SOCIO-ECONOMIC TRENDS AND GROWTH IN CONSERVATION AREAS

Final report

Stefan Noble, Emma Plunkett and Obi Sargoni (OCSI)

David McLennan & Michael Noble (deprivation.org)

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Chapter outline

Chapter 1: Executive Summary

Project overview

In this project for Historic England the research team from Oxford Consultants for Social Inclusion (OCSI) and deprivation.org set out to generate new insights into the patterns and trends in socio-economic measures of 'Good Growth' across the multitude of Conservation Areas in England.

The three primary research questions underpinning this research were as follows:

(1) What is the profile of Conservation Areas across selected indicators of 'Good Growth' at a baseline point in time?
(2) How has the profile of Conservation Areas changed over time on the selected indicators of 'Good Growth'?
(3) How do the changes observed over time on indicators of 'Good Growth' in Conservation Areas compare to changes in non-Conservation Area locations?

There are approximately 10,000 Conservation Areas across the country and these areas vary considerably on a number of important factors, such as population size, areal size, level of urbanisation and geographical location. The research methodology adopted in this project was designed to address the many analytical challenges posed by the heterogeneity of Conservation Areas on these important factors.

The project commenced with a review of the comprehensive list of Conservation Areas across England in order to determine how to group the 10,000 individual Conservation Areas into meaningful units of analysis in which to assess the performance of Conservation Areas on indicators of 'Good Growth'.

It was first necessary to classify every Lower-layer Super Output Area (LSOA) in the country as either Conservation Area or not so that we could compare the performance of Conservation Areas and non-Conservation Areas. LSOAs were flagged as Conservation Areas if more than 10% of the residential addresses in an LSOA were located within a Conservation Area. A typology classification was then applied to all LSOAs to aid the subsequent analysis and interpretation of the results and ensure Conservation Areas could be benchmarked against non-Conservation Areas on a like-for-like basis. Three Typology Categories were created (based on level of urbanisation of the LSOA):

- Town Centre
- Urban Residential
- Rural

The outcome of this stage was for every LSOA in the country to be assigned a unique mutually exclusive Conservation Area status and Typology Category. These categories were then combined by concatenating the two classification types to create a final classification.
Table 1.1 highlights the number of people living in each of the six classification groups across England

Table 1.1: Population in mid-2015 by Conservation Area Classification

Typology Category	**Conservation Area status**	
	Conservation Area	Non-Conservation Area
Town Centre	Approx. 5.8 million	Approx. 2.8 million
Urban Residential (i.e. non-city/Town Centre)	Approx. 4.2 million	Approx. 30.6 million
Rural	Approx. 5.2 million	Approx. 3.8 million

Each of the Conservation Area LSOAs in a Local Authority District (LAD) was then aggregated up by Typology Category to create a LAD based Conservation Area classification – referred to throughout this document as '*Conservation Aggregates'*. The result of this methodological step was that it reduced the number of analytical units from circa 10,000 individual Conservation Areas to 789 *Conservation Aggregates.*
The next phase consisted of constructing a set of appropriate comparator areas against which to benchmark *Conservation Aggregates* on indicators of '*Good Growth*'. These comparator areas - (referred to throughout the document as '*Comparator Aggregates')* were constructed by selecting non-Conservation Area LSOAs, from the same or adjacent LADs, with similar population sizes and deprivation (IMD) levels at a baseline point in time. Each *Conservation Aggregate* was matched to its own *Comparator Aggregate*. Therefore, just as there are 789 *Conservation Aggregates* in total, so too are there 789 *Comparator Aggregates*.

Alongside the work to determine appropriate geographies, the initial phase of this project comprised of a review of the literature on measures of 'Good Growth' and a parallel review of data sources that could be utilised to measure 'Good Growth' at suitable spatial levels. We identified four dimensions of 'Good Growth' that we could measure using publicly available data: 'Economic Growth', 'Inclusive Growth', 'Affordable Growth' and 'Wider Growth'. We selected one census-based indicator and one administrative-based indicator under each of the four dimensions of 'Good Growth', resulting in a total of eight indicators of 'Good Growth' that would form the basis of the analysis.

The analysis of 'Good Growth' was structured into five analytical chapters. We commenced the analysis by assessing patterns and trends in the four census-based 'Good Growth' indicators in a single chapter. We then proceeded to assess patterns and trends in each of the four administrative data-based indicators, dedicating a separate chapter to each. Finally we concluded our analyses by synthesising the results across the eight indicators to assess whether there was any evidence of commonalities or differences between areas or between typology groups.

The purpose of the analyses undertaken here is to review the profile of Conservation Areas at selected points in time and the temporal trends that Conservation Areas have followed, both individually and in the context of their matched comparator. The purpose of the analysis is explicitly *not* to evaluate whether there has been any measurable 'impact' or 'effect' on 'Good Growth' of Conservation Area designation as this would require a different form of research project which is outside the scope of what is feasible in this project. The analysis presented here is contextual and exploratory and establishes an important foundation on which further future research can build.

Analysis of the four Census-based measures of 'Good Growth'

This chapter explores how Conservation Aggregates were changing in absolute terms (i.e. their 'direction of travel') and in relative terms (i.e. compared to similar non-Conservation Areas in the same locality) across four key Census indicators measuring four dimensions of *Good Growth*: Economic Growth, Inclusive Growth, Affordable Growth and Wider Growth between 2001 and 2011. The four census-based indicators of 'Good Growth' are: (i) the proportion of people with degree level qualifications; (ii) the proportion of people describing their health as being good or very good; (iii) the proportion of houses lacking central heating; and (iv) the proportion of people working long hours.

It is clear from this analysis that (with a handful of exceptions), the vast majority of Conservation Aggregates were showing improvement in absolute terms on each of the key census indicators

identified, showing an increase in qualifications and good health and a reduction in the people working long hours and households lacking central heating.

However, it is not possible to conclude from this evidence that Conservation Area status was a key driver of this improvement because this improvement was also shown in similar non-Conservation Areas in the same locality, and when performance of Conservation Aggregates was compared against these matched Comparator Aggregates, the pattern was decidedly mixed.

However, the majority of Conservation Aggregates in Rural areas were performing better than Comparator Aggregates (this was particularly evident among Conservation Aggregates in the South West). By contrast, the majority of Town Centre Conservation Aggregates were performing less well than Comparator Aggregates.

There were no clear geographic patterns, with the worst and best performing individual Conservation Aggregates being scattered between the regions. However, Conservation Aggregates in London tended to perform less well on average than Comparator Aggregates.

Looking at the indicators individually, we identified that Town Centre Conservation Aggregates performed particularly badly on terms of reducing the proportion of households without central heating compared with non-Conservation Aggregates. The difference in performance was particularly evident in the Yorkshire Humber and West Midlands.

Analysis of 'Economic Growth' using administrative data

This chapter examines how the economic characteristics of Conservation Areas (measured in terms of the proportion of people claiming unemployment benefit[1] have changed over time (between 2005 and 2016), and whether there is any evidence that Conservation Area status promotes and facilitates economic growth.

The analysis showed that Conservation and Comparator Aggregates follow broadly similar trajectories over the period: a period of stability followed by a sharp increase during the financial crash followed by another period of stability (at above pre-crash levels) followed by a recovery to slightly below the baseline period. However, there is some evidence to suggest that Conservation Aggregates were slightly more resilient than Comparators during the financial crash (particularly for Town Centre Conservation Aggregates in the North East).

The majority of Conservation Aggregates experienced an overall fall in unemployment between 2005 and 2016. For most of these areas the magnitude of change was quite small, although for each category there were a minority of cases where the change was notably more pronounced.

There were some notable regional variations, with the largest falls in unemployment in Conservation Areas over the period seen in London and East Anglia (particularly in Norfolk). By contrast, there were visible increases in unemployment in large parts of the North of England particularly around Greater Manchester.

Just under half of all Conservation Aggregates in each category experienced both absolute and relative improvement over the period, seeing a reduction in unemployment rate faster than their associated Comparator Aggregates. By contrast, approximately one in five of all Conservation

[1] Jobseekers Allowance/unemployed Universal Credit claimants

Aggregates in Urban Residential areas and less than one in six in Rural and Town Centre (16%) categories experienced both absolute and relative worsening over the period

There was no clear geographical pattern in terms of relative performance, with Comparator Aggregates from all regions represented among the best and worst performing areas.

Analysis of 'Inclusive Growth' using administrative data

This chapter explores whether growth in Conservation Areas is inclusive, which is measured as the extent to which the most deprived members of the community experience growth, both in absolute terms (i.e. their 'direction of travel') and in relative terms (compared to similar non-Conservation Areas in the same locality).

The proportion of working age people receiving DWP benefits (Working age client group) 2005-2015 was selected as the indicator to measure trends in levels of deprivation. This indicator was selected because it captures multiple aspects of deprivation, comprising benefits payable to those requiring additional financial support due to low income, worklessness, poor health, caring responsibilities, bereavement or disability[2].

The analysis showed that Conservation Aggregates had a better base position than Comparator Aggregates, with a lower proportion of people claiming DWP benefits. The Conservation Aggregates with the highest claimant rates were generally located in former manufacturing and coastal areas, but there were also notably high proportions of benefit claimants in Urban Residential Conservation Aggregates in North East London in 2005.

Conservation and Comparator Aggregates follow broadly similar trajectories over the period: a period of stability followed by a sharp increase during the financial crash followed by another period of stability (at above pre-crash levels) followed by a recovery to slightly below the baseline period.

The majority of Conservation Aggregates had lower DWP claimant rates in 2005 compared with 2015. Town Centre Conservation Aggregates saw more notable improvement over the period than across other categories. Conservation Aggregates in London featured prominently among urban areas showing the greatest levels of improvement, while the most improving Rural Conservation Aggregates were typically located in the North.

While Conservation Aggregates generally saw improvement in absolute terms, the performance relative to matched Comparator Aggregates was more mixed. Just under half of all Conservation Aggregates in each category experienced both absolute and relative improvement over the period, seeing a reduction in DWP Benefit claimant rate faster than their associated Comparator Aggregates. There were also regional differences in terms of relative performance, particularly for the Town Centre category, with Town Centre Conservation Aggregates in the North East outperforming Comparator Aggregates, while Town Centre Conservation Aggregates in London and the East were showing slower reductions in claimant count than Comparator Aggregates.

[2] The following benefits are included: Bereavement Benefit, Carers Allowance, Disability Living Allowance, Incapacity Benefit/Severe Disablement Allowance, Income Support, Jobseekers Allowance, Pension Credit and Widows Benefit.

Analysis of 'Affordable Growth' using administrative data

This chapter examines how Conservation Areas changed over time in terms of affordability in absolute terms (i.e. their 'direction of travel') and in relative terms (i.e. compared to similar non-Conservation Areas in the same locality). Change in average property price (2005-2016) is the indicator used in this chapter as a proxy measure of *affordability* i.e. the cost of living in the area.

We acknowledge that this measure of 'affordability' should ideally be constructed to take into account average earnings as well as average property prices, as 'affordability' is determined by earnings as well as house prices. Unfortunately, however, no reliable earnings data exists at a detailed geographical level and so it was regrettably not possible to take this into account in the consideration of house price patterns and trends.

Note: While, high and rising house prices can be seen to be a marker of strong economic growth, they have a detrimental impact on affordability. Therefore, in this chapter, when we refer to "positive direction of travel" or areas "outperforming" others in terms of changes in property prices, we are talking about areas with lower prices or areas experiencing a fall or slower increase in property prices, rather than high and rising property prices as these areas are becoming more affordable.

The analysis showed that property prices were higher in Conservation Aggregates than Comparator Aggregates at a baseline point in time and the gap became wider between 2005 and 2016 with Conservation Aggregates increasing at a faster rate than Comparator Aggregates.

The increase was particularly noticeable in Town Centre Conservation Aggregates which went from having on average the most affordable accommodation in 2005 to the least affordable in 2016 (largely driven by extremely high property price rises in London). However, increases were widespread, with approximately 97% of Conservation Aggregates becoming less affordable between 2005 and 2016.

While property price rises were experienced across Conservation Aggregates and Comparator Aggregates alike, Conservation Aggregates are in general seeing larger rises in relative terms than Comparator Aggregates. The increase in property prices in Conservation Areas over and above neighbouring areas with similar characteristics suggests that Conservation Area status could be contributing to areas becoming less affordable. This effect is particularly evident in areas which have experienced high and rising property prices overall (with Conservation Aggregates in London not only experiencing the largest price rises in absolute terms but also relative to their matched Comparator Aggregates). A similar effect was seen in much of the South East and East, suggesting that Conservation Areas within or in close proximity of London were at greater risk of failing to achieve affordable growth.

Comparison with other dimensions of *Good Growth* suggests achieving affordable growth is likely to be a particular challenge of Conservation Aggregates, with only 2% of Rural Conservation Aggregates, 3.5% of Urban Residential Conservation Aggregates and 4.3% of Town Centre Conservation Aggregates achieving both a positive direction of travel (becoming more affordable) and a positive performance (becoming more affordable relative to similar areas in the locality). Based on current trajectories this is likely to be a growing challenge in Conservation Areas going forward.

Analysis of 'Wider Growth' using administrative data

This chapter explored patterns and trends in crime rates (between 2011 and 2016) across Conservation Aggregates and their matched Comparator Aggregates in order to comment on an indicator of wider growth.

We found that when assessed in terms of national and regional groupings, the Town Centre Conservation Aggregates had higher average crime rates than the Urban Residential Conservation Aggregates which, in turn, had higher crime rates than the Rural Conservation Aggregates. These disparities between the group averages persisted across the time period considered.

It was also evident that the three categories of Conservation Aggregate followed similar trends over time, consisting of a slight drop in the crime rate between 2011 and 2013/2014, followed by a slight increase through to 2016, leaving the 2016 average crime rates at a simile level to the 2011 baseline figures.

The respective groups of Comparator Aggregates exhibited similar levels of crime at baseline to their group of Conservation Aggregates, although the average rates in the Conservation Aggregate categories was slightly higher at each time point than the average rate in the respective Comparator Aggregate group.

In all three Conservation Aggregate category groupings there were some areas that exhibited considerably higher crime rates than the rest of the areas. The Conservation Aggregates with the highest crime rates were the Town Centre areas in City of London and Blackpool. However, both these areas have relatively large non-resident population who are potentially at risk of victimisation and yet do not live in the area, thus skewing the crime rates which are based on crimes per 1,000 resident population.

In terms of absolute changes to the crime rate over the period of analysis, half the Town Centre areas saw crime rates fall whilst the other half saw crime rates rise; just less than half the Urban Residential areas saw crime rates fall, meaning that just over half saw crime rates rise; and a clear majority of Rural areas say crime rates rise, with less than a third of such areas seeing the crime rate fall.

Finally, in terms of changes over time relative to the matched Comparator Aggregates, roughly half the Conservation Aggregates performed better than their matched Comparator Aggregate, while approximately half performed worse. There were no clear regional differences in which areas showed the best and worst performance.

Synthesis across all eight indicators of 'Good Growth'

This chapter explores differences in the relative performance of Conservation Aggregates across each of the four dimensions and eight individual indicators of *Good Growth* to see whether a) Conservation Areas are performing relatively well or badly on particular dimensions of *Good Growth* and b) whether Conservation Aggregates are displaying consistent patterns of performance when looking across all four dimensions of Good Growth.

We were able to draw stronger conclusions with regards to the former question than the latter, as we noted that Conservation Aggregates tended to perform relatively badly on indicators of

Affordable Growth relative to their matched Comparator Aggregates (although Rural Conservation Aggregates did fare quite well on the indicator relating to central heating). The general level of consistency across the affordability indicators for the three types of Conservation Aggregate was not detected for the other dimensions of *Good Growth*.

However, from the analysis above we were not able to conclusively show that Conservation Aggregates as a whole exhibited consistently better or worse performance than Comparator Aggregates as a whole when all indicators were taken into account. In other words, there is no strong evidence to suggest that Conservation Areas are performing notably better or notably worse in terms of achieving *Good Growth* than similar non-Conservation Areas in the same locality. The picture is a mixed one, with a similar proportion of areas performing notably better as performing notably performing worse, when all categories of Conservation Area and dimensions and indicators of *Good Growth* are taken into consideration. This is an interesting finding in itself as had we concentrated on a single indicator of *Good Growth* we may have come to a more definitive conclusion. However, by broadening the range of indicators included in the study, we have unearthed some of the complexities in terms of trends and trajectories of Conservation Aggregates, with some Conservation Aggregates showing strong performance on particular aspects of *Good Growth* but only a minority showing *consistently* positive or negative performance.
However, we have observed some regional differences, with Town Centre and Rural Conservation Areas in the North East region generally performing better relative to their comparators than those in other regions, while Conservation Aggregates in the West Midlands were more likely to exhibit a consistently poor performance relative to their matched Comparator Aggregates.

Conclusion and Recommendations

While most Conservation Aggregates saw absolute improvements on most indicators of 'Good Growth' over the respective time periods, the findings were much more mixed when Conservation Aggregates were compared against their matched Comparator Aggregates. On most of the indicators, roughly half the Conservation Aggregates performed better than their matched Comparator Aggregate, while roughly half performed worse.

The finding that, overall, there is little evidence to suggest that Conservation Aggregates performed either systematically better or systematically worse than their matched Comparator Aggregates is perhaps the most important conclusion to be drawn from this research project. This finding suggests that Conservation Area designation does not appear to hinder 'Good Growth', but neither does it appear to necessarily promote it, when assessed across these eight indicators.

Due to data availability, these eight indicators necessarily relate to what might be regarded as 'hard outcomes' e.g. employment status, educational qualifications, average house prices etc. A recommendation emerging from this current research project into Conservation Areas is that Historic England should consider further research into the 'softer outcomes' that might be associated with living in or near to Conservation Areas, such as people's perceived sense of wellbeing or their attachment to place. Research into 'softer outcomes' would require new primary data collection, consisting of surveys and/or qualitative focus groups etc. and would complement the analysis of 'harder outcomes' presented in this current research report.

Chapter 2: Introduction; aims and objectives; research questions; brief overview of methodology

This chapter outlines the key methodology and analytical approach for the *Socio-Economic Trends and Growth in Conservation Areas* research project. The chapter is structured as follows: first we provide some background to the project and set out the research questions that we seek to address through this work; we then note some of the key research challenges that shaped the approach adopted; we then provide details on the research methodologies that we have utilised to address the research questions; we subsequently set out in brief the analytical approach we have followed; and finally we highlight what has not been included in the analysis and why.

Background

Historic England have commissioned Oxford Consultants for Social Inclusion (OCSI) and deprivation.org to investigate whether and, if so, how the socio-economic characteristics of Conservation Areas have changed over time and whether Conservation Area status promotes and facilitates sustainable, inclusive, long-term growth, i.e. '*Good Growth*'.

In this project we seek to address the following research questions:

- What is the profile of Conservation Areas across selected indicators of '*Good Growth*' at a baseline point in time?
- How has the profile of Conservation Areas changed over time on the selected indicators of '*Good Growth*'?
- How do the changes observed over time on indicators of '*Good Growth*' in Conservation Areas compare to changes in non-Conservation Area locations?

The overarching aim of these three research questions is to understand whether Conservation Areas are characterised by sustainable, long term growth (i.e. '*Good Growth*').

Key research challenges

Historic England acknowledged in the tender documentation for this project that Conservation Areas are "very diverse and their boundaries do not align with administrative boundaries", which presents problems in terms of both data collation and analytical approach. In our initial inception report we identified three key challenges: (i) the diverse nature of Conservation Areas means that we will encounter problems in comparing areas on a like-for-like basis; (ii) some Conservation Areas have very low populations, which poses a challenge for tracking change over time in socio-economic indicators; and (iii) the date of designation may vary considerably between the Conservation Areas. Please see the project Inception Report for a detailed discussion of these issues.

Research methodology

Our research methodology is designed with the objective of facilitating both 'snapshot' and temporal trend analyses of Conservation Areas and selected comparator benchmarks in a way that allows for a degree of distributional analysis (i.e. assessing variation between different areas) whilst acknowledging that it is not feasible to consider each Conservation Area as an independent unit within the scope of this project (due to the large number of diverse and non-standard geographical areas, circa 10,000). Our methodology consists of a number of phases and each is discussed here.

Phase 1: Review the comprehensive list of Conservation Areas

The first phase of this project involved reviewing the comprehensive list of Conservation Areas across England in order to assist the research team in supporting our methodological approach and, where necessary, informing revisions to the methodologies to better reflect the entirety of the Conservation Areas across England.

The review consisted of an assessment of Conservation Areas' geographical boundaries (including their physical locations and the resultant spatial patterning) and the associated population distribution.

The information gathered from the review on the scale, size, composition and distribution of the Conservation Areas aligned with our broad methodological assumptions. However, two key issues were raised as part of this phase:

1) A number of Conservation Areas relate to canals, waterways and heritage railways rather than residential or commercial neighbourhoods. Following discussions with Historic England we have agreed to exclude these from the analysis.
2) We identified 16 Local Authorities where the Conservation Area boundary matches the Local Authority District boundary exactly i.e. the entire area is classified as a Conservation Area. In these cases Historic England does not hold the Local Authority District Conservation Area boundaries. These Local Authority Districts have been excluded from the analysis.

Phase 2: Review existing literature on measures of '*Good Growth*' and review the relevant data landscape

The aim of this phase was to identify a selection of key dimensions of '*Good Growth*' and then to select one or more relevant indicators to measure each dimension. These measures would then be used to determine whether Conservation Areas are experiencing '*Good Growth*'.

Appendix I outlines the list of key national and international studies and measures of '*Good Growth*' that have been drawn from in order to identify a set of common themes of and measures of '*Good Growth*. Below are a list of key themes/dimensions identified as part of this work:

- Economic growth: Jobs growth, sectorial diversity, job security and employment, earnings, persistent disadvantage, human capital, future capacity e.g. new employment opportunities, business start-ups.
- Inclusive growth: Reducing inequality and ensuring growth is experienced across all segments of the population, reducing poverty and deprivation through growth, reducing labour market exclusion, promoting good health to ensure all sectors of the population can contribute to and benefit from growth, economic regeneration.

- Affordable growth: Living costs, housing affordability, costs associated with housing condition, fuel costs.
- Wider growth: Quality of life, work-life balance, wellbeing, civic participation, accessibility, connectedness, safety, sustainable growth (environmental factors).

Having identified the key dimensions of *Good Growth*, the next stage involved building up a shortlist of possible key indicators to consider under each dimension of '*Good Growth*'. This list was drawn from an extensive review of key open data sources (listed in Appendix J) with the following search criteria applied:

a) Data is relevant to the theme we are exploring (with supported references from the literature review).
b) Data has full national coverage (available across England as a whole).
c) Data is available down to sufficient geographical granularity (published down to Lower layer Super Output Area or Output Area geographies), to be used in conjunction with the Conservation Area typology classifications developed in Phase 3 below.
d) Data is available for multiple time points across a suitable time period (to enable analysis of how Conservation Areas are changing over time).
e) Data must be accompanied by sufficient metadata to demonstrate a transparent data collection/production methodology so that we can assess that the data is sufficiently robust to track change at neighbourhood level.

Table 2.1 highlights the key indicators that have been considered under each theme. Appendix J provides more detailed information about these indicators including description, source date coverage, relevance to the research (including examples of where referenced elsewhere and potential issues associated with including the indicator).

Table 2.1: Shortlist of indicators by theme

Theme	Indicators (source in brackets)
Economic growth	• Jobs per working age population (Business Register and Employment Survey) • Unemployment claimant count (Dept for Work and Pensions) • Long term unemployment (Dept for Work and Pensions) • People with degree level qualifications (Census 2011) • Gross Value Added (GVA) per capita (Office for National Statistics)
Inclusive Growth	• Working age client group (Dept for Work and Pensions) • Income distribution (Annual Survey for Hours and Earnings) • Index of Multiple Deprivation (IMD) (Communities and Local Government) • People receiving Working Tax Credits (HM Revenue and Customs) • People describing their health as good or very good (Census 2011)
Affordable growth	• Average house price (Land Registry) • Total price/salary ratio (average house) (Land Registry/Office for National Statistics) • Proportion of properties in Council Tax Band A (Valuation Office Agency) • Fuel Poverty (Dept for Business, Energy & Industrial Strategy) • Housing lacking central heating (Census 2011) • Age of property (Valuation Office Agency)

Wider growth	• People working 49+ hours (Census 2011) • Working age pop unable to work due to disability/long-term illness: Employment Support Allowance/Incapacity Benefit (Dept for Work and Pensions) • Distance travelled to work (Census 2011) • Personal wellbeing indicators (Office for National Statistics) • Voting in local elections (Electoral Commission) • Overall crime rate (Police UK) • Public transport travel time to key services (Dept for Transport) • Healthy life expectancy (Office for National Statistics)

From the list above we identified two key indicators under each theme, one from the census and one from the administrative data, to form the core of our analysis. These are explored in the subsequent chapters.

Phase 3: Develop and implement a suitable area typology/classification

The aim of this phase was to group Conservation Areas into meaningful categories in order to aid the subsequent analysis and interpretation of the results.
It was necessary to group Conservation Areas into categories for two principle reasons:

1) The diverse nature of Conservation Areas means that we would encounter problems in comparing individual areas on a like-for-like basis. Based on our Phase 1 review of the digitised boundaries provided by Historic England we recognised that Conservation Areas will vary greatly in terms of a number of important factors, including their areal size, population size, population density and primary economic function, as well as their geographical location.
2) It is evident from the exploration of digitised boundaries in Phase 1 that some Conservation Areas have very low populations, such as small, rural hamlets. Areas of low population size pose a challenge for tracking change over time in socio-economic indicators because the indicators tend to have larger standard errors and are therefore regarded as being 'less reliable' than those in higher population areas.

A typology classification has therefore been applied to all Conservation Areas. Furthermore, in order to enable us to compare Conservation Areas against other relevant benchmarks, it was also necessary to apply the same area typology/classification to all *non-Conservation Areas*.

Below we highlight each of the stages involved in developing the classification (See Appendix K for more detailed description of each of the stages):

Stage 1: Identifying the geographical building block for identifying and classifying Conservation Areas
Based on the exploration of potential *Good Growth* indicators in phase 2, the LSOA geography was identified as the smallest geography with sufficient data coverage to be included in the analysis.

Stage 2: Determining the typology classification to apply
The typology categorisation we have applied differentiates between different types of LSOA based upon the level of urbanisation and whether or not it is an area of Conservation Area designation.

Table 2.2: The six typology categories:

Urbanisation category	Conservation Area status	
	Conservation Area	Non-Conservation Area
Town Centre	---	---
Urban Residential (i.e. non-city/Town Centre)	---	---
Rural	---	---

Stage 3: Determining Conservation Area status

The outcome of this stage was to classify every LSOA in the country as either Conservation Area or not so that we could compare the performance of Conservation Areas and non-Conservation Areas on *Good Growth* indicators. Historic England supplied the research team with two separate Output Area (OA) to Conservation Area (CA) lookup tables which were used as a starting point for classifying neighbourhoods as Conservation Areas. Using a combination of the lookup tables provided by Historic England and the digitised boundary files, we successfully produced an initial distinction between Conservation Area LSOAs and non-Conservation Area LSOAs.

Stage 4: Determining Urbanisation category

The outcome of this stage was for every LSOA in the country to be classified into one of three urbanisation categories:

- Town Centre
- Urban Residential
- Rural

We utilised three main datasets to generate an initial categorisation between Town Centre, Urban Residential and Rural LSOAs. First, we used the ONS Rural Urban Classification to distinguish between rural and urban areas. Second, we used data on the resident and workplace population from the 2011 Census to make an initial distinction between the two urban categories of Town Centre and Urban Residential. This approach was than refined Ordinance Survey's AddressBase Plus data to feed into this categorisation process.

Stage 5: Combining Conservation Area Status and Urbanisation category to create a six way classification

Every LSOA was assigned a unique mutually exclusive Conservation Area status and Urbanisation Category. These categories were then combined by concatenating the two classification types to create a final classification. Table 2.3 highlights the number of people living in each of the six classification groups across England, following stage 5.

Table 2.3: Population in mid-2015 by Conservation Area Classification

Urbanisation category	Conservation Area status	
	Conservation Area	Non-Conservation Area
Town Centre	Approx. 5.8 million	Approx. 2.8 million
Urban Residential (i.e. non-city/Town Centre)	Approx. 4.2 million	Approx. 30.6 million
Rural	Approx. 5.2 million	Approx. 3.8 million

Phase 4: Aggregate (i.e. merge) Conservation Areas of the same typology classification within Local Authority Districts

The fourth phase of this study entailed aggregating/merging of each particular typology class within each individual Local Authority District (LAD), in order to aid analysis and interpretation (as we explain below).

Each of the Conservation Area LSOAs in a LAD was aggregated up by classification type to create a LAD based Conservation Area classification. In other words, where an LAD contains four 'Town Centre' Conservation Areas, (whether the areas are adjacent or not) these four areas, or rather the best-fit LSOAs that constitute them, were aggregated to form a single analytical unit for the purposes of comparison. This process was undertaken separately for each of the typology groups. Therefore, an LAD such as Leeds consists of a single aggregation of 'Town Centre' Conservation Areas, a single aggregation of 'Urban Residential' Conservation Areas, and a single aggregation of 'Rural' Conservation Areas.

