and new technology classrooms.

Based on the specific context relating to Norwich and the projects, the following hypotheses were developed in collaboration with the local authority and college:

1. **Hypothesis 1:** The majority of businesses within Norwich report skills shortages, specifically in higher technical and management skills, requiring a new pipeline of experienced graduates (context). The ACE Centre and Digi-Tech Factory will provide additional, high-quality education, training, and facilities, including new or expanded courses (output). It will achieve this by targeting skills that are best suited to the needs of local employers, such as those in the digital sector (mechanism). The new facilities are expected to increase the number of students being taught advanced skills and improve their academic level (short-term outcome), in turn increasing the overall level and quality of local advanced skills (longer-term outcome).
2. **Hypothesis 2:** Norwich is uniquely positioned in the digital sector with many key businesses located within the city (context). The ACE Centre and Digi-Tech Factory will provide training to apprentices and employees and increase partnerships with local businesses (output). By targeting the right companies and skills, this is expected to increase the number of employees (or potential employees) with advanced skills, address skills gaps (mechanisms and short-term outcomes), and lead to improvements in local business outcomes such as turnover and productivity (longer-term outcomes).

D.2.3 Emerging findings

EVIDENCE THAT THE ACE CENTRE AND DIGI-TECH FACTORY HAVE INCREASED THE LEVEL AND QUALITY OF LOCAL ADVANCED SKILLS (HYPOTHESIS 1)

There is medium-strength evidence that the ACE Centre and Digi-Tech Factory have increased the provision of digital and advanced manufacturing skills and supported the uptake of related programmes. Both projects have improved the amount and quality of teaching and learning space for advanced skills education. Hundreds of learners and apprentices use the facilities each year, exceeding the targets set out in the initial Town Investment Plan. Throughout this case study, the strength of evidence is assessed using the framework outlined in Annex A.

Evidence that this has led to an overall increase in the level and quality of local advanced skills is weak. College stakeholders reported that the projects have enabled new advanced skill courses to run and enhanced existing courses. The fact that some project users are enrolled in these new or improved courses suggests that there is some additionality in the level and quality of advanced skills being developed in the local area. However, more data is required to quantitatively validate and quantify the extent of any additionality.

Changes in the amount and quality of teaching and learning space

The Digi-Tech Factory project created 2780m^2 of new space for digital learning and teaching, in line with the target set in the project's business plan. Monitoring data show that the project delivered a significant amount of specialist IT equipment, including high-performance workstations, interactive touch screens, and robotics technology.

The ACE Centre involved refurbishing an existing building rather than creating a new space. Improvements to the quality of the space and facilities include the addition of high-specification CAD (Computer-aided design) PCs, computer-controlled lathes and mills, and electric motor vehicles.

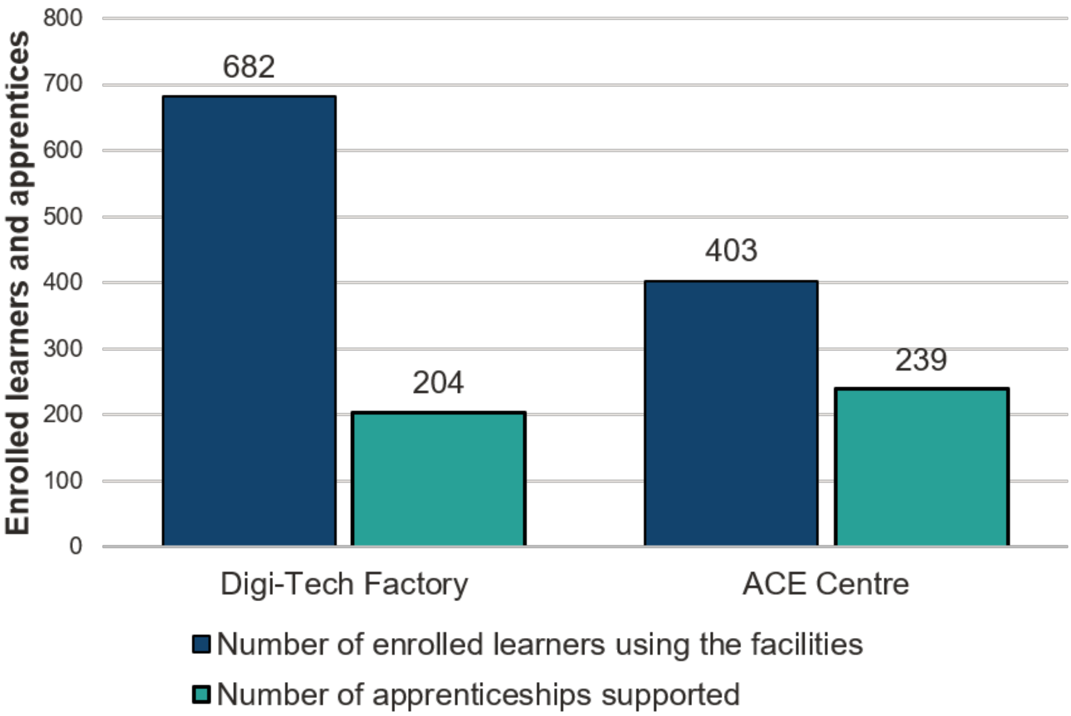
College stakeholders reported that both the ACE Centre and Digi-Tech Factory have had a substantial positive effect in increasing the amount of space and quality of the learning environment for students. In particular, they highlighted how improvements to the quality of facilities have had knock-on effects in a number of areas:

1. **The ability to deliver new courses**. Without the additional space and high-quality facilities from these projects, the college would not have been able to run several courses. For example, the Data Analyst, Information Communication Technician, and Game Design courses at the Digi-Tech Factory and the Electric Vehicle courses at the ACE Centre are wholly dependent on the new facilities.
2. **The quality of existing courses**. In courses that existed prior to the projects' completion, students had to use lower-specification equipment (such as PCs and lathes) and often shared facilities, which negatively affected course quality and student learning.
3. **Attracting prospective students and partner businesses**. Stakeholders noted that the high-quality facilities and equipment at the Digi-Tech Factory and ACE Centre make a significant difference to prospective placement employers, apprenticeship providers, and students when they visit the site.

Changes in the number of students enrolled and receiving training

Figure D.3 shows enrolment at the Digi-Tech Factory and ACE Centre. There is strong enrolment at both facilities, relative to the targets set out in the business case.

Figure D.3 Enrolled learners and apprentices at the Digi-Tech Factory and ACE Centre (April 2024 to March 2025)



Source: MHCLG Monitoring Data.

At the Digi-Tech Factory, there were 682 learners and 204 apprentices between April 2024 and March 2025, an increase from 300 learners and 55 apprentices in the previous period (April 2023 to March 2024). These figures exceed the 477 learners and 100 apprentices targeted in the Norwich Investment Plan prior to the project's start.

At the ACE Centre, there were 403 learners and 239 apprentices between April 2024 and March 2025, compared to 450 learners and 60 apprentices in the previous period (April 2023 to March 2024). The ACE Centre business case does not target a specific number of learners or apprentices to be supported, but aims to support 140 additional learners and 30 additional apprentices above the current baseline.

It is not possible to determine the extent to which these learners might be displaced from other facilities and courses, given the enrolment figures from the monitoring data. Data from the college to assess additionality was not available. It was also not possible to assess additionality with the available data in the Longitudinal Educational Outcomes data set developed by the Department for Education, due to the granularity of data available and reporting lags.

However, college stakeholders report that the 2 projects allowed them to offer additional courses and enrol additional students who would not have been enrolled if the Digi-Tech Factory and ACE Centre had not been built. The fact that the projects allow the college to offer these additional courses suggests that some portion of these learners and apprentices will be additional. This may represent an overall increase in the number of young people and adults with advanced skills in the local area. However, the extent of this additionality is uncertain at present.

EVIDENCE THAT THE ACE CENTRE AND DIGI-TECH FACTORY HAVE IMPROVED LOCAL BUSINESS OUTCOMES (HYPOTHESIS 2)

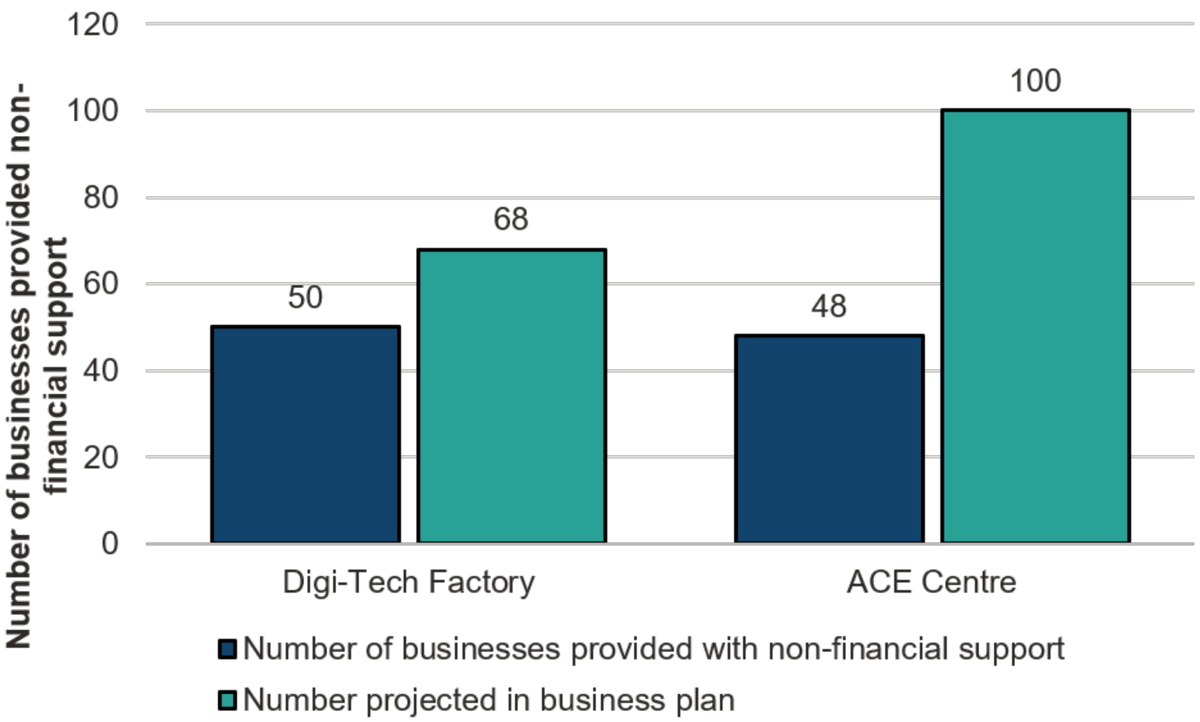
There is weak evidence that the ACE Centre and Digi-Tech Factory have increased the number of businesses receiving support and collaborating with the college.

However, there is no evidence of overall improvements in employment or in local businesses' ability to find workers with advanced skills to date. These changes are expected to emerge only in the longer term, and it was not possible to assess them with the available evidence. While stakeholder input suggests the projects are likely to have a positive effect, this remains unquantifiable at this stage.

Changes in the number of businesses providing non-financial support and collaborating with the college

Figure D.4 shows that the Digi-Tech Factory provided non-financial support to 50 companies between April 2024 and March 2025, slightly lower than the 68 targeted in the business case. In the same period, the ACE Centre provided non-financial support to 48 companies, fewer than the business case estimate (over 100).

Figure D.4 Number of businesses provided non-financial support from the Digi-Tech Factory and ACE Centre (Apr-Sep 2024)



Source: MHCLG Monitoring Data.

Interviewed college stakeholders reported that some of this support is likely additional (it would not have been achieved without the projects). Stakeholders reported that the projects have allowed the college to offer additional courses and enrol additional apprentices. However, the exact number of additional companies that were provided non-financial support cannot be determined based on the available data.

College stakeholders also suggested that there will likely be an increase in the overall number and skill level of apprentices who return to the workplace. This may have a positive effect on local business outcomes in the longer term, but this will take time to realise. It was not possible to validate this with quantitative data or through interviews with supported businesses.

There is some evidence that the new facilities provided by the projects have led to additional collaborations with specific local businesses. Aviva is a multinational insurance company with a significant presence in Norwich. After the Digi-Tech Factory was built, Aviva partnered with the college as part of its Foundry initiative, which was designed to help build Norwich's digital workforce. The initiative involved supporting T Level students based at the Digi-Tech Factory with training sessions and work placements, as well as running a Hackathon at the facility. A stakeholder suggested that the facilities and training offered at the new building were instrumental in hosting the Hackathon and provided a cohort of T Level students learning advanced skills who could engage with the Foundry initiative.

Changes in the number of businesses investing in, and finding workers with, advanced skills

There is some anecdotal evidence that the Digi-Tech Factory and ACE Centre are supporting the availability of, and investment in, advanced skills in Norwich. However, there is no quantitative evidence of an impact on these measures to date.

Interviewed stakeholders from the college, local authority, and local businesses described the increased demand for and shortages of advanced digital, construction and engineering skills in the local economy, consistent with the findings in Norwich’s local skills strategy publications. As the Digi-Tech Factory and ACE Centre projects have enabled the college to offer additional courses in advanced skills, the number of apprentices (and students with work placements) on these courses may indicate an increase in investment in advanced skills by local businesses.

One local business stakeholder noted that the skills taught at the Digi-Tech Factory should help address skill shortages in the digital space. A local authority stakeholder also stated that several businesses had provided positive anecdotal feedback on the quality and skills of those trained at the Digi-Tech Factory.

However, quantitative evidence on whether the Digi-Tech Factory and ACE Centre have driven additional investment in advanced skills by local businesses was not available at the time of this case study.

D.3 Ashfield: Enterprising Ashfield

D.3.1 Key findings

THE PROJECT

Enterprising Ashfield is a business support and skills programme delivered by Nottingham Trent University (NTU) on behalf of Ashfield District Council. It supports new and existing businesses, offers free short courses for local people and firms, and provides match-funded graduate placements. Delivery began in 2022 and is funded by the Ashfield Town Deal until March 2026. The programme was extended to September 2026 using underspend from the Towns Fund.

CHANGES IN BUSINESS CREATION AND GROWTH

There is strong evidence that the programme delivered its targets, with strong uptake among local businesses and entrepreneurs, enabling the programme to complete its targets ahead of schedule.

There is medium-strength evidence of a positive effect on business creation, productivity, and innovation of participating entrepreneurs and businesses. Users point to a combination of grant provision, tailored advice and links to NTU as important drivers of business success.

There is medium-strength evidence that uptake of the business support and training activity is additional. Interview and survey evidence suggest the programme reached people who would not otherwise have sought business support or skills programmes.