The result of this methodological step was that it reduced the number of analytical units from circa 10,000 individual Conservation Areas to a theoretical maximum of 978 aggregated areas (i.e. 326 districts x 3 typology groups). In practice, not every LAD contained all three types of Conservation Area (and we have additionally excluded some LADs from our analysis due to insufficient Conservation Area boundary data).

Aggregating/merging Conservation Areas in this way ensured that areas were only combined with other similar areas (i.e. an 'Urban Residential' Conservation Area would not be merged with a 'Rural' or 'Town Centre' Conservation Area etc) and areas are only aggregated within the confines of LAD boundaries (thereby ensuring that areas are only combined with geographically proximate areas that are likely to be subject to the same Local Authority-wide socio-economic dynamics etc).

In the remainder of this Report we refer to the aggregated/merged Conservation Areas per typology and per Local Authority District as '*Conservation Aggregates'*.

The actual number of *Conservation Aggregates* in total was 789. This consists of 301 Town Centre Conservation Aggregates, 286 Urban Residential Conservation Aggregates, and 202 Rural Conservation Aggregates.

Phase 5: Construct appropriate comparator areas

The fifth phase of our work programme consisted of constructing a set of appropriate comparator areas against which to benchmark Conservation Areas on indicators of '*Good Growth*'. Whilst high-level benchmarking can be undertaken using national or regional averages etc, it is more appropriate to compare the results for Conservation Areas with results for other non-Conservation Areas of similar population size and similar characteristics at a baseline point in time.

Our approach was to firstly use the English Indices of Deprivation 2007 to generate a summary deprivation score on the Index of Multiple Deprivation (IMD) for each Conservation Aggregate. The IMD 2007 was based on a mid-2005 data time point. The IMD 2007 was used to identify areas with similar socio-economic characteristics at that mid-2005 time point. Next we produced a population total for each Conservation Aggregate. We then took each type of Conservation Aggregate and each LAD in turn and used a combination of GIS and statistical software to select an appropriate number of LSOAs from the *non-Conservation Area* parts of the LAD or neighbouring LADs that were of the

same typology and were similar to the Conservation Aggregate in terms of the IMD score and which, when summed together, contained approximately the same population as the relevant Conservation Aggregate.

Upon completion of this process, each Conservation Aggregate across the country (i.e. 'Town Centre', 'Urban Residential' and 'Rural' in each of the relevant LADs) was assigned a matched comparator group which is similar to the Conservation Aggregate in terms of level of deprivation at the baseline time point and in terms of population size. The comparator groups therefore represented appropriate benchmarks against which to compare trends observed in the Conservation Aggregates.

In the remainder of this report we refer to the aggregated/merged comparator groups per typology and per local authority district as '*Comparator Aggregates'*. Each Conservation Aggregate is matched to its own Comparator Aggregate. Therefore, just as there are 789 Conservation Aggregates in total, so too are there 789 Comparator Aggregates.

To illustrate how the Comparator Aggregates relate to their matched Conservation Aggregate, we can present the case West Lancashire. The West Lancashire Urban Residential Conservation Aggregate was composed of eight LSOAs, with a total population of 11,386 and a population-weighted IMD score of 9.97. The matched Comparator Aggregate that we constructed was also composed of eight LSOAs and had a total population of 11,690 and a population-weighted IMD score of 10.41. As such, the Comparator Aggregate is very well matched to the Conservation Aggregate in terms of both the population size and the IMD score.

Phase 6: Generate indicators of '*Good Growth*' for Conservation Aggregates and Comparator Aggregates

Having constructed the Conservation Aggregate areas and Comparator Aggregate areas as discussed above, we then aggregated OA/LSOA level data as appropriate to generate the indicators of '*Good Growth*' (defined in Phase 2 of the methodology) to construct measures for each Conservation Aggregate and Comparator Aggregate.

Analytical approach

The methodological steps outlined above are designed to generate a wealth of valuable data on patterns and trends in indicators of '*Good Growth*' for Conservation Aggregates and Comparator Aggregates which are suitable for addressing the research questions set out above. This is explored in the subsequent analysis chapters (chapters 3-7).

In terms of analytical focus, we have undertaken a combination of static 'snap shot' analyses and analyses of change over time. In both types of analyses we highlight patterns of commonality or divergence within and between groups of areas. When looking at change over time we have considered trends in each Conservation Aggregate in both *absolute* terms (i.e. simply looking at the trend in the Conservation Aggregate, irrespective of the Comparator Aggregate) and in *relative* terms (i.e. in the context of the change in its matched Comparator Aggregate). This enabled us to analyse the extent to which Conservation Aggregates have experienced better/similar/worse trends over time in the selected indicators of '*Good Growth*' when compared to other similar types of areas of similar population size which are not subject to Conservation Area designation. In other words, we are comparing areas on a like-for-like basis.

We believe the methodological approach is best suited to addressing the key research questions in the context of the scope of this study.

What has not been included in analysis

There are certain methodological approaches which we believe are ill-suited to the current study and therefore were not part of the analysis approach adopted. First, we did not construct a single composite measure of '*Good Growth*' by combining multiple indicators. Second, did not use to use the 'date of designation' as a central part of our analyses. Third, we did not use information on the *quality* of Conservation Area management as a central part of our analysis. Fourth, and finally, we did not undertake any statistical modelling (i.e. regression analyses) as part of this project. We did not believe the study is well suited to the application of conventional evaluation techniques such as formal propensity score matching, econometric modelling or difference in difference estimation. For a full discussion on the reasons behind our decisions in these regards, please see the project Inception Report.

Chapter 3: Analysis of Census-based indicators of *Good Growth*

Introduction

In this chapter we examine four key Census indicators of '*Good Growth*' which each reflect one of the four dimensions of *Good Growth*:

- Economic Growth
- Inclusive Growth
- Affordable Growth
- Wider Growth

For each of the Census indicators we explore the main trends between 2001 and 2011 (the two most recent Census periods) in order to determine whether Conservation Aggregates are improving both in absolute terms and relative to their matched Comparator Aggregates for each of the three categories of Conservation Aggregate (Rural, Urban Residential and Town Centre) on each of the measures explored.

We will first look at how Conservation and Comparator Aggregates have changed nationally on these key indicators, before drilling down to regional and Local Authority level to look at whether the patterns observed nationally, also hold across each of the *regions* and individual Local Authorities.

The Census measures

In Chapter 2 – *Phase 2: review of literature on Good Growth; review of data sources on Good Growth* we summarised the process that was adopted for identifying a shortlist of key indicators under each of the dimensions of "*Good Growth*".

Under each of the four dimensions we identified a relevant Census indicator to include in our analysis. The primary reason for including Census data in the analysis is that the Census provides a rich source of data at small area level being the only survey dataset drawn from a 100% sample of the population and therefore is sufficiently robust to present data at the geography levels required for the study. The Census also provides data on particular themes for which it is not possible to draw from administrative data such as adult skill levels and working patterns. The indicators selected are shown in Table 3.1 below alongside a rationale for including these indicators in the analysis.

Table 3.1 Census indicators selected under each *Good Growth* theme.

Theme	Indicator	Rationale
Economic Growth	People with degree level qualifications	"(An area's).. prosperity depends on how many of its people are in work and how productive they are, which in turn rests on the skills they have and how effectively those skills are used. Skills are a foundation of decent work" [3]. People with degree qualifications is used as measure of concentration of people with high skills in the labour market.
Inclusive Growth	People describing their health as good or very good	The wider health and wellbeing of a community are identified as key components of inclusive growth, with the OECD's Inclusive Growth Framework incorporating health indicators as the key non-income measure of inclusive growth[4].
Affordable growth	Housing lacking central heating	The costs of heating a home are a key component of costs of living, with approximately 2.5 million households in England (11%) estimated to be in fuel poverty (where the average costs of heating a home would put them in poverty)[5]. Costly forms of heating are a key driver of this, with households lacking central heating at increased risk of fuel poverty as the costs of heating the home through other forms of heating are considerably more expensive[6].
Wider growth	People working 49+ hours	Ensuring a positive work life balance is an important component of "*Good Growth*" with 'work-life balance' and time with family rated by public respondents as one of most important aspects of wellbeing in PWCs Good Growth for Cities study[7], while the UK Mental Health Foundation states that work-related stress costs the country 10.4 million working days per year[8].

Appendix A provides further information for each of these indictors including a more detailed description, methodology for producing the indicators, source, time period covered, key strengths and issues to consider when using the indicator to track change over time and examples of where the indicator has been used in other measures of *Good Growth*.

[3] OEDC International Labour Office (2010) A Skilled Workforce for Strong, Sustainable and Balanced Growth A G20 Training Strategy, page 1

[4] http://www.oecd.org/inclusive-growth/

[5] Department for Business Energy and Industrial Strategy: Annual Fuel Poverty StatisticsReport, 2017 https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/623108/Fuel_Poverty_Statistics_Report_2017.pdf

[6] https://www.ovoenergy.com/guides/energy-guides/heating-costs-gas-vs-oil-vs-electric-storage-heaters.html

[7] https://www.pwc.co.uk/industries/government-public-sector/good-growth.html

[8] https://www.mentalhealth.org.uk/a-to-z/w/work-life-balance

How are Conservation Aggregates performing on key Census indicators of *Good Growth* across England as a whole?

Table 3.2 below summarises the overall performance of each category of Conservation Aggregates across England as a whole on the key Census indicators of *Good Growth*.

The table is structured as a report card, with each of the Conservation Aggregates given a red (negative) or green (positive) score depending on their direction of travel and performance against Comparator Aggregates on the following measures:

1) Base position: The *Base position* score is calculated as the *average* indicator value for the respective group of Conservation Aggregates in 2001 *minus* the *average* indicator value in the respective group of Comparator Aggregate in 2001[9]. A Conservation Aggregate category is highlighted green if it has a better outcome on a key Census indicator in 2001 than the average for the relevant Comparator Aggregate category. Where Conservation Aggregates show a worse base position they are highlighted red. Note, a score **above zero** indicates a **positive** base position for degree and good health measures, as having a greater proportion of people with high skills and good health are key factors in experiencing *Good Growth*. By contrast, a score of **less than zero** indicates a **positive** outcome for the central heating and working hours measures, as having fewer people with costly heating and working long hours support *Good Growth* outcomes.

2) End position: The *End position* score is calculated as the *average* indicator value for the respective group of Conservation Aggregates in 2011 *minus* the *average* indicator value in the respective group of Comparator Aggregates in 2011[10]. A Conservation Aggregate category is highlighted green if it has a better outcome on a key Census indicator in 2011 than the average for the relevant Comparator Aggregate category. Where Conservation Aggregates show a worse *End position* they are highlighted red[11].

3) Relative performance: *Relative performance* is calculated as the *average* change in the Conservation Aggregate between 2001 and 2011 (2011 score *minus* 2001 score) ***minus*** the *average* change in the Comparator Aggregate over the same period i.e. the difference in change in the Conservation Aggregate compared to the Comparator Aggregate over the same period[12]. A Conservation Aggregate category is highlighted green if it has shown improvement relative to a Comparator Aggregate on the key Census indicator between 2001 and 2011 (e.g. improved at a faster rate, declined at a slower rate or shown improvement

[9] For example, if 20.5% of people in a Conservation Aggregate were educated to degree level in 2001 and 10.0% of people in the Comparator Aggregate were educated to degree level in 2001, then the Base position score would be +10.5%.

[10] For example, if 80% of people in a Conservation Aggregate had good health in 2011 and 60% of people in the Comparator Aggregate had good health in 2011 the End position score would be +20%.

[11] Note: A score above zero indicates a positive end position for degree and good health measures, because having a greater proportion of people with high skills and good health are key factors in experiencing *Good Growth*. By contrast, a score of less than zero indicates a positive outcome for the central heating and working hours measures as having fewer people with costly heating and working long hours also help to contribute towards *Good Growth*.

[12] For example, if the proportion of people working 50+ hours a week increased by 3.1 percentage points in the Conservation Aggregate between 2001 and 2011 and increased by 1.3 percentage point in the Comparator Aggregate, the Conservation Aggregate would have a score of +1.8 percentage points on this measure.

while the Comparator Aggregate has experienced a decline). Where Conservation Aggregates have performed worse than a Comparator Aggregate they are highlighted red[13].

4) Direction of travel: The *Direction of travel* score is calculated as the *average* indicator value in a Conservation Aggregate in 2011 *minus* the *average* indicator value in a Conservation Aggregate in 2001[14]. A Conservation Aggregate category is highlighted green if it has shown improvement in absolute terms between 2001 and 2011. Where Conservation Aggregates show a negative *Direction of travel* they are highlighted red[15].

Table 3.2 Performance of Conservation Aggregate categories on key Census measures of *Good Growth*.

Indicator	Category	Base position (relative to matched comparator area)	End position (relative to matched comparator area)	Relative performance (relative to matched comparator area)	Direction of travel (i.e. absolute change)
People with degree level qualifications	Rural	5.1	5.6	0.5	9.0
	Urban Residential	8.3	8.1	-0.2	7.2
	Town Centre	11.4	10.8	-0.6	6.3
People describing their health as good or very good	Rural	1.7	1.3	-0.4	11.5
	Urban Residential	1.1	1.0	0.0	12.5
	Town Centre	2.0	1.6	-0.4	13.6
Housing lacking central heating	Rural	0.7	0.4	-0.2	-4.1
	Urban Residential	-0.5	0.0	0.5	-4.8
	Town Centre	-1.7	0.2	1.9	-6.1
People working 49+ hours	Rural	2.6	2.2	-0.5	-3.9
	Urban Residential	3.3	3.2	-0.1	-2.8
	Town Centre	4.3	4.8	0.5	-2.3

*

It is clear from the right-most column in Table 3.2, titled 'Direction of travel', that Conservation Aggregates of all categories have on average experienced positive trends on each of these *Good Growth* measures in absolute terms, with an increase in the proportion of people educated to degree level, and increase in the proportion of people describing their health as good or very good, a reduction in households lacking central heating and a reduction in people working long hours.

[13] Note: A score above zero indicates a positive performance for degree and good health measures, because having experiencing an increase proportion of people with high skills and good health relative to similar areas in the locality suggest that the Conservation Area status is helping to contribute towards the area experience *Good Growth*. By contrast, a score of less than zero indicates a positive outcome for the central heating and working hours measures as experiencing a reduction in the proportion of people with costly heating and working long hours at a faster rate than comparator areas also help suggests that Conservation Areas status is a key driver of *Good Growth*.

[14] For example, if a 5% of households in a Conservation Aggregate were lacking central heating in 2001, compared with 4% in 2011, a Conservation Aggregate would have a Direction of travel score of -1 percentage points because the indicator value has decreased over the period.

[15] Note: A score above zero indicates a positive direction of travel for degree and good health measures, because having an increased proportion of people with high skills and good health are key factors in experiencing *Good Growth*. By contrast, a score of less than zero indicates a positive outcome for the central heating and working hours measures as experiencing a reduction in the proportion of people with costly heating and working long hours also help to contribute towards *Good Growth*.

However, the table also shows that while the groups of Conservation Aggregates were improving in absolute terms, they were not always improving to the same extent as the groups of Comparator Aggregates. The column titled 'Relative performance' in the table compares change in the groups of Conservation Aggregates and groups of Comparator Aggregates and reveals a more mixed picture in terms of performance of Conservation Aggregates.

Town Centre Conservation Aggregates have improved at a slower rate than Comparator Aggregates on each of the four Census *Good Growth* indicators. By contrast, Rural Conservation Aggregates performed slightly better than Comparator Aggregates on three of the four measures, while Urban Residential areas exhibited a similar performance in Conservation and Comparator Aggregates alike.

People living in Conservation Aggregates were considerably more likely to be educated to degree level than in non-Conservation Aggregates in 2001 and 2011 across each of the three categories. However, while Rural Conservation Aggregates saw an increase in the proportion of people educated to degree level at a faster rate than across Comparator Aggregates from the same category; Urban and Town Centre Conservation Aggregates did not improve at the same rate as their Comparator Aggregates on average.

A similar pattern emerges for the good health measure, with Conservation Aggregates showing improvements in the proportion of people in good health, but these improvements were mirrored and slightly exceeded across Comparator Aggregates.

The patterns was more mixed across the different categories for households lacking central heating; with Rural Conservation Aggregates improving at a slightly faster rate than Comparator Aggregates (from a worse starting position). By contrast, Town Centre Conservation Aggregates had a notably lower proportion of households lacking central heating in 2001 than Comparator Aggregates, but this situation had reversed by 2011, as Comparator Aggregates saw greater reductions in households lacking central heating.

In contrast, to the other Census *Good Growth* indicators, Conservation Aggregates exhibited a worse base position than Comparator Aggregates on average in terms of people working long hours. Conservation Aggregates exhibited a mixed performance on this indicator, with Rural Conservation Aggregates improving at a faster rate than Rural Comparators, Urban Residential Conservation Aggregates showing similar trends to Comparators and Town Centre Aggregates improving at a slower rate than matched Comparators.

Key findings summary:

- Conservation Aggregates of all categories have been showing a positive direction of travel across each of the key Census *Good Growth* indicators.
- However, their performance is more mixed when considered alongside Comparator Aggregates, with Rural Conservation Aggregates generally improving at a faster rate than Comparator Aggregates while Town Centre Conservation Aggregates are improving at a slower rate than Comparator Aggregates across each of the four indicators.
- Town Centre Conservation Aggregates are performing particularly poorly in terms of reducing the number of households lacking central heating, in 2001 they had a lower proportion of households without central heating than Comparator Aggregates but by 2011 this situation had reversed.

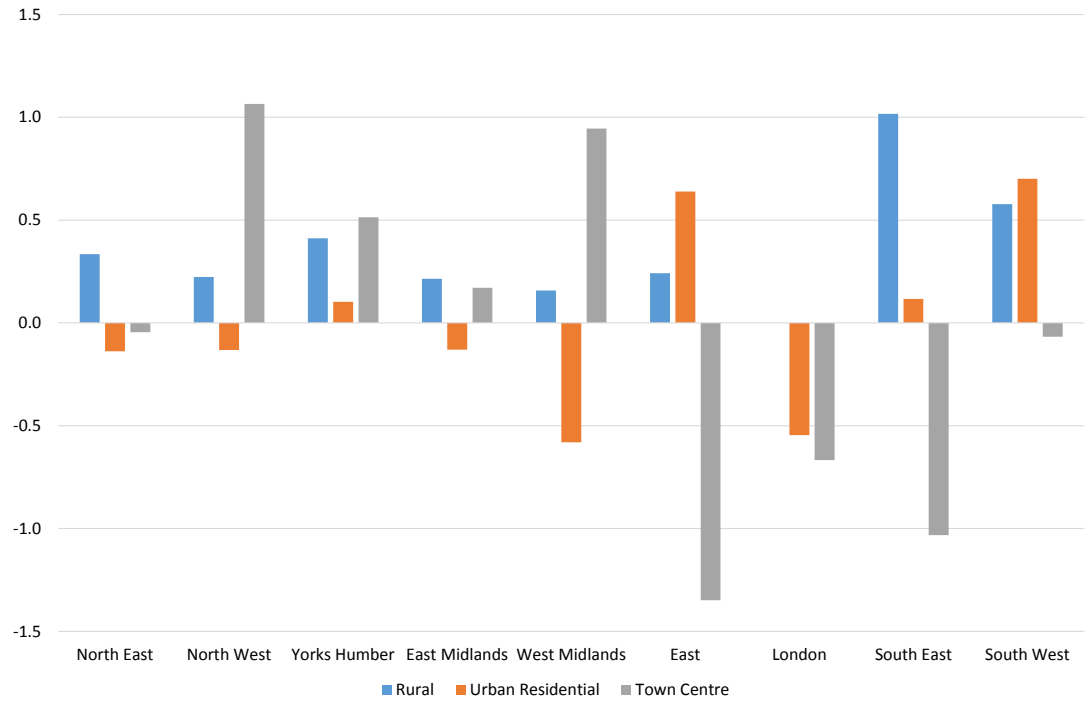
- People living in Conservation Aggregates on average are in a better position than Comparator Aggregates in terms of qualifications and health but a worse position in terms of work life balance.

Performance of Conservation Aggregates at regional level

The presentation of *Good Growth* indicators at national level for each category of Conservation and Comparator Aggregate necessarily masks variations observed between individual Conservation Aggregates and Comparator Aggregates. Before turning to focus on individual areas, it is first instructive to consider variations in performance at regional level. The objective here is to assess whether the broad patterns of change presented through Table 3.2 hold when the data are broken down into each of the nine regions of England.

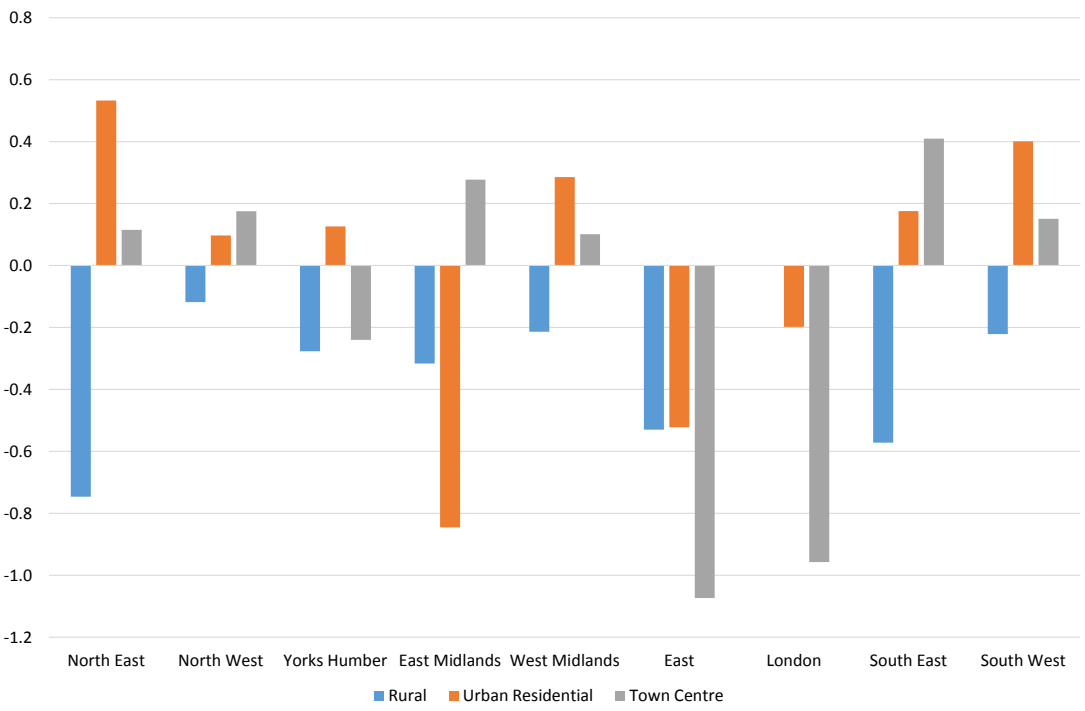
Figures 3.1-3.4 show difference in performance for each of the three categories of Conservation and Comparator Aggregates for the four *Good Growth* indicators respectively. The heights of the bars represent the difference between the Conservation Aggregate and the matched Comparator Aggregate in terms of change on each *Good Growth* indicator between 2001 and 2011. The bars essentially convey the change in each Conservation Aggregate net of the change in the matched Comparator Aggregate. For example, if a Conservation Aggregate saw its proportion of people with degree qualifications increase by 10 percentage points over the period, and its matched Comparator Aggregate saw its rate increase by 5 percentage points over the period, then the net change in the Conservation Aggregate would equal +5 percentage point change. Alternatively, if a Conservation Aggregate saw its rate change by -3 percentage points over the period (i.e. a reduction in proportion of degree educated residents), and its matched Comparator Aggregate saw its rate change by -1 percent point (also a fall) then the net change in the Conservation Aggregate wold equal -2 percentage points change. If the change was identical in the Conservation Aggregate and its matched Comparator Aggregate then the net change over the period in the Conservation Aggregate would be zero.

Figure 3.1 Performance of Conservation Aggregates on change in the proportion of people educated to degree level (relative to Comparator Aggregates) across the Regions



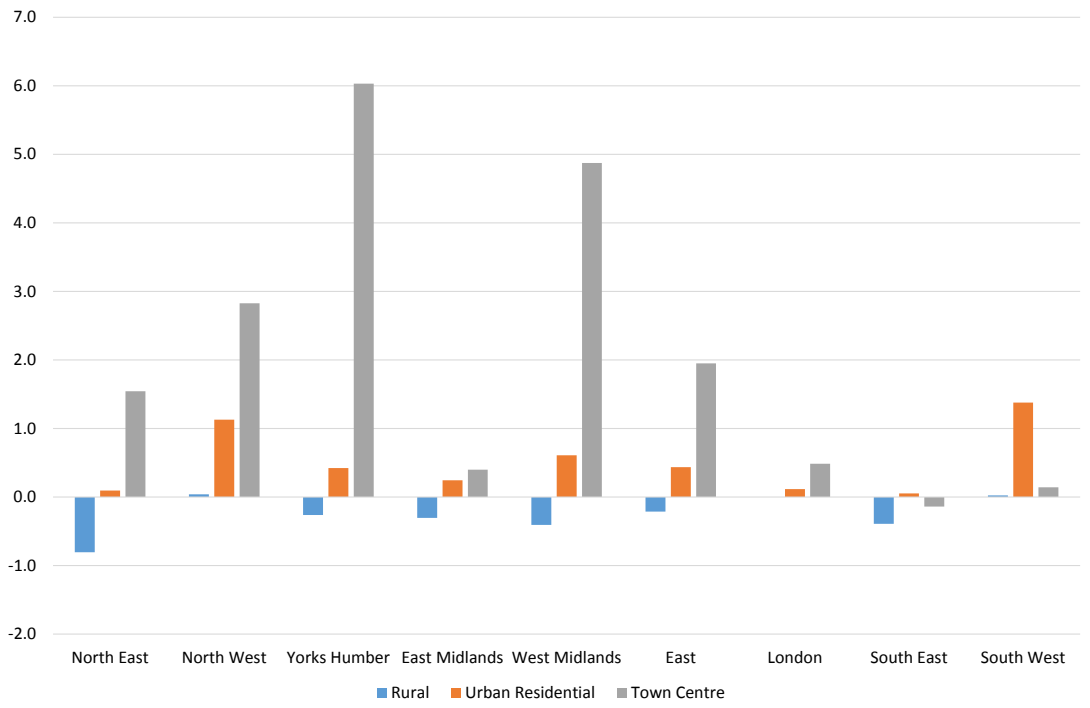
Note: In Figure 3.1, values **greater than zero** represent a **more favorable** change in the group of Conservation Aggregates than in the group of Comparator Aggregates

Figure 3.2 Performance of Conservation Aggregates on change in the proportion of people in good health (relative to Comparator Aggregates) across the Regions



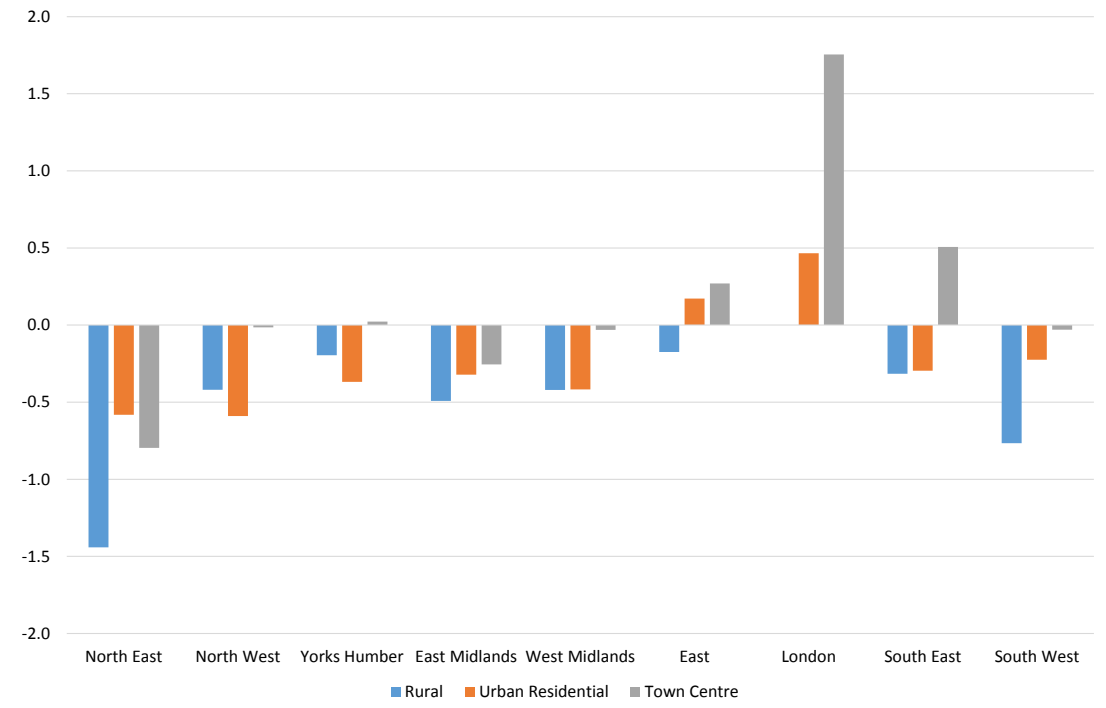
Note: In Figure 3.2, values **greater than zero** represent a **more favorable** change in the group of Conservation Aggregates than in the group of Comparator Aggregates

Figure 3.3 Performance of Conservation Aggregates on change in the proportion of households lacking central heating (relative to Comparator Aggregates) across the Regions



Note: In Figure 3.3, values **less than zero** represent a **more favorable** change in the group of Conservation Aggregates than in the group of Comparator Aggregates.