It is too early to identify area-wide effects on business creation, growth, or job creation across Ashfield, because secondary data does not yet cover a long enough period after programme delivery.

CHANGES IN SKILLS AND EMPLOYMENT

There is strong evidence that the programme widened access to free training for people who live or work in Ashfield. Enrolment in courses has been strong and consistent since the start of the programme.

There is medium-strength evidence that the programme had a positive and additional effect on learners. The majority of learners reported they would not have undertaken the training had it not been for Enterprising Ashfield.

There is medium-strength evidence of positive skills and employment effects for learners. However, it is too early to assess these at the local authority level.

There is medium-strength evidence that graduate placements support local employment. The programme has successfully placed graduates in local companies, with several positions converting to permanent roles. Businesses report positive feedback from the programme that has helped them to fill short-term skills gaps.

D.3.2 Project context and hypotheses

Ashfield District Council covers Kirkby-in-Ashfield, Sutton-in-Ashfield, and Hucknall. Kirkby has around 21,000 residents, and Sutton has around 37,000 (ONS, 2024). Deprivation in Ashfield is relatively high. It ranks in the 30% most deprived local authorities in England (MHCLG, 2025).

Ashfield District Council received £62.6 million in a joint Town Deals award for Kirkby and Sutton-in-Ashfield across 17 projects. Of this, £3.9 million was provided to the Enterprising Ashfield project, which also received an additional £3.8 million from other sources.

The Enterprising Ashfield programme, which started operating in March 2022, addresses a range of challenges in the area. These include below-average skill levels, low business survival rates, and low graduate retention. The programme has 3 main elements:

1. **Business support:** providing support for new business ideas through the HeadStart programme, and support for the growth of existing businesses through scale-up and R&D support.
2. **Local skills:** offering a range of short courses for individuals (such as writing, social media and marketing, and photography) and businesses (such as Power BI and IT software).
3. **Graduate placements:** providing financial support to businesses that offer 6, 12 or 48-week graduate placements.

Unlike public realm-focused case studies, Enterprising Ashfield is not expected to influence outcomes through visible physical change in the town. Instead, the programme is expected to affect outcomes through direct support to individuals and businesses, including business advice, short courses, and graduate placements. As a result, effects are expected to emerge first at the participant level, including changes in business creation, business growth, skills, and employment. Wider area-level effects take longer to materialise, and their publication lags behind delivery, meaning these wider quantitative outcomes are not yet fully observable.

Based on the local context and the logic model, the following hypotheses were developed in collaboration with the District Council:

1. **Hypothesis 1:** Ashfield is located in an area of high deprivation, with increasing unemployment post-COVID-19 and a history of low graduate retention (context). The Enterprising Ashfield programme is expected to provide startup and scale-up business support, as well as Research and development (R&D) support, to local businesses (output). Due to a lack of available alternatives and targeted marketing activities (mechanism), this is expected to change the uptake of training by local businesses and entrepreneurs (short-term outcome), reaching those that would otherwise not have considered support (mechanism and short-term outcome). This is expected to lead to an increase in the number of new businesses in the area and an increase in local business growth (long-term outcome).
2. **Hypothesis 2:** Educational attainment and average salaries in Ashfield are lower than the national average (context). The Enterprising Ashfield programme is expected to provide a variety of skills-training programmes to individuals (output). Due to marketing aimed at increasing awareness of the wide variety of free training offered (outputs and mechanisms), this is expected to improve local skills (short-term outcome). The programme is expected to reach individuals who would otherwise not have undertaken training (mechanism) and lead to an increase in employment and potential earnings (long-term outcome).

D.3.3 Emerging evidence

EVIDENCE THAT ENTERPRISING ASHFIELD HAS INCREASED BUSINESS CREATION AND SUPPORTED BUSINESS GROWTH (HYPOTHESIS 1)

There is strong evidence that Enterprising Ashfield has delivered a range of business support since March 2022 and achieved high levels of take-up by businesses and local entrepreneurs. Stakeholders suggest this reflects the programme’s community-focused outreach and marketing, which helped it reach new businesses and entrepreneurs who might not otherwise have engaged with support. Throughout this case study, the strength of evidence is assessed using the framework outlined in Annex A.

There is medium-strength evidence to support that recipient businesses and entrepreneurs have started new businesses or improved productivity, innovation, or turnover as a result. However, it is not yet possible to assess the contribution to similar business outcomes across Ashfield as a whole.

In addition, there are several regeneration projects in Ashfield funded by the Towns Fund and other non-Towns Fund sources. It is not possible within this evaluation to fully separate the effect of the Enterprising project from the other regeneration works in Ashfield. Changes in the local area may be driven by the collective effect of this wider portfolio of projects, rather than the Enterprising Ashfield project alone.

Changes in the uptake of business support

There is strong evidence that Enterprising Ashfield has achieved high levels of take-up across its business support offer. It has delivered strongly against targets. For example, the programme had already met its HeadStart target of supporting 225 new businesses by November 2025, based on programme monitoring data. It also exceeded its graduate placement target by November 2025 (56, compared with the target of 50). It was close to meeting its targets for business growth support and R&D support.

Stakeholders said this take-up is driven by the way the programme was marketed. They described a strong community-focused outreach approach, including flyer drops, radio features, and bus stop adverts. In their view, this helped the programme reach people and firms who would not otherwise have approached the council or university for help.

Awareness of the programme is reasonably high, as indicated by a survey of local residents conducted as part of this study. Of the residents surveyed, 15% had heard of Enterprising Ashfield, and 3% reported direct or indirect experience with it. These proportions were consistent between the baseline in March 2024 and the follow-up in March 2025.

Satisfaction with business support in Ashfield improved from the baseline to the follow-up resident surveys. However, these survey samples are small, so findings should be treated with caution. The share of people reporting being satisfied or very satisfied rose by 6 percentage points to 18%.

Changes in the number of new businesses

There is medium-strength evidence that Enterprising Ashfield has supported the creation of new businesses among participants.

Survey evidence collected by NTU suggests that many HeadStart recipients have gone on to start a business. Among the 52 entrepreneurs who received HeadStart support and responded to the survey, 87% said they had started a business, and a further 12% said they still hoped to do so.

Stakeholders and delivery partners reported that the programme helped people overcome practical barriers to starting a business, including limited finances, low confidence, and knowledge gaps. They also felt that the support was reaching people who would not otherwise have had the knowledge or confidence to start up a business.

There is some evidence that part of this activity is additional. A third of beneficiaries who started a business after receiving support (33%) said they would not have done so without Enterprising Ashfield. This suggests the programme has done more than support people who were already likely to start a business.

However, these findings are based on self-reported evidence from supported participants. It is too early to determine whether Enterprising Ashfield has increased business startup rates across Ashfield overall, because the latest published data do not cover a sufficient period after the programme. For example, the Business Structure Database (BSD) is only available up to 2023, which would capture only the first year after the start of the programme.

Changes in business growth

There is emerging evidence that Enterprising Ashfield is supporting business growth, but the evidence is not yet strong enough to assess wider impacts across Ashfield.

Businesses receiving growth support, R&D collaboration, or graduate placements reported positive effects from the programme. Among NTU survey respondents:

- 62% said the support had led, or would lead, to higher productivity
- 38% expected an increase in turnover
- 81% said the programme had helped them adapt, innovate, or change in a positive way

Beneficiaries interviewed for the case study were also positive. Some said the support had helped them grow more quickly than they otherwise would have. Others highlighted the value of links to NTU academics and the way the programme helped them identify new opportunities for innovation and growth.

There is also some evidence that the programme is helping businesses build networks. Stakeholders described new links forming between small firms that met through HeadStart or the short-course offering. This may create further opportunities for referrals, collaboration and shared learning over time.

However, most of this evidence is based on participants' views and future expectations. Therefore, it is too early to draw firm conclusions about the programme’s effect on wider business growth, job creation or business performance across Ashfield.

EVIDENCE THAT ENTERPRISING ASHFIELD HAS IMPROVED EMPLOYMENT OPPORTUNITIES THROUGH THE PROVISION OF SKILLS TO LOCAL PEOPLE (HYPOTHESIS 2)

There is strong evidence that Enterprising Ashfield has expanded access to free skills training for people living or working in Ashfield.

There is medium-strength evidence that participants have developed useful skills through the programme. However, it is too early to assess the extent to which this has translated into wider employment and earnings impacts across the area.

Changes in access to, and uptake of, skills training

There is strong evidence that Enterprising Ashfield has increased access to, and take-up of, skills training in Ashfield.

The programme offers free short courses for individuals and businesses. These include courses aimed at supporting people into work, helping them progress in their careers, or strengthening skills needed to start and grow a business. Courses cover a wide range of topics, from writing and presentation skills to digital tools, AI, and marketing.

The course offer has expanded quickly. During its first year, the programme offered 14 short courses. This rose to 44 courses in 2023/24 and 76 courses in 2024/25. By March 2025, 743 unique learners had taken part, including 345 returning learners. Monitoring data from February 2026 shows that the programme had exceeded its targets for both new and returning learners, resulting in more than 1,100 enrolments in Enterprising Ashfield training.

Stakeholders and beneficiaries said the design of the offer helps explain this strong take-up. Courses are free at the point of use, delivered locally or online, and cover both basic employability skills and more technical content. This appears to have made the offer relevant and accessible to a wide range of residents and local businesses.

There is also evidence of sustained engagement. Stakeholders said many participants progressed from one course or support offer to another, with the programme team helping them identify suitable next steps. This suggests that Enterprising Ashfield is not only attracting learners but also keeping them engaged.

Changes in the skills of local people

There is medium-strength evidence that Enterprising Ashfield has improved skills for those who took part in the programme.

Participants reported that the training was relevant to their careers and business needs. NTU’s participant survey, shared with Frontier Economics in February 2026, found that 80% of course completers said the training had encouraged them to undertake further training. This suggests the programme is helping to build confidence as well as skills.

There is also evidence that the training is reaching people who would otherwise not have engaged in learning. Most of the learners surveyed (64%) said they would not have undertaken the training without Enterprising Ashfield. This suggests the programme is widening access rather than simply replacing existing activity.

Stakeholders and beneficiaries described the courses as accessible and well-matched to local needs, especially in digital and marketing skills. These courses were particularly popular and were seen as helping people and businesses address important local skills gaps.

However, this evidence is based on participants' views rather than a broader measure of skill change across Ashfield. Therefore, it provides a good indication of positive change for learners, but not for the area as a whole.

Changes in the local employment opportunities

There is weak evidence that Enterprising Ashfield is improving employment opportunities for participants. Some participants said the training had helped them get a new job, secure a promotion or move into a higher-skilled role. However, the limited availability of data means it is too early to assess whether these effects are detectable in wider labour market indicators.

Some learners are already seeing employment-related benefits, based on NTU surveys. Among course attendees, 69% said the training had given them skills that would help their career or earnings potential. A smaller proportion (23%) said the training had helped them secure a job, move into a higher-skilled role, gain a promotion, or start a business.

Stakeholders felt that employment effects were most likely to arise through 3 routes:

- helping learners move into work or self-employment
- helping graduate placements turn into permanent roles
- supporting business growth that could create additional jobs over time

They said the graduate placement strand had been particularly successful, with many longer placements converting into permanent jobs.

Job satisfaction among residents in Ashfield increased between the baseline and follow-up surveys. The proportion of full- or part-time workers in Ashfield who reported that “all” or “most” of the time they “find my job fulfilling” increased by 14 percentage points to 72% in 2025. This difference is significant at the 5% level. However, sample sizes are too small to conclude how far these changes differ specifically for those with exposure to Enterprising Ashfield.

D.4 Scunthorpe: Creating 21st Century Digital Connectivity

D.4.1 Key findings

THE PROJECT

Scunthorpe is the largest town in North Lincolnshire. North Lincolnshire had widespread superfast broadband in 2020/21 but limited access to Ultrafast Full Fibre. The Creating 21st Century Digital Connectivity project delivered Ultrafast Fibre to central Scunthorpe and key business areas. The project was completed in December 2021. This infrastructure now offers speeds from 100 megabits per second (Mbps) up to 1,000 Mbps, with the new network passing roughly 2,000 business premises.

CHANGES IN BUSINESS OUTCOMES

There is strong evidence that the project delivered its core output, increased availability and choice of ultrafast connectivity in the deployment area, and helped create the conditions for further commercial network investment.

There is weak evidence that this increased availability has translated into higher uptake so far. Stakeholders report that businesses value the service's reliability and capacity. However, this evidence is based on isolated examples, and the available survey evidence is limited and based on a small sample.

There is weak evidence of wider, long-term impacts that can be attributed to this project, such as area-wide productivity or business growth. Some individual businesses may have benefited from improved connectivity, but the project is too small and geographically concentrated for these effects to be detectable in town-level indicators.

D.4.2 Project context and hypothesis

Scunthorpe is an industrial town in North Lincolnshire. As of 2024, the town had a population of approximately 83,000 people (ONS, 2024). The local authority is in the 40% most deprived areas in England (MHCLG, 2025).

North Lincolnshire Council was awarded £20.9 million as part of its Town Deal, spread across 6 projects. Creating 21st Century Digital Connectivity received £150,000 in Town Deals funding with an additional £270,000 from other sources. Although broadband coverage was high across Scunthorpe, in 2020, less than 2% of premises had access to Ultrafast Fibre and to the Premises Broadband network (North Lincolnshire Town Investment Plan, 2020).

The project installed an Ultrafast Fibre-to-the-Premises network in the heart of Scunthorpe town centre, covering core professional service areas and extending to key businesses, including major industrial estates. It delivered a fibre network capable of gigabit speeds, passing roughly 2,000 business premises and offering full-fibre speeds from 100 Mbps to 1,000 Mbps. Towns Fund support provided an important bridge funding to bring forward delivery. The project was completed in December 2021.

The Creating 21st Century Digital Connectivity project was selected for the case studies as one of the few projects that focused on expanding digital infrastructure and improving local connectivity. However, the relatively small funding amount and lack of baseline data create challenges for attributing impacts to the project.

Based on the specific context of the project and a logic model developed in collaboration with the local authority, the following key hypothesis was developed:

1. **Hypothesis 1:** Businesses in Scunthorpe had limited access to Ultrafast Full Fibre, even though there was clear demand (context). The project installed a fibre network offering Ultrafast Fibre speeds (output). Because faster broadband enables greater use of digital services (mechanism), this is expected to increase business take-up of ultrafast services and support digitally intensive activity (short-term outcome), leading to improvements in business productivity and growth, including supporting new firms to locate in the town centre over time (long-term outcome).

D.4.3 Emerging findings

EVIDENCE THAT THE PROJECT HAS IMPROVED BUSINESS OUTCOMES (HYPOTHESIS 1)

There is strong evidence that the project increased the availability of ultrafast broadband within the deployment area. Throughout this case study, the strength of evidence is assessed using the framework outlined in Annex A.

However, evidence that this increased availability has led to greater business uptake and, through this, supported business productivity, growth and the attraction of some digitally focused firms to Scunthorpe is weaker.

Stakeholders reported instances in which ultrafast broadband has been instrumental in the relocation, establishment, or growth of some businesses. However, these are specific, isolated examples that are not supported by secondary or survey evidence, which is limited. This, along with the small funding value, makes attribution challenging.

Changes in ultrafast broadband availability

There is strong evidence that the project achieved its primary goals of increasing access to ultrafast broadband in the centre of Scunthorpe. Qualitative evidence supports that the project has also enabled further broadband investment and improvements in the town.

The project delivered Ultrafast Fibre to the Premises access to around 2,000 businesses in central Scunthorpe.

The increase in coverage is reflected in secondary data collected by Ofcom. The data show that in 2020 and 2021, prior to the rollout, the commercial properties in the centre of Scunthorpe (where the cable was deployed) had around 40% ultrafast broadband coverage. This coverage increased to over 70% in 2023.

The average number of ultrafast broadband lines available to properties in the deployment area increased from fewer than one to more than 2, according to Ofcom data. This indicates greater provider choice and resilience for premises.

The project helped to attract broadband providers to the area, which otherwise was not commercially appealing to them, according to local stakeholders:

"The thing is that I learned [from this], that ultra-fast fibre was like a bit of a grabbing exercise for the network at the time and that those providers that weren't prepared to commercially invest in the areas, how do you attract them here? How do you attract them to an area that's got high levels of deprivation throughout the town centre and businesses, business parks that aren't necessarily high technology business parks?" ***Project stakeholder***

There is also evidence of high local demand for ultrafast broadband from residents and businesses. In 2020, a survey conducted by North Lincolnshire Council found that over 1,300 residents and local businesses registered interest in receiving ultrafast fibre.

A business survey was deployed in February 2026 as part of this case study. It was sent to businesses in the area covered by the cable rollout, and it found that the appetite for a good internet connection was high. All 20 respondents agreed that having a fast broadband connection was somewhat or very important for their business. However, it is not possible to draw strong conclusions from the survey due to the limited sample of respondents.

Changes in ultrafast broadband uptake and digital activity

There is weak to moderate evidence that the increased provision of ultrafast broadband has directly led to increased uptake by businesses in Scunthorpe. However, quantitative evidence supporting this is more limited.

There has been some uptake among local businesses, particularly those that value the service's reliability and capacity. Stakeholders pointed to specific examples where the ultrafast broadband was crucial to supporting business resilience and operational capacity.

Wider evidence of uptake is more limited. In the locally deployed business survey:

- 10% of respondents reported having an ultrafast broadband connection
- 50% of businesses reported upgrading their broadband services in the last 4 years to one that is faster or has higher reliability

However, the survey sample is small and unlikely to be representative of all businesses in the area.

Changes in business productivity, growth, and the relocation of new firms

There is weak evidence that the project is supporting business and service location decisions. The available evidence points to emerging, localised effects at the firm level, rather than wider impacts across Scunthorpe. Positive benefits are mostly reported through qualitative insights, with limited quantitative data to support them.

Assessing long-term effects is difficult at this stage. The project's Town Deals contribution was relatively small compared with other investments in the town, and the infrastructure was deployed in a defined central area. This means any benefits are more likely to be visible first in individual business decisions than in area-wide secondary data.

UK Business Count data shows the number of businesses in Scunthorpe has slowly increased from 1,880 in 2020 to 2,075 as of 2024. However, this growth is not directly attributable to the project.

Most of the growth has occurred in sectors that do not appear to be highly reliant on ultrafast broadband. For example, the number of transport and storage businesses increased from 270 in 2020 to 365 in 2024. There have not been clear changes in sectors more likely to depend on strong digital infrastructure, for example, professional, scientific and technical activities, or information and communication. This weakens the case that observed business growth to date reflects the project's expected effects, which would be more likely to emerge first in digitally reliant sectors.

Given the project scale and geography, longer-term benefits are more likely to be felt at the firm level. Stakeholders reported examples consistent with this, including:

1. Ultrafast broadband was seen as important for the success of new office spaces in the town centre, supporting business relocation decisions.
2. A hospital introduced a community diagnostics department locally that requires access to high-speed and reliable broadband. Stakeholders suggest that the availability of ultrafast broadband was an important factor in the facility's location in Scunthorpe.
3. Stakeholders also noted increased interest in investment in the area from residential developers, reflecting the perceived value of strong broadband connectivity for residents.

These examples suggest the project may be contributing to some local investment and location decisions. Still, they remain isolated and insufficient to demonstrate widespread business impacts across the town.

When asked about additionality, stakeholders felt that the Town Deals' contribution bridged a funding gap and accelerated the delivery of the ultrafast cables. They generally expected the private sector to invest in the cable network in the future, but not on the same timeline:

> *"It was the catalyst for the investment into that space… broadband that's available in the town centre and in some of our industrial estates, where, commercially, they wouldn't have made sense to invest in in the past. So without the funding, it either wouldn't have happened, or it wouldn't have happened for a number of years yet."* ***Project stakeholder***

D.5 Hereford: Electric Buses (City Zipper)

D.5.1 Key findings

THE PROJECT

The City Zipper is a free electric bus service for residents and visitors to Hereford. It operates a wholly new route around Hereford city centre, including stops at the main public transport hubs and medical, leisure and retail facilities. The buses started operating in November 2023.

CHANGES IN BUS USAGE

There is strong evidence that the City Zipper has increased the quality of the bus services and overall bus usage, having introduced a new route. Residents use the service to access a wide range of local facilities, and improved north–south connectivity appears to be a key driver of usage.

Satisfaction with the City Zipper is high, with over three-quarters of the users reporting that they were satisfied. Interviewed stakeholders and residents attributed this to the quality of the bus facilities and the fact that it is provided free at the point of use.

Although isolating causal impact is difficult, stakeholder insight suggests that at least some journeys are likely to substitute car trips.

CHANGES IN BUSINESS OUTCOMES

There is no evidence of an impact of the City Zipper on business outcomes such as turnover. This is largely due to the role of wider economic factors, expected time lags in identifying impacts, and the small scale of the project relative to other factors driving local business outcomes. It has not been possible to control for these wider factors within the case study.

D.5.2 Project context and hypotheses

Hereford is a town of about 61,000 people (ONS, 2024) within the Herefordshire local authority area. Although the local authority overall has a moderate level of deprivation, Hereford is within the 40% most deprived towns in England (MHCLG, 2025).

Hereford Council was awarded more than £22 million in Town Deals funding across 6 projects. The City Zipper received £1.7 million of this funding, with an additional £0.5 million from other sources. The project introduced the free City Zipper shuttle service for residents and visitors. This included procuring electric buses, contracting with a service operator, and installing key infrastructure such as bus stops and charging facilities. The bus service is funded until at least March 2027.

Based on the specific context of the project and a logic model developed in collaboration with the local authority, the following key hypotheses were developed:

1. **Hypothesis 1:** Hereford has difficulties with poor connectivity between the city's regions and high congestion (context). The City Zipper is expected to improve the affordability, quality, and number of bus services (output). By improving accessible, community-designed and free public transport access (mechanism), the project is expected to increase bus patronage and physical connectivity in Hereford (outcome).
2. **Hypothesis 2:** By increasing access to, and the number of trips into, the town centre (mechanism and short-term outcome), the City Zipper is expected to improve business outcomes in the town centre (outcome).

D.5.3 Emerging findings

EVIDENCE THAT THE CITY ZIPPER HAS INCREASED BUS PATRONAGE (HYPOTHESIS 1)

There is strong evidence that the City Zipper has increased overall bus usage and improved access to local facilities in Hereford. The project has delivered a new bus route that was not previously served by a commercial operator. While at least part of these journeys is likely to displace car journeys, evidence of overall additional impact and of impact on physical connectivity is weak. Throughout this case study, the strength of evidence is assessed using the framework outlined in Annex A.

Changes in the number, quality, and affordability of bus services

The City Zipper operates on a previously unserved route. While there are commercial bus services that stop in the city centre, the City Zipper operates a unique circular route connecting several local facilities and venues.

Users of the City Zipper reported a high degree of satisfaction with the service. In the resident survey, 47% of the 320 respondents who had heard of the City Zipper were either very or fairly satisfied with the service, compared to 16% who were either very or fairly dissatisfied. When limiting the sample to the 72 respondents who have used the City Zipper at least once in the last 12 months, 76% reported being satisfied with the service compared to just 14% who were dissatisfied.

Stakeholders and residents suggested that this high degree of satisfaction is a result of the service's free, high-quality, and accessible nature. The City Zipper is free to use and offers free onboard phone charging and wifi. The buses have also been designed with accessibility in mind, for example, incorporating bright colour schemes to assist visually impaired users. Town council and local authority stakeholders both reported that the City Zipper's offering compared favourably with existing commercial services. Town council stakeholders noted that, because not all residents live close to the route, some dissatisfaction may have stemmed from the fact that not all residents benefit from the service to the same degree.

Changes in access to local facilities

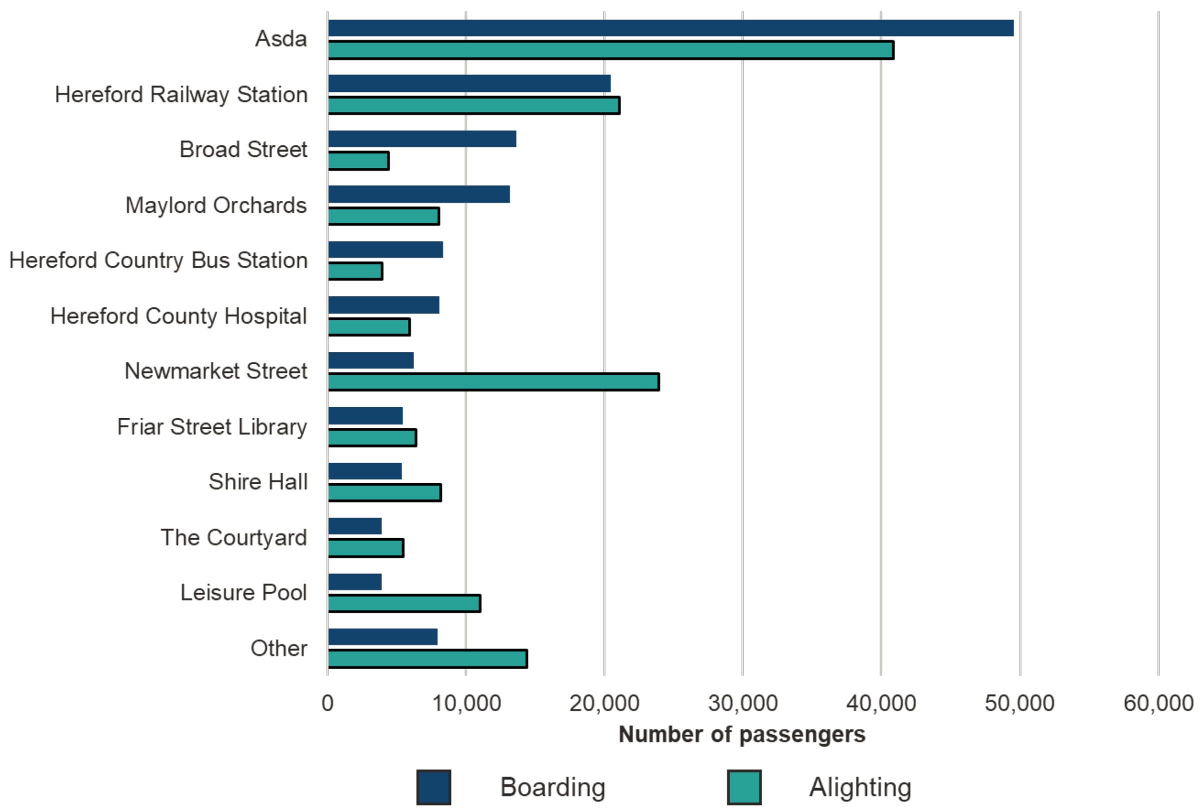
Bus usage data, evidence from the resident survey, and stakeholder input all suggest that the City Zipper is being used by residents primarily to access key facilities in the town centre. The City Zipper's route covers the north and south sides of Hereford City centre, including stops at supermarkets, medical facilities, the train station, retail areas, a technical college, and entertainment, leisure and community facilities.

Interviewed stakeholders and residents reported that the City Zipper has increased the choices and options available to people regarding where they can go and which mode of transportation they can use. They described the improved links between the south and north of the city centre as one of the most important outcomes of the scheme.

In particular, these stakeholders reported that the Asda stop in the south of the city has been used as an unofficial park-and-ride location. People now park their cars and use the City Zipper to access the facilities and venues in the city centre. For example, stakeholders noted that, to access Hereford County Hospital, users would previously have had to rely on the limited and expensive parking. However, it is now common for people to park at Asda and use the free City Zipper to attend to appointments.

Figure D.5 shows bus data on boarding and alighting stops, supporting the view that the City Zipper is being used to access a range of key local facilities and that the north-south connectivity element is a key driver of patronage.

Figure D.5 Most popular boarding and alighting stops on the City Zipper



Source: Hereford City Council.

The most popular boarding stop is the Asda in the south of the city, followed by key transport interchanges, stops close to retail areas in the city, and locations of key medical and community facilities. A similar set of stops is the most popular for alighting, although several stops (such as Newmarket Street) see higher alighting numbers.