Figure 3.4 Performance of Conservation Aggregates on change in the proportion of people working more 49 hours per week (relative to Comparator Aggregates) across the Regions



Note: In Figure 3.4, values **less than zero** represent a **more favorable** change in the group of Conservation Aggregates than in the group of Comparator Aggregates.

Analysis of the underpinning data revealed that all regional groupings of Conservation Aggregates saw improvement in absolute terms on each of the Census *Good Growth* indicators (data not shown here). However, it is evident from comparing across the charts above that there is some variation in terms of regional outcomes on these indicators when considered in the context of the respective Comparator Aggregates.

Conservation Aggregates in London performed less well relative to Comparator Aggregates on each of the *Good Growth* measures. This pattern was observable across each of the typology categories.

Conservation Aggregates in other regions showed more divergent trends across the different Census indicators and across the individual typology categories.

Figure 3.1 shows that Town Centre Conservation Aggregates in the North West and West Midlands saw greater increases in the proportion of degree educated residents than across Comparator Aggregates, while the reverse was true in the East and South East.

Figure 3.2 shows that Conservation Aggregates in the East region saw slower improvements in terms of people reporting good health than across Comparator Aggregates (particularly in Town Centre areas).

Figure 3.3 shows that the poor performance of Town Centre Conservation Aggregates in terms of households lacking central heating (observed in table 3.2 above) was particularly evident in Yorkshire and The Humber and the West Midlands; while performance was consistent with Comparator Aggregates in the South East and South West.

Figure 3.4 shows that the poor relative performance of Town Centre Conservation Aggregates on hours worked (observed in table 3.2 above) was largely confined to Conservation Aggregates in London and the South East, while Conservation Aggregates in the North East were seeing a faster fall in the proportion of people working long hours than the Comparator Aggregates.

Key findings summary:

- All of the regional Conservation Aggregates experienced a positive direction of travel on each of the Census *Good Growth* indicators.
- However, there were notable regional variations in terms of performance relative to Comparator Aggregates.
- Conservation Aggregates in London performed less well than Comparator Aggregates across each of the *Good Growth* measures.
- Other notable divergences in performance included:
    - Town Centre Conservation Aggregates in the North West and West Midlands outperforming comparators in terms of increases in degree educated residents.
    - Conservation Aggregates in the East region performing worse than Comparator Aggregates on increasing the proportion of people in good health.
    - Town Centre Conservation Aggregates in Yorkshire Humber and West Midlands performing considerably worse than comparators on reducing households lacking central heating.
    - Town Centre Conservation Aggregates in London and the South East performing worse than comparators in on the working long hours indicator.

The analyses presented so far in this chapter have focused on patterns and trends in *Good Growth* for national and regional groupings of the three categories of Conservation and Comparator Aggregates. However, as noted throughout this report, national and regional summaries are averages of many individual area trends and patterns and these summaries can mask substantial variations at the more detailed geographical level. In order to ascertain the extent to which individual Conservation Aggregates followed similar or divergent trends to the respective Comparator Aggregates, it is necessary to move beyond the national and regional summaries. In the remainder of this chapter the analyses focuses on examining patterns and trends using the data for each individual Conservation Aggregate and Comparator Aggregate. The objective is to assess the degree of commonality or difference between individual areas in terms of change over time, comparing the Conservation Aggregates to the respective matched Comparator Aggregates.

Performance of Conservation Aggregates at Local Authority level

We have already explored the performance of Conservation Aggregates on key Census *Good Growth* indicators at national and regional level. However, looking at national and regional averages can obscure local variation in performance of Conservation Aggregates.

The focus in this section of the analysis is to observe whether trends in Census *Good Growth* indicators in Conservation Aggregates are indeed similar to their matched Comparator Aggregates when viewed at an individual level or whether there is evidence of more pronounced changes across Conservation Aggregates than across Comparator Aggregates. The starting assumption is that, if Conservation Area designation has no effect on *Good Growth* (either positively or negatively), then trends on these *Good Growth* indicators in each Conservation Aggregate are likely to be of similar magnitude (and direction) to the matched Comparator Aggregate. If, however, there is any clear patterning that Conservation Aggregates fare better than their matched Comparator Aggregates then this would also be worthy of further research to understand the reasons for this. Equally, if there is any clear patterning that Conservation Aggregates fare worse than their matched Comparator Aggregates then this would also be worthy of further research. Whilst these analysis presented here cannot reveal anything about causation and cannot permit any direct attribution of impact, they do provide an important overview of how Conservation Aggregates are changing over time relative to other similarly deprived, similarly sized geographical areas in the same general geographical vicinity. By drilling the analysis down to individual Conservation Aggregate level we can also help identify particular outliers which could potentially be worth exploring in future research to explore underlying factors which could help to explain why these Conservation Aggregates perform relatively well or badly compared with matched Comparator Aggregates.

Tables 3.3-3.7 below summarise the overall trend in Rural, Urban Residential and Town Centre Conservation Aggregates relative to their matched Comparator Aggregate for each of the four Census *Good Growth* indicators. The areas are grouped into four categories:

1) Conservation Aggregates experiencing both a positive direction of travel and improvement relative to their matched Comparator Aggregates over the period. Conservation Aggregates in this group could be said to be achieving *Good Growth* as they were both improving in absolute terms and were experiencing this improvement at a faster rate than non-Conservation Aggregates in the same locality.
2) Conservation Aggregates which have seen a positive direction of travel, but where this improvement has been smaller than in their matched Comparator Aggregate. Conservation Aggregates in this group are showing absolute improvement but there is less evidence to

suggest that their Conservation Area status has been a factor in this change, as similar non-Conservation Areas have experienced a greater level of improvement.

3) Conservation Aggregates experiencing a negative trend on a key indicators but where this trend is of smaller magnitude than seen in their matched Comparator Aggregates. These areas are likely to be located in areas with wider challenges, where the Conservation Aggregate may have proved more resilient than the surrounding area.
4) Conservation Aggregates experiencing both a negative trend on a particular indicator and they are performing worse than their matched Comparator Aggregates. It could be argued that this group is the most concerning, as these areas have experienced a worsening both in absolute terms and also relative to their matched Comparator Aggregate.

Table 3.3: Absolute and relative performance of Conservation Aggregates on proportion educated to degree level

	Rural	Urban Residential	Town Centre
1) Improving trend (% educated to degree level increasing) & Conservation Aggregates outperform Comparator Aggregates	65.7%	53.5%	36.7%
2) Improving trend (% educated to degree level increasing) & Comparator Aggregates outperform Conservation Aggregates	34.3%	46.5%	63.3%
3) Negative trend (% educated to degree level falling) & Conservation Aggregates outperform Comparator Aggregates	0%	0%	0%
4) Negative trend (% educated to degree level falling) & Comparator Aggregates outperform Conservation Aggregates	0%	0%	0%
Total	100%	100%	100%

Table 3.4: Absolute and relative performance of Conservation Aggregates on proportion in good health

	Rural	Urban Residential	Town Centre
1) Improving trend (% in good health increasing) & Conservation Aggregates outperform Comparator Aggregates	61.7%	51.0%	43.4%
2) Improving trend (% in good health increasing) & Comparator Aggregates outperform Conservation Aggregates	38.3%	49.0%	56.6%
3) Negative trend (% in good health falling) & Conservation Aggregates outperform Comparator Aggregates	0%	0%	0%
4) Negative trend (% in good health falling) & Comparator Aggregates outperform Conservation Aggregates	0%	0%	0%
Total	100%	100%	100%

Table 3.5: Absolute and relative performance of Conservation Aggregates on proportion of households lacking central heating

	Rural	Urban Residential	Town Centre
1) Improving trend (% lacking central heating decreasing) & Conservation Aggregates outperform Comparator Aggregates	61.7%	46.5%	31.2%
2) Improving trend (% lacking central heating decreasing) & Comparator Aggregates outperform Conservation Aggregates	38.3%	53.5%	68.3%
3) Negative trend (% lacking central heating increasing) & Conservation Aggregates outperform Comparator Aggregates	0%	0%	0%
4) Negative trend (% lacking central heating increasing) & Comparator Aggregates outperform Conservation Aggregates	0%	0%	0.5%
Total	100%	100%	100%

Table 3.6: Absolute and relative performance of Conservation Aggregates on proportion of people working 50+ hours per week

	Rural	Urban Residential	Town Centre
1) Improving trend (% working 50+ hours decreasing) & Conservation Aggregates outperform Comparator Aggregates	60.6%	56.0%	52.5%
2) Improving trend (% working 50+ hours decreasing) & Comparator Aggregates outperform Conservation Aggregates	39.4%	41.2%	44.8%
3) Negative trend (% working 50+ hours increasing) & Conservation Aggregates outperform Comparator Aggregates	0%	0.4%	0%
4) Negative trend (%working 50+ hours increasing) & Comparator Aggregates outperform Conservation Aggregates	0%	2.5%	2.7%
Total	100%	100%	100%

It can be seen in Tables 3.3-3.6, the vast majority of Conservation Aggregates showed absolute improvements on the Census *Good Growth* indicators. Every Rural Conservation Aggregate showed improvement on each of the four measures. All Urban Residential Conservation Aggregates experienced improvement in terms of qualifications, health and central heating, with 97% showing improvement in terms of working hours[16]. All Town Centre Conservation Aggregates experienced

[16] Of the 3% showing a negative direction of travel, two these were located in London (Newham, and Kensington and Chelsea) with the others in smaller urban locations in Shepway (Kent), Cotswold, Colchester, Cannock Chase and Lincoln. See Map D.44 in Appendix D for details.

improvement in terms of qualifications and health, all bar one Conservation Area[17] experienced improvement in terms of reducing household lacking central heating, and more than 97% showed improvement in terms of working hours[18].

However, the story was more mixed in terms of performance relative to Comparator Aggregates. Rural Conservation Aggregates were most likely to outperform Comparator Aggregates with more than 60% of Rural Conservation Aggregates experiencing improvement in absolute and relative terms on each of the four selected Census *Good Growth* indicators.

More than half of all Urban Residential Conservation Aggregates improved at a faster rate than Comparator Aggregates on three of the four indicators, with 54% experiencing faster increases in people with degree qualifications, 51% experiencing faster increases in people in good health and 56% experiencing larger reductions in people working long hours than the national average. However, less than half of all Urban Residential Conservation Aggregates (47%) saw faster reductions in households lacking central heating than their matched Comparator Aggregates.

Town Centre Conservation Aggregates performed less well relative to their matched Comparator Aggregates, with less than one in three (31%) Town Centre Conservation Aggregates improving at faster rate than similar non Conservation Areas in terms of reducing households lacking central heating. Town Centre Conservation Aggregates were also outperformed by their matched Comparators in terms of increasing the proportion of people with degree level qualifications (63% of Comparator Aggregates saw greater improvements) and people in good health (57% of Comparator Aggregates saw greater improvements); however, Town Centre Conservation Aggregates were slightly more likely to see faster falls in households working more than 49 hours a week, with 53% of Conservation Aggregates decreasing faster than Comparator Aggregates.

Key findings summary:

- The vast majority of individual Conservation Aggregates experienced improvement on all four Census "Good Growth indicators in *absolute terms* i.e. experienced a positive direction of travel.
- All Conservation Aggregates saw increases in people educated to degree level and people in good health, all bar one saw a reduction in households lacking central heating and all bar a small handful of Urban Residential areas saw a reduction in proportion of people working 50+ hours per week.
- However, this improvement was in the context of similar improvement in matched Comparator Aggregates, and performance relative to these areas was mixed.
- More than 60% of Rural Conservation Aggregates improved at a faster rate than matched Comparator Aggregates across each of the Census *Good Growth* Indicators.
- Performance was less impressive for Town Centre Conservation Aggregates, which were generally outperformed by similar non-Conservation Areas in the same locality.

[17] Hart in Hampshire saw an increase of 0.6 percentage points in proportion of households lacking central heating.

[18] Of the 3% showing a negative direction of travel, five these were located in London (City of London, Southwark, Hackney, Greenwich and Tower Hamlets) and one in Runneymede (Surrey). See Map D.45 in Appendix D for details.

How are individual Conservation Areas changing relative to matched Comparator Aggregates?[19]

We have explored the overall patterns of performance of Conservation Aggregates relative to Comparator Aggregates, we will now explore whether there are any geographic variations in terms of performance.

The maps below compare the performance of the Conservation Aggregates relative to their matched Comparator Aggregates on each of the Census *Good Growth* indicators between 2001 and 2011 in Rural, Urban Residential and Town Centre categories. Conservation Aggregates shaded pink on the maps are characterised as showing notable improvement relative to their Comparator Aggregates. Areas shaded blue are characterised as seeing an appreciable worsening in their position relative to matched Comparator Aggregates. Conservation Aggregates shaded light green have experienced small relative change between 2001 and 2011. Enlarged versions of these maps are available in Appendix D. For detail of how the map colours are calculated see Appendix C.

[19] Note: for this analysis we have excluded Conservation Aggregates where we were unable to achieve a good match with Comparator Aggregates, either in terms of IMD 2007 score or overall population. See Appendix A for details.

Figure 3.5 Change in on Census *Good Growth* indicators 2001 to 2011 in Rural Conservation Aggregates relative to matched Comparator Aggregates

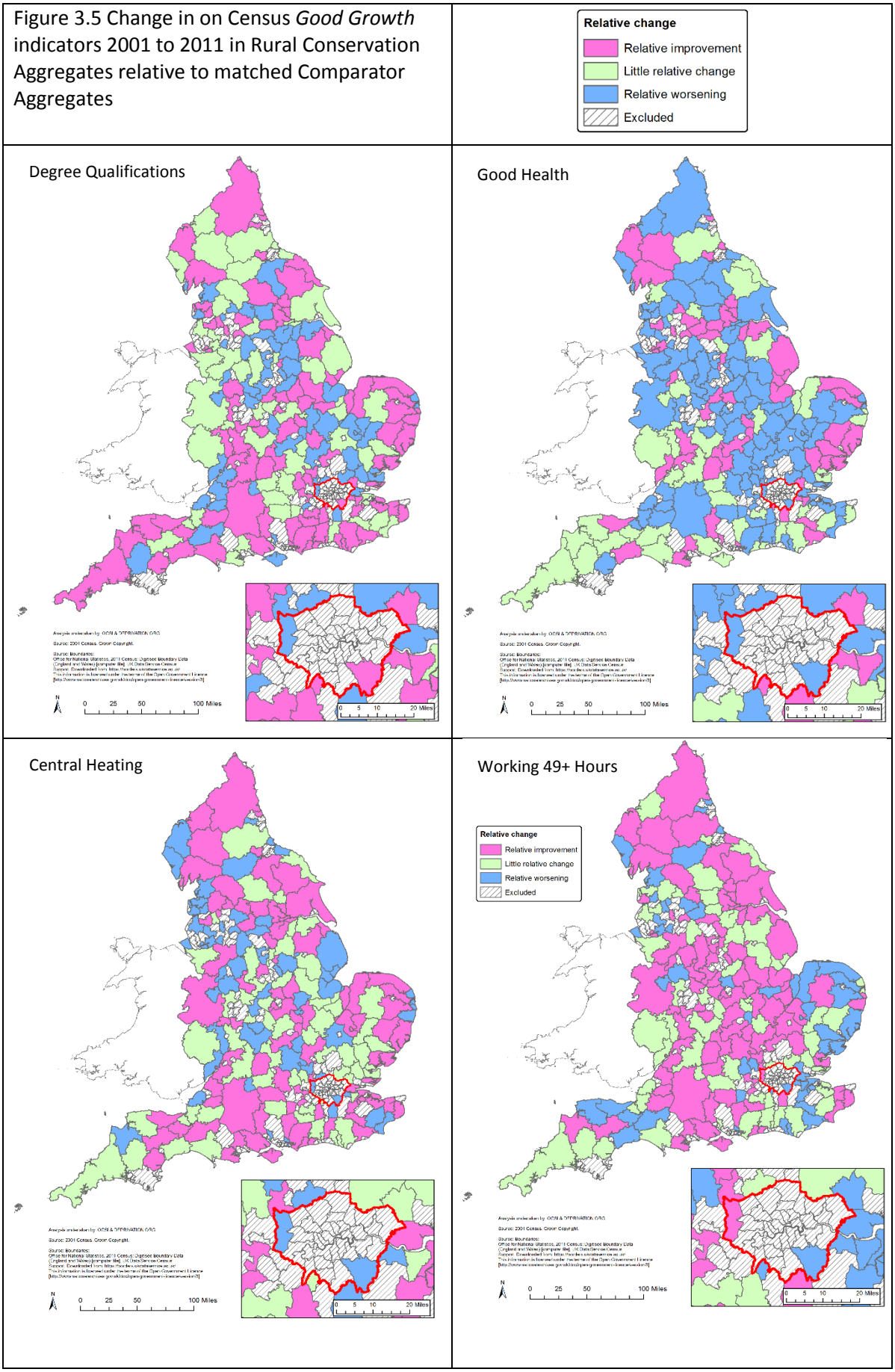


Figure 3.6 Change in on Census *Good Growth* indicators 2001 to 2011 in Urban Residential Conservation Aggregates relative to matched Comparator Aggregates

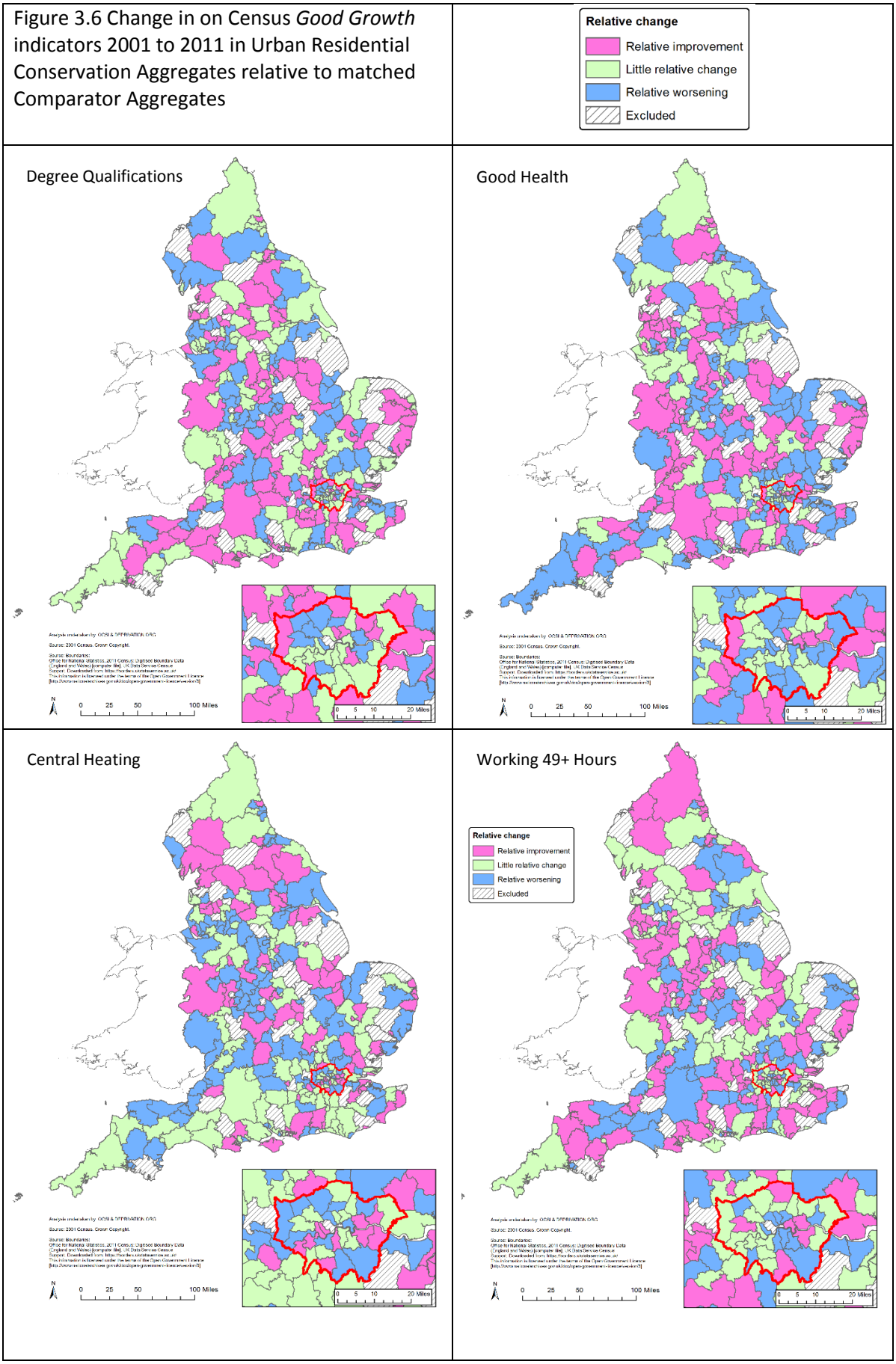
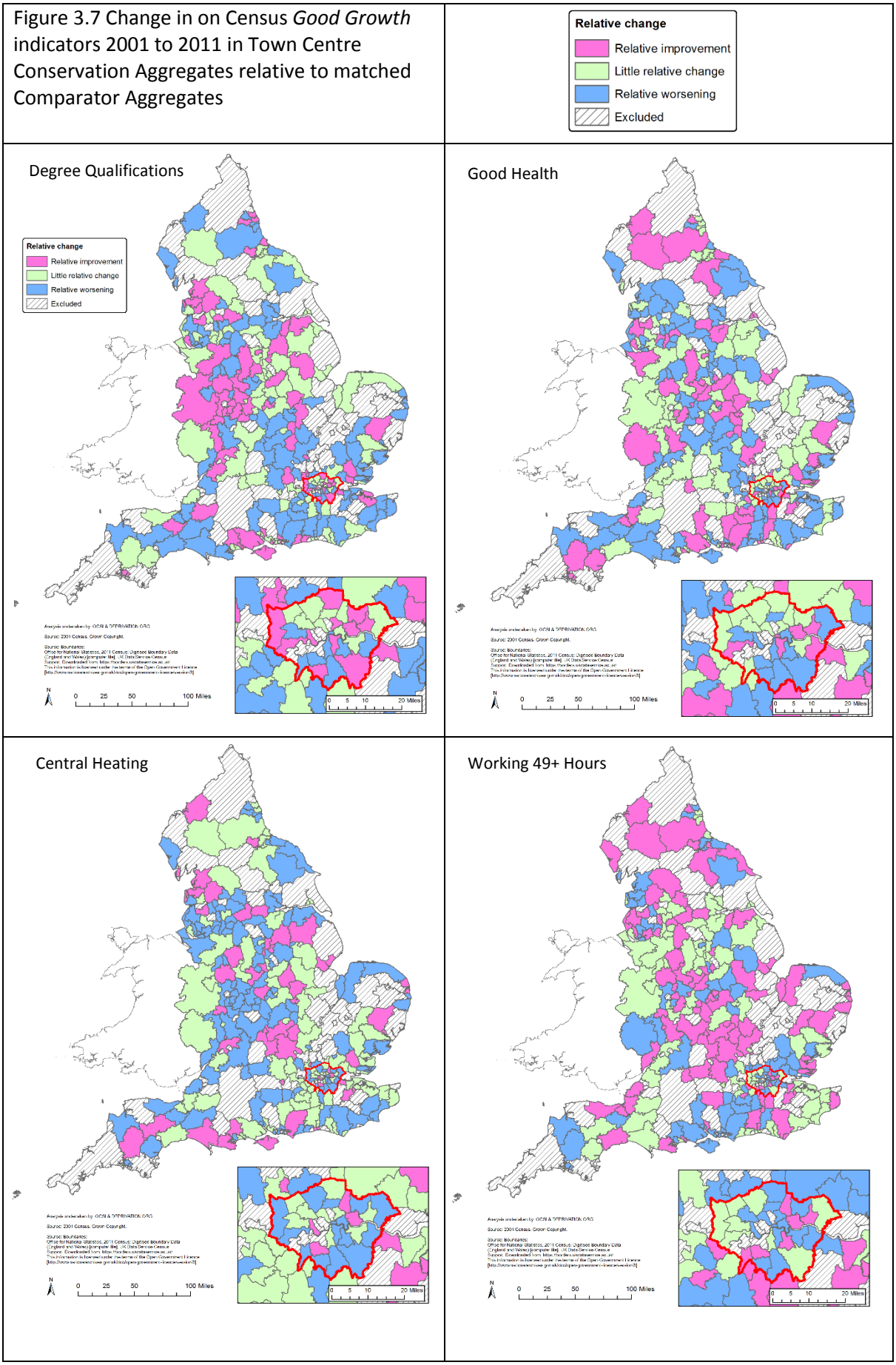


Figure 3.7 Change in on Census *Good Growth* indicators 2001 to 2011 in Town Centre Conservation Aggregates relative to matched Comparator Aggregates



The maps do not show clear regional variations in terms of performance, there are Conservation Aggregates in all parts of the country performing relatively better or worse than their matched Comparator Aggregates. There is also generally, no clear correlation across each of the *Good Growth* areas, with Conservation Aggregates performing relatively well across some indicators and relatively badly on others. However, more detailed analysis of the data reveals that some Conservation Aggregates are consistently performing better or worse than Comparator Aggregates.

Table 3.7 lists the Rural, Urban Residential and Town Centre Conservation Aggregates which perform better than the Comparator Aggregates on all four of the Census Good Growth Indicators.

Rural		Urban		Town Centre	
Conservation Aggregate	Region[20]	Conservation Aggregate	Region	Conservation Aggregate	Region
Braintree	E	Waveney	E	Mid Suffolk	E
Bolsover	EM	St Edmundsbury	E	E Hertfordshire	E
Kettering	EM	Hertsmere	E	Boston	EM
Bolsover	EM	Kettering	EM	Erewash	EM
South Lakeland	NW	Amber Valley	EM	Newham	L
Eden	NW	North Tyneside	NE	Darlington	NE
South Lakeland	NW	Northumberland	NE	Chorley	NW
Test Valley	SE	Blackpool	NW	Milton Keynes	SE
Cherwell	SE	Lancaster	NW	Christchurch	SW
West Oxfordshire	SE	Mole Valley	SE	Stafford	WM
Arun	SE	Tunbridge Wells	SE		
West Berkshire	SE	Hastings	SE		
New Forest	SE	Rushmoor	SE		
Mid Sussex	SE	Stroud	SW		
East Dorset	SW	E Devon	SW		
Cotswold	SW	Poole	SW		
Tewkesbury	SW	Shropshire	WM		
Cornwall	SW	Stratford-on-Avon	WM		
Mid Devon	SW	Stoke-on-Trent	WM		
East Dorset	SW	Coventry	WM		
Cotswold	SW	Dudley	WM		
Tewkesbury	SW	Harrogate	YH		
Wychavon	WM				
Selby	YH				
York	YH				

Each of these areas would be worth exploring further as potential case studies of Conservation Aggregates achieving Good Growth across the selected census-based indicators.

A total of 25 Rural Conservation Aggregates outperformed their matched Comparator Aggregates on all four Census *Good Growth* indicators. These Conservation Aggregates were spread across seven of the nine regions, with a particularly high concentrations in the South West (accounting for 8 of the 25).

A total of 23 Urban Residential Conservation Aggregates outperformed their matched Comparator Aggregates on all four Census *Good Growth* indicators. Again, these Conservation Aggregates were

[20] For presentation purposes, we have abbreviated the region names: NE = North East, NW = North West, YH = Yorkshire Humber, EM = East Midlands, WM = West Midlands, E = East of England, L = London, SE = South East, SW = South West.

dispersed with eight of the nine regions containing Urban Residential Conservation Aggregates which outperformed Comparators on each of the measures of *Good Growth*.

A total of 10 Town Centre Conservation Aggregates outperformed their matched Comparator Aggregates on all four Census *Good Growth* indicators, spread across eight of the nine regions. Eight of the 10 best performing Town Centre Conservation Aggregates were in smaller Town Centre locations[21].

Table 3.8 lists the Rural, Urban Residential and Town Centre Conservation Aggregates which perform worse than the Comparator Aggregates on all four of the Census *Good Growth* Indicators.

Rural		Urban		Town Centre	
Conservation Aggregate	Region [22]	Conservation Aggregate	Region	Conservation Aggregate	Region
Great Yarmouth	E	King's Lynn and West Norfolk	E	Epping Forest	E
Hertsmere	E	E Hertfordshire	E	Braintree	E
Lancaster	NW	Cambridge	E	Harlow	E
Trafford	NW	Chesterfield	EM	Uttlesford	E
Swindon	SW	Southwark	L	Hertsmere	E
Rugby	WM	Harrow	L	North Norfolk	E
Telford and Wrekin	WM	Copeland	NW	Newark & Sherwood	EM
Stafford	WM	Halton	NW	Charnwood	EM
		Gravesham	SE	Ashfield	EM
		Southampton	SE	Broxtowe	EM
		Solihull	WM	Barnet	L
		Herefordshire, County of	WM	Camden	L
		North Warwickshire	WM	Haringey	L
		Cannock Chase	WM	Croydon	L
				Stockton-on-Tees	NE
				Halton	NW
				Pendle	NW
				Rochdale	NW
				Tameside	NW
				Fylde	NW
				St. Helens	NW
				Wirral	NW
				Chiltern	SE
				Ashford	SE
				Hart	SE
				Rother	SE
				Torridge	SW
				Newcastle-under-Lyme	WM
				Rotherham	YH
				Ryedale	YH
				Barnsley	YH
				Selby	YH

[21] Towns with a population of less than 100,000 residents.