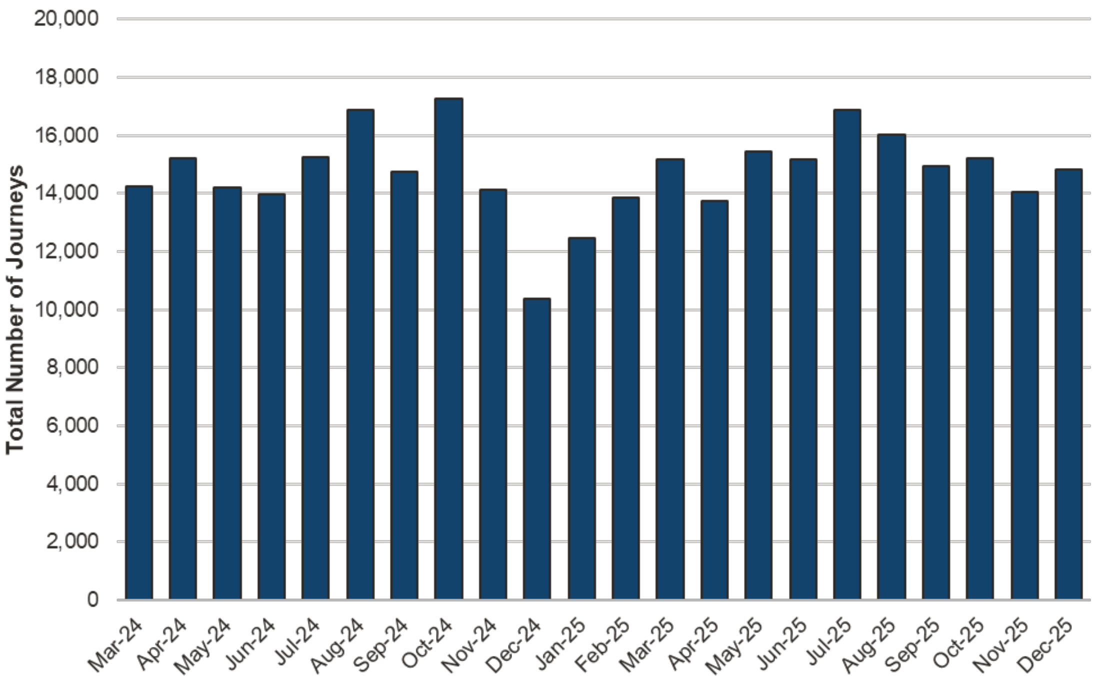
This is further supported by the results of the resident survey. Respondents who had used the City Zipper in the previous 12 months reported that they most commonly travelled on the service to access general shopping facilities and grocery stores (43% of users) and health centres or GP facilities (29% of users). A fifth of users also reported using the City Zipper to access additional public transport links, suggesting it is affecting local residents' connectivity to key facilities and the town centre.

Overall change in bus usage in Hereford

While there is strong evidence of higher-than-expected usage of the City Zipper in Hereford, it is difficult to determine precisely how much of this usage is additional to or displaces car travel.

Figure D.6 shows that there were approximately 15,000 passenger journeys on the City Zipper per month on average, between March 2024 and January 2026. This usage rate exceeds the 150,000 annual trips estimated for the project in the 2021 Hereford Town Investment Plan.

Figure D.6 Number of passenger journeys on the City Zipper by month



Source: Hereford City Council.

The resident survey suggests that usage is primarily driven by a subset of residents in Hereford who use it frequently. In the resident survey, 22% of respondents reported using the City Zipper at least once in the past 12 months, with 7% reporting using the service at least once a month and up to once a week. In contrast, 65% of respondents had not used the Zipper in the past 12 months, with 13% having never heard of the service.

In terms of other potential policies enabling these effects, there are local projects designed to increase walking and cycling in Hereford. However, these are based in a different area of the town and are not expected to directly affect usage of the City Zipper (or the potential car journeys displaced by the new buses).

Evidence of additionality and of overall shift from cars towards buses in Hereford is weak. There are 2 mechanisms by which the use of the City Zipper might represent an increase in overall bus patronage in Hereford.

The first mechanism is if any of the journeys on the City Zipper are additional. A journey would be described as additional if, without the City Zipper, the journey would not have been made. Council stakeholders have pointed to some cases where journeys may be additional, but reported that this effect is hard to evidence.

The second mechanism is when a journey displaces journeys that would have been made by a different mode of transportation (such as a car). The project's business case estimated that roughly 1,500 car journeys per year would be displaced by the City Zipper (amounting to approximately 125 per month). This represents less than 1% of journeys being made on the City Zipper each month.

While there is no clear evidence of additional journeys, there is some evidence that a proportion of journeys on the City Zipper are displacing car journeys (though the exact proportion cannot be established). Stakeholder input, supported by bus boarding data, suggests that many users use the Asda stop as an unofficial park-and-ride into the city centre, implying at least a partial displacement of car journeys, with the final portion of the trip into the city centre taken on the City Zipper. In addition, the fact that the City Zipper operates on a new route that does not duplicate existing services indicates that some of its journeys are more likely to displace car journeys.

Finally, survey evidence also shows a weak correlation between the use of the City Zipper and increased use of public transport in Hereford. In particular, 37% of City Zipper users increased their use of public transport in Hereford over the past 12 months in the resident survey, compared to 18% who reported a decrease. This is further evidence that at least some of the journeys on the City Zipper are either additional or displacing other transport modes.

Where journeys on the City Zipper are displacing (or partially displacing) car journeys, the use of the bus service may have follow-on effects, including reduced greenhouse gas emissions and congestion, as well as improved air quality. However, the actual extent to which these effects have been realised is difficult to evidence.

EVIDENCE THAT THE CITY ZIPPER IMPROVED BUSINESS OUTCOMES (HYPOTHESIS 2)

At this stage, there is no evidence that the City Zipper has improved business outcomes in Hereford. The City Zipper is most commonly used to access shopping facilities, with the most popular boarding and alighting stops at an Asda supermarket. While there is strong evidence of improved accessibility of the city centre for bus users, and some quantitative evidence that bus journeys are displacing car journeys, there is no quantitative evidence that the overall number of trips to the city centre (and footfall or dwell time) has changed.

Wider changes in business outcomes, such as turnover, have not been assessed in depth in this case study due to expected time lags and the scale of the City Zipper project. Local council and business stakeholders reported that the economic climate was challenging for retail and hospitality businesses. In particular, footfall had not yet fully recovered from the COVID-19 pandemic at the time of the site visit, limiting revenue for high street businesses. They noted that while the City Zipper may have played a role in increasing the number of trips into the city, its impact is likely to be limited compared to the wider challenges affecting business outcomes.

D.6 Harlow: Cambridge Road Junction

D.6.1 Key findings

THE PROJECT

The Cambridge Road Junction project created a new highway junction connecting the Templefields employment site to Cambridge Road. It provided improved vehicle access to the site as well as new walking and cycling access. The junction opened for use in August 2025.

CHANGES IN BUSINESS OUTCOMES

There is medium-strength evidence that the project improved the ease and resilience of access to Templefields by creating a second access point.

There is weak evidence of shorter commute times for some users, based on self-reported reductions among employees in the Templefields site. Although this was consistent across most of the employees interviewed at the site, there is limited broader evidence to support the strength of this effect at this stage.

Evidence of changes in vacancies, turnover or business mix to date is weak. While the project appears to have improved access and reduced journey times for some users, these benefits mainly take the form of efficiency gains for existing businesses rather than stronger drivers of new demand. Stakeholders reported that Templefields was already relatively successful, and the project is expected to create time efficiencies for existing businesses, rather than attract new businesses or customers.

CHANGES IN SATISFACTION WITH LOCAL PHYSICAL CONNECTIVITY

There is emerging evidence that the junction improved walking access between Harlow Mill station and the east end of the Templefields site, which some businesses felt improved the commute for staff and customers.

Satisfaction with the junction is mixed. Business representatives described it as functional and convenient, but raised issues with traffic light sequencing and queues.

D.6.2 Project context and hypotheses

Harlow is a town in the East of England and part of Essex County Council. As of 2024, the town had a population of approximately 99,000 people (ONS, 2024). The Harlow local authority is in the 40% most deprived areas in England (MHCLG, 2025).

Harlow Council was awarded £23.7 million as part of its Town Deal, spread across 5 projects. The Cambridge Road Junction received £1.5 million in Town Deals funding with an additional £6 million in an infrastructure grant.

Templefields is an employment site with a mix of light industrial and service businesses, including wholesalers, mechanics, engineers, and fabricators. It also includes a waste and recycling centre. The project used Towns Fund support to create a new road junction providing improved vehicle, cycling and walking access to Templefields. This provides an additional entrance and exit point for the site, which previously relied on a single access.

This case study focuses on the short-term aims and outcomes expected to result directly from the project.

Based on the specific context of this project in Harlow and a logic model developed in collaboration with Harlow District Council, the following key hypotheses were developed:

1. **Hypothesis 1:** Templefields is a key employment site in Harlow, providing one of the main business locations in the town (context). The Cambridge Road Junction provides a new highway junction connecting Templefields onto Cambridge Road, alongside new cycling and walking access to the site (output). Because access to the site is expected to become easier and more reliable (mechanism), this is expected to increase business activity on the site (short-term outcome), leading to fewer vacancies and higher business turnover (long-term outcome).
2. **Hypothesis 2:** Access to the Templefields site has limited high-quality walking and cycling routes (context). The new junction is expected to improve this infrastructure (output). Because journeys should feel safer and more convenient (mechanism), this should increase active travel use and improve resident and worker satisfaction with local connectivity (medium-term outcome).

D.6.3 Emerging findings

EVIDENCE THAT THE CAMBRIDGE ROAD JUNCTION HAS IMPROVED BUSINESS OUTCOMES IN TEMPLEFIELDS (HYPOTHESIS 1)

There is strong evidence that the junction delivered its core outputs. It created a second access point into Templefields, reducing reliance on a single entrance and improving the resilience and reliability of access for businesses, employees, and deliveries. Throughout this case study, the strength of evidence is assessed using the framework outlined in Annex A.

There is weak evidence of short-term efficiency gains, driven by improved reliability and easier access to the site. Several business representatives reported saving between 2 and 20 minutes on their commute each way. However, there is a lack of wider data to support this. Furthermore, there is no evidence of wider business outcome changes so far, as stakeholders reported little change in business mix or vacancies and described Templefields as a relatively successful site already.

Change in the ease and reliability of access to Templefields

Evidence that the junction improved access and resilience is medium-strength and is consistent across different stakeholders. Business representatives were mostly happy with the changes made to the junction. They described it as “functional and well-used” and “convenient”, noting that the junction provides a good access point.

The new junction reduced the site's vulnerability to access disruptions. Local businesses highlighted that the existing single access presented an operational vulnerability, for example, when incidents, maintenance, or temporary restrictions disrupted access for customers and delivery drivers.

However, many also mentioned challenges due to delays in traffic light sequencing, which created long queues. Several also noted people making illegal turns from the junction, due to the inability to make a left turn when exiting Templefields onto Cambridge Road. A trade-off in the design, which aims to ensure the route through Templefields is not used as a cut-through by those driving between the town centre and the north-east of Harlow.

Changes in business activity, vacancy rates, and business turnover

There is weak evidence that the new junction has led to efficiency improvements from reduced commute times and delivery reliability. These appear to be driven by improvements in access. However, evidence of improvements in business outcomes (activity, vacancies, and turnover) is weak.

The Templefields site is primarily visited by people who work there and by individuals using the waste and recycling facility. Very few businesses reported having operations that required customers to attend in person. This means that the scope for ease of access to drive turnover improvements through increased sales directly is limited.

Evidence points to improved time efficiencies for existing users, especially for the businesses located closest to the new junction. Businesses also reported greater reliability in receiving deliveries.

These efficiencies could develop into productivity gains for businesses. Still, the small sample size and short timeframes mean it is not possible to assess the wider impacts on productivity at this stage.

Evidence on changes in vacancies and business activity is limited. Business representatives did not report a noticeable change in the number or composition of firms. Several described Templefields as a relatively successful site already, with typically low vacancy rates and a diverse set of businesses. This suggests that changes in business turnover or occupancy may be slow to materialise and are likely to depend on wider infrastructure upgrades.

EVIDENCE THAT THE CAMBRIDGE ROAD JUNCTION HAS IMPROVED WORKER AND RESIDENT SATISFACTION (HYPOTHESIS 2)

There is medium-strength evidence that the junction improved walking connectivity for some users, particularly between Harlow Mill station and the east end of Templefields. However, evidence of this leading to changes in sustainable travel choices is limited.

Overall satisfaction and travel impacts are mixed. Interviews with local businesses and stakeholders highlighted operational issues such as traffic light sequencing, queues, and unsafe turning movements, which can weaken user experience. Survey evidence points to mixed overall satisfaction with the junction and, more broadly, increased dissatisfaction with connectivity in Harlow.

Change in the availability and use of high-quality cycle and walking infrastructure

There is strong evidence that the project delivered improved cycling and walking connectivity to Templefields, based on business feedback and the site visit. There are clear signs that the new infrastructure has improved walking access for some users, and some reported improved journeys as a result. However, evidence that these improvements have translated into greater use of active travel is more limited. This suggests that the behavioural change has not yet followed the infrastructure improvements and may require further improvements or incentives.

Several of the business representatives based in the Templefields site spoke positively about the improved walking access. The new junction links the train station to the east end of the Templefields site, improving commutes for some workers and customers of certain businesses, particularly those closest to the junction.

However, most of the business representatives interviewed still travelled by car and reported rarely seeing individuals cycling on the new cycle paths. Limited availability of quantitative data on the transport modes used to access the Templefields site limits the strength of the evidence on this point.

Changes in resident satisfaction with road connectivity in Harlow

Evidence of improved resident satisfaction with road connectivity is weak at this stage.

Residents’ satisfaction with the new junction is broadly positive. Survey respondents who had used the junction since it opened were more likely to be satisfied with it (29%) than dissatisfied (21%).

Residents who were satisfied with the junction primarily attributed this to improvements in their journeys to key amenities (59%), although some specifically highlighted the importance of the junction's appearance (16%).

However, residents who were dissatisfied with the junction also commonly reported that the project had worsened their journeys to key amenities (69%). These contradictory findings appear to stem from differing impacts of the project on individual routes, according to interview findings, specifically due to the inability to turn left out of the junction onto Cambridge Road.

More generally, perceptions of ease of travelling around Harlow decreased following the completion of the project, with 30% of residents reporting that it was difficult to travel around the town centre in the follow-up survey, compared to 12% in the baseline survey. Residents attributed this to congestion in Harlow.

The reported decrease in ease of travel in the town centre is not attributable directly to the Cambridge Road Junction. At the time of the follow-up survey, there were other significant works ongoing in the town centre related to other Towns Fund projects. The Cambridge Road Junction is located outside the town centre and was only opened one month before the survey.

The project's role in improving ease of travel is expected to pick up in the longer term. The project is part of a wider infrastructure renewal, designed to manage the pressure from 23,000 new homes planned in north Harlow over the next 20 years.

This includes improvements to a railway bridge that was the single entrance to the Templefields site and a second river crossing to connect the new development to Harlow town centre. This scale of growth is expected to increase pressure on transport infrastructure and local connectivity.

Stakeholders reported that the wider regeneration activities in the area had been well received, particularly the expansion of the high street, which enabled the introduction of a Christmas market. As such, they feel that announcements of future projects and associated roadworks and disruption have been met with positivity and an emphasis on pride in the area:

> *"Largely speaking, it's been overwhelmingly positive of everything that, not just the council, but partners are doing to improve Harlow as a better place to work, live, and play in."* ***Project stakeholder***

However, there is no evidence of changes in overall pride in place in Harlow to date, based on the resident survey findings.

D.7 Mablethorpe: Station Leisure and Learning Centre

D.7.1 Key findings

THE PROJECT

The Station Leisure and Learning Centre (Station Centre) was originally constructed in 1984. It was significantly redeveloped and expanded through a Town Deal project, which was completed in July 2024. The redevelopment updated and expanded the fitness facilities and added a new swimming pool and changing area. It also added a cafe, a wider community space, a meeting room used for learning and training, and a gaming area.

CHANGES IN HEALTH AND WELLBEING

The local community's use of the Station Centre increased significantly following its redevelopment, and satisfaction with the facilities is high. Station Centre users attributed this to the high-quality facilities and classes, which are not available elsewhere in the area.

The evidence suggests that the increase in visits is largely additional, rather than displaced from other facilities. The Station Centre provides facilities which are not otherwise available in the immediate area. There is no evidence of a decrease in visitation to the closest available alternative following the redevelopment of the Station Centre.

There has been no observable change in overall wellbeing in the area to date. Any medium- to long-term wellbeing benefits are most likely to occur among residents in more deprived areas, due to the facilities' location.

CHANGES IN PRIDE IN PLACE

There is weak evidence of improvements in pride in place in Mablethorpe following the completion of the project, although attribution of these changes to the Station Centre is uncertain.

The proportion of residents who would recommend their local area as a good place to live increased by a statistically significant amount. This change was greater among Station Centre visitors, suggesting the project may be supporting pride in place by providing more community activities and high-quality community space. However, visitors to the Station Centre constitute a relatively small subgroup of survey respondents, and this finding should be interpreted with caution.

It is not possible to robustly attribute changes in pride in place in Mablethorpe to the Station Centre specifically. The changes in most metrics of pride in place were not statistically significant, and the metrics that showed statistically significant changes may be affected by other ongoing regeneration projects in the town. A lack of a robust control group for comparison means it is not possible to draw a causal link.

D.7.2 Project context and hypotheses

Mablethorpe is a coastal town in the East Lindsey local authority area. As of 2021, the town had a population of approximately 7,600 people (ONS, 2024). Mablethorpe is located in an area of high deprivation (MHCLG, 2025).

East Lindsey District Council was awarded £23.8 million as part of its Town Deals, spread across 6 projects. The Station Centre received £7.5 million in Town Deals funding with an additional £7.8 million from other sources. Levels of physical activity in East Lindsey are relatively low compared to the rest of the country. In the local authority, 32% of adults were classed as inactive in 2023/24 (defined as doing less than 30 minutes of exercise activity per week), down slightly from 33% in 2019/20 (Sport England, 2025).

The Station Centre was previously partly refurbished in 1997. However, community consultations and broader business planning highlighted that the existing facilities were no longer fit for purpose for the local community's needs. The redevelopment updated the facilities for current needs, notably adding swimming facilities alongside wider improvements. The centre is operated by Magna Vitae, a charitable trust which also operates other sports and leisure centres in East Lindsey.

This redevelopment proceeded in phases, with the Station Centre fully closing from April to July 2024 while works concluded.

Based on the specific context of the project and a logic model developed in collaboration with the local authority, the following key hypotheses were developed:

1. **Hypothesis 1:** The Station Centre is located in an area with high levels of deprivation, in particular with respect to health, and a low baseline level of sport participation (context). The redevelopment is expected to increase the provision of local, accessible, affordable, and high-quality sport and fitness facilities (output). Because of a lack of suitable, close alternative sports centre options (mechanism), this is expected to encourage local residents to increase their level of sports participation and engagement (short-term outcome), leading to changes in measures of residents' physical and mental wellbeing (long-term outcome).
2. **Hypothesis 2:** There is a perception by local residents that there has been a history of underinvestment in Mablethorpe, resulting in deterioration and underutilisation of town assets (context). The redevelopment of the Station Centre is expected to improve the quality of local amenities and community offerings (output) because residents value having sports and leisure facilities locally (mechanism), which is expected to improve residents’ satisfaction with local amenities and increase pride in place (outcome).

D.7.3 Emerging findings

EVIDENCE THAT THE CENTRE HAS IMPROVED LOCAL WELLBEING (HYPOTHESIS 1)

There is strong evidence that the redevelopment of the Station Centre has supported increased sports participation of residents, particularly those from groups with previously lower levels of activity. Increases in use of the sports facilities appear to be largely additional, with no evidence of significant displacement from nearby alternatives. Throughout this case study, the strength of evidence is assessed using the framework outlined in Annex A.

There is no clear evidence of improvements in overall wellbeing in the area, although the increase in physical activity suggests these benefits may be realised in the long term.

Changes in the level of sports participation

The local community has received the updated facilities well. Visitors reported a high degree of satisfaction with the new facilities, and local community use of the facilities is high.

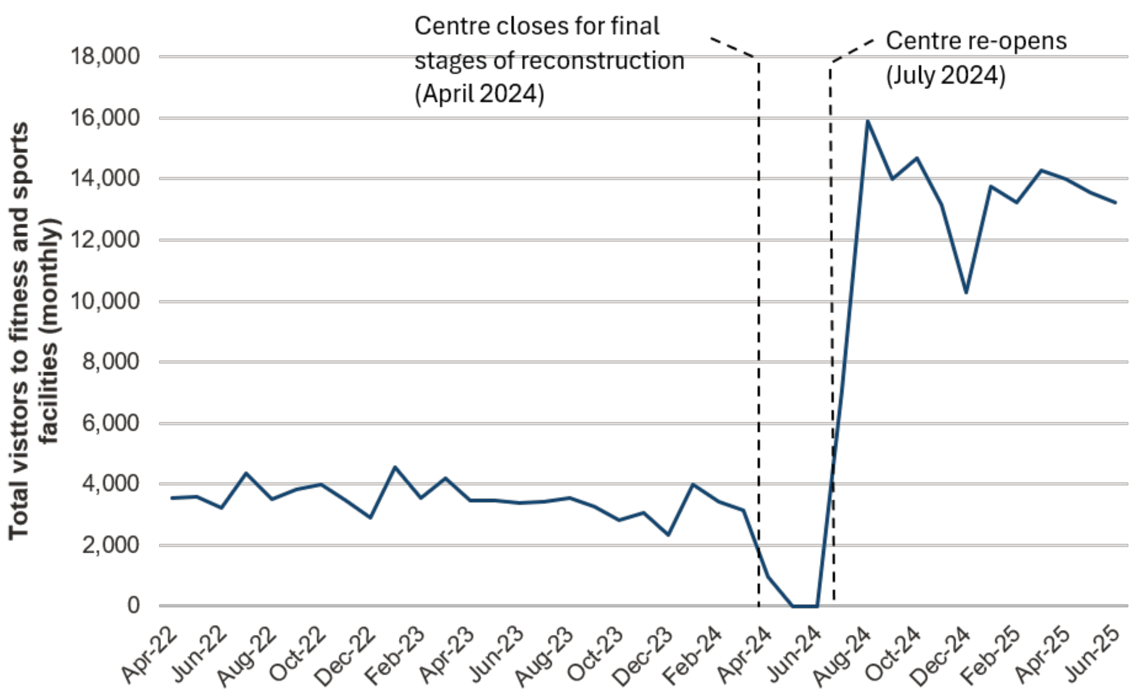
In the follow-up resident survey, 89% of visitors were satisfied with the sports facilities at the Station Centre (with 4% dissatisfied). Of the survey respondents, 82% reported that sports facilities in their local area had improved over the past 2 years.

A third (33%) of respondents to the follow-up survey reported having visited the Station Centre in the previous 12 months. The most commonly visited facilities were the pool facilities, which 66% of Station Centre visitors (and 22% of area residents) had visited in the previous 12 months.

Gym membership at the Station Centre increased significantly after its redevelopment. The Station Centre averaged 385 members per year from April 2022 to March 2024, prior to the redevelopment. This increased by 300%, to 1,539, for the period from April 2024 to March 2025.

Figure D.7 shows a large increase in overall visits to the centre following the completion of the new facilities.

Figure D.7 Number of visitors to fitness and sport facilities at Station Centre



Source: Frontier Economics, with data provided by MagnaVitae.

The fitness facilities had an average of approximately 3,500 monthly visitors over the period from April 2022 to March 2024. This increased to approximately 13,600 during the period from August 2024 (the first full month of reopening) to June 2025. Visits to the entirely new swimming facilities account for 43% of all visits to the fitness facilities since the Station Centre reopened, and usage of the other sports facilities has more than doubled.

There is no evidence of displacement from other leisure facilities in the area. Usage data for the nearest alternative (in Louth) does not show any change following the opening of the redeveloped Station Centre. Stakeholders and users consistently emphasised the lack of available alternatives in interviews.

Station Centre users interviewed for this case study attributed the increased usage primarily to the new swimming facilities and the improved and modern gym equipment. Other major contributors highlighted were the new fitness classes offered, the improved look and feel of the facilities, positive word of mouth within the community, and the community feel of the centre (including the role of the cafe and the friendly attitude of the centre staff):

> *"It always seemed Mablethorpe got all the leftovers, the hand-me-downs, but now we've got all the new equipment here."* ***Local resident***

In general, stakeholders and residents reported that effective community consultation had helped to ensure the centre was fit for the local community, and accessible to different groups (in particular older users, children and families, and users with mobility challenges). They highlighted that this consultation had ensured the centre offered both the fitness options and the wider services required by the local community, and had helped the centre address gaps in community provision for which there were no other options in the area.

There was some feedback that, despite this consultation, more could have been done to ensure the facilities were accessible for specific groups. However, the Station Centre users emphasised that building staff had been generally receptive to input on accessibility and had continued to address these challenges.

Changes in the overall physical and mental wellbeing

Table D.1 shows that overall physical and mental wellbeing in Mablethorpe has not changed significantly following the redevelopment of the Station Centre. While there were some increases in overall reported life satisfaction and the extent to which people felt things they did were worthwhile in the follow-up survey, these changes were not statistically significant. Residents in the Mablethorpe area also reported a non-statistically significant decrease in overall happiness and a statistically significant increase in anxiety.

Table D.1 Wellbeing indicators: Mablethorpe

Question	Baseline[A]	Follow-up[A]	Baseline: visited the Station Centre in the last year[B]	Follow-up: visited the Station Centre in the last year[B]
Overall, how satisfied are you with your life nowadays?	7.41	7.49	7.60	7.62
Overall, to what extent do you feel the things you do in your life are worthwhile?	7.65	7.68	7.82	7.85
Overall, how happy did you feel yesterday?	7.57	7.50	7.94	7.75
Overall, how anxious did you feel yesterday?	2.85*	3.28*	2.81	3.11
Sample size[C]	343 to 361	316 to 335	95	104

Source: Frontier Economics.
Note: Wellbeing indicators are based on an 11-point scale, where 0 corresponds to 'Not at all [satisfied/anxious…]', and 10 is 'Completely [satisfied/anxious…]'. The table reports a weighted average of respondents' answers.
*Asterisks indicate significance: * $p< 0.10$, ** $p<0.05$, *** $p<0.01$*
[A] Statistical significance is tested between the entire sample in baseline and follow-up surveys.
[B] Statistical significance is tested between only the visitors in the baseline and follow-up surveys.
[C] The number of respondents may slightly vary across categories due to variations in individuals who have not responded to a question or responded 'Don't know', so a range is reported.

There were similar changes over time in the reported wellbeing of residents who had visited the Station Centre or who had heard of it but not visited it, at follow-up compared to baseline. While the Station Centre may be improving the overall wellbeing of individual users through increased sport and leisure activity, it is not possible to directly assess this through the survey due to changes in the individual respondents over time.
However, the increases in sport and leisure participation in the local community suggest that the project may contribute to wider changes in wellbeing over time. Station Centre users also had higher reported wellbeing on average than non-users. However, it is not possible to draw a causal link between wellbeing and the use of the Station Centre specifically, as this finding is based on a small sample of respondents who had visited the Station Centre.

All residents in the surveyed areas were in the top 50% most deprived Lower layer Super Output Areas (LSOAs) (based on IMD 2019), with residents in the top 25% most deprived LSOAs accounting for 88% of responses to the follow-up survey. These residents in the top 25% most deprived LSOAs were more likely to have heard of or visited the Station Centre. This suggests that the Station Centre is reaching residents in more deprived areas and is well placed to support wellbeing benefits in these areas in the medium to long term.

EVIDENCE THAT THE CENTRE HAS IMPROVED PRIDE IN PLACE (HYPOTHESIS 2)

While the updated facilities have been well received by the local community, evidence of improvements in wider pride in place is weak. While there were statistically significant changes in some measures of pride in place, there was no change in most indicators. It is also not possible to attribute any changes specifically to the project.

In addition, there are several regeneration projects in Mablethorpe funded by the Towns Fund and other non-Towns Fund sources. It is not possible within this evaluation to fully separate the effect of the Station Centre from the other regeneration works in Mablethorpe. Changes in the local area, or lack thereof, may be driven by the collective effect of this wider portfolio of projects, rather than the Station Centre alone.

Changes in pride in place

The majority of residents (60% in the follow-up survey) believe that it is important to have sports facilities in their local area. Among those who have visited the Station Centre in the last 12 months, this rises to 83%. This suggests that improvements to local sports facilities could affect pride in place in Mablethorpe.