[22] For presentation purposes, we have abbreviated the region names: NE = North East, NW = North West, YH = Yorkshire Humber, EM = East Midlands, WM = West Midlands, E = East of England, L = London, SE = South East, SW = South West.

Each of these areas would be worth exploring further as potential case studies of Conservation Aggregates which have not achieved *Good Growth* across the selected census-based indicators.

There were fewer Rural Conservation Aggregates performing relatively worse than their matched Comparator Aggregates on the Census *Good Growth* indicators than vice versa. Only eight Rural Conservation Aggregates performed worse than Comparator Aggregates on the four indicators (compared with 25 performing better on these same indicators).

A similar pattern could be seen for Urban Residential Conservation Aggregates, with 14 performing worse than their matched Comparator Aggregates, compared with 23 performing better on each of the four Census *Good Growth* indicators.

By contrast, Town Centre Conservation Aggregates were notably more likely to perform poorly relative to matched Comparator Aggregates than perform well, with 32 Town Centre Conservation Aggregates performing worse than Comparator Aggregates on each of the four Census Good Growth Indicators.

Key findings summary:

- There was no strong geographic pattern in terms of relative performance of Conservation Aggregates, with areas from all regions among the best and worth performing areas.
- However, there was some evidence that Conservation Aggregates in the South West were outperforming Comparator Aggregates on multiple key Good Growth indicators.
- As notes above, individual Rural Conservation Aggregates were more likely to outperform Conservation Aggregates, while the reverse is true for Town Centre Conservation Aggregates.
- There are number of Conservation Aggregates which consistently performed better or worse than similar non-Conservation Areas in the locality. It would be worthwhile to consider these areas for further exploration.

Conclusion

In this chapter we have explored trends across four key Census indicators measuring four dimensions of *Good Growth*: Economic Growth, Inclusive Growth, Affordable Growth and Wider Growth in order to determine how the socio-economic characteristics of Conservation Areas have changed over time, and whether there was any evidence that Conservation Area status promotes and facilitates sustainable, inclusive, long-term growth, i.e. *Good Growth*.

In order to address these questions we looked both at how Conservation Aggregates were changing in absolute terms(i.e. their 'direction of travel') and in relative terms (i.e. compared to similar non-Conservation Areas in the same locality).

It is clear from this analysis that (with a handful of exceptions), the vast majority of Conservation Aggregates were showing improvement in absolute terms on each of the key census indicators identified, showing an increase in qualifications and good health and a reduction in the people working long hours and households lacking central heating.

However, it is not possible to conclude from this evidence that Conservation Area status was a key driver of this improvement because this improvement was also shown in similar non-Conservation Areas in the same locality, and when performance of Conservation Aggregates was compared against these matched Comparator Aggregates, the pattern was decidedly mixed.

However, the majority of Conservation Aggregates in Rural areas were performing better than Comparator Aggregates (this was particularly evident among Conservation Aggregates in the South West). By contrast, the majority of Town Centre Conservation Aggregates were performing less well than Comparator Aggregates.

There were no clear geographic patterns, with the worst and best performing individual Conservation Aggregates being scattered between the regions. However, Conservation Aggregates in London tended to perform less well on average than Comparator Aggregates. We identified a set of individual Conservation Aggregates which consistently performed better and less well than Comparators and recommend considering them for further exploration in future research.

Looking at the indicators individually, we identified that Town Centre Conservation Aggregates performed particularly badly on terms of reducing the proportion of households without central heating compared with non-Conservation Aggregates. The difference in performance was particularly evident in the Yorkshire Humber and West Midlands.

The Census indicators have given us an insight into some of the changes which have occurred in Conservation Aggregates over the period. However, a key limitation of the Census data is that it only covers to time period: 2001 and 2011. This presents three problems for our analysis:

1) Data is increasingly out of date and does not provide us with information about how Conservation Aggregates have been changing post 2011.
2) The trend data provided is derived from two snapshots which are 10 years apart. It is not therefore possible to infer how areas were changing between those two periods, whether there was any fluctuation in performance.
3) The base timepoint for the Census data – 2011 is outside the scope of the rest of the study, which explores performance from 2005. We have matched Conservation Aggregates to equivalent Comparator Aggregates based on their base position in 2005. Any Conservation Aggregates that experienced notable change between 2001 and 2005 will be less well matched with their Comparator Aggregates and it is harder to determine whether the divergence in performance occurred before or after 2005.

It is therefore necessary to explore a wider set of indicators from different sources which more comprehensively cover the time period of the study, in order to effectively determine whether Conservation Areas are key drivers of *Good Growth*. These indicators are explored in each of the four chapters below.

Chapter 4: Analysis of 'Economic Growth'

Introduction

In this chapter we examine whether Conservation Areas are experiencing 'Economic Growth' using an indicator derived from administrative data.

First we highlight our approach to measuring economic growth, introducing the key indicator used in this part of the analysis.

Next, we provide an overview of the main trends in the selected indicator of Economic Growth. This section presents the *national average* baseline position, direction of travel and performance of Conservation Aggregates compared to the respective groups of Comparator Aggregates for each of the three categories of Conservation Aggregate (Rural, Urban Residential or Town Centre).

We then go on to look at whether the patterns observed nationally, also hold across each of the *regions*.

Finally we drill down to the individual Conservation Aggregates and explore the following key questions

1) What is the economic profile of the Conservation Areas at a baseline point in time?
2) How has the profile of Conservation Areas changed over time?
3) How are Conservation Areas changing relative to matched Comparator Aggregates (are they experiencing a different rate of growth to similar areas in their locality?

Measuring economic growth

In Chapter 2 – *Phase 2: review of literature on Good Growth; review of data sources on Good Growth* we summarised the process that was adopted for identifying a short list of key indicators under each of the dimensions of "*Good Growth*".

Five indicators were shortlisted from this stage:

- Unemployment claimant rate (Dept for Work and Pensions)
- Jobs density (Business Register and Employment Survey)
- Long term unemployment (Dept for Work and Pensions)
- People with degree level qualifications (Census 2011)
- Gross Value Added (GVA) per capita (Office for National Statistics)

It was necessary to further narrow down this shortlist, to ensure that the final indicator selected for analysis was available at sufficient granularity[23] and temporal coverage[24] to enable us to observe annual changes in economic performance at Lower layer Super Output Area (LSOA) level (the building block for defining the Conservation Aggregates[25]).

Following this stage, one indicator has been selected to measure 'economic growth' in Conservation Areas:

[23] Published down to Lower layer Super Output Area (LSOA) level
[24] Covering a long enough time period for us to observe a trend over the period.
[25] see Chapter 1 for details of how these geographies have been developed

<u>Unemployment rate</u>: Proportion of resident population of working age who are receiving benefits payable to people who are out of work, available for and actively seeking full-time employment benefit: Jobseekers Allowance (JSA)/Universal Credit for jobseekers.

This indicator formed a key component of a number of national and international measures of *Good Growth* as a measure of the resilience of the labour market and job security.

Appendix A provides details of this indictor including a more detailed description, methodology for producing the indicator, source, time period coverage, key strengths and issues to consider when using the indicator to track change over time and examples of where the indicator has been used in other measures of *Good Growth*.

Unemployment rate was the only indicator under this dimension which was available on a consistent basis for the whole time period at LSOA level. We had also considered including Jobs Density but this indicator was first published in 2009 – after the period of the financial crash so would not give a true picture of the impact of economic changes over the last 10 years in Conservation Areas.

Overview of change in unemployment rates between 2005 and 2016

The unemployment data from DWP is available over a lengthy time period, enabling a detailed examination of trends in unemployment rates from 2005 through to 2016. Figure 4.1 below shows the average unemployment rate across each of the Conservation and Comparator Aggregate categories. Each line represents one of the six typology categories, with solid lines representing Conservation Aggregates, dashed lines representing Comparator Aggregates, green lines representing Rural categories, red lines representing Urban Residential and blue lines representing Town Centres.

The trend lines presented in Figure 4.1 convey a great deal of information, highlighting commonalities and differences between categories at the 2005 start point and the 2016 end point, and showing the trajectories that each category grouping has followed during this eleven year period. A number of key findings are evident from Figure 4.1. Firstly, and with a particular focus on the Conservation Aggregates, it is clear that at the baseline time-point of 2005, the group of Town Centre Conservation Aggregates exhibit higher unemployment rates than the group of Urban Residential Conservation Aggregates, which in turn exhibit higher unemployment rates than the group of Rural Conservation Aggregates. The trend lines demonstrate that this ordering between the three categories persists in each year between 2005 and 2016. Secondly, it is evident that although the three categories of Conservation Aggregate were notably different from each other at every annual time point, the general temporal patterns followed across the time period were in fact very similar. These trends consist of a period of relative stability in unemployment rates between 2005 and 2008 across all three types of Conservation Aggregate, followed by a sharp rise in unemployment between 2008 and 2009 (coinciding with the onset of the financial crash, which saw widespread increases in unemployment nationally) which persisted until around 2012, followed by a gradual decline in unemployment rates through to the end point of 2016. Indeed, by 2016 the unemployment rate had dropped to below the pre-crash levels in all three categories of Conservation Aggregate.

Figure 4.1: Unemployment rate in Conservation and Comparator Aggregates 2005 to 2016

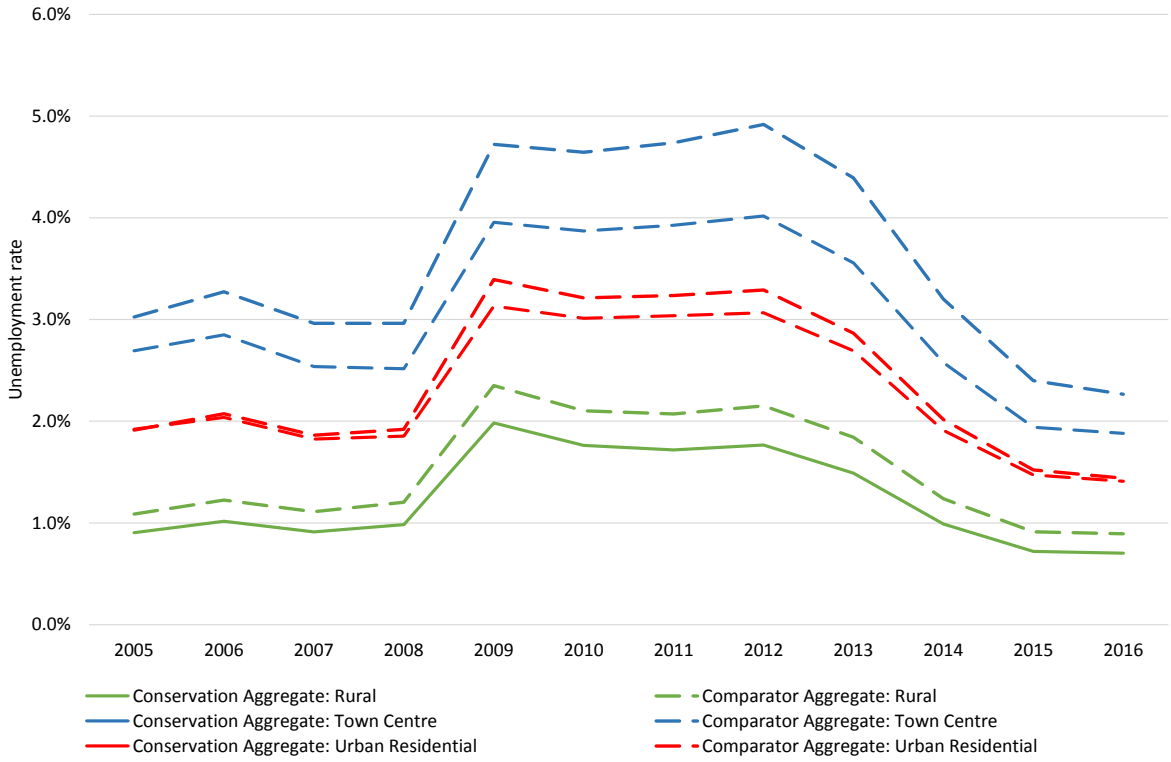


Table 4.1 shows the unemployment rates for each category of Conservation Aggregate in 2005 and 2016 and shows the percentage point change over this entire period.

Table 4.1: Conservation Aggregate unemployment rates at baseline and end point

		2005	2016	Change
Conservation Aggregates	Rural	0.9%	0.7%	-0.2%
	Urban Residential	1.9%	1.4%	-0.5%
	Town Centre	2.7%	1.9%	-0.8%
Comparator Aggregates	Rural	1.1%	0.9%	-0.2%
	Urban Residential	1.9%	1.4%	-0.5%
	Town Centre	3.0%	2.3%	-0.8%

It is also evident that, although there was a considerable increase in unemployment across all three categories of Conservation Aggregate at the point of the economic crash, there were some differences between the three categories in the magnitude of change observed. Specifically, between 2008 and 2009 the unemployment rate increased by 1.0 percentage point for the group of Rural Conservation Aggregates, 1.3 percentage points for the group of Urban Residential Conservation Aggregates, and 1.4 percentage points for the Town Centre Conservation Aggregates. While these changes may be regarded as quite small in absolute terms, they represent quite considerable *relative* changes compared to the pre-crash levels. For example, the unemployment rate doubles in Rural Conservation Aggregates over this single year period (from 1% to 2%).

It should be noted, however, that data presented in Figure 4.1 represent totals for all Conservation Aggregates per category and that the individual Conservation Aggregates may show different trajectories (which we explore later in this chapter).

Having explored how Conservation Aggregates have changed over the period, it is also important to consider this trend in the context of change in Comparator Aggregates over the same period (Figure 4.1 also shows unemployment rates for the three categories of Comparator Aggregate). A number of key features emerge through the consideration of the trends observed in Comparator Aggregates in conjunction with the trends in Conservation Aggregates discussed above. Firstly, it is evident that at the baseline time point of 2005, the unemployment rates in each of the three categories of Conservation Aggregate are very similar to the rates in the respective group of Comparator Aggregates. The rates are almost identical for the Urban Residential categories, while the Rural and Town Centre Conservation Aggregates exhibit slightly lower unemployment rates relative to the respective group of Comparator Aggregates. The second key finding is that the Comparator Aggregates follow a similar trend to the Conservation Aggregates over the time period, consisting of a relatively stable period between 2005 and 2008, followed by a sharp increase between 2008 and 2009, a period of stability at the higher unemployment rate between 2009 and 2012, and a steady decline from 2012 through to 2016. Although the patterns and trends appear to be quite similar between the respective groups of Conservation Aggregate and Comparator Aggregate, there is potentially some indication that the Conservation Aggregates may have been slightly more resilient to the financial crash than the Comparator Aggregates, with Conservation Aggregates experiencing a smaller increase than Comparator Aggregates between 2008 and 2009. However, during the period of recovery, the Comparator Aggregates have closed the gap with Conservation Aggregates and the difference in unemployment rates in 2016 between Conservation and Comparator Aggregates was similar to pre-crash levels on average.

Key findings summary:

- Unemployment rates were higher in Town Centre Conservation Aggregates than across other categories throughout the whole period.
- Town Centre Conservation Aggregates saw more notable improvement over the period than across other categories.
- Conservation and Comparator Aggregates follow broadly similar trajectories over the period: A period of stability followed by a sharp increase during the financial crash followed by another period of stability (at above pre-crash levels) followed by a recovery to slightly below the baseline period.
- However, there is some evidence to suggest that Conservation Aggregates were slightly more resilient than Comparators during the financial crash.

Change in unemployment rates at regional level

The presentation of unemployment rates for each category of Conservation and Comparator Aggregate across the entire country necessarily masks variations observed between individual Conservation Aggregates and Comparator Aggregates. The focus now turns to sub-national analyses of unemployment levels and trends in the categories of Conservation and Comparator Aggregate. Before turning to focus on unemployment rates in each of the individual areas, it is first instructive to consider patterns and trends at regional level. Other research has shown how different regions

across the country have experienced different trends in unemployment over the period (e.g. see ONS Statistical Bulletin Regional Labour Market Statistics in the UK[26]), albeit without a focus on Conservation Areas. The objective here is to assess whether the broad patterns of change presented through Figure 4.1 hold when the data are broken down into each of the nine regions of England. To aid the readability of this report, the charts showing unemployment rates in the regions are presented in Appendix E and the key points are picked out and presented in a narrative here in the main body of the report. Figures E.1-E.6 in Appendix E show unemployment rates for Conservation and Comparator Aggregates for the Rural, Urban Residential and Town Centre categories respectively at a baseline point in time and change over time.

It is evident from comparing across the charts that each of the nine regions show a similar pattern and trend as was observed in Figure 4.1. Specifically, in each of the nine regions, unemployment rates are highest for the group of Town Centre Conservation Aggregates, followed by Urban Residential Conservation Aggregates, followed by the Rural Conservation Aggregates. These distinctions are evident in each year between the 2005 baseline and the 2016 end point and shared across Conservation and Comparator Aggregates alike. Furthermore, the trend identified in Figure 4.1 (consisting of a period of stability, followed by increase at the time of the financial crash, followed by a further period of stability at that higher rate, and then finally a gradual decline through to 2016) holds for each of the nine regions.

With regards to the Rural category of Conservation Areas, all nine regions saw a small reduction in unemployment rates between 2005 and 2016. The North East region showed the smallest decrease (a fall of less than 0.1 percentage points) despite having the highest starting position. The largest reduction in unemployment rate occurred in the London region (a fall of 0.8 percentage points[27]), however in terms of absolute magnitude this was still quite small. The pattern was similar for the Urban Residential category, with eight of the regional level Conservation Aggregates seeing an average reduction in unemployment over the period, the exception being the North East, where Urban Residential Conservation Aggregates saw a slight increase (0.2 percentage points) over the period. Again, the largest reduction in Urban Residential Conservation Aggregate unemployment rate occurred in the London region (a fall of 1.2 percentage points), reflecting a wider trend of reduction in unemployment across the capital over the period. In common, with the trends displayed in Figure 4.1, the average fall in unemployment rate between 2005 and 2016 was greater in Town Centre Conservation Aggregates than across Rural or Urban Residential Conservation Aggregates in each of the nine regions. The largest reduction in Town Centre Conservation Aggregate unemployment rate occurred in the London region (a fall of 1.4 percentage points), but average falls of 0.7 percentage points or greater were also experienced in the East Midlands, West Midlands, East and South East.

While, most of these trends were mirrored for Comparator Aggregates, there were some notable divergences between Conservation and Comparator Aggregates at Regional level. The largest of these was between Town Centre Conservation and Comparator Aggregates in the North East region, where Conservation Aggregates experienced a 0.4 percentage point *reduction* in unemployment

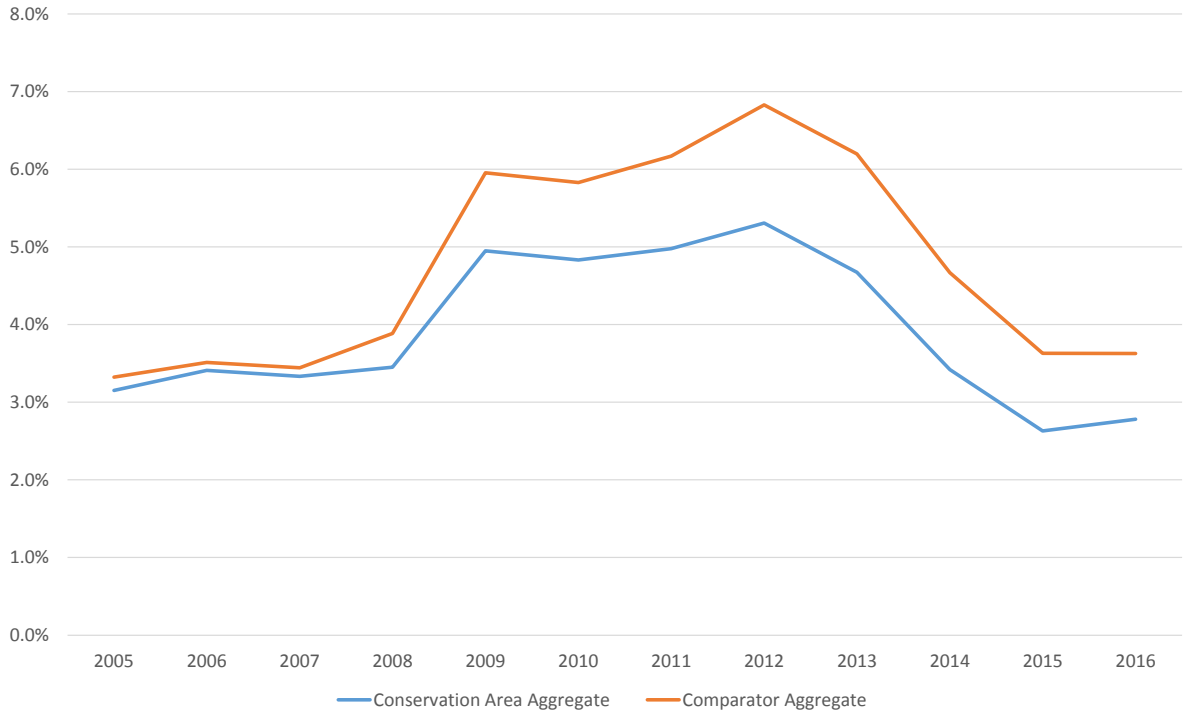
[26] https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/bulletins/regionallabourmarket/latest

[27] However, there are very few Rural Comparator Aggregates in the London region – outside of London, the largest fall was experienced in the East of England (0.4 percentage points).

while Comparator Aggregates experienced a 0.3 percentage points *increase* on average over the 2005-2016 period.

Figure 4.2 shows this trend in more detail, outlining changes in Town Centre Conservation and Comparator Aggregates in the North East on an annual basis. The chart shows that Town Centre Comparator Aggregates in the North East saw a notably larger increase in unemployment during the financial crisis than across Conservation Aggregates suggesting these areas were more resilient.

Figure 4.2 Change in unemployment rate in Town Centre Conservation and Comparator Aggregates in the North East region



The North East also experienced a divergence in trends for Rural Conservation and Comparator Aggregates (with Conservation Aggregates experienced a small fall in unemployment claimant rate (less than 0.1%), while Comparator Aggregates saw a small increase (0.1%)). The North West region also experienced an observable divergence in direction of travel between Conservation and Comparator Aggregates: Town Centre Conservation and Urban Residential Conservation Aggregates across the region experienced small average falls in unemployment (0.35 and 0.02 percentage points respectively), while unemployment increased slightly in respective comparators (0.04 and 0.09 percentage points respectively) over the same period.

Key findings summary:

- Across each of the regions, Conservation Aggregates experienced a similar pattern to the national average both in terms of overall trajectory and relative position of Rural, Urban and Town Centre Aggregates.
- However, there were notable regional differences in absolute trends, with Conservation Aggregates in London experiencing a considerable fall in unemployment rate between 2005 and 2016, while the North East experienced a more mixed picture (a small reduction

in town centre areas, a small increase in Urban Residential areas and little absolute change in rural areas).

- There was a visible divergence in direction of travel in the North East between Town Centre Conservation and Comparator Aggregates, with Conservation Aggregates seeing a reduction in unemployment while their comparators saw an increase over the same period.
- Divergences were smaller across other regions and categories.

The analyses presented so far in this chapter have focused on patterns and trends in unemployment rates for national and regional groupings of the three categories of Conservation and Comparator Aggregates. Exploration of this information has demonstrated the overall trends in unemployment rates over the period. However, as noted throughout this report, national and regional summaries are averages of many individual area trends and patterns and these summaries can mask substantial variations at the more detailed geographical level. In order to ascertain the extent to which individual Conservation Aggregates followed similar or divergent trends to other areas in the same category, and to ascertain the extent to which Conservation Aggregates followed similar or divergent trends to the respective Comparator Aggregates, it is necessary to move beyond the national and regional summaries. In the remainder of this chapter the analyses therefore turn to examine patterns and trends using the data for each individual Conservation Aggregate and Comparator Aggregate. The objective is to assess the degree of commonality or difference between individual areas at specified points in time and in terms of change over time, firstly with a focus solely on the Conservation Aggregates, and then through comparing the Conservation Aggregates to the respective matched Comparator Aggregates.

What is the profile of the individual Conservation Areas at a baseline point in time?

The charts below show the distribution of unemployment benefit claimant rates across Conservation Aggregates (by category) in 2005. The Conservation Aggregates are ordered highest to lowest in terms of unemployment rate, with the height of the bars representing the unemployment rate (as a percentage of the working age population) in 2005.

The three horizontal reference lines show the average value for three groups of areas. The red horizontal reference line relates to the average for all Conservation Aggregates of that type (i.e. Rural, Urban Residential or Town Centre), the green horizontal reference line relates to the average for all Comparator Aggregates of that type, and the orange horizontal reference line relates to the average for all non-Conservation Aggregate areas of that type across the country. As such, the value depicted by the orange horizontal reference line includes the Comparator Aggregates and all other non-Conservation Aggregate areas. The Comparator Aggregates represent a particular subset of the group of areas depicted by the orange horizontal reference line.

Figure 4.2 Unemployment benefit claimant rate in Rural Conservation Aggregates in 2005

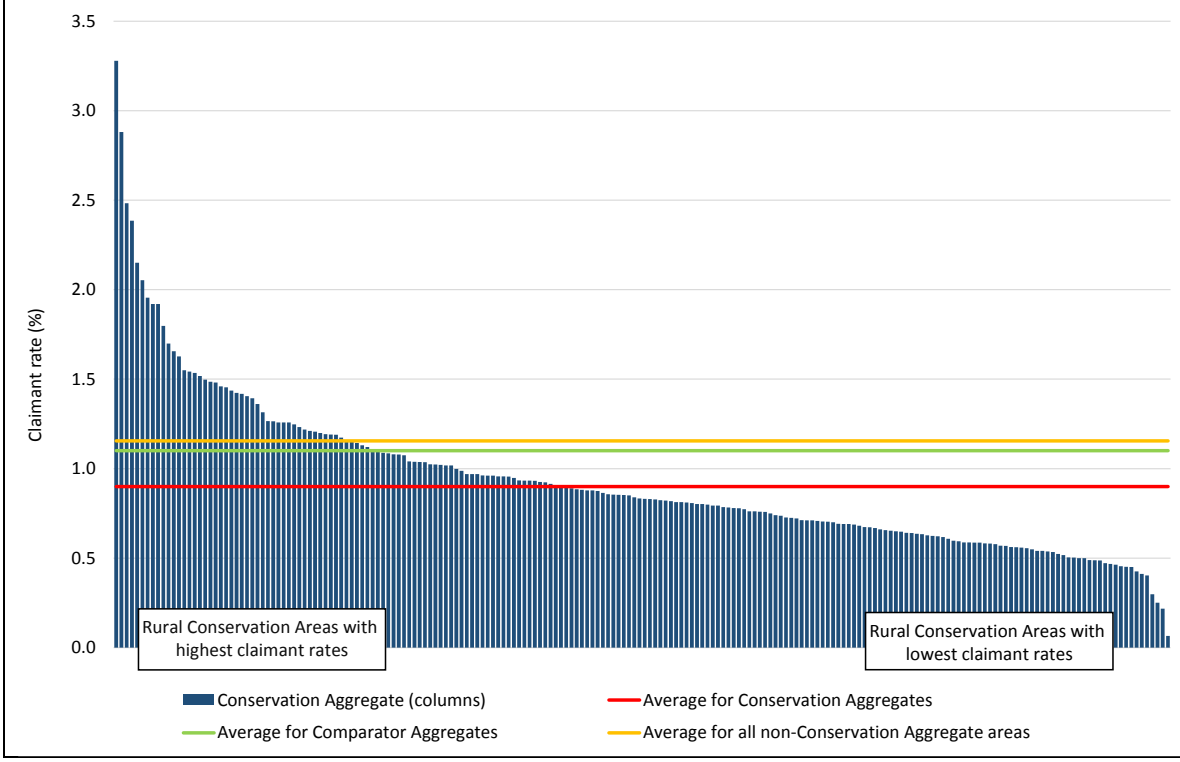


Figure 4.3 Unemployment benefit claimant rate in Urban Residential Conservation Aggregates in 2005

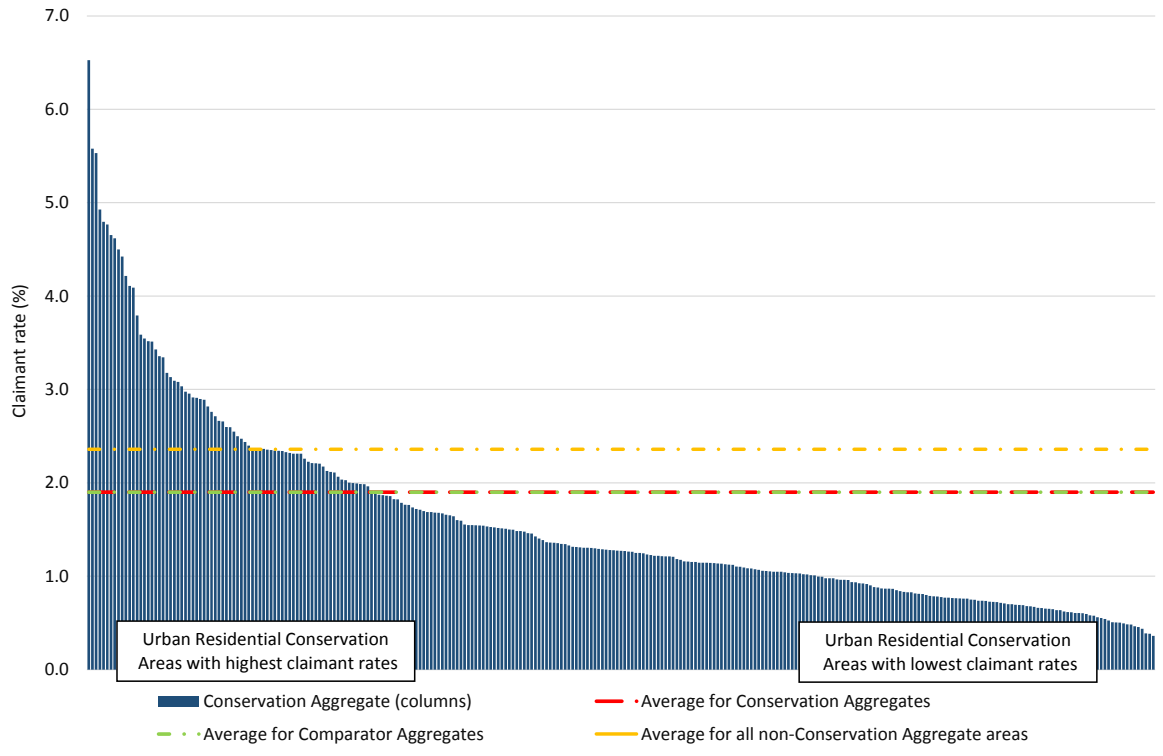
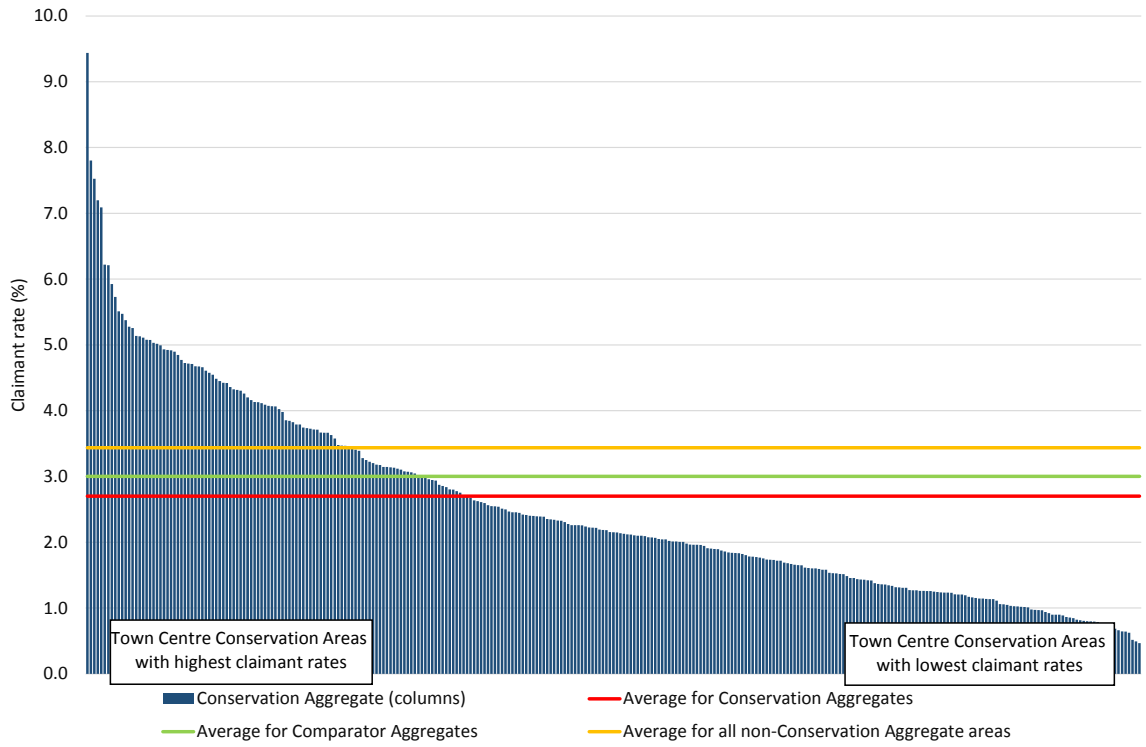


Figure 4.4 Unemployment benefit claimant rate in Town Centre Conservation Aggregates in 2005



It was apparent from Figure 4.1 and Table 4.1 that the average unemployment rate for the groups of Rural and Town Centre Conservation Aggregates were slightly lower than the average rates in the respective groups of Comparator Aggregate at the baseline point in time, while for the Urban Residential group the rate was identical between the Conservation Aggregates and Comparator Aggregates. These findings are shown again in Figures 4.2 to 4.4 as the red horizontal reference lines (Conservation Aggregate average) can be seen in the context of the green horizontal reference lines (Comparator Aggregate average). It is further evident from Figures 4.2 to 4.4 that the unemployment rate was lower in the groups of Conservation Aggregate than in the respective groups of 'all non-Conservation Aggregate areas' of the relative types. So at the baseline point in time, unemployment was typically lower in Conservation Aggregates than in the rest of the country (assessed separated by typology category).

Each of the three charts shows a similarly shaped distribution of individual Conservation Aggregate unemployment rates, albeit stretching across different ranges of values up the vertical y-axis. On all three charts, the unemployment rates increase gradually across the Conservation Aggregates from right to left along the horizontal axis, then increase much more steeply at the most deprived end of the distribution (on the far left of each chart). These distributions indicate that in each of the three area type categories there are a relatively small number of Conservation Aggregates across England that exhibit notably higher unemployment rates that the majority of the other Conservation Aggregates of that type.

With regard to the Rural Conservation Aggregates in 2005, the proportion of people unemployed ranged from a high of 3.3% in Mansfield to a low of less than 0.1% in Preston. Analysis of the data

underpinning Figure 4.2 reveals that mining, manufacturing and coastal areas featured heavily among those Rural Conservation Aggregates that had the highest unemployment rates.

With regards to Urban Residential Conservation Aggregates in 2005, the proportion of people unemployed ranged from a high of 6.5% in Barrow-in-Furness to a low of 0.4% in the Vale of White Horse (South West Oxfordshire). As such, the magnitude of the difference between the highest and lowest unemployment rates was greater for the Urban Residential category than for the Rural category considered above. The Urban Residential Conservation Aggregates with the highest unemployment rates in 2005 were typically located in large cities, with 8 of the 10 Local Authorities with the highest rates in London or the West Midlands (Birmingham/Black Country).

With regard to the Town Centre Conservation Aggregates, the unemployment rates in 2005 were typically higher than the Rural and then Urban Residential categories, with more than half (57%) of all Town Centre Conservation Aggregates having unemployment rates of 2% or more. The unemployment rates ranged from a high of 9.4% in Great Yarmouth to a low of 0.5% in Tandridge (Surrey). Analysis of the underpinning data reveals that coastal areas feature quite prominently among the Town Centre Conservation Aggregates with the highest unemployment rates, with 11 of the 20 Conservation Aggregates with the highest unemployment located in coastal areas.

For more details on the geographic distribution of unemployment claimants in Conservation Aggregates at a baseline point in time see, Maps E7 to E9 in Appendix E.

Key findings summary:

- Town Centre Conservation Aggregates saw a greater spread in baseline unemployment rates compared with other categories, while there was much less variation in unemployment rates in Rural Conservation Aggregates.
- Coastal areas featured prominently among the Rural and Town Centre Conservation Aggregates with the highest unemployment rates.
- Urban Residential Conservation Aggregates with the highest unemployment rates were mainly situated in large metropolitan areas (London/West Midlands).

How do Conservation Aggregates compare with their Comparator Aggregates at a baseline point in time?

The Comparator Aggregates were designed to be as similar as possible to their Conservation Aggregate in terms of levels of multiple deprivation and population size in 2005. Before turning to analyse change in each Conservation Aggregate relative to its matched Comparator Aggregate, it is first instructive to consider the degree to which individual Comparator Aggregates match their Conservation Aggregate on the unemployment indicator at the 2005 baseline time point.

The scatterplots below compare the unemployment rate in 2005 in Conservation Aggregates and their matched Comparator Aggregates. Each point represents a Local Authority area, with the horizontal axis showing the unemployment rate in the Conservation Aggregate and the vertical line showing the unemployment rate of the Comparator Aggregate in 2005. The charts show how closely

the baseline unemployment rate in Conservation Aggregates is mirrored in their associated Comparator Aggregates, with areas plotted close to the diagonal reference line showing a very good match between Conservation and Comparator Aggregates, areas displayed above the diagonal reference line showing higher unemployment in Conservation Aggregates than Comparator Aggregates (and vice versa).

Note: for this analysis we have excluded Conservation Aggregates where we were unable to achieve a good match with Comparator Aggregates, either in terms of IMD 2007 score or overall population. See Appendix A for details.

Figure 4.5 Unemployment benefit claimant rate in Rural Conservation and Comparator Aggregates in 2005

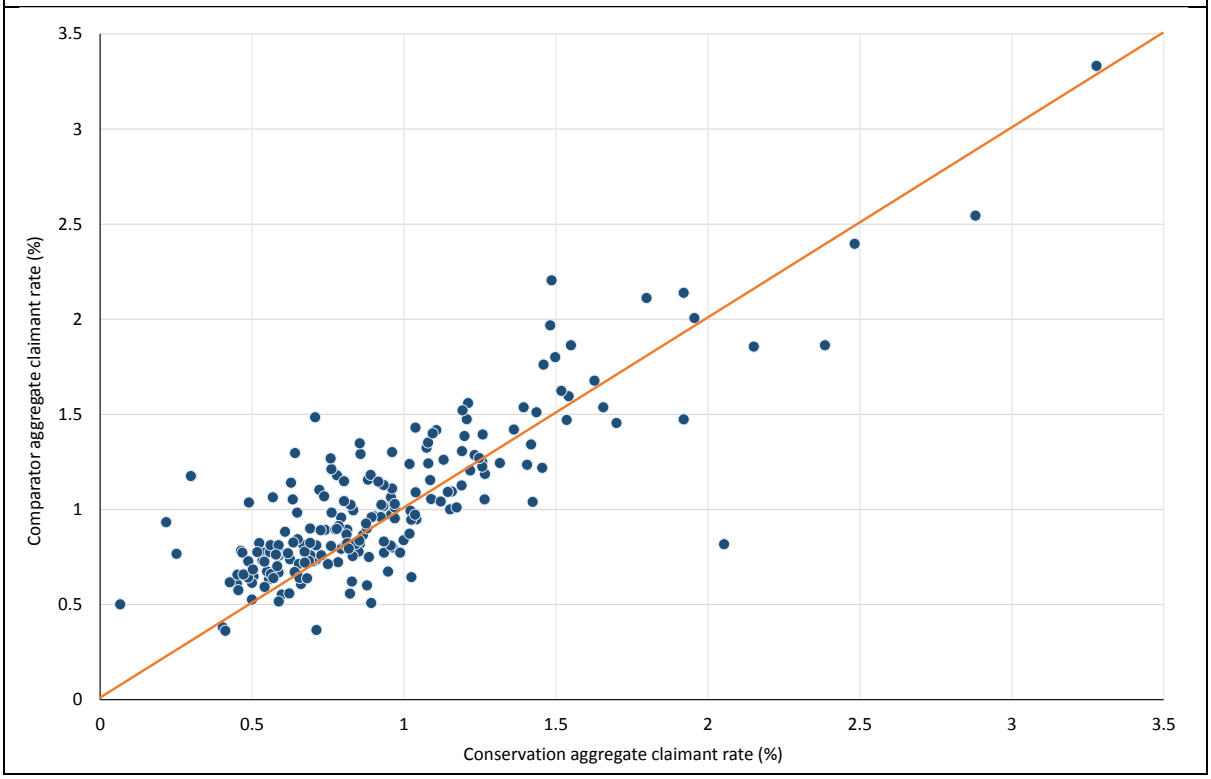


Figure 4.6 Unemployment benefit claimant rate in Urban Residential Conservation and Comparator Aggregates in 2005

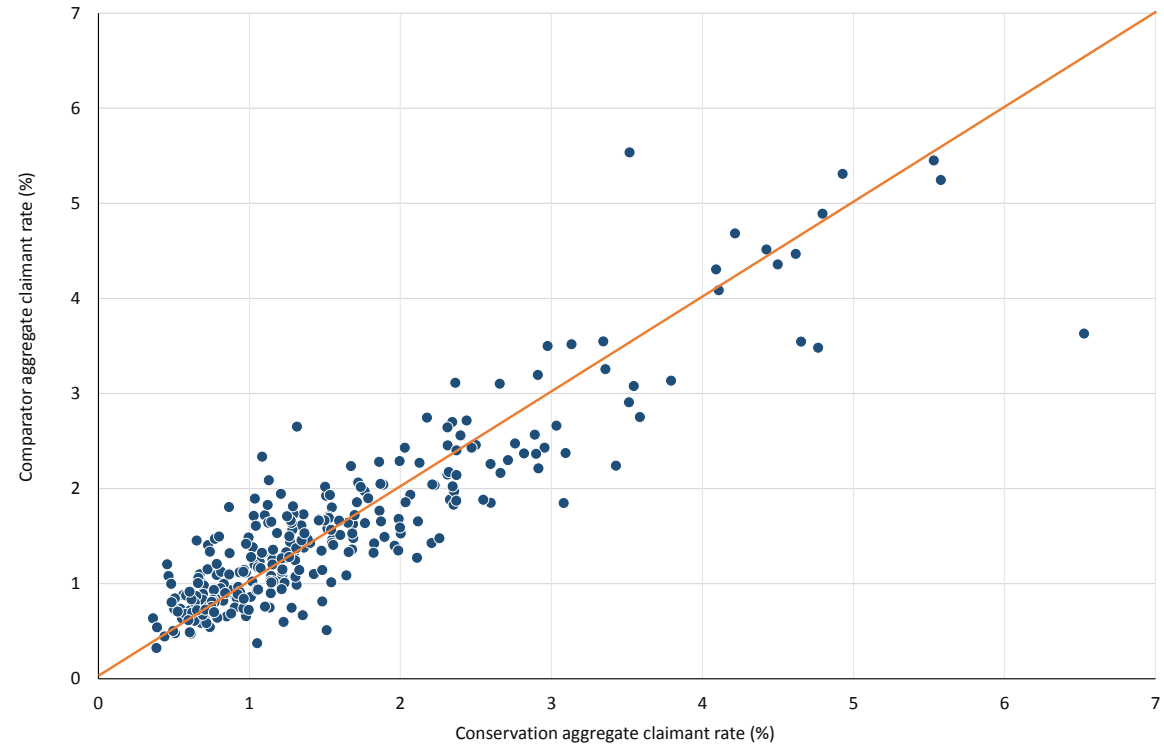
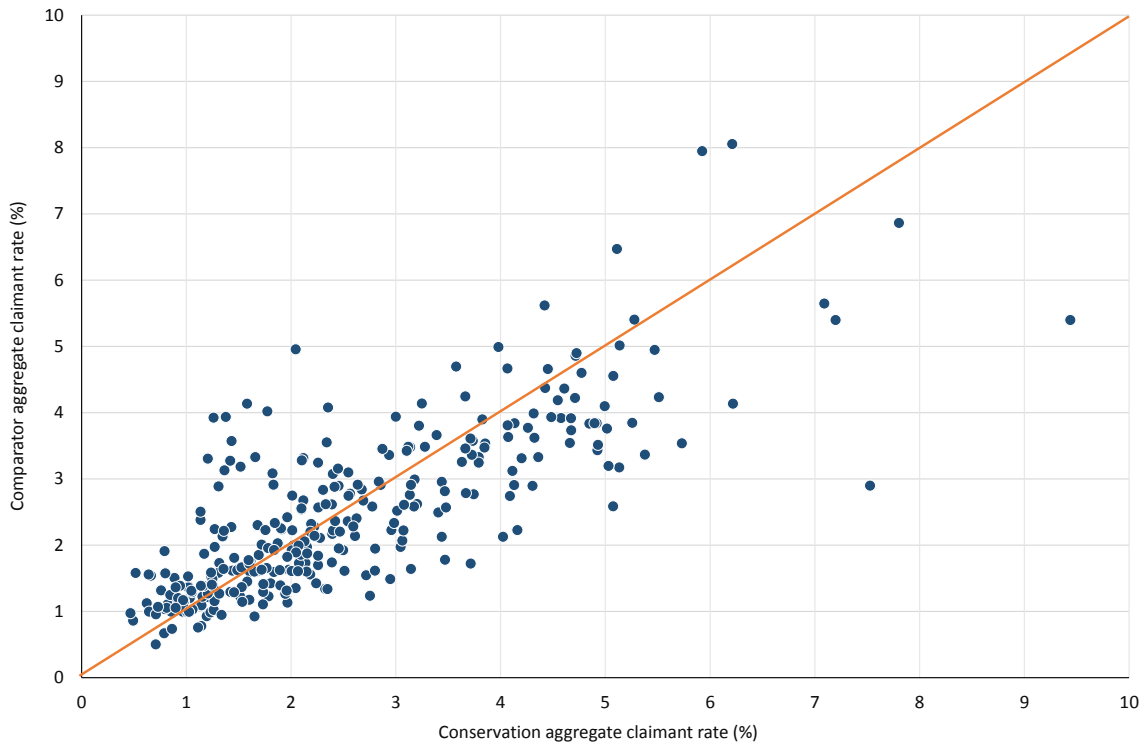


Figure 4.7 Unemployment benefit claimant rate in Town Centre Conservation and Comparator Aggregates in 2005



It is evident from each of these figures that the vast majority of Rural, Urban Residential and Conservation Aggregates had similar unemployment rates to their matched Comparator Aggregates in 2005.

- We see that 158 of the 199 Rural Conservation Aggregates (79%) had an unemployment rate within +- 0.3 percentage points of their associated Comparator Aggregate[28].
- We see that 169 of the 286 Urban Residential Conservation Aggregates (59%) having an unemployment rate within 0.3 parentage points of their associated Comparator Aggregate[29].
- We see that 104 of the 256 (41%) Town Centre Conservation Aggregates of this type had unemployment rates within 0.3 percentage points of their Comparator Aggregates[30].

The difference at baseline was therefore typically slightly more pronounced for the Town Centre category than for either the Rural or Urban Residential category.

Key findings summary:

- The majority of Conservation Aggregates had extremely similar unemployment rates to their matched Comparator Areas at a baseline point in time.
- This match was closest for Rural Conservation Aggregates, while there were a greater number of outliers in the Town Centre category

How has the profile of Conservation Areas changed over time?

[28] Of the remaining 41, two had an unemployment rate more than 0.5 percentage points higher than the Comparator Aggregates (Halton and Copeland) and nine had an unemployment rate 0.5 percentage points lower than the Comparator Aggregates. The Rural Conservation Aggregate with the highest Unemployment rate relative to their Comparator Aggregate was Halton in Cheshire (with an Unemployment rate 1.2 percentage points higher than the Comparator Aggregate). The Rural Conservation Aggregate with the lowest Unemployment rate relative to their Comparator Aggregate was East Dorset (with an Unemployment rate 0.9 percentage points lower than the Comparator Aggregate).

[29] Of the remaining 117 areas, 28 had an unemployment rate more than 0.5 percentage points higher than the Comparator Aggregates and 28 had an unemployment rate 0.5 percentage points lower than the Comparator Aggregates. The Urban Residential Conservation Aggregate with the highest Unemployment rate relative to their Comparator Aggregate was Barrow-in-Furness, which was also the Urban Conservation Aggregate with the highest overall unemployment rate. The Unemployment rate in Barrow-in-Furness was 2.9 percentage points higher than the Comparator Aggregate. In contrast, the Urban Residential Conservation Aggregate with the lowest Unemployment rate relative to their Comparator Aggregate was Newham (with an Unemployment rate 2 percentage points lower than the Comparator Aggregate).

[30] Of the remaining 152, 70 had unemployment rates 0.5 percentage points higher, including 29 with an unemployment rates 1 percentage point higher at a baseline point in time. At the other end of the spectrum, 27 had unemployment rate 0.5 percentage points lower than their comparators (including eight areas with unemployment rates 1 percentage point lower). The Town Centre Conservation Aggregate that was least well matched with their comparator in terms of baseline unemployment rate was Ipswich, where unemployment in the Conservation Aggregate was 4.6 percentage point higher than the Comparator Aggregate (despite these areas being well matched in terms of IMD and population size). Coastal areas also featured prominently among areas less well matched areas, with seven of the ten Town Centre areas with the biggest differences between Conservation Aggregates and matched comparators located in Coastal Local Authorities.

The general trends in unemployment rates across the three categories of Conservation Aggregate (and the three categories of Comparator Aggregate) were revealed through Figure 4.1 and the accompanying discussion. Those general patterns and trends were subsequently seen to hold when looking at regional groupings, with a few noted exceptions. The following analyses are concerned with unpicking these high-level summaries to show the patterns and trends experienced within each individual Conservation Aggregate over the time period considered. Again, the focus is on the period 2005 to 2016. The charts below compare the percentage point change in unemployment across each of the Conservation Aggregates between 2005 and 2016 and therefore show the distribution of values that underpin the national and regional summarised presented above.

The size of the bars in Figure 4.8 are calculated by taking the unemployment rate in 2016 and subtracting the unemployment rate in 2005. Therefore, in cases where the rate was higher in 2016 than in 2005 the change value will be positive (i.e. a worsening), whereas in cases where the rate was lower in 2016 than in 2005 the change value will be negative (i.e. an improvement).

Figure. 4.8 Percentage point change in Unemployment benefit claimant rate in Rural Conservation Aggregates between 2005 and 2016

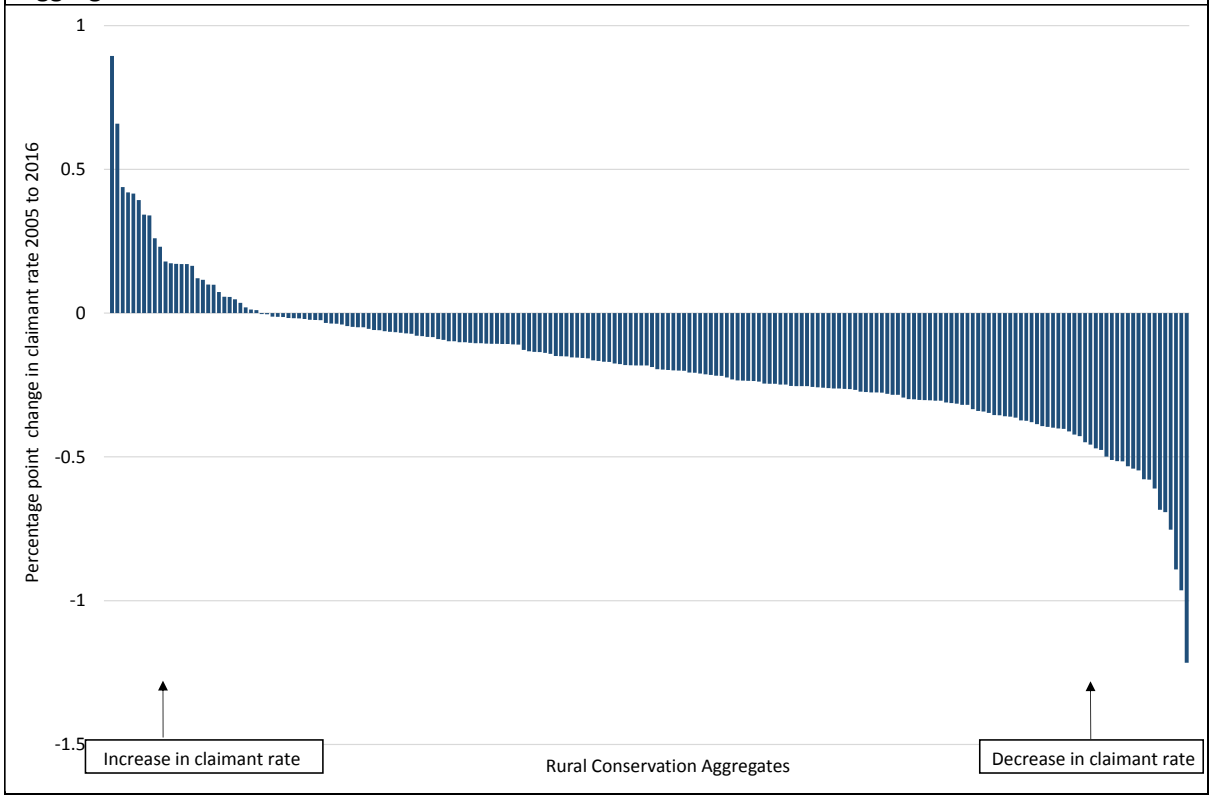


Figure 4.9 Percentage point change in Unemployment benefit claimant rate in Urban Residential Conservation Aggregates between 2005 and 2016

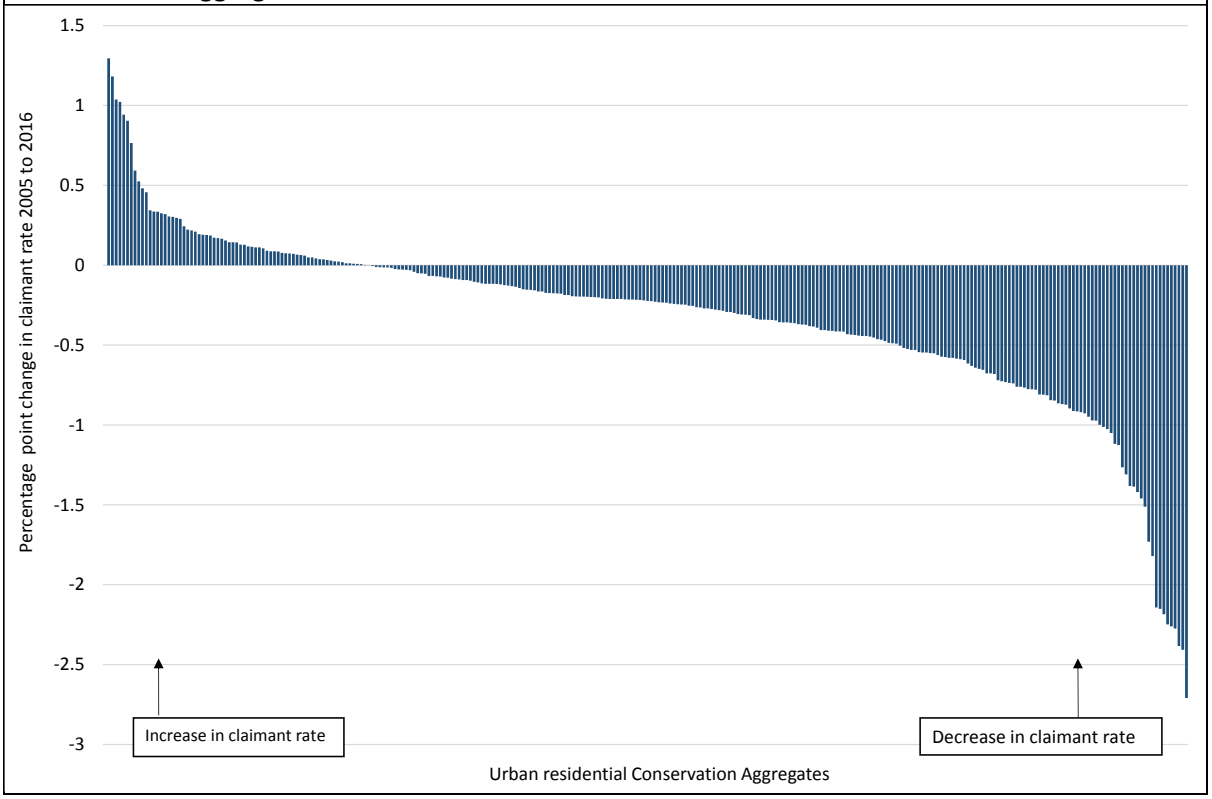
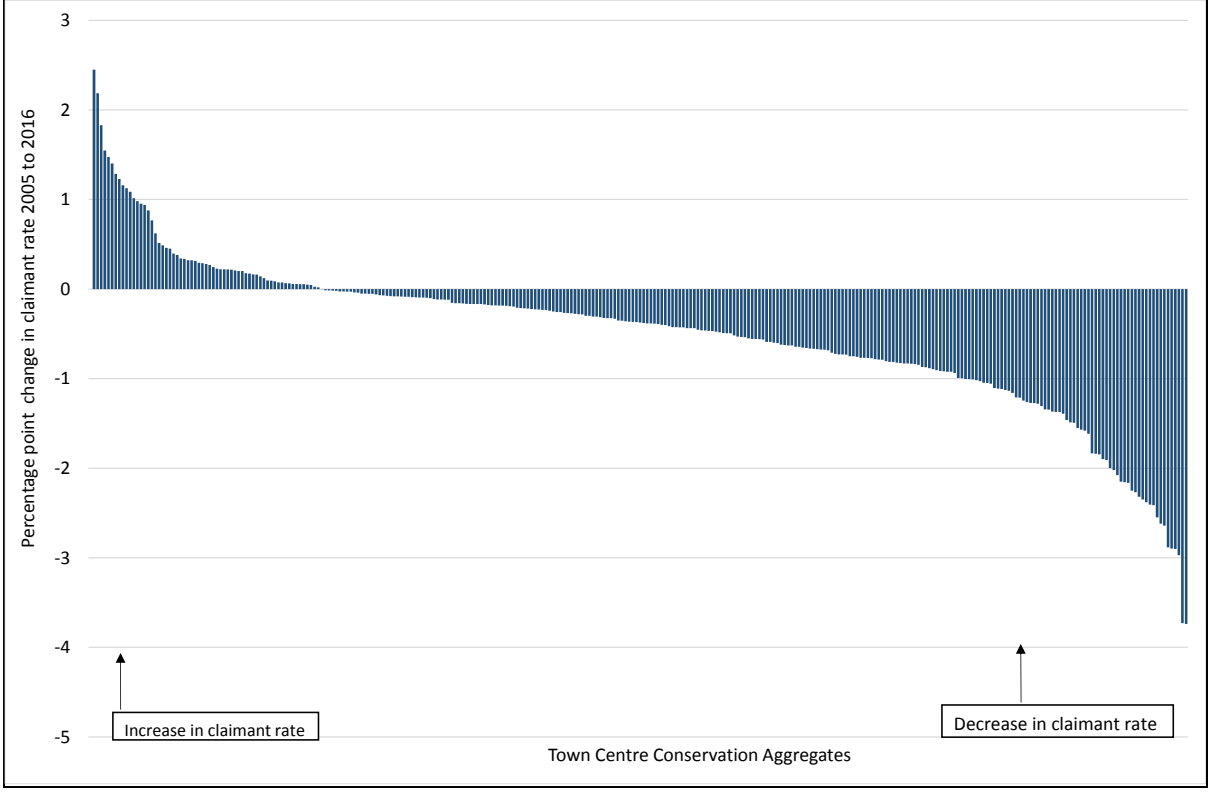


Figure 4.10 Percentage point change in Unemployment benefit claimant rate in Town Centre Conservation Aggregates between 2005 and 2016



As illustrated in the charts above, the overall distribution in terms of percentage point change in unemployment claimant rate is similar across Rural, Urban Residential and Town Centre Conservation Aggregates alike. The majority of Conservation Aggregates in each category experienced an overall fall in unemployment rate between 2005 and 2016, with a notable minority experiencing an increase in unemployment over the period. However, the spread of change in unemployment rate was widest in Town Centre Conservation Aggregates and narrowest in Rural Conservation Aggregates.