The evidence of any improvements in pride in place to date is weak. Table D.2 shows that while there were statistically significant changes in some measures of pride in place following the completion of the project, in general, the changes in pride in place were not significant. For example:

- the proportion of respondents who would recommend their local area as a good place to live increased from 68% to 74%
- there was a statistically significant increase in the proportion of respondents who agreed their area has improved in the last 2 years, from 14% to 21%
- other measures, such as the proportion of adults who were proud to live in their local area, did not improve

Table D.2 Pride in place indicators: Mablethorpe

Question	Baseline[A]	Follow-up[A]	Baseline: visited the Station Centre in the past year[B]	Follow-up: visited the Station Centre in the past year[B]
Proportion of adults who were (were not) proud to live in their local area	73% (6%)	73% (7%)	71% (9%)	75% (5%)
Proportion of adults who agreed (disagreed) that they would still like to be living in their local area in 5 years	79% (11%)	75% (14%)	73% (17%)	71% (17%)
Proportion of adults who would (would not) recommend their local area to others as a good place to live	68%* (10%)	74%* (8%)	62%* (13%)	74%* (7%)
Overall satisfaction (dissatisfaction) with the local area as a place to live	82% (9%)	81% (7%)	78% (8%)	84% (8%)
The area has improved in the last 2 years	14%**	21%**	27%	36%
The area has got worse in the last 2 years	25%	25%	28%	20%
Proportion of adults who were satisfied (dissatisfied) with local services and amenities in their local area	64% (16%)	69% (13%)	69% (16%)	77% (8%)
Sample size[C]	343 to 361	316 to 335	95	104

Source: *Frontier Economics.*
Notes: *Asterisks indicate significance: * p< 0.10, ** p<0.05, *** p<0.01*
[A] Statistical significance is tested between baseline and follow-up.
[B] Statistical significance is tested between visitors and non-visitors in the past 12 months.
[C] The number of respondents may slightly vary across categories due to variations in individuals who have not responded to a question or responded 'Don't know', so a range is reported.

Improvements in pride in place were larger for respondents who had visited the Station Centre in the past year. However, the sample of respondents who had visited the Station Centre is relatively small, so it is not possible to draw a strong conclusion from this.

There was no statistically significant change in pride in place across any of the indicators available in the wider East Lindsey area between 2023/24 and 2024/25 in the Community Life Survey, or in England overall. However, the changes in most indicators in Mablethorpe were not statistically significant, so it is not possible to attribute any changes to the Station Centre project, given the available evidence.

D.8 Warrington: Living Well Hub

D.8.1 Key findings

THE PROJECT

The Living Well Hub is a health and wellbeing centre developed in a previously vacant retail space in Warrington town centre. It provides a range of collocated health and community services, including mental health, family, and employment and benefits services. It opened in March 2024.

CHANGES IN LOCAL WELLBEING

There is strong evidence that the Living Well Hub has increased access to and use of local health and wellbeing services. This is enabled by its central location in the town centre and the wide range of collocated services.

Evidence of wider changes in local wellbeing is limited. While qualitative evidence suggests the Living Well Hub is supporting the wellbeing of individual users, it is not possible to assess its impact on overall wellbeing in the local area with the available evidence.

CHANGES IN HEALTH DISPARITIES

There is medium-strength evidence that the Living Well Hub is overcoming key barriers to accessing health and wellbeing services, in particular for users from more deprived areas. There is no evidence of overall decreases in health disparities in Warrington to date.

D.8.2 Project context and hypotheses

Warrington is located in Cheshire, England. It had a population of approximately 175,000 as of the 2021 Census (ONS, 2024). Warrington is an area of mixed deprivation overall, with pockets of very high deprivation around the town centre (MHCLG, 2025). The one-mile area surrounding the Living Well Hub is particularly deprived, with the majority of Lower layer Super Output Areas in this area falling within the top 3 deciles of deprivation in England.

Warrington received £22.1 million in Town Deals funding, spread across 7 projects. The Living Well Hub received £3.1 million in Town Deals funding, with an additional £3.2 million from other sources.

A previously vacant retail space in the town centre was transformed into a centre for health and wellbeing services as part of the project. A wide range of pre-existing services were relocated to the Living Well Hub. This includes mental health services, combined assessment services for older people, integrated services for diabetes and related conditions, general and family health services, community services for homelessness and domestic abuse, and Department for Work and Pensions services. The Living Well Hub is administered by the Warrington and Halton Teaching Hospitals National Health Service Foundation Trust.

The project is primarily intended to reduce health deprivation and inequalities in Warrington by providing a convenient and easy way to access services. Based on the project's specific context and a logic model developed in collaboration with the local authority, the following key hypotheses were formulated.

1. **Hypothesis 1:** Warrington has a particularly high level of health deprivation, with poor health and wellbeing outcomes (context). The Living Well Hub will provide access to a range of health services, targeted to the community's needs (output). By providing accessible services in the town centre (mechanism), it is expected to increase use of health services (short-term outcome), leading to an improvement in residents' health and wellbeing (long-term outcome).
2. **Hypothesis 2:** Warrington additionally has high levels of health inequity (context). By collocating health services in a well-accessible area of the town centre, the Living Well Hub will reduce barriers to accessing health services (output). Increased use of health services by the more deprived population in Warrington (short-term outcome) and cross-referrals from collocated services (mechanism) are expected to reduce health disparities within the borough (long-term outcome).

D.8.3 Emerging findings

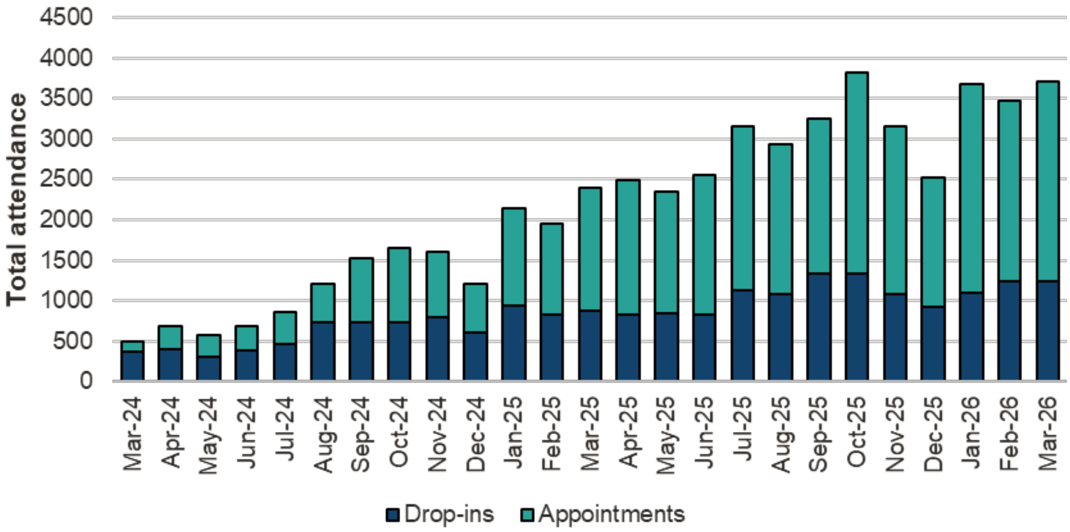
EVIDENCE THAT THE PROJECT HAS IMPROVED LOCAL WELLBEING (HYPOTHESIS 1)

There is strong evidence that the Living Well Hub has supported uptake of health services and the accessibility of health and wellbeing services in Warrington. However, there is no evidence of improvements in wider wellbeing from the project. This is primarily driven by a lack of data. Throughout this case study, the strength of evidence is assessed using the framework outlined in Annex A.

Change in use of health and wellbeing services

Figure D.8 shows that visits to the Living Well Hub have exceeded local authority expectations. There were 16,510 total attendees in the first year of operation, from April 2024 to March 2025. This exceeded the target of 15,000 attendees. Average monthly attendance exceeded 3,000 from April 2024 to March 2026 (the most recent period of data available for this analysis).

Figure D.8 Attendance at the Living Well Hub, March 2024 to March 2026



Source: Data provided by Warrington and Halton Teaching Hospitals NHS Foundation Trust.

As the services have become more popular, stakeholders noted that they shifted towards an appointment-based model (rather than primarily drop-in), with drop-ins now representing approximately a third of all visits. Overall awareness of the Living Well Hub in Warrington is high, with 35% of respondents to the resident survey aware of the Hub and 5% reporting having used it in the previous 12 months.

Usage of the Living Well Hub can be broadly split into 2 categories: visits displaced from other health service providers (in particular, general practitioners) and additional usage.

Displaced visits generate direct benefits for users by providing a more convenient point of health care access and access to additional referral services. They may also generate further benefits by reducing the burden on other health services.

Additional visits provide a direct benefit to visitors by reducing unmet health needs and increasing healthcare utilisation.

Overall, there is strong evidence that visitation to the Living Well Hub is generating benefits by reducing the burden on local hospitals and general practitioners and by expanding access to healthcare through additional healthcare provision.

Of all visitors to the Living Well Hub, 52% reported that they would have obtained the main service they came for from their general practitioner or hospital if the Hub had not been available, between April 2025 and March 2026. A further 32% reported that they would have received services elsewhere, rather than from a hospital or general practitioner.

Of all visitors to the Living Well Hub, 15% reported they would not have obtained services at all if the Living Well Hub were not available. Drop-in users were more likely to report that they would not have obtained services otherwise. This supports the view that the service's accessible, drop-in nature is increasing accessibility.

The teams offering services at the Living Well Hub attributed the strong take-up to the facilities' accessible, central location and the collocation of multiple complementary services.

Since the Living Well Hub is located in the centre of town, interviewed stakeholders reported that this reduced barriers to visits, particularly for residents from deprived areas. The centre was also designed to be welcoming to a broad range of groups, including through the use of colours and design elements, and by ensuring there was a staff member on hand to welcome visitors in an informal way.

Delivery teams at the Living Well Hub repeatedly highlighted the benefits of collocation. Complementary services were organised on the same day to reduce barriers to access and allow for easier cross-referrals. This was an important driver of increased use of the facilities, with 9% of visits resulting in secondary services through referrals. Collocation has also allowed for new services (for example, baby massage classes) to be offered by reducing the cost of provision, according to delivery teams.

Change in health and wellbeing outcomes

Evidence of changes in overall health and wellbeing is weak. While there is some qualitative and quantitative evidence of improvements, it is not possible to attribute changes in health and wellbeing specifically to the Living Well Hub. Data are not available to assess differences in outcomes between users and non-users over time, and the sample of survey respondents who have used the Living Well Hub is too limited.

Qualitative evidence from case studies carried out by the Living Well Hub team supports the conclusion that the Living Well Hub is contributing to changes in individual users' wellbeing. For example:

1. In one case study, a user engaged with Talking Point, which provides face-to-face advice on housing, care, loneliness, and finance. Talking Point was able to connect them to other services at the Living Well Hub, including support for accessing benefits and bereavement counselling. The user reported that their mental health improved as a result of this support.
2. In another case study, a drop-in visitor who was unable to access support via telephone due to their disabilities was helped to access benefits support. This visitor returned a week later, reporting they would not otherwise have been able to resolve the issue and that the support had a significant impact on their overall health.

There has also been a 3% reduction in Type 1 hospital accident and emergency attendances since the opening of the Living Well Hub (visits to major, consultant-led 24-hour emergency departments), according to the local NHS trust. However, it is not possible to attribute this to the opening of the Living Well Hub.

Overall, the qualitative evidence indicates that the Living Well Hub supports improvements in individual wellbeing. However, it is not possible to draw a causal link between any overall improvements in the area and the Living Well Hub. It may be possible to identify the impact of the Living Well Hub on overall local wellbeing in the longer term, depending on future data availability.

EVIDENCE THAT THE PROJECT HAS REDUCED HEALTH DISPARITY (HYPOTHESIS 2)

The Living Well Hub has reduced the barriers for vulnerable residents to access health and welfare services. However, it is too early to assess an overall change in health disparities in the area.

Change in barriers to accessing health services

Project stakeholders and delivery teams emphasised the Living Well Hub's accessibility and central location as key factors in reducing barriers to accessing health services.

Improving accessibility is a key part of overcoming barriers to access for residents from more deprived areas. Of those who responded to the resident survey, 21% were dissatisfied with health and general practitioner services in Warrington (compared to 49% who were satisfied). More deprived residents were particularly likely to report that health services in Warrington are difficult to access. For example:

1. Residents from the most deprived quartile of areas were substantially more likely to report they were dissatisfied due to facilities being hard to access (44%), when compared to residents from the least deprived quartile (13%).
2. Of the residents who were dissatisfied with health and general practitioner services, 78% reported this was due to difficulty obtaining an appointment. This was similar across deprivation levels.

The evidence supports the conclusion that the Living Well Hub is helping to overcome these barriers to access and challenges in obtaining appointments. The Living Well Hub is located in the centre of Warrington, providing easy access to facilities. Approximately a third of all visits to the Living Well Hub are drop-ins (as of May 2025). While this is not direct evidence of reduced barriers to accessing health services, it indicates that the Living Well Hub is providing an offer that addresses key barriers.

Change in health and wellbeing outcomes for deprived residents

It is not possible to assess any changes in health and wellbeing for more deprived residents in Warrington with the available data. However, the evidence for the mechanisms described above suggests that the Living Well Hub may help reduce health inequalities over the long term.

D.9 St Ives: St Ives Theatre

D.9.1 Key findings

THE PROJECT

The St Ives Theatre project refurbished and upgraded an existing theatre to help secure its long-term sustainability. It made essential upgrades to damaged and run-down infrastructure and added a new cafe and bar.

CHANGES IN PRIDE IN PLACE

There is strong evidence that the works improved the condition and usability of the theatre. Satisfaction with the theatre's condition increased significantly in the resident survey, and visitors and wider stakeholders were positive about the changes made.

There is weak evidence of wider pride in place changes to date. However, there is strong evidence that the expected drivers of these changes (visible improvements to a valued heritage asset and strong local support for the theatre) have been delivered.

CHANGES IN BUSINESS OUTCOMES

There is medium-strength evidence that the use of the venue has increased. The theatre is on track to exceed previous visitor numbers, and local residents reported increasing their visits to the theatre.

It is too early to assess the extent to which this increased usage will translate into wider effects on footfall and business outcomes in the areas surrounding the theatre. However, there is strong evidence for the expected drivers of footfall, including greater outreach to other community groups and offering expansion, which are expected to extend the theatre's season.

D.9.2 Project context and hypotheses

St Ives is a coastal town in Cornwall. As of 2024, the town had a population of approximately 5,000 people (ONS, 2024). The local authority is in the 30% most deprived areas in England (MHCLG, 2025).

Cornwall Council was awarded £19.9 million as part of its Town Deals, spread across 9 projects. The St Ives Theatre received £1.5 million in Town Deals funding with an additional £200,000 from other sources. The redeveloped theatre opened in April 2025.

St Ives has a strong cultural and visitor economy, but there are concerns about affordability and the extent to which local people benefit from visitor spend. It has fewer 'anchor' community institutions than larger towns (St Ives Town Investment Plan, 2021). Smaller community assets play an important role in local networks, wellbeing, and resilience, but need investment to remain fit for purpose.

St Ives Theatre is the home of Kidz R Us, a community-led youth theatre company. The project aimed to refurbish and upgrade the existing theatre by providing essential maintenance, a new cafe-bar, and securing the long-term future of the historic building, protecting its role as a community asset. Other new theatre facilities included a staff office, upgraded technical kit, an air management system, and additional toilets.