The vast majority of Rural Conservation Aggregates had a similar unemployment rate in 2016 compared with the base period. Indeed, 71% of Rural Conservation Areas had an unemployment rate in 2016 that was within +-0.3 percentage points of the 2005 unemployment rate.

The percentage point change in unemployment rate in Rural Conservation Aggregates ranged from an increase of 0.9 percentage points in Hyndburn to a decrease of 1.2 percentage points in Mansfield. The data underpinning the chart also reveal interesting geographical patterns, with increases in unemployment that were particularly notable in the rural areas surrounding Manchester (with seven of the 11 Rural Conservation Aggregates with the greatest increases in unemployment being located within 25 miles of Manchester – see maps on the following pages for more details). By contrast, there are concentrations of Rural Conservation Aggregates experiencing falls across some coastal areas of East Anglia, with Waveney, Great Yarmouth, King's Lynn and West Norfolk and North Norfolk all ranked among the 10 Rural Conservation Aggregates with the largest fall in unemployment over the period.

The majority of Urban Residential Conservation Aggregates also had a similar unemployment rate in 2016 compared with the base period. Indeed, 52% of Urban Residential areas (149 out of 287) had an unemployment rate in 2016 within +-0.3 percentage points of their 2005 unemployment rate[31]. The percentage point change in unemployment rate in Urban Residential Conservation Aggregates ranged from an increase of 1.3 percentage points in St Helens to a decrease in claimant rate of 2.7 percentage points in Tower Hamlets. The Urban Residential Conservation Aggregates seeing the largest increases in unemployment over the period were predominantly located in the North of England, with nine of the 20 Urban Residential areas with the largest increases located in the North West region, four in the North East and three in the Yorkshire and Humber region. By contrast, of the ten Urban Residential areas with the largest falls in unemployment over the period, nine were located in London. This correlates with the regional findings above, and reflects wider regional trends in unemployment over the period.

As identified above, Town Centre Conservation Aggregates experienced greater change in Unemployment rates over the period, with just under half (48%) experiencing changes of +-0.5 percentage points over the period[32]. The percentage point change in unemployment rate in Town Centre Conservation Aggregates ranged from an increase of 2.5 percentage points in West Lindsey (Lincolnshire) to a decrease in claimant rate of 3.7 percentage points in Great Yarmouth. As was seen with Urban Residential areas, the Town Centre Conservation Aggregates with the largest increase in unemployment tend to be concentrated in the North West region, with 11 of the 19 Town Centre areas with an increase in unemployment of more than 0.5 percentage points located in the North West region. By contrast, of the 20 Town Centre Conservation Aggregates with the largest falls in unemployment over the period, 11 were located in London. There were also notable falls in

[31] Of the remaining 138, nine experienced an increase of 0.5 percentage points or greater and 77 experienced a fall of 0.5 percentage points or greater.

[32] Of these, 12 experienced an increase of 1 percentage point or greater and 62 experienced a fall of 1 percentage point or greater.

Norfolk and Suffolk, with Ipswich, Great Yarmouth, Waveney (Lowestoft and North East Suffolk coast) and Norwich also featuring among the 20 Town Centre areas with the largest decreases in unemployment over the period.

Key findings summary:

- The majority of Conservation Aggregates experienced an overall fall in unemployment between 2005 and 2016.
- For most of these areas the magnitude of change was quite small, although for each category there were a minority of cases where the change was notably more pronounced.
- Town Centre Conservation Aggregates experienced a greater scale of change with larger increases at one end of the distribution and larger falls at the other end
- The largest falls in unemployment in Conservation Areas over the period were seen in London and East Anglia (particularly in Norfolk).
- Areas experiencing notable increases in unemployment were particularly concentrated in the North particularly in the area around Greater Manchester
- These geographical patterns persisted across Rural, Urban Residential and Town Centre areas alike suggesting that wider regional shifts in unemployment may be taking place.

The maps below show this geographical spread in more detail – showing change in unemployment rate between 2005 and 2016 in Rural, Urban Residential and Town Centre Conservation Aggregates. Conservation Aggregates shaded pink on the map are characterised as showing notable decreases in unemployment over the period (absolute improvement). Conservation Aggregates shaded blue are characterised as having notable increases in unemployment (absolute worsening of position). Conservation Aggregates shaded light green have not experienced appreciable change between 2005 and 2016. For detail of how the map colours are calculated see Appendix C.

Figure 4.11 Change in Unemployment rates 2005 to 2016 in in Rural Conservation Aggregates

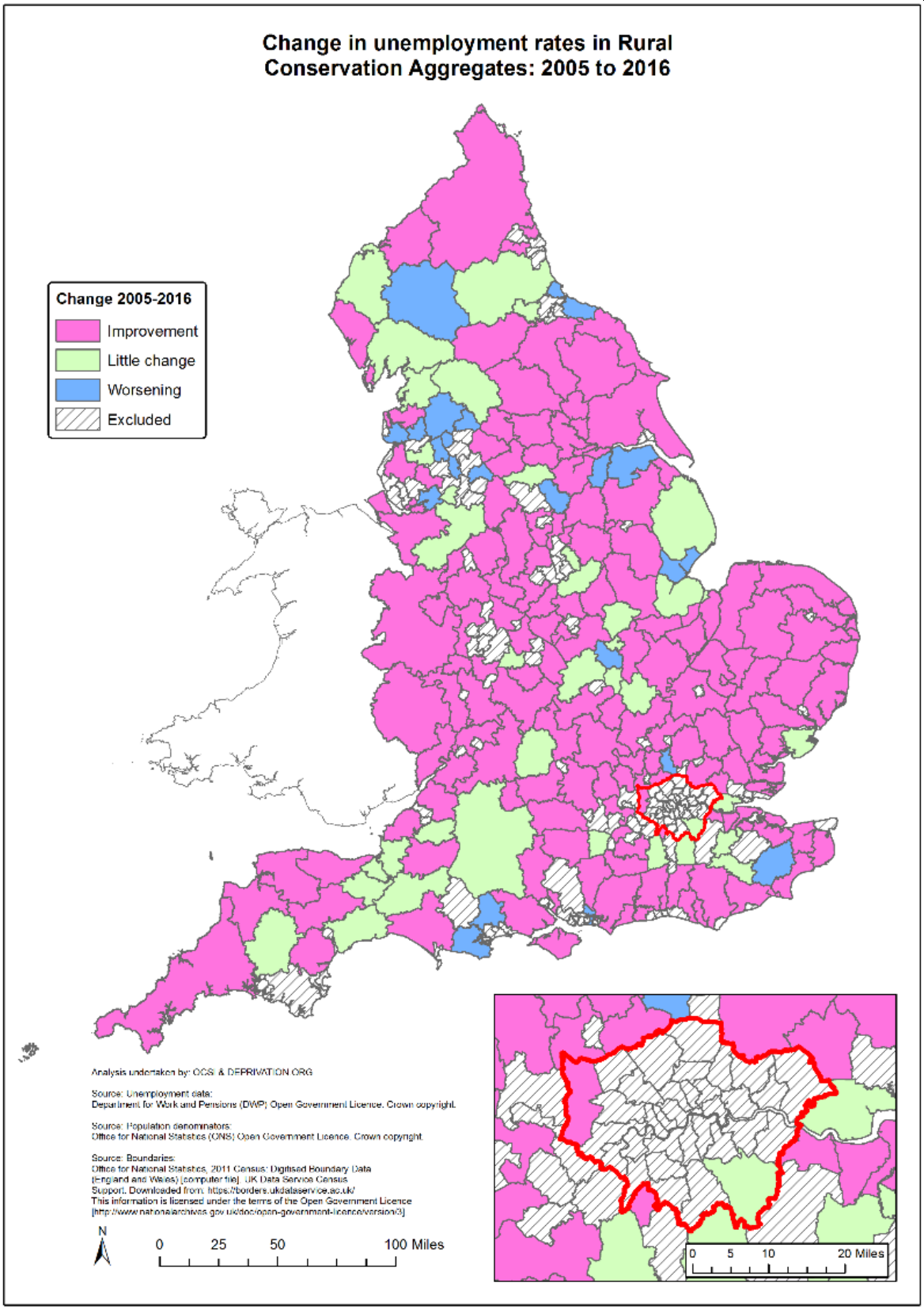


Figure 4.12 Change in Unemployment rates 2005 to 2016 in Urban Residential Conservation Aggregates

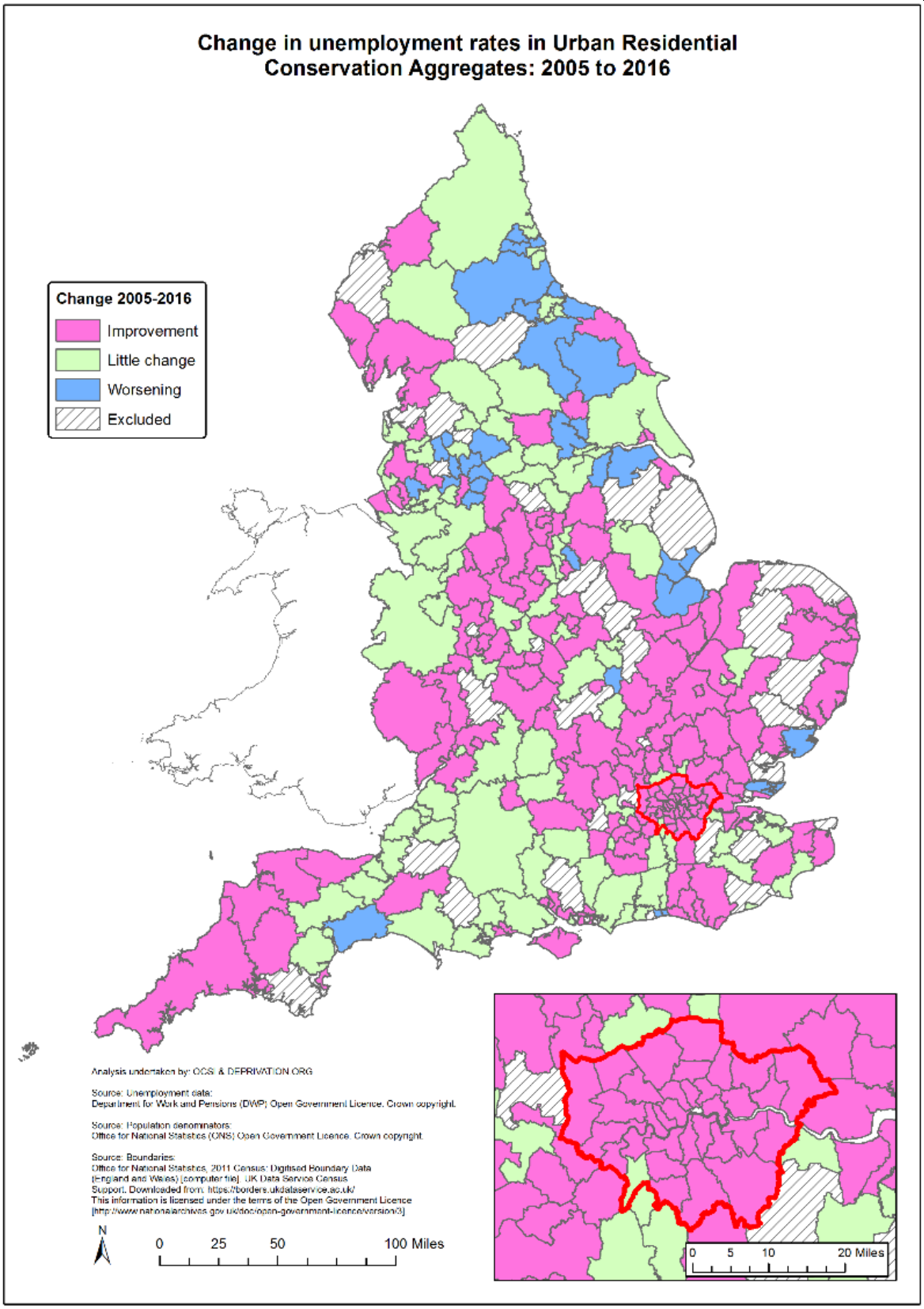
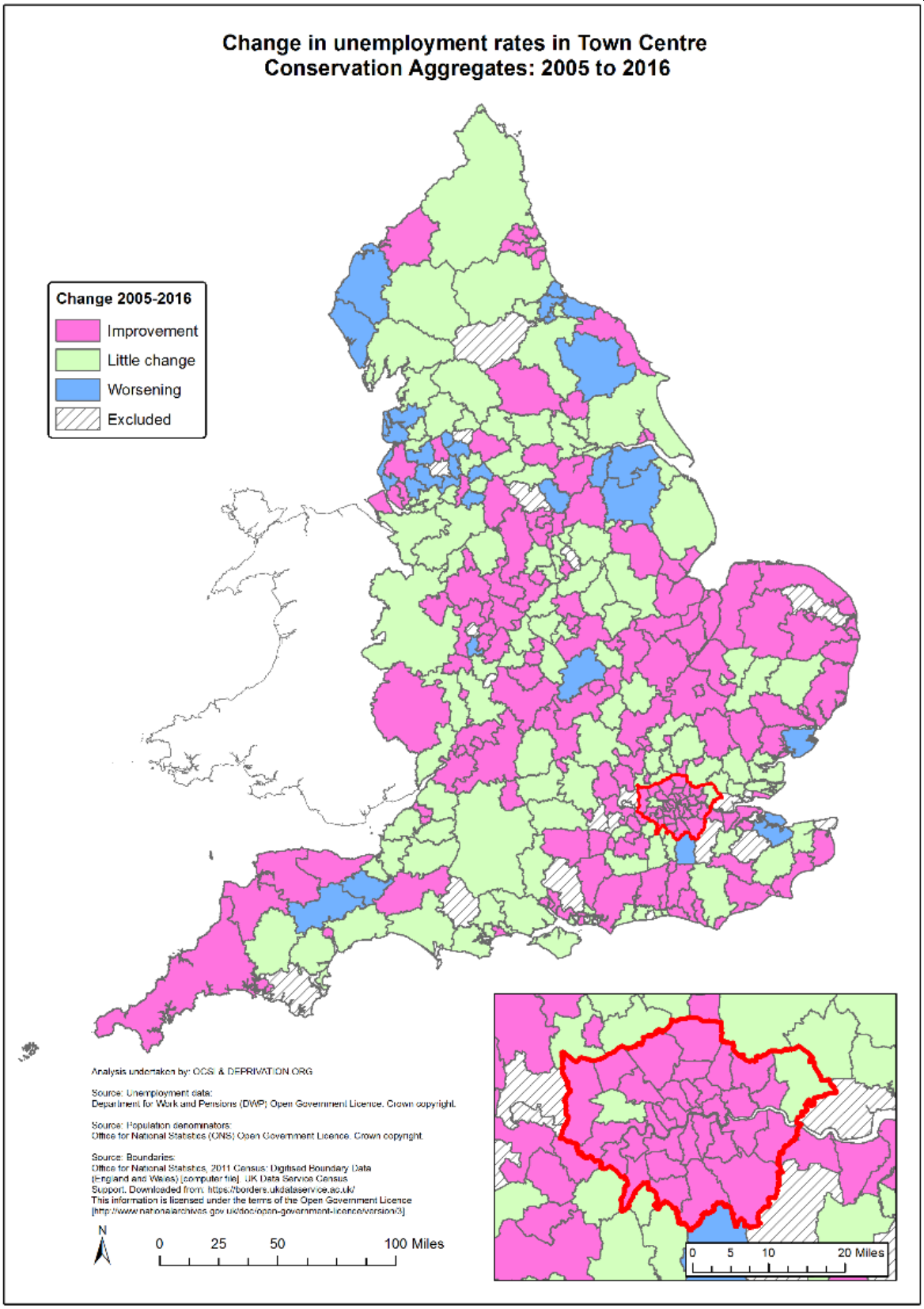


Figure 4.13 Change in Unemployment rates 2005 to 2016 in Town Centre Conservation Aggregates



These findings are helpful in setting the context in terms of how Conservation Aggregates have changed over time on the unemployment indicator. However, in order to assess whether Conservation Aggregates were simply following the broader trends or alternatively experiencing more (or indeed less) pronounced trends, it is necessary to consider each Conservation Aggregate relative to its matched Comparator Aggregate. This is the focus of the following analytical section.

How are Conservation Areas changing relative to matched Comparator Aggregates?[33]

It was observed earlier in this chapter that, on the whole, the Comparator Aggregates registered very similar rates of unemployment to their matched Conservation Aggregate at the 2005 baseline time point. This means that analyses of change over time in Conservation Aggregated relative to their matched Comparator Aggregates can be undertaken with a sufficient degree of confidence. The starting assumption is that, if Conservation Area designation has no effect on unemployment rates (either positively or negatively), then unemployment trends in each Conservation Aggregate are likely to be of similar magnitude (and direction) to the matched Comparator Aggregate. The focus in this section of the analysis is to observe whether unemployment trends in Conservation Aggregates are indeed similar to their matched Comparator Aggregates or whether there is evidence of more pronounced changes across Conservation Aggregates than across Comparator Aggregates. If there is any clear patterning whereby Conservation Aggregates show better outcomes than their matched Comparator Aggregates then this is worthy of further research. Equally, if there is any clear patterning that Conservation Aggregates fare worse than their matched Comparator Aggregates then this would also be worthy of further research. Whilst these analysis presented here cannot reveal anything about causation and cannot permit any direct attribution of impact, they do provide an important overview of how Conservation Aggregates are changing over time relative to other similarly deprived, similarly sized geographical areas in the same general geographical vicinity.

Table 4.2 below summarises the overall trend in Rural, Urban Residential and Town Centre Conservation Aggregates relative to their matched Comparator Aggregate. The areas are grouped into four categories:

1) Conservation Aggregates experiencing both reduction in unemployment and improvement relative to their matched Comparator Aggregates over the period. Conservation Aggregates in this group could be said to be achieving *Good Growth* as they had both a positive direction of travel and were experiencing this improvement at a faster rate than non-Conservation Aggregates in the same locality.
2) Conservation Aggregates which have seen an improvement in terms of reduction in unemployment, but where this improvement has been smaller than in their matched Comparator Aggregate. Conservation Aggregates in this group have had a positive direction of travel but there is less evidence to suggest that their Conservation Area status has been a driver of this improvement, as similar non-Conservation Areas have experienced a greater level of improvement.

[33] Note: for this analysis we have excluded Conservation Aggregates where we were unable to achieve a good match with Comparator Aggregates, either in terms of IMD 2007 score or overall population. See Appendix B for details.

3) Conservation Aggregates experiencing an increase in unemployment but an improvement relative to their matched Comparator Aggregates over the period. Conservation Aggregates in this group have seen an overall worsening of unemployment rates over the period; however, similar areas within the same locality have been experienced an even greater increase in unemployment (suggesting that the Conservation Aggregate may have proved more resilient than the surrounding area).
4) Conservation Aggregates experiencing both an increase in unemployment and where they have not been performing as well as their matched Comparator Aggregates over the period. It could be argued that this group is the most concerning, as these areas have experienced a worsening both in absolute terms and also relative to their matched Comparator Aggregate.

Table 4.2: Absolute and relative performance of Conservation Aggregates

	Rural	Urban Residential	Town Centre
1) Reduction in unemployment in Conservation Aggregates & Conservation Aggregates outperform Comparator Aggregates	47.2%	41.3%	46.1%
2) Reduction in unemployment in Conservation Aggregates & Comparator Aggregates outperform Conservation Aggregates	39.2%	34.3%	30.9%
3) Increase in unemployment in Conservation Aggregates & Conservation Aggregates outperform Comparator Aggregates	0.5 %	4.2%	7.4%
4) Increase in unemployment in Conservation Aggregates & Comparator Aggregates outperform Conservation Aggregates	13.1%	20.3%	15.6%
Total	100%	100%	100%

Please see Scatterplots E.17 to E.19 in Appendix E for more detailed exploration of the distribution of Conservation Aggregates in each of these four groups.

It can be seen from Table 4.2 that just under half of all Conservation Aggregates in Rural (47%) Urban Residential (41%) and Town Centre (46%) categories experienced both absolute and relative improvement over the period, seeing a reduction in unemployment rate faster than their associated Comparator Aggregates.

By contrast, approximately one in five of all Conservation Aggregates in Urban Residential areas (20%) and less than one in six in Rural (13%) and Town Centre (16%) categories experienced both absolute and relative worsening over the period, seeing an increase in unemployment and a worsening of position relative to their matched Comparator Aggregates.

Just under 40% of Conservation Aggregates in Rural areas and approximately one in three in Urban Residential (34%) and Town Centre (31%) categories, experienced an improvement in absolute terms but of a magnitude less than that seen in their matched Comparator Aggregates.

Only a very small number of Conservation Aggregates saw unemployment rates increase overall but with this change being better than that observed in their matched Comparator Aggregates.

The magnitude of the difference between changes in unemployment rate in Conservation Aggregates and their matched Comparator Aggregates is explored in the charts below. The heights of the bars represent the difference between the Conservation Aggregate and the matched Comparator Aggregate in terms of change in unemployment between 2005 and 2016. The bars essentially convey the change in each Conservation Aggregate net of the change in the matched Comparator Aggregate. For example, if a Conservation Aggregate saw its unemployment rate increase by 2 percentage points over the period, and its matched Comparator Aggregate saw its rate increase by 1.5 percentage points over the period, then the net change in the Conservation

Aggregate would equal +0.5 percentage point change. Alternatively, if a Conservation Aggregate saw its rate change by -3 percentage points over the period (i.e. a reduction on unemployment rate), and its matched Comparator Aggregate saw its rate change by -1 percent point (also a fall) then the net change in the Conservation Aggregate wold equal -2 percentage points change. If the change was identical in the Conservation Aggregate and its matched Comparator Aggregate then the net change over the period in the Conservation Aggregate would be zero.

Those Conservation Aggregates that lie *below* the zero line on the following charts are represented within rows 1 and 3 of Table 4.2 as they have experienced a *more favourable* change over time than was seen in the matched Comparator Aggregate. Similarly, those Conservation Aggregates that lie *above* the zero line on the following charts are represented within rows 2 and 4 of Table 4.2 as they have experienced a *less favourable* change over time than was seen in the matched Comparator Aggregate.

Figure 4.14 Difference in percentage point change in Unemployment claimant rate between 2005 and 2016 between Rural Conservation and Comparator Aggregates

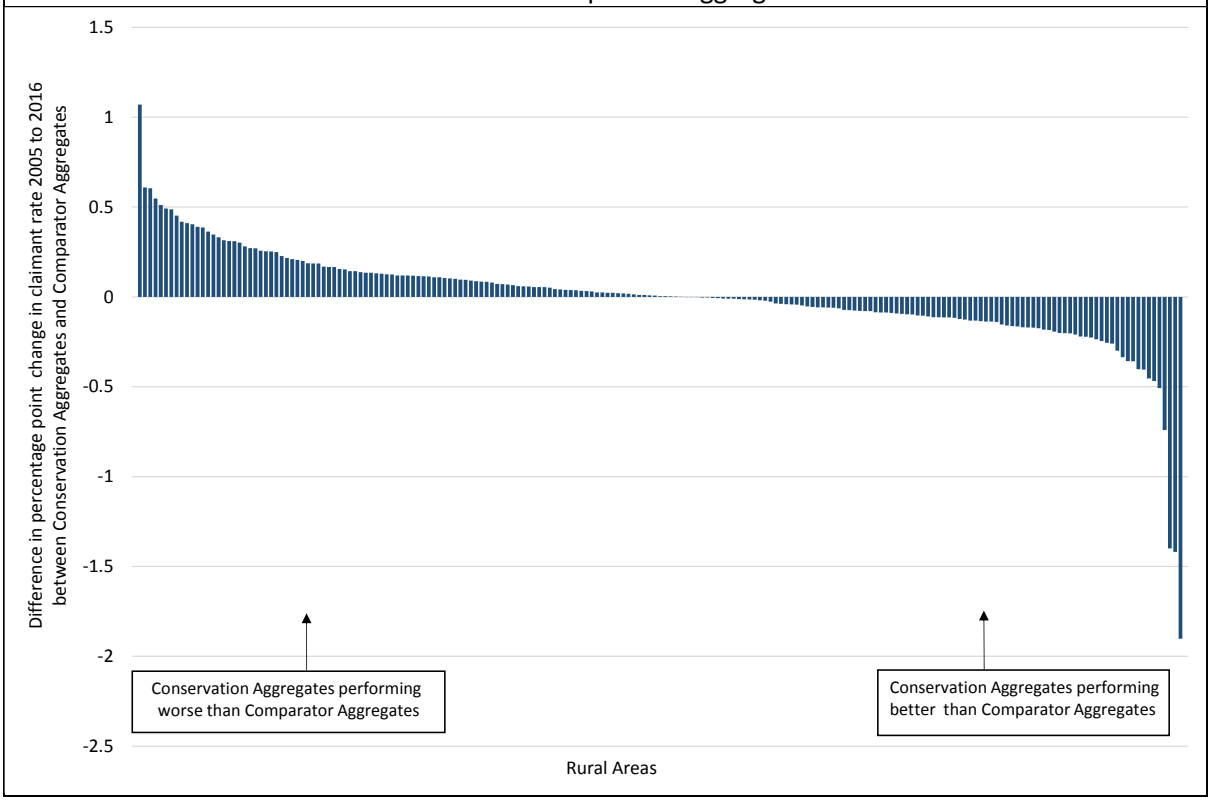


Figure 4.15 Difference in percentage point change in Unemployment claimant rate between 2005 and 2016 between Urban Residential Conservation and Comparator Aggregates

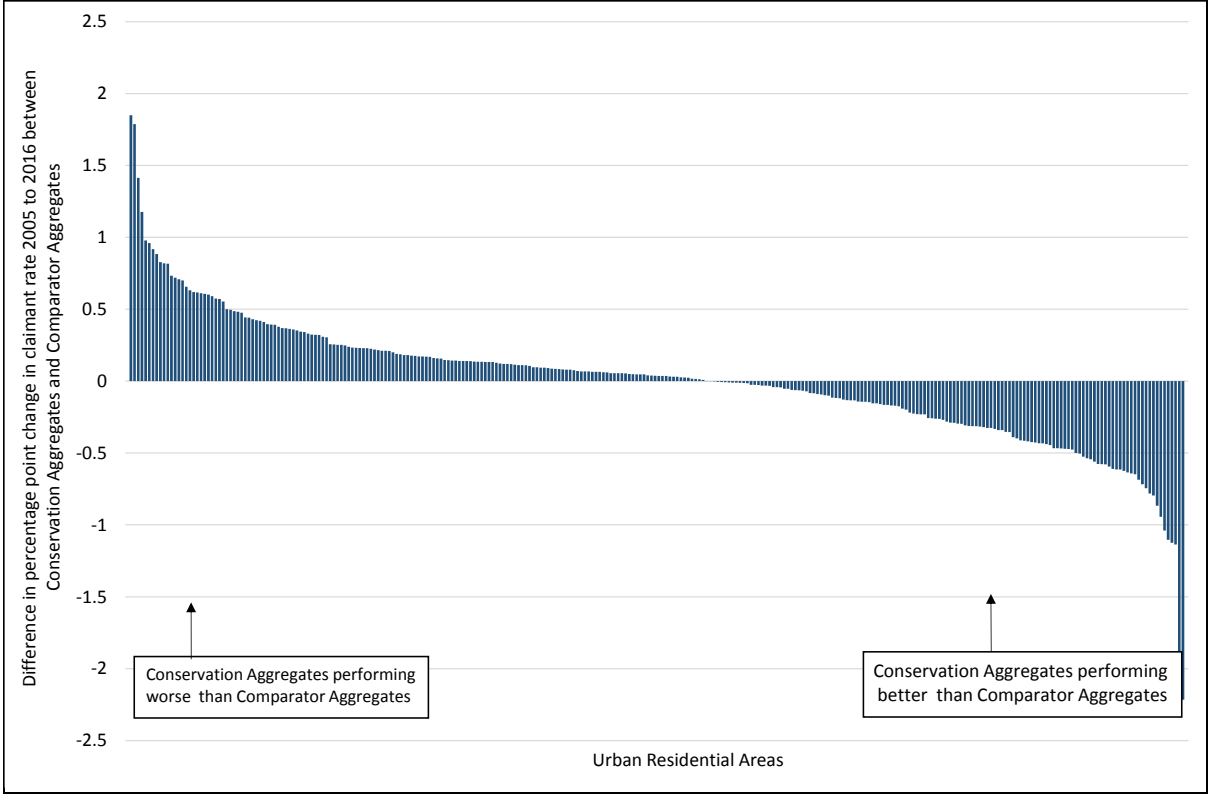
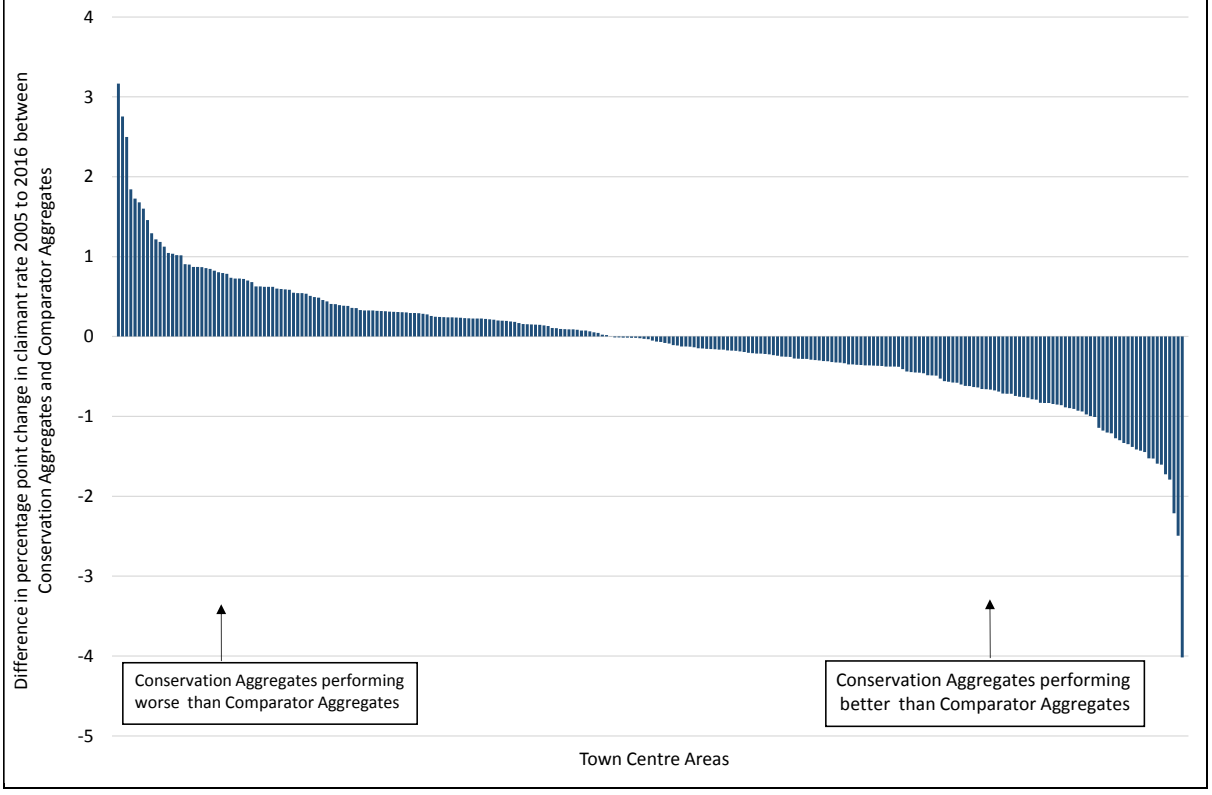


Figure 4.16 Difference in percentage point change in Unemployment claimant rate between 2005 and 2016 between Town Centre Conservation and Comparator Aggregates



As illustrated in the charts above, the overall distribution in terms of relative performance is similar across Rural, Urban Residential and Town Centre Conservation Aggregates alike with roughly half of Conservation Aggregates outperforming comparators and vice versa.

Town Centre groups showed a greater divergence between Conservation and Comparator Aggregates, with just under half (47%) Conservation Aggregates experiencing a variation in performance of greater than +- 0.4 percentage points. By contrast, the vast majority of Rural Conservation Aggregates showed similar trends to their Comparator Aggregates between 2005 and 2016 with variation in performance of less than +-0.4 percentage points in 179 of the 199 (90%) Rural Conservation Aggregates. Urban Residential areas showed a greater degree of variation than Rural areas; however, the majority of Urban Residential Conservation Aggregates showed similar trends to their Comparator Aggregates between 2005 and 2016 with variation in performance of less than +-0.4 percentage points in 204 of the 286 Urban Conservation Aggregates (71%).

However, for each category there were a minority of cases where the divergence in performance was notably more pronounced. Tables 4.3 to 4.8 below show the best and worst performing Conservation Aggregates in each category.

The data show that 11 Rural Conservation Aggregates preformed worse than their Comparator Aggregates by a magnitude of 0.4 percentage points or more[34]; these are shown in Table 4.3 below.

Table 4.3: Worst performing Rural Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in unemployment claimant rate 2005 to 2016 (% point change)		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Bromley	London	0.0	-1.1	1.1
Preston	North West	0.4	-0.2	0.6
Oldham	North West	0.4	-0.2	0.6
Warrington	North West	0.4	-0.1	0.5
Havant	South East	0.2	-0.3	0.5
Bury	North West	0.4	-0.1	0.5
Telford and Wrekin	West Midlands	-0.1	-0.6	0.5
Solihull	West Midlands	0.0	-0.5	0.5
South Holland	East Midlands	0.0	-0.4	0.4
North West Leicestershire	East Midlands	-0.3	-0.7	0.4
Pendle	North West	0.3	-0.1	0.4

Not all of the worst performing Conservation Aggregates in relative terms experienced a negative overall direction of travel in absolute terms. The worst performing Rural Conservation Aggregate had an unemployment rate which remained relatively stable over the period, but this did not keep pace with their matched Comparator Aggregate which experienced a fall of 1.1 percentage points over the period. In total, seven of the 11 worst performing Conservation Aggregates experienced an increase in unemployment, while their Comparator Aggregate experienced a fall over the 2005 to 2016 period. In the remaining four cases both Conservation and Comparator Aggregates experienced a decrease but the decrease was larger for the Comparator Aggregate. Areas from the

[34] Please note, the 0.4 threshold is an arbitrary threshold for presentation purposes rather than representing statistically significant difference

North West featured prominently among the worst preforming Rural Conservation Aggregates with five of the seven worst performing areas located in the North West region (see maps at the end of the chapter for more detailed geographical distribution). This reflects the predominance of areas in the North West among the Conservation Aggregates with the greatest increases in unemployment rate over the period.

Table 4.4 shows the nine Rural Conservation Aggregates which performed notably better than their Comparator Aggregates (differences in performance of 0.4 percentage or more).

Table 4.4: Best performing Rural Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in unemployment claimant rate 2005 to 2016 (% point change)		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Mansfield	East Midlands	-1.2	0.7	-1.9
Wigan	North West	-0.2	1.2	-1.4
Halton	North West	-0.9	0.5	-1.4
Medway	South East	-0.6	0.2	-0.7
Bolsover	East Midlands	-0.6	-0.1	-0.5
Epsom and Ewell	South East	-0.5	0.0	-0.5
Blaby	East Midlands	-0.2	0.2	-0.5
Swindon	South West	-0.4	0.0	-0.4
North Tyneside	North East	-0.3	0.1	-0.4

All of the best performing Rural Conservation Aggregates experienced an overall reduction in unemployment over the 2005 to 2016 period. In seven of these areas, the Conservation Aggregate experienced a decrease in unemployment rate while their Comparator Aggregate experienced an increase. In the remaining two areas both Conservation and Comparator Aggregates experienced a decrease in unemployment, but the decrease was larger in the Conservation Aggregate. Mansfield Rural Conservation Aggregate performed better than all other Conservation Aggregates relative to its associated Rural Comparator, with unemployment decreasing by 1.2 percentage points between 2005 and 2016 compared with a 0.7 percentage point increase over the same period in the Comparator Aggregate.

Table 4.5 shows the 10 Urban Residential Conservation Aggregates which preformed worst relative to their Comparator Aggregates.

As with rural areas, not all of the worst performing Urban Residential Aggregates in relative terms experienced an increase in unemployment in absolute terms. Three of the 10 worst performing areas experienced a fall in unemployment (albeit at a slower rate than the Comparator Aggregates). In six of these areas, the Conservation Aggregate experienced an increase in unemployment in the context of a fall in unemployment in their matched Comparator Area, while in one area (St Helens) both Conservation and Comparator Aggregate experienced an increase but the increase was larger for the Conservation Aggregate. Ryedale Urban Residential Conservation Aggregate performed worst relative to their associated Comparator Aggregate with unemployment in the Conservation Aggregate increasing by 1.0 percentage points, while unemployment in the Urban Residential Comparator Aggregate fell by 0.8 percentage points over the same period.

Table 4.5: Worst performing Urban Residential Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in unemployment claimant rate 2005 to 2016 (% point change)		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Ryedale	Yorks Humber	1.0	-0.8	1.8
Tendring	East	1.2	-0.6	1.8
Newham	London	-2.3	-3.7	1.4
Adur	South East	0.2	-0.9	1.2
North Lincolnshire	Yorks Humber	0.9	-0.1	1.0
Medway	South East	-0.2	-1.2	1.0
Hambleton	Yorks Humber	0.8	-0.2	0.9
St. Helens	North West	1.3	0.4	0.9
Boston	East Midlands	0.3	-0.5	0.8
Ealing	London	-0.2	-1.0	0.8

Table 4.6 below shows the 10 Urban Residential Conservation Aggregates which performed best relative to Comparator Aggregates.

Table 4.6: Best performing Urban Residential Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in unemployment claimant rate 2005 to 2016 (% point change)		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Sandwell	West Midlands	-1.4	0.8	-2.2
Bolsover	East Midlands	-1.7	0.4	-2.1
West Somerset	South West	-0.9	0.2	-1.1
Barrow-in-Furness	North West	-0.4	0.8	-1.1
Fenland	East	-2.4	-1.3	-1.1
Uttlesford	East	-1.0	0.1	-1.0
Liverpool	North West	-1.1	-0.2	-0.9
Coventry	West Midlands	-1.3	-0.4	-0.9
Barking and Dagenham	London	-2.2	-1.4	-0.8
Chesterfield	East Midlands	-1.1	-0.3	-0.8

All of the best performing areas saw a reduction in unemployment, with five of these areas seeing a reduction in the context of an increase in unemployment across their matched comparator. Sandwell Conservation Aggregate was the best performing, with unemployment decreasing by 1.4 percentage points between 2005 and 2016 compared with a 0.8 percentage point increase over the same period in the Comparator Aggregate.

Table 4.7 below shows the 10 Town Centre Conservation Aggregates which preformed worst relative to their Comparator Aggregates.

Table 4.7: Worst performing Town Centre Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in unemployment claimant rate 2005 to 2016 (% point change)		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Daventry	East Midlands	1.3	-1.9	3.2
West Lindsey	East Midlands	2.5	-0.3	2.8
Blackpool	North West	2.2	-0.3	2.5
North Lincolnshire	Yorks Humber	1.0	-0.9	1.8
Dudley	West Midlands	0.9	-0.8	1.7
Bury	North West	1.1	-0.6	1.7
Mansfield	East Midlands	-0.2	-1.8	1.6
Redcar and Cleveland	North East	0.5	-0.9	1.5
Tendring	East	1.5	0.3	1.3
Sefton	North West	0.5	-0.8	1.2

Eight of the 10 Conservation Aggregates experienced a worsening position in both absolute and relative terms, i.e. an increase in unemployment in contrast to a fall in unemployment in their matched Comparator Aggregate. Daventry was the worst performing area with unemployment in the Conservation Aggregate increasing by 1.3 percentage while unemployment in the Comparator Aggregate fell by 1.9 percentage points over the same period. Nine of the ten worst performing areas were located in the North or Midlands (see maps at the end of the chapter for more detailed geographical distribution).

Table 4.8 below shows the 10 Town Centre Conservation Aggregates which performed best relative to Comparator Aggregates.

Table 4.8: Best performing Town Centre Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in unemployment claimant rate 2005 to 2016 (% point change)		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Ipswich	East	-3.7	0.3	-4.0
Barrow-in-Furness	North West	-0.1	2.4	-2.5
Chesterfield	East Midlands	-2.6	-0.4	-2.2
Liverpool	North West	-2.4	-0.6	-1.8
West Somerset	South West	-1.4	0.4	-1.7
Basingstoke and Deane	South East	-1.2	0.4	-1.6
Barking and Dagenham	London	-2.6	-1.0	-1.6
Eastbourne	South East	-1.9	-0.4	-1.5
Wakefield	Yorks Humber	-0.7	0.8	-1.5
City of London	London	-2.2	-0.7	-1.4

All of the best performing areas saw a reduction in unemployment, with five of these areas seeing a reduction in the context of an increase in unemployment across their matched Comparator Aggregate. Ipswich was the best performing Town Centre Conservation Aggregate, with unemployment decreasing by 3.7 percentage points between 2005 and 2016 compared with a 0.3 percentage point increase over the same period in the Comparator Aggregate. There is no strong

geographic pattern in terms of best performing areas, with Town Centre Conservation Aggregates from seven of the nine regions represented among the best performing areas.

Key findings summary:

- Just under half of all Conservation Aggregates in each category experienced both absolute and relative improvement over the period, seeing a reduction in unemployment rate faster than their associated Comparator Aggregates
- By contrast, approximately one in five of all Conservation Aggregates in Urban Residential areas and less than one in six in Rural and Town Centre (16%) categories experienced both absolute and relative worsening over the period
- In addition, approximately one-third saw an improvement in absolute terms but at a slower rate than across their comparators.
- However, the magnitude of difference in performance between Conservation Aggregates and Comparators was small in the majority of cases.
- There was no clear geographical pattern in terms of relative performance, with Comparator Aggregates from all regions represented among the best and worst performing areas.
- Five Conservation Aggregates saw an improvement relative to their Comparator Aggregate of more than 2 percentage points (Ipswich Town Centre (4), Barrow-in-Furness Town Centre (2.5), Chesterfield Town Centre (2.2), Sandwell Urban Residential (2.2) and Bolsover Urban Residential (2.1). These could be considered for possible case studies in future research of Conservation Areas showing economic growth at a faster rate than the wider area.
- Three Conservation Aggregates saw a worsening relative to their Comparator Aggregate of more than 2 percentage points (Daventry Town Centre (3.2), West Lindsey Town Centre (2.8) and Blackpool Town Centre (2.5). These could be considered for possible case studies in future research of Conservation Areas showing economic growth at a slower rate than the wider area.

The maps below show the geographical pattern in more detail – each map compares the performance of the Conservation Aggregates relative to their matched Comparator Aggregates on unemployment rate between 2005 and 2016 in Rural, Urban Residential and Town Centre categories. Conservation Aggregates shaded pink on the maps are characterised as showing notable improvement relative to their Comparator Aggregates. Areas shaded blue are characterised as seeing an appreciable worsening in their position relative to matched Comparator Aggregates. Conservation Aggregates shaded light green have experienced small relative change between 2005 and 2016. For detail of how the map colours are calculated see Appendix C.

Figure 4.17 Change in Unemployment rates 2005 to 2016 in Rural Conservation Aggregates relative to matched Comparator Aggregates

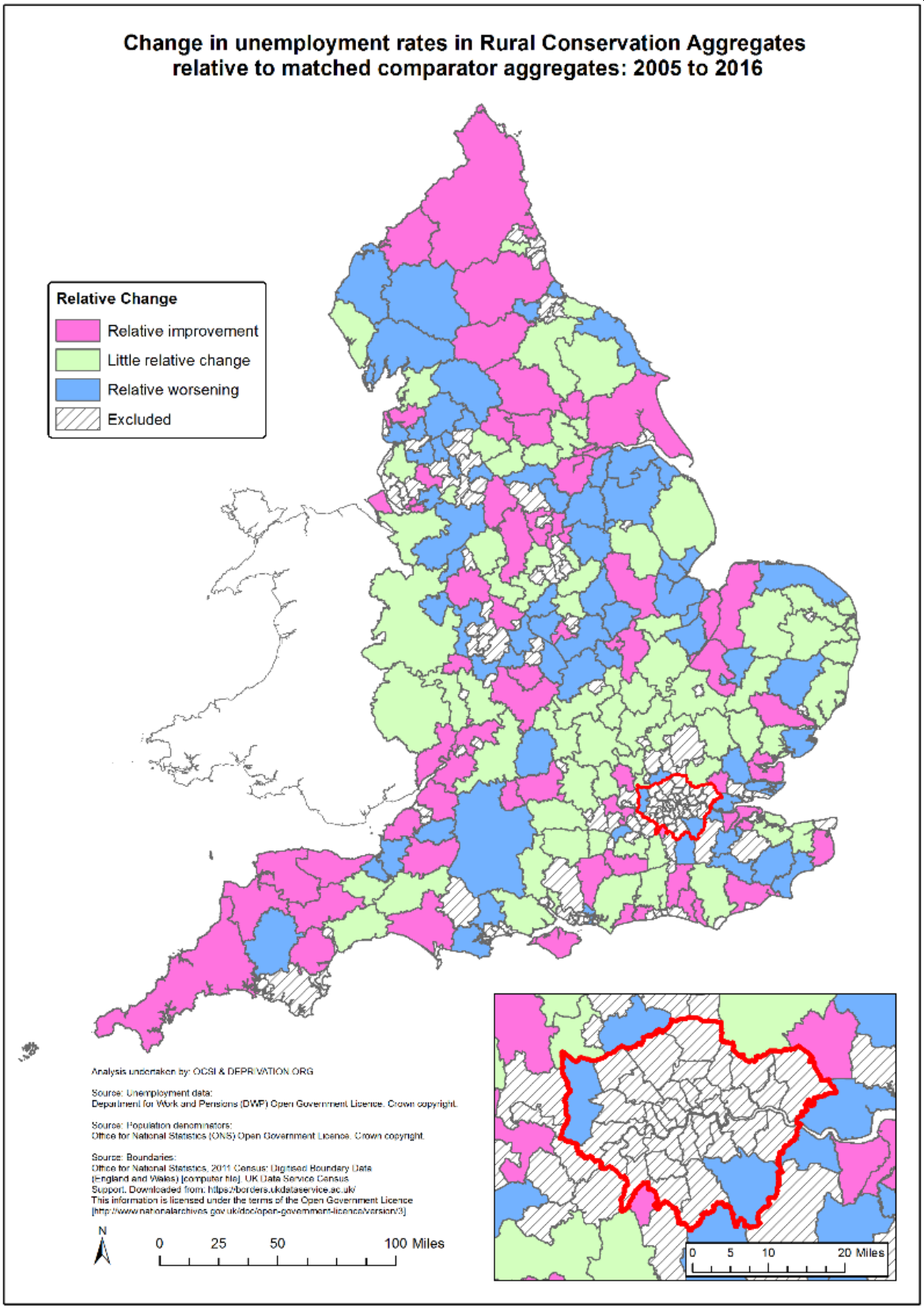


Figure 4.18 Change in Unemployment rates 2005 to 2016 in Urban Residential Conservation Aggregates relative to matched Comparator Aggregates

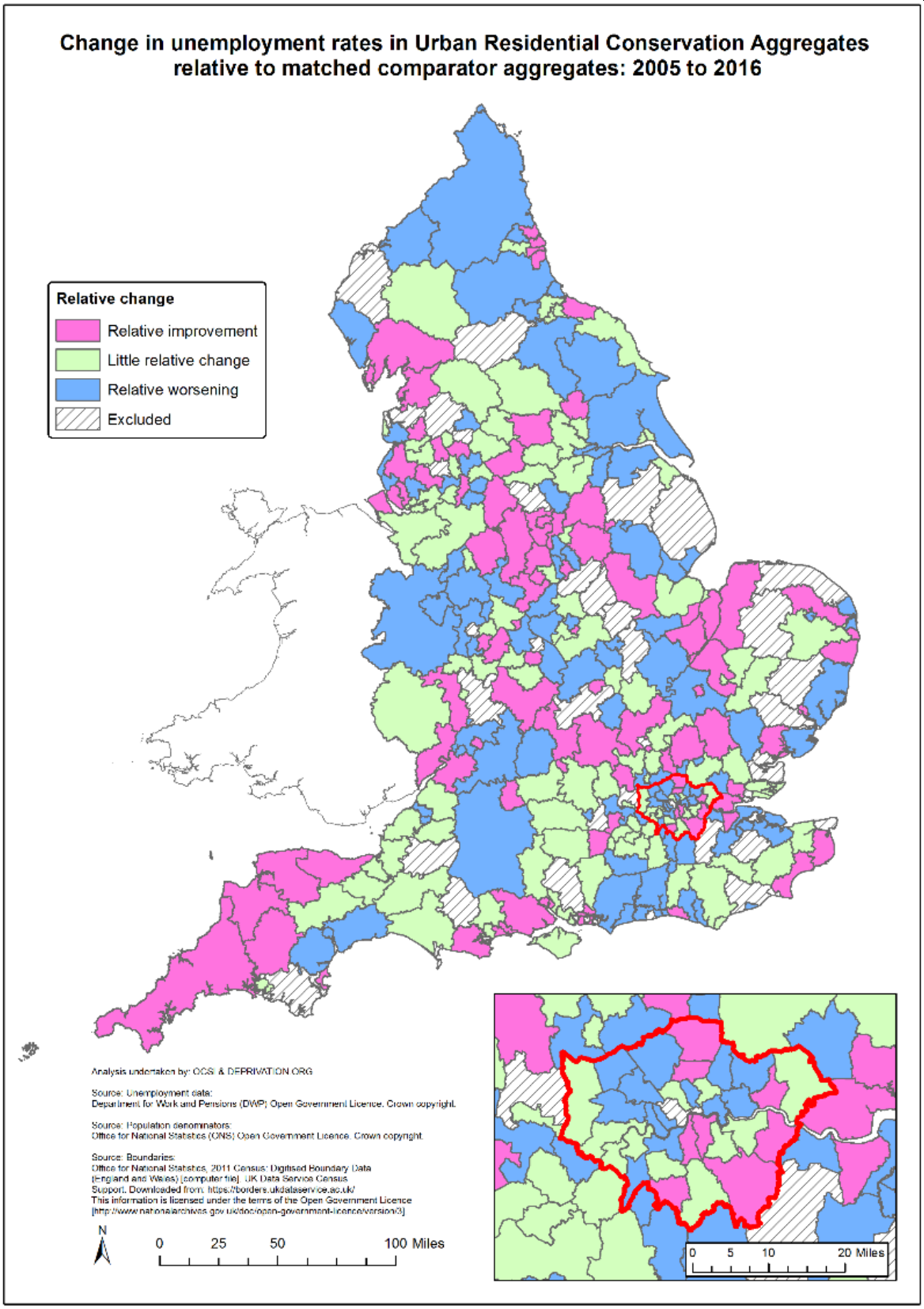
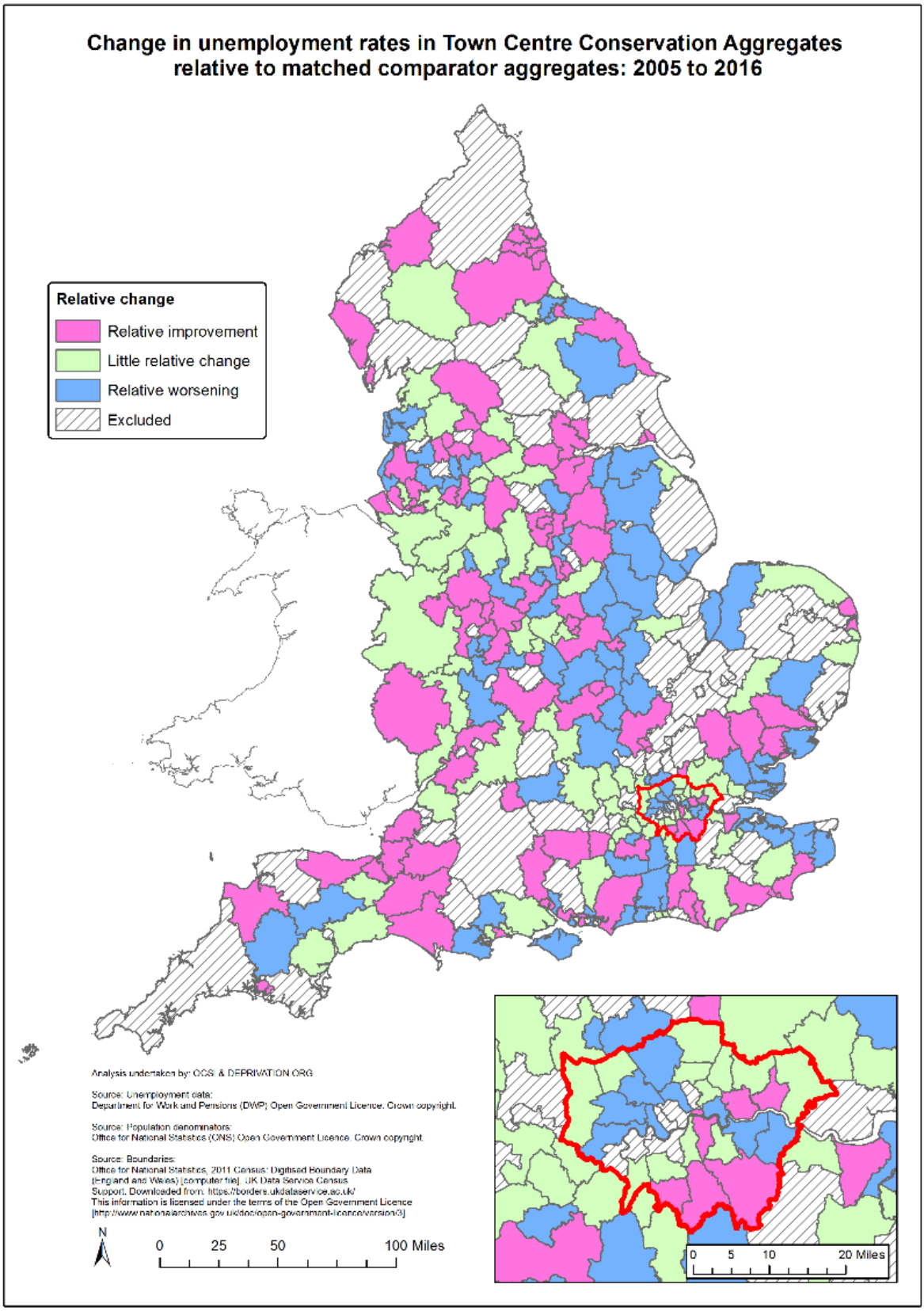


Figure 4.19 Change in Unemployment rates 2005 to 2016 in Town Centre Conservation Aggregates relative to matched Comparator Aggregates



Conclusion

In this chapter we have explored trends in unemployment benefit in order to determine how the economic characteristics of Conservation Areas have changed over time and whether there was any evidence that Conservation Area status promotes and facilitates economic growth.

In order to address these questions we looked both at how Conservation Aggregates were changing in absolute terms (i.e. their 'direction of travel') and in relative terms (i.e. compared to similar non-Conservation Areas in the same locality).

The analysis showed that Conservation and Comparator Aggregates follow broadly similar trajectories over the period: a period of stability followed by a sharp increase during the financial crash followed by another period of stability (at above pre-crash levels) followed by a recovery to slightly below the baseline period. However, there is some evidence to suggest that Conservation Aggregates were slightly more resilient than Comparators during the financial crash (particularly for Town Centre Conservation Aggregates in the North East).