Based on the logic model and the specific context, the following hypotheses have been developed:

1. **Hypothesis 1:** St Ives has historically low levels of investment in community assets, meaning that locals are underserved and existing assets are underutilised or in disrepair (context). The St Ives Theatre redevelopment is expected to improve the quality of the historic theatre and provide new cafe-bar facilities (output). As the theatre is an important historic asset and the development has local support (mechanism), it is expected to improve resident perception of local facilities (short-term outcome), leading to increased community engagement and improved pride in place (long-term outcomes). Pride in place is considered a longer-term outcome for this project as it is less visible and involves fewer members of the local community.
2. **Hypothesis 2:** Returns from tourism are focused in specific areas of St Ives, meaning that some areas are left behind with higher levels of deprivation (context). The development is expected to expand the theatre's capacity and the number of events and community clubs using its services (output). Through community and outreach activities (mechanism), this is expected to increase the number of residents and visitors in attendance (short-term outcome), which is expected to lead to greater footfall in that area of St Ives, driving business outcomes such as increases in turnover and investment (long-term outcome). Footfall is considered a longer-term outcome as the theatre is in a less well-visited location, so footfall will only grow gradually as awareness and theatre visits grow.

D.9.3 Emerging findings

EVIDENCE THAT THE ST IVES THEATRE REDEVELOPMENT HAS IMPROVED RESIDENT SATISFACTION AND PRIDE IN PLACE (HYPOTHESIS 1)

There is strong evidence that the project improved a valued community asset and is likely to benefit most users and families engaged with Kidz R Us. Throughout this case study, the strength of evidence is assessed using the framework outlined in Annex A.

There is strong evidence that the theatre has been well received, leading to improvements in perceptions of the town's facilities. However, it is too early to assess area-wide pride in place changes, especially as high baseline satisfaction and pride make it more challenging to detect statistically significant changes.

Change in the provision of high-quality community facilities

The survey and interviews provide strong evidence that the quality of the theatre and its facilities have improved.

Local stakeholders reported that the building was in disrepair before the works, including a leaking roof. They described the reopened theatre as a clear improvement in safety, comfort, and professionalism.

Evidence from the resident survey aligns with the interview findings. Among respondents who reported having visited the theatre in the past, satisfaction with the theatre's condition rose from 53% at baseline (September 2024) to 77% at follow-up (September 2025). Satisfaction is especially high (94%) among respondents who reported visiting the theatre since the reopening. Dissatisfaction fell from 8% to 5% over the same period.

Changes in resident perceptions of local facilities

There is strong evidence that resident perceptions of local facilities in St Ives have improved since the reopening of the St Ives Theatre. This finding appears partially driven by satisfaction with the visible changes to the theatre. Ongoing changes to other key historic or community sites across the town, funded by the Town Deals, are also affecting perceptions. It is difficult to disaggregate the impact of the various projects.

The proportion of residents who were satisfied with services and amenities in St Ives town centre increased from 53% at baseline to 61% after project completion. This improvement is statistically significant at the 10% level.

Visiting the new theatre is correlated with higher satisfaction with the services and amenities in St Ives town centre. Residents who had visited the theatre since its reopening were 19 percentage points more likely to be satisfied with the services and amenities in the town centre than non-visitors. The difference in satisfaction is statistically significant at the 5% level.

This suggests theatre use is correlated with having more positive perceptions of local services and amenities. However, the subgroup that reported having visited the St Ives Theatre is small (36 at follow-up), so this does not imply causation and should be considered illustrative only.

Stakeholders and residents reported that the high-quality improvements made to the St Ives Theatre had increased anticipation for the completion of other ongoing Town Deal projects in the town. They considered the various projects part of a set of visible improvements to key buildings in St Ives that addressed local requirements:

> *"I think with the facelift on the outside of the building, and same thing happening at Guildhall, and same thing at Leech Pottery, buildings that were starting to look a little bit aged, are looking nice and clean and tidy. I think that's got to have a positive effect, on everyone really."* ***Local resident***

Residents and volunteers are keen to see further improvements to the theatre and the wider local area. One priority they highlighted is installing an air-conditioning system, as heat in the auditorium, particularly during the summer, was a common complaint among visitors. Air conditioning was considered in the original regeneration plans, but rising costs meant it was not included in the final scope; instead, an air circulation system was installed.

Changes in community involvement and pride in place

There is weak evidence of improvements in community involvement and pride in place. There are some early changes for direct theatre users that were mentioned in qualitative interviews. However, it is too early to detect changes in these outcomes for the wider community.

Stakeholders reported that they expected more interest in the theatre group from St Ives and the wider area as a result of the changes to the theatre. However, it is too early to tell if this has materialised.

Existing users reported benefits from taking part in the theatre programme and activities, including improved confidence and communication skills. Theatre volunteers and stakeholders emphasised the importance of the theatre providing Kidz R Us with a permanent home. This gives young people regular access to the stage, helping them build confidence and experience through rehearsals and more performances.

Table D.3 shows responses to pride in place indicators in St Ives. There is no evidence of a statistically significant change in pride in place in St Ives to date. For example, 82% of residents reported feeling proud to live in their local area at follow-up, compared to 81% at baseline. The high baseline pride in place limits the scope for improvement. Other standard pride in place indicators also do not show significant changes.

Table D.3 Pride in place indicators: St Ives

Question	Baseline	Follow-up
Proportion of adults who were (were not) proud to live in their local area	81% (4%)	82% (3%)
Proportion of adults who agreed (disagreed) that they would still like to be living in their local area in 5 years	82% (6%)	83% (7%)
Proportion of adults who would (would not) recommend their local area to others as a good place to live	77% (6%)	81% (6%)
Overall satisfaction (dissatisfaction) with the local area as a place to live	85% (5%)	87% (5%)
The area has improved in the last 2 years	7%	6%
The area has got worse in the last 2 years	34%	33%
Proportion of adults who were satisfied (dissatisfied) with local services and amenities in their local area	68%* (13%)**	75%* (8%)**
Sample size[A]	328 to 347	250 to 264

Source: Frontier Economics.
*Notes: Asterisks indicate significance: * p< 0.10, ** p<0.05, *** p<0.01*
Statistical significance is tested between baseline and follow-up.
[A] Number of respondents may slightly vary across categories due to variations in individuals who have not responded to a question or responded 'Don't know', so a range is reported.

However, while there was no observable change in the survey analysis, project stakeholders and theatre volunteers noted that the improved facilities had further increased users' pride in their surroundings. One stakeholder noted that young people were very respectful of the space and protective of it due to their increased sense of ownership.

EVIDENCE THAT THE ST IVES THEATRE REDEVELOPMENT HAS IMPROVED LOCAL BUSINESS OUTCOMES (HYPOTHESIS 2)

There is medium-strength evidence that the theatre is already delivering an improved and extended offer, with early signs of increased use of the facilities. Evidence on wider business impacts is weak, and it remains too early to assess at this stage.

In addition, there are several regeneration projects in St Ives funded by the Towns Fund and other non-Towns Fund sources. It is not possible within this evaluation to fully separate the effect of the theatre redevelopment from the other regeneration works in St Ives. Changes in the local area, or lack thereof, may be driven by the collective effect of this wider portfolio of projects, rather than theatre redevelopment alone.

Change in the number of events and services offered, and use of the facilities

There is strong evidence that, since reopening, Kidz R Us has increased its outreach to other community groups and expanded the variety of performances and activities on offer at the theatre. This is expected to drive increased attendance and extend the theatre's season. However, it is too early to assess whether there have been sustained improvements in attendance.

A key part of the theatre's longer-term sustainability strategy is extending its opening hours to allow different groups to use it, offering more activities for the area, and creating further opportunities for income generation.

Since reopening in April 2025, a range of groups have used the space, in addition to its regular Kidz R Us groups. These groups have included:

- 3 school groups and workshops
- 2 exercise groups
- a community group
- 12 third-party music and performance groups

There is also evidence that the new cafe-bar is encouraging more visits to the theatre and providing income to help support the theatre's resilience. Stakeholders said the cafe-bar creates more reasons for visitors and locals to visit the theatre at different times of the day.

It is too early to assess changes in attendance at the theatre shows. At the time of this case study, the theatre had been open for 6 months, limiting the ability to compare attendance rates to those from previous years.

Between April and September 2025, the theatre received over 6,000 visitors. The majority of whom (4,600) attended one of the summer Kidz R Us performances or guest performances held between July and September 2025. Data from previous years was not available. However, project stakeholders confirmed that they were on target to exceed the visitor numbers of previous years.

At the follow-up survey (September 2025), 14% of respondents reported having visited the theatre in the last year. This is a 100% increase in the proportion that reported having visited in the previous 12 months at baseline (September 2024), and it is significant at the 1% level. However, the theatre was closed for renovations between April 2024 and April 2025 at the time of the baseline survey. As a result, these figures are not directly comparable.

Project stakeholders and volunteers, as well as theatre users, suggested the renovations were driving increased attendance. They said the renovations have helped increase people's awareness of the theatre, both through the visibility and curiosity during the works. They also reported that visits to the new cafe-bar may have increased ticket sales.

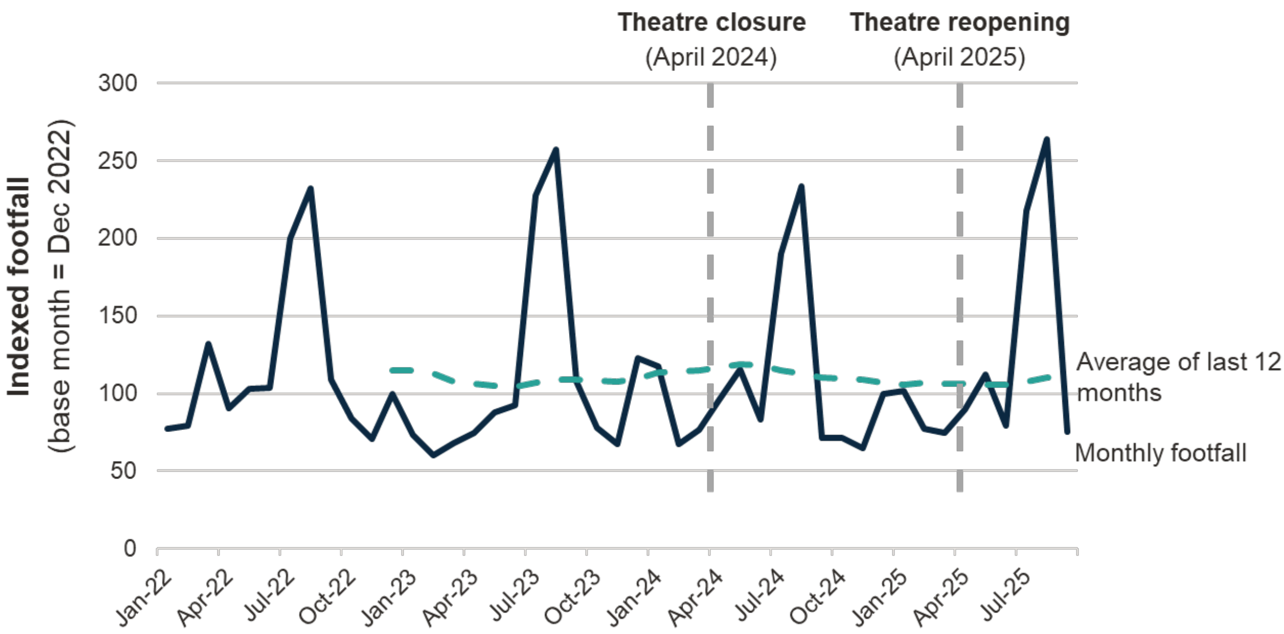
Change in local footfall

The short timeframe since theatre completion means it is too early to assess longer-term outcomes such as footfall. There is currently weak evidence that the theatre renovation has driven changes in footfall in the area surrounding the theatre. This area is less visited than the St Ives seafront and the main tourist areas. Increased footfall is expected to be a long-term outcome as awareness of the theatre and cafe-bar grows. This differs from other case studies, where footfall is treated as a short-term outcome, because the improvements made by the Towns Fund are typically in central locations, where they are more visible to residents and visitors.

Stakeholders and theatre volunteers felt that changes to the theatre and cafe-bar opening hours would encourage increased engagement from tourists. They hoped that ongoing improvements to the local area would encourage more visitors to spend time in other parts of St Ives, rather than focusing on the more traditional tourist areas such as the seafront.

Figure D.9 illustrates that footfall has been relatively stable in the area immediately surrounding the theatre in recent years. As the theatre reopened in mid-April 2025, there is not sufficient post-opening data to assess the effect on local footfall.

Figure D.9 Footfall around the St Ives Theatre



Source: Frontier Economics, based on Place Informatics data.
Note: Footfall data covers 3 streets close to the theatre: North Terrace, Chapel Street and Gabriel Street.

D.10 Kidsgrove: Kidsgrove Sports Centre

D.10.1 Key findings

THE PROJECT

The former Kidsgrove Sports Centre closed to the public in 2017, with no comparable facilities available locally. It was subsequently redeveloped as part of a Town Deals project and reopened in July 2022. The redevelopment expanded the offering, with the centre now providing a 25-metre swimming pool, sports hall, gym, and studios, as well as flexible space for local businesses and community groups.

CHANGES IN HEALTH AND WELLBEING

There is strong evidence that the Kidsgrove Sport Centre renovations provided high-quality and accessible facilities that are well used by the local community. Users were positive about the available facilities, and stakeholders highlighted the importance of community consultation in ensuring they were fit for purpose.

The increase in visits appears to be largely additional. Many residents lacked adequate access to sports facilities while the sports centre was closed, and there is no evidence of a decrease in visits to other alternatives following re-opening.

There is medium-strength evidence of a higher average wellbeing among visitors compared to non-visitors, although differences in most indicators were not statistically significant.

It is not possible to robustly attribute these differences in wellbeing to the redeveloped sports centre, given the limited sample size, absence of a strong counterfactual, and time lag typically associated with wider wellbeing outcomes.

CHANGES IN PRIDE IN PLACE

Residents place high importance on local sports facilities. There is strong evidence that satisfaction with local sports facilities has increased, and satisfaction with the new Kidsgrove Sports Centre is high.

There is weak evidence that the sports centre is affecting pride in place, although it is not possible to attribute any changes to the project specifically. Regular users of the centre report more positive views of their local area than non-users across a range of pride in place measures. However, the differences in most measures of pride in place were not statistically significant. A lack of a baseline and of a counterfactual group for comparison also means it is not possible to draw any causal link between the Kidsgrove Sports Centre and improved pride in place.

D.10.2 Project context and hypotheses

Kidsgrove is a town of about 16,000 people (ONS, 2024) just north of Stoke-on-Trent. The local authority is in line with the average level of deprivation in England (IMD, 2025), but there are pockets of significant deprivation within Kidsgrove itself. Levels of physical activity in Newcastle-under-Lyme are relatively low compared to the rest of the country.

With 33% of adults classed as inactive in 2021/22 (defined as doing less than 30 minutes of exercise activity per week), compared to the 26% average for England.

Newcastle-under-Lyme Borough Council was awarded £16.9 million as part of the Town Deals, spread across 5 projects. The Kidsgrove Sports Centre received £2.3 million in Town Deals funding, alongside £7.6 million from other sources. The original Kidsgrove Sports Centre opened in 1973 and closed in 2017, leaving no suitable alternative facilities in the local area. The redevelopment expanded a range of facilities, equipment and classes, including swimming classes in the 25-metre pool, a sports hall for football, badminton, basketball, cricket and other sports, a gym, a dance and fitness studio, an indoor cycling studio, and space for business and community use.

Based on the specific context of the project and a logic model developed in collaboration with the local authority, the following key hypotheses were developed.

1. **Hypothesis 1:** Kidsgrove Sports Centre is located in an area with high levels of deprivation, particularly in the vicinity of the sports centre, and a low baseline level of sport participation (context). The redevelopment is expected to increase the provision of local, accessible, affordable, and high-quality sport and fitness facilities (output). Because of a lack of close alternative sports centre options (mechanism), this is expected to encourage local residents to increase their level of sports participation and engagement (mechanism and short-term outcome), leading to changes in measures of residents' physical and mental wellbeing (longer-term outcome).
2. **Hypothesis 2:** There has been a history of underinvestment in Kidsgrove, resulting in underutilisation of town assets (context). The redevelopment of Kidsgrove Sports Centre is expected to improve the quality of local amenities and community offerings (output), because residents value having sports facilities locally (mechanism), which is expected to improve residents' satisfaction with local amenities and increase pride in place (outcome).

D.10.3 Emerging findings

EVIDENCE THAT THE KIDSGROVE SPORTS CENTRE HAS IMPROVED LOCAL WELLBEING (HYPOTHESIS 1)

There is strong evidence that the development of Kidsgrove Sports Centre has provided high-quality, accessible facilities that meet the needs of the local population, as indicated by data from the resident survey and qualitative interviews. There is also strong evidence that these facilities have helped increase the sports participation of local people, particularly those from more deprived backgrounds, with significant increases in sports visits in the area. Both qualitative and quantitative evidence point to this increase being additional and not displacing users from nearby alternatives.

However, there is no evidence of improvements in overall wellbeing in the area. While the increases in physical activity suggest these benefits might be realised over the longer term, it is not possible to draw a causal link between the Kidsgrove Sports Centre and improvements in overall wellbeing at present. Throughout this case study, the strength of evidence is assessed using the framework outlined in Annex A.

The provision of accessible, high-quality facilities

There is strong evidence that residents hold positive views of the facilities, and that local awareness of the Kidsgrove Sports Centre is high. This is supported by both qualitative insight and quantitative survey data.

In the follow-up resident survey (May 2024), 79% of residents were aware of the centre, and 18% had visited it within the last 12 months. Of those who have visited the centre, 64% reported doing so at least once a month.

Users of the sports centre were very positive about the facilities available. Over 90% of people who visited in the last 12 months reported that the facilities met their needs. While this is based on a limited sample size, it is consistent with qualitative feedback from stakeholders and facility users interviewed. Qualitative insights from the interviews suggest that the strong importance that the centre holds for the local community (both before and after its redevelopment) was a key contributor to its positive reception. In addition, interviewed stakeholders highlighted that the design of the new centre underwent several rounds of community consultation to ensure it met their needs. Stakeholders emphasised this as a key factor in achieving local buy-in.

Changes in the level of sports participation

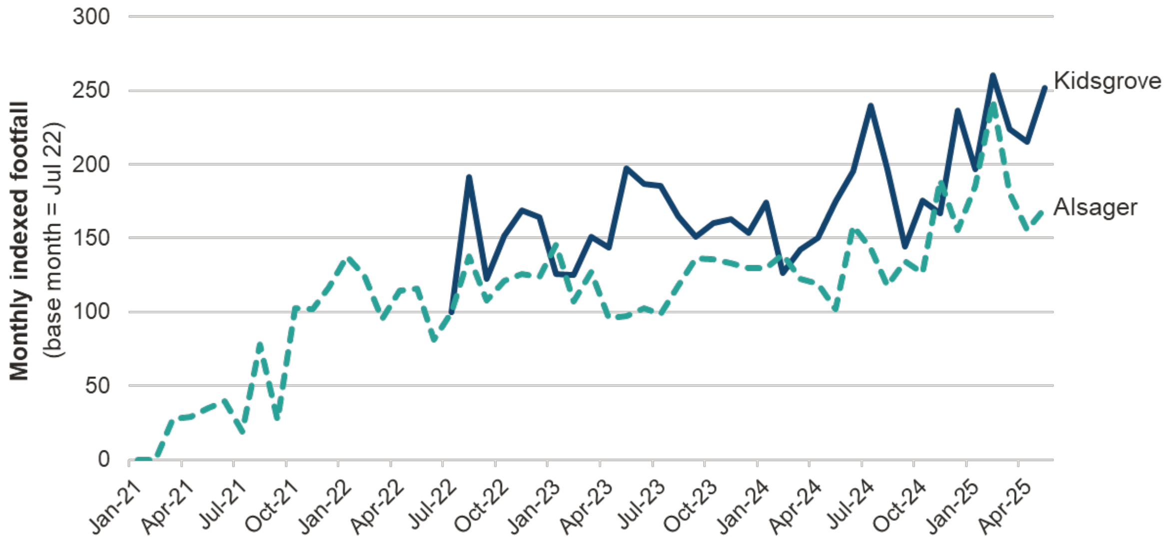
There is medium-strength evidence that sports participation in Kidsgrove has increased following the reopening of the Kidsgrove Sports Centre.

While the centre was closed, many residents lacked access to sports facilities, according to stakeholder interviews. This meant that exercise levels in the area dropped significantly. The original business case, conducted in 2021, found that over 63% of respondents no longer engaged in recreational sport due to a lack of accessible facilities in their area.

The centre achieved its membership target within the first 6 months, according to data provided by the Kidsgrove Sports Centre Community Group. The target, equivalent to the number of members in the old centre at the time of its closure, has since been exceeded.

Figure D.10 shows monthly footfall at the Kidsgrove Sports Centre and the nearest alternative (Alsager). Monthly footfall at the Kidsgrove Sports Centre doubled between opening and late 2024. The new sports centre averaged approximately 5,000 visits per month between April 2023 and April 2024. This trend appears to continue throughout 2025. However, it has not been possible to validate this increase with the sports centre due to an issue with their visitor scanner system.

Figure D.10 Footfall trends for Kidsgrove and Alsager Sports Centres



Source: *Frontier Economics, data provided by Place Informatics.*
Note: *Footfall data is available until September 2025. However, discrepancies between the footfall data and monthly membership data mean the last 4 months have been excluded.*

The Kidsgrove Sports Centre does not appear to have displaced usage from nearby alternatives. While footfall at Kidsgrove Sports Centre increased after its opening, footfall at Alsager remained consistent with seasonal trends.

The demographics of centre members vary considerably. Data provided by the Kidsgrove Sports Centre show that users represent a good cross-section of the public, including 60% female, 30% over the age of 60, and 25% with a registered physical disability or learning difficulty.

Qualitative interviews, survey evidence, and footfall data support that while the centre primarily attracts local users from deprived areas, a substantial minority of users also visit from outside the immediate Kidsgrove area. Footfall data, provided by Place Informatics, shows that while the majority of visitors (60% to 70%) come from the local area, the remainder come from other postcodes. This is consistent with the resident survey, which found that the centre is also attracting users from less deprived areas outside the immediate town boundary.

Changes in physical and mental wellbeing

There is weak evidence that Kidsgrove Sports Centre has affected the wellbeing of local people. However, it is too early to fully assess this relationship as wellbeing impacts take longer to emerge.

Table D.4 shows data from the resident survey, which suggests that frequent users of the centre have higher wellbeing than less frequent or non-users.

Table D.4 Wellbeing indicators, Kidsgrove

Question	Visited the sports centre at least once a month[A]	Visited the sports centre at least once in the last 12 months[A], [B]	Not visited the sports centre in the last 12 months[C]
Overall, how satisfied are you with your life nowadays?	7.8**	7.5*	6.8
Overall, to what extent do you feel the things you do in your life are worthwhile?	7.8	7.7	7.2
Overall, how happy did you feel yesterday?	7.7	7.5	7.0
Overall, how anxious did you feel yesterday?	3.9	4.1	3.5
Number of respondents[D]	27	42	181 to 183

Source: *Frontier Economics.*
Note: *Wellbeing indicators are based on an 11-point scale, where 0 corresponds to 'Not at all [satisfied/anxious…]', and 10 is 'Completely [satisfied/anxious…]'. The table reports a weighted average of respondents' answers.*
[A] Statistical significance is tested between visitors (in the past month or 12 months) and non-visitors.
[B] Includes those who visited Kidsgrove Sports Centre at least once a month in the last 12 months.
[C] Includes those who have not heard of/do not know of the Kidsgrove Sports Centre.
[D] Number of respondents may slightly vary across categories due to variations in individuals who have not responded to a question or responded 'Don't know', so a range is reported.

Average life satisfaction was higher among those who had visited the sports centre at least once in the past month or year compared with non-visitors over the same periods. These differences were statistically significant at the 5% and 10% levels, respectively. However, the sample of respondents who had visited the sports centre was limited and may not be fully representative of all users.

These differences indicate a weak correlation between wellbeing and sports centre usage. However, differences in other self-reported health and wellbeing measures were not statistically significant. The absence of a baseline or strong counterfactual makes it unclear whether the observed differences in wellbeing are a result of attending the sports centre. Individuals with higher wellbeing may be simply more inclined to use the centre, rather than the centre itself improving their wellbeing.

Physical and mental wellbeing effects usually take multiple years for effects to be realised. While robust evidence is not yet available, the current correlation and insights from the literature (LGA, 2023) suggest that future assessments could reveal positive impacts on long-term physical and mental wellbeing in Kidsgrove. This indicates that the sports centre project may contribute to improved health outcomes over time.

EVIDENCE THAT THE KIDSGROVE SPORTS CENTRE HAS INCREASED PRIDE IN PLACE (HYPOTHESIS 2)

There is strong evidence that Kidsgrove residents are satisfied with the changes to the sports centre. A majority of residents report that sports facilities in Kidsgrove have improved over the last 2 years. Satisfaction is particularly high among individuals who have used the sports centre since its reopening.

However, evidence that this has translated into changes in pride in place to date is weak. Although there are some differences in pride in place of users and non-users of the sports centre, the lack of a baseline means it is not possible to assess whether the centre is likely to have influenced wider pride in place at this stage. The limited sample of survey respondents who had visited the sports centre also limits the conclusions which can be drawn.

In addition, there are several regeneration projects in Kidsgrove funded by the Towns Fund and other non-Towns Fund sources. It is not possible within this evaluation to fully separate the effect of the Kidsgrove Sports Centre from the other regeneration works in Kidsgrove. Changes in the local area, or lack thereof, may be driven by the collective effect of this wider portfolio of projects, rather than Kidsgrove Sports Centre alone.

Changes in satisfaction with local facilities

There is strong evidence that residents value having quality sports facilities in their local area. Over 70% of residents agree that it is very or fairly important to have sports facilities in their local area. Among those who have visited the sports centre in the last 12 months, this rises to over 90% (with over 70% stating that it is very important).

Kidsgrove residents agree that, on average, sports facilities in the area have improved over the past 2 years. Of the respondents to the resident survey, 45% reported that facilities have improved, compared with only 15% who believe they have got worse. This difference increases by 10 percentage points when considering just those who have heard of the sports centre and by 25 percentage points when considering those who have visited the sports centre in the last 12 months.

Changes in pride in place

Table D.5 presents a range of pride in place indicators for visitors and non-visitors to Kidsgrove Sports Centre. There is a moderate positive correlation between visits to the sports centre and pride in place. Visitors are significantly more likely to report being proud to live in the local area than non-visitors. This difference is statistically significant at the 5% level. However, the number of visitors who responded to the survey is relatively limited, and as a result, these results may not be fully representative.

Table D.5 Wider pride in place indicators

Question	Visited Kidsgrove Sports Centre at least once a month in the last 12 months[A]	Visited the Kidsgrove Sports Centre at least once in the last 12 months[A], [B]	Not visited the Kidsgrove Sports Centre in the last 12 months[C]
Proportion of adults who were (were not) proud to live in their local area	70%* (15%)	71%** (17%)	51% (21%)
Proportion of adults who agreed (disagreed) that they would still like to be living in their local area in 5 years	74% (19%)	67% (19%)	61% (19%)
Proportion of adults who would (would not) recommend their local area to others as a good place to live	65% (8%)	66% (10%)	53% (21%)
Overall satisfaction (dissatisfaction) with the local area as a place to live	63% (15%)	62% (17%)	65% (22%)
The area has got better (worse) in the last 2 years	11% (37%)	12% (31%*)	6% (45%)
Proportion of adults who were satisfied (dissatisfied) with local services and amenities in their local area	70% (15%)	69% (14%)	64% (18%)
Sample size[D]	27	41-42	180-187

Source: *Frontier Economics.*
Notes: *Asterisks indicate significance: * p< 0.10, ** p<0.05, *** p<0.01*
[A] Statistical significance is tested between visitors (in the past month or 12 months) and non-visitors.
[B] Includes those who visited Kidsgrove Sports Centre at least once a month in the last 12 months.
[C] Includes those who have not heard of/do not know of Kidsgrove Sports Centre.
[D] Number of respondents may slightly vary across categories due to variations in individuals who have not responded to a question or responded 'Don't know', so a range is reported.

Differences in other indicators were not statistically significant, largely due to the limited sample size. However, the consistent direction of the results suggests a potential link between visiting the centre and greater pride in place.

Lack of baseline data and a clear counterfactual means it is not possible to assess changes in pride in place in Kidsgrove. The results only suggest a correlation between visiting the sports centre and pride in place. In addition, residents in Kidsgrove were more likely to report that the area had worsened (and less likely to report that it had improved) over the past 2 years compared with the wider Amber Valley local authority or England overall. As a result, while the sports centre may have helped increase pride in place among regular users, it appears less likely to have influenced others in the community.