The majority of Conservation Aggregates experienced an overall fall in unemployment between 2005 and 2016. For most of these areas the magnitude of change was quite small, although for each category there were a minority of cases where the change was notably more pronounced.

There were some notable regional variations, with the largest falls in unemployment in Conservation Areas over the period seen in London and East Anglia (particularly in Norfolk). By contrast, there were visible increases in unemployment in large parts of the North of England particularly around Greater Manchester.

Just under half of all Conservation Aggregates in each category experienced both absolute and relative improvement over the period, seeing a reduction in unemployment rate faster than their associated Comparator Aggregates. By contrast, approximately one in five of all Conservation Aggregates in Urban Residential areas and less than one in six in Rural and Town Centre (16%) categories experienced both absolute and relative worsening over the period

There was no clear geographical pattern in terms of relative performance, with Comparator Aggregates from all regions represented among the best and worst performing areas.

In the last section we identified a set of Conservation Aggregates which improved at a significantly faster rate than their Comparator Aggregates [35]. Each of these could be considered as potential case studies of areas where Conservation Area status might potentially be helping to drive economic growth.

We also identified a set of Conservation Aggregates which saw notable worsening relative to their Comparator Aggregates[36]. Each of these could be considered as potential case studies of areas where Conservation Area status might be providing a barrier to delivering economic growth.

[35] Five Conservation Aggregates saw an improvement relative to their Comparator Aggregate of more than 2 percentage points (Ipswich Town Centre (4), Barrow-in-Furness Town Centre (2.5), Chesterfield Town Centre (2.2), Sandwell Urban Residential (2.2) and Bolsover Urban Residential (2.1).

[36] Three Conservation Aggregates saw a worsening relative to their Comparator Aggregate of more than 2 percentage points (Daventry Town Centre (3.2), West Lindsey Town Centre (2.8) and Blackpool Town Centre (2.5).

Chapter 5: Analysis of 'Inclusive Growth'

Introduction

In this chapter we examine whether Conservation Areas are experiencing 'Inclusive Growth' using an indicator derived from administrative data.

First we highlight our approach to measuring inclusive growth, introducing the key indicator used in this part of the analysis.

Next, we provide an overview of the main trends on the selected indicator of Inclusive Growth. This section presents the *national average* baseline position, direction of travel and performance of Conservation Aggregates compared to the respective groups of Comparator Aggregates for each of the three categories of Conservation Aggregate (Rural, Urban Residential or Town Centre).

We then go on to look at whether the patterns observed nationally, also hold across each of the *regions*.

Finally we drill down to the individual Conservation Aggregates and explore the following key questions

1) What is the profile of the Conservation Areas at a baseline point in time?
2) How has the profile of Conservation Areas changed over time?
3) How are Conservation Areas changing relative to matched Comparator Aggregates (are they experiencing a different rate of growth to similar areas in their locality?

Measuring inclusive growth

In Chapter 2 – *Phase 2: review of literature on Good Growth; review of data sources on Good Growth* we summarised the process that was adopted for identifying a short list of key indicators under each of the dimensions of *Good Growth*.

Five indicators were shortlisted from this stage:

- Working age client group (Dept for Work and Pensions)
- Income distribution (Annual Survey for Hours and Earnings)
- Index of Multiple Deprivation (IMD) (Communities and Local Government)
- People receiving Working Tax Credits (HM Revenue and Customs)
- People in good health (Census)

It was necessary to further narrow down this shortlist, to ensure that the final indicators selected for analysis were available at sufficient granularity[37] and temporal coverage[38] to enable us to observe annual changes in economic performance at Lower layer Super Output Area (LSOA) level (the building block for defining the Conservation Aggregates[39]).

[37] Published down to Lower layer Super Output Area (LSOA) level
[38] Covering a long enough time period for us to observe a trend over the period.
[39] see Chapter 1 for details of how these geographies have been developed

Following this stage, one indicator has been selected to measure 'inclusive growth' in Conservation Areas:

> **DWP benefit claimants: Proportion of resident working age population in the Department for Work and Pensions (DWP), i.e. the 'Working Age Client Group' (WACG).**

People counted among the Working Age Client Group those receiving benefits payable to all people of working age (16-64) who need additional financial support due to low income, worklessness, poor health, caring responsibilities, bereavement or disability. The following benefits are included: Bereavement Benefit, Carers Allowance, Disability Living Allowance, Incapacity Benefit/Severe Disablement Allowance, Income Support, Jobseekers Allowance, Pension Credit and Widows Benefit. Figure are derived from 100% sample of administrative records from the Work and Pensions Longitudinal Study (WPLS), with all clients receiving more than one benefit counted only by their primary reason for interacting with the benefits system (to avoid double counting). This indicator was considered for inclusive growth because it captures multiple aspects of deprivation (poor health, low income, worklessness) as can be used to measure the extent to which economic growth in the locality is also benefiting the most disadvantaged members of the community.

Appendix A provides details of this indictor including a more detailed description, methodology for producing the indicator, source, time period coverage, key strengths and issues to consider when using the indicator to track change over time and examples of where the indicator has been used in other measures of *Good Growth*.

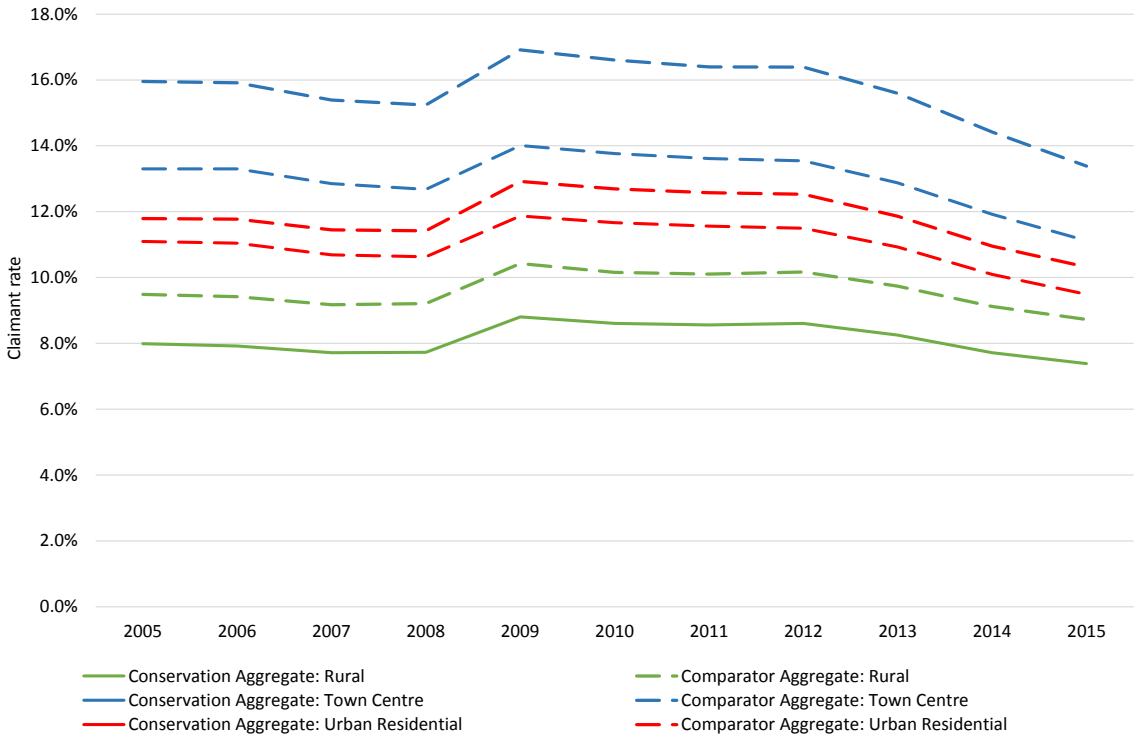
Overview of change in DWP claimant rates between 2005 and 2015

The chart below shows the proportion of working age people receiving DWP benefits across each of the Conservation and Comparator Aggregate categories. Each line represents one of the six typology categories, with solid lines representing Conservation Aggregates, dashed lines representing Comparator Aggregates, green lines representing Rural categories, red lines representing Urban Residential and blue lines representing Town Centres.

The trend lines presented in Figure 5.1 highlight commonalities and differences between categories at the 2005 start point and the 2015 end point, and showing the trajectories that each category grouping has followed during this ten year period. A number of key findings are evident from Figure 5.1. Firstly, and with a particular focus on the Conservation Aggregates, it is clear that at the baseline time-point of 2005, the group of Town Centre Conservation Aggregates exhibit higher claimant rates than Urban Residential Conservation Aggregates, which in turn exhibit claimant rates than Rural Conservation Aggregates. The trend lines demonstrate that this ordering between the three categories persists in each year between 2005 and 2015. Secondly, it is evident that although the three categories of Conservation Aggregate were notably different from each other at every annual time point, the general temporal patterns followed across the time period were in fact very similar. These trends consist of a period of relative stability in claimant rates between 2005 and 2008 across all three types of Conservation Aggregate, followed by a rise in between 2008 and 2009 (coinciding with the onset of the financial crash, which saw widespread increases in benefit claimant rates nationally) which persisted until around 2012, followed by a steady decline in claimant rates through

to the end point of 2015. Indeed, by 2015 there were a lower proportion of people receiving DWP benefits then in each of the preceding 10 years[40].

Figure 5.1 Proportion of people receivng DWP Benefits Conservation and Comparator Aggregates 2005 to 2015



It should be noted, however, that data presented in Figure 5.1 represent totals for all Conservation Aggregates per category and that the individual Conservation Aggregates may show different trajectories (which we explore later in this chapter).

Having explored how Conservation Aggregates have changed over the period, it is also important to consider this trend in the context of change in Comparator Aggregates over the same period.

Table 5.1 shows the DWP Benefit claimant rates for each category of Conservation Aggregate and Comparator Aggregate in 2005 and 2015 and shows the percentage point change over this entire period.

Table 5.1: Conservation Aggregate DWP Benefit claimant rates at baseline and end point

		2005	2015	Change
Conservation Aggregates	Rural	8.0%	7.4%	-0.6%
	Urban Residential	11.1%	9.5%	-1.6%
	Town Centre	13.3%	11.1%	-2.2%
Comparator Aggregates	Rural	9.5%	8.7%	-0.8%
	Urban Residential	11.8%	10.3%	-1.5%
	Town Centre	16.0%	13.4%	-2.6%

[40] This trend was similar to the unemployment trend observed in the previous chapter. Unemployment benefit (Jobseekers Allowance) is a component of the Working Age DWP Benefit and rises in unemployment are likely to have contributed to this overall change.

A number of key features emerge through the consideration of the trends observed in Comparator Aggregates in conjunction with the trends in Conservation Aggregates discussed above. Firstly, it is evident that at the baseline time point of 2005, the DWP claimant rates in each of the three categories of Conservation Aggregate slightly lower than the rates in the respective group of Comparator Aggregates. The second key finding is that the Comparator Aggregates follow a similar trend to the Conservation Aggregates over the time period, consisting of a relatively stable period between 2005 and 2008, followed by a sharp increase between 2008 and 2009, a period of stability at the higher claimant rate between 2009 and 2012, and a steady decline from 2012 through to 2015. In general the patterns and trends appear to be quite similar between the respective groups of Conservation Aggregate and Comparator Aggregate. However, the Town Centre Comparator Aggregates have seen a slightly larger average fall in the proportion of people receiving DWP benefits than the Conservation Aggregates between 2005 and 2015 (from a higher starting position), suggesting that they are beginning to close the gap with Town Centre Conservation Aggregates on average.

Key findings summary:

- DWP claimant rates were higher in Town Centre Conservation Aggregates than across other categories throughout the whole period.
- Town Centre Conservation Aggregates saw more notable improvement over the period than across other categories.
- Conservation and Comparator Aggregates follow broadly similar trajectories over the period: A period of stability followed by a sharp increase during the financial crash followed by another period of stability (at above pre-crash levels) followed by a recovery to slightly below the baseline period.
- Conservation Aggregates had a slightly better base position than Comparator Aggregates, but Town Centre Comparator Aggregates are closing the gap (improving at a faster rate, on average, than Conservation Aggregates).

Change in DWP benefit claimant rates at regional level

We have summarised how the groups of Conservation Aggregates have been performing, on average, relative to respective groups of Comparator Aggregates across England as a whole. We will now explore whether these patterns hold at regional level.

Charts F.1-F.6 in Appendix F show DWP benefit claimant rates for Conservation and Comparator Aggregates for the Rural, Urban Residential and Town Centre categories respectively at a baseline point in time and change over time.

It is evident from comparing across the charts that each of the nine regions show a similar pattern and trend as was observed in Figure 5.1. Specifically, in eight of the nine regions[41], claimant rates are highest for the group of Town Centre Conservation Aggregates, followed by Urban Residential Conservation Aggregates, followed by the Rural Conservation Aggregates. These distinctions are evident in each year between the 2005 baseline and the 2015 end point and shared across Conservation and Comparator Aggregates alike. Furthermore, the trend identified in Figure 5.1

[41] London is the exception. In London Urban Residential Conservation Areas had higher DWP claimant counts than Town Centre claimant counts

(consisting of a period of stability, followed by increase at the time of the financial crash, followed by a further period of stability at that higher rate, and then finally a gradual decline through to 2015) holds for each of the nine regions.

By 2015 all of the regions had lower claimant rates than in 2005 across Conservation Aggregate and Comparator Aggregates alike. For Rural Conservation Aggregates, the largest fall occurred in the North East region (a fall of 1.7 percentage points) while the smallest fall occurred the South East region (a fall of 0.2 percentage points). For Urban Residential Conservation Aggregates, the largest reduction in the DWP claimant rate occurred in the London region (a fall of 3.2 percentage points) and the smallest reduction was in the South East (a fall of 0.4 percentage points). The average fall in DWP claimant rates between 2005 and 2015 was greater in Town Centre Conservation Aggregates than across Rural or Urban Residential Conservation Aggregates in each of the nine regions. The largest reduction in DWP claimant rates occurred in the North East region (a fall of 3.6 percentage points), but average falls of 2.0 percentage points or greater were also experienced in the North West, East Midlands and London).

These falls were mirrored in Comparator Aggregates (of all categories), with Rural and Urban Residential Comparator Aggregates generally experiencing a similar average fall regionally as Conservation Aggregates.

There was greater divergence in performance among Town Centre Conservation and Comparator Aggregates, with Conservation Aggregates in the North East experiencing notably larger falls in claimant rate (in excess of 2 percentage point greater) than the Comparator Aggregates. By contrast, Town Centre Conservation Aggregates in London and the East were improving at a slower rate than similar non-Conservation Areas.

Key findings summary:

- Across each of the regions, Conservation Aggregates experienced a similar pattern to the national summaries, both in terms of overall trajectory and relative position of Rural, Urban Residential and Town Centre Aggregates.
- There were regional differences in overall trends: With Conservation Aggregates in the North East region on average seeing larger falls, while reductions were smaller in Conservation Aggregates in the South East.
- There were also regional differences in terms of relative performance, particularly for the Town Centre category, with Town Centre Conservation Aggregates in the North East outperforming Comparator Aggregates, while Town Centre Conservation Aggregates in London and the East were showing slower reductions in claimant count than Comparator Aggregates.
- Divergences were smaller across other regions and categories.

We have now looked at baseline position and change in terms of national and regional average levels of DWP claimant rates across each of the six typology categories between 2005 and 2015.

It is necessary to drill down further to Local Authority level to see whether there is stronger evidence of a divergence. It is to the Local Authority analysis we now turn.

What is the profile of the Conservation Areas at a baseline point in time?

The charts below show the distribution of DWP benefit claimant rates across Conservation Aggregates (by category) in 2005. Conservation Aggregates are ordered highest to lowest in terms of claimant rate, with the height of the bars representing the DWP claimant rate (as a percentage of the working age population) in 2005.

The three horizontal reference lines show the average value for three groups of areas. The red horizontal reference line relates to the average for all Conservation Aggregates of that type (i.e. Rural, Urban Residential or Town Centre), the green horizontal reference line relates to the average for all Comparator Aggregates of that type, and the orange horizontal reference line relates to the average for all non-Conservation Aggregate areas of that type across the country. As such, the value depicted by the orange horizontal reference line includes the Comparator Aggregates and all other non-Conservation Aggregate areas. The Comparator Aggregates represent a particular subset of the group of areas depicted by the orange horizontal reference line.

Figure 5.2 DWP benefit claimant rate in Rural Conservation Aggregates in 2005

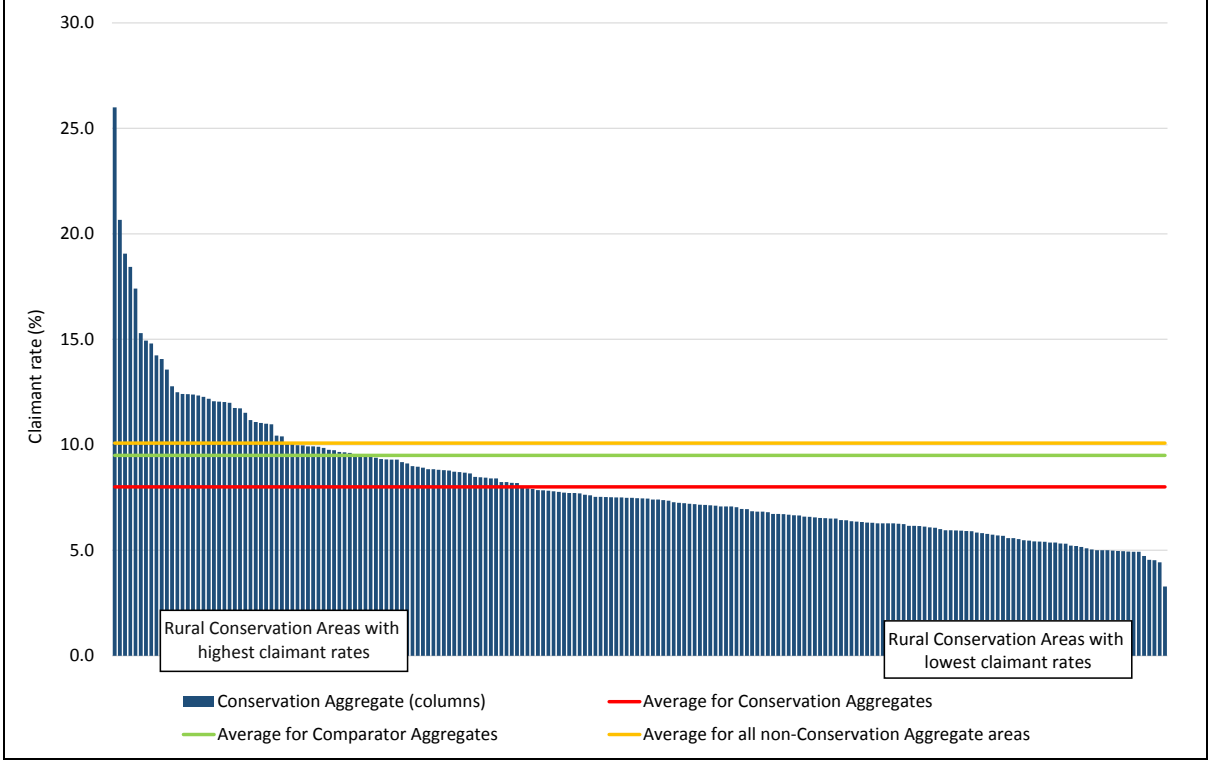


Figure 5.3 DWP benefit claimant rate in Urban Residential Conservation Aggregates in 2005

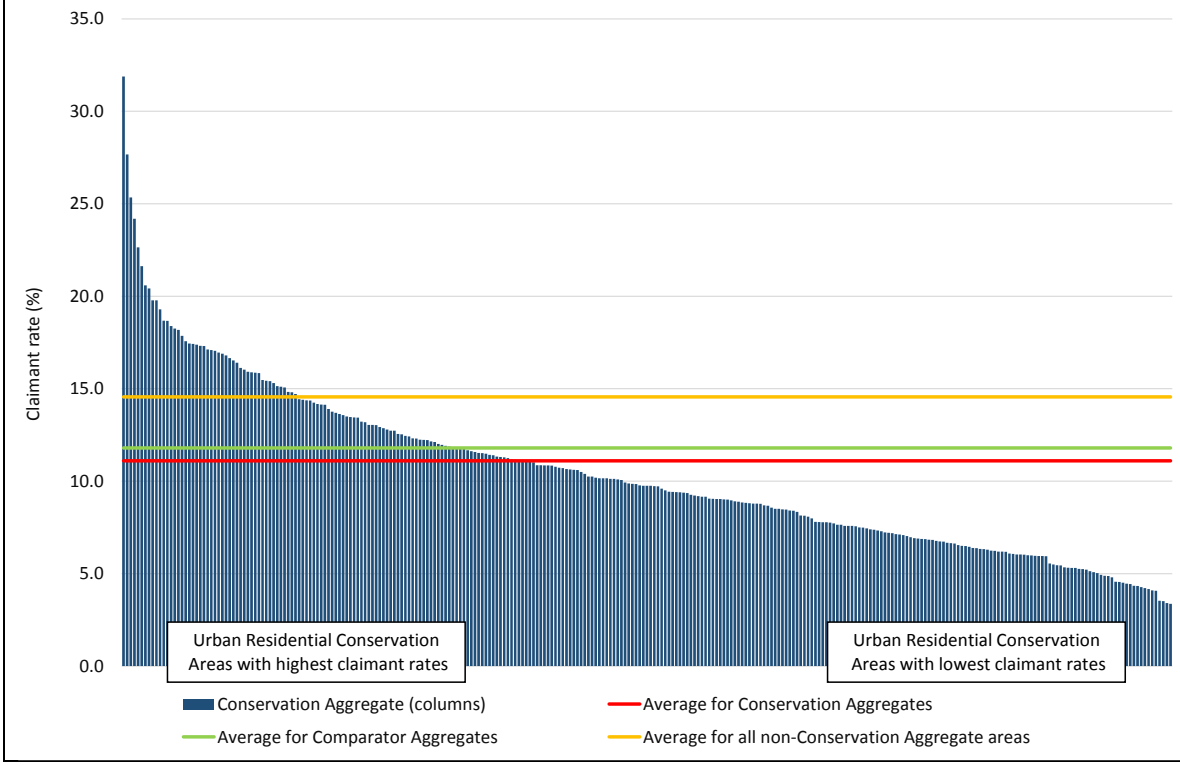
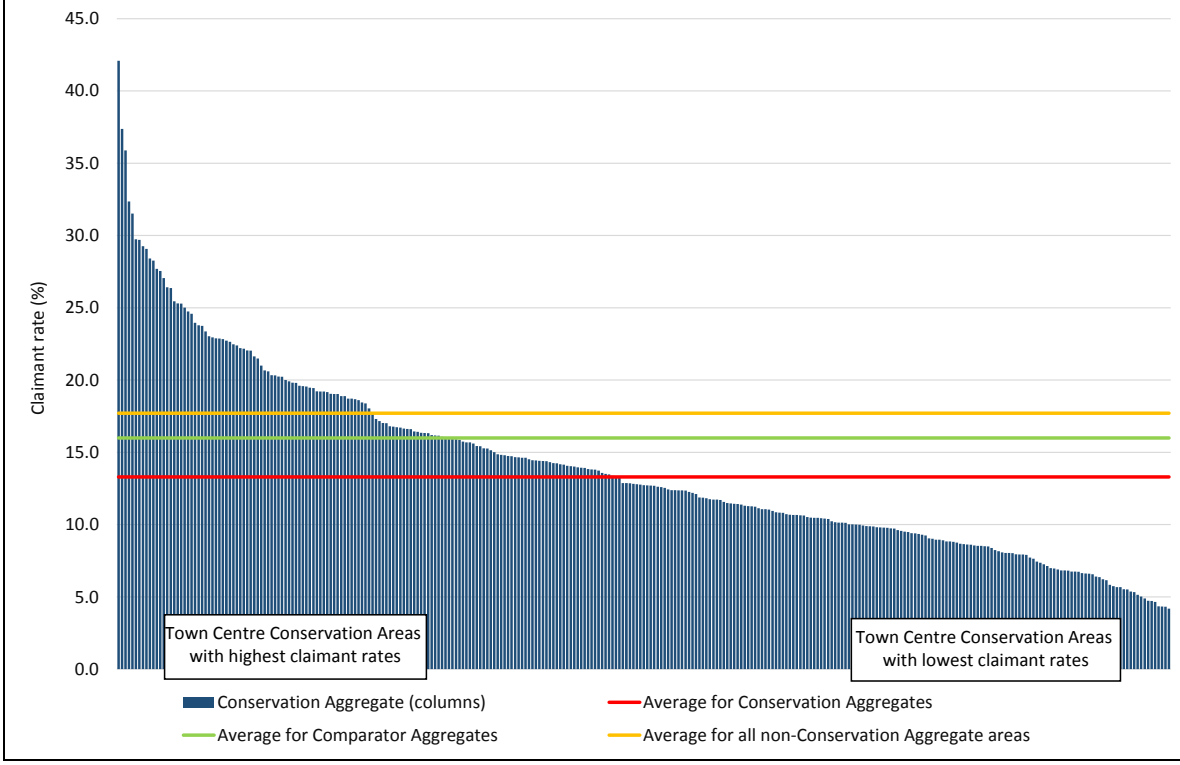


Figure 5.4 DWP benefit claimant rate in Town Centre Conservation Aggregates in 2005



It was apparent from Figure 5.1 and Table 5.1 that the average DWP claimant rate for all three groups of Conservation Aggregate were lower than the average rates in the respective groups of Comparator Aggregate at the baseline point in time. These findings are shown again in Figures 5.2 to 5.4 as the red horizontal reference lines (Conservation Aggregate average) can be seen to be lower than the green horizontal reference lines (Comparator Aggregate average). It is further evident from Figures 5.2 to 5.4 that the DWP claimant rate was lower in the groups of Conservation Aggregate than in the respective groups of 'all non-Conservation Aggregate areas' of the relative types. So at the baseline point in time, the DWP claimant was typically lower in Conservation Aggregates than in the rest of the country (assessed separated by typology category).

When looking at the columns depicting individual Conservation Aggregate claimant rates, each of the three charts shows a similarly shaped distribution, albeit stretching across different ranges of values up the vertical y-axis. On all three charts, the claimant rates increase gradually across the Conservation Aggregates from right to left along the horizontal axis, then increase much more steeply at the most deprived end of the distribution (on the far left of each chart). These distributions indicate that in each of the three area type categories there are a relatively small number of Conservation Aggregates across England that exhibit notably higher proportions of people receiving DWP benefits that the majority of the other Conservation Aggregates of that type.

With regard to the Rural Conservation Aggregates in 2005, the proportion of people receiving DWP benefits ranged from a high of 26% in Mansfield to a low of 3.3% in Trafford. Analysis of the data underpinning Figure 4.2 reveals that mining, manufacturing and coastal areas featured heavily among those Rural Conservation Aggregates that had the highest claimant rates.

With regards to Urban Residential Conservation Aggregates in 2005, the proportion of people receiving DWP benefits ranged from a high of 31.2% in Barrow-in-Furness to a low of 3.4% in the Runnymede (Surrey). The Urban Residential Conservation Aggregates with the highest DWP claimant rates were typically located in manufacturing areas in the North and Midlands but there were also concentrations in North East London (four North East London boroughs were among the 10 Urban Residential Conservation Aggregates with the highest claimant rates in 2005).

With regard to the Town Centre Conservation Aggregates, the claimant rates in 2005 were typically higher than the Rural and then Urban Residential categories, more than half (57%) of all Town Centre Conservation Aggregates had claimant rates of 15% or more. The proportion of working age people receiving DWP benefits in Town Centre Conservation Aggregates in 2005 ranged from a high of 42% in Barrow-in-Furness to a low of 4.2% in Hart (Surrey). Analysis of the underpinning data reveals that coastal areas feature quite prominently among the Town Centre Conservation Aggregates with the highest claimant rates, with each of the five 5 Conservation Aggregates with the highest DWP benefit claimant rates located in coastal areas.

For more details on the geographic distribution of DWP Benefit claimants in Conservation Aggregates at a baseline point in time see, Maps F7 to F9 in Appendix F.

Key findings summary:

- The distribution of claimant rates at a baseline was similar across each of the Conservation Aggregate categories, with the widest variation in claimant rates seen for Town Centre Aggregates.
- Manufacturing and coastal areas featured prominently among the Conservation Aggregates with the highest claimant rates.
- Urban Residential Conservation Aggregates in North East London, also experienced comparatively high claimant rates in 2005.

How do Conservation Aggregates compare with Comparator Aggregates at a baseline point in time?

The scatterplots below compare the DWP claimant rate in 2005 in Conservation Aggregates and their matched Comparator Aggregates. Each point represents a Local Authority area, with the horizontal axis showing the DWP claimant rate in the Conservation Aggregate and the vertical line showing the DWP claimant rate of the Comparator Aggregate in 2005. The charts show how closely the baseline DWP claimant rate in Conservation Aggregates is mirrored in their associated Comparator Aggregates, with areas plotted close to the trendline showing a good match between Conservation and Comparator Aggregates, areas displayed above the trendline showing higher claimant rates in Conservation Aggregates than Comparator Aggregates (and vice versa).

Figure 5.5 DWP benefit claimant rate in Rural Conservation and Comparator Aggregates in 2005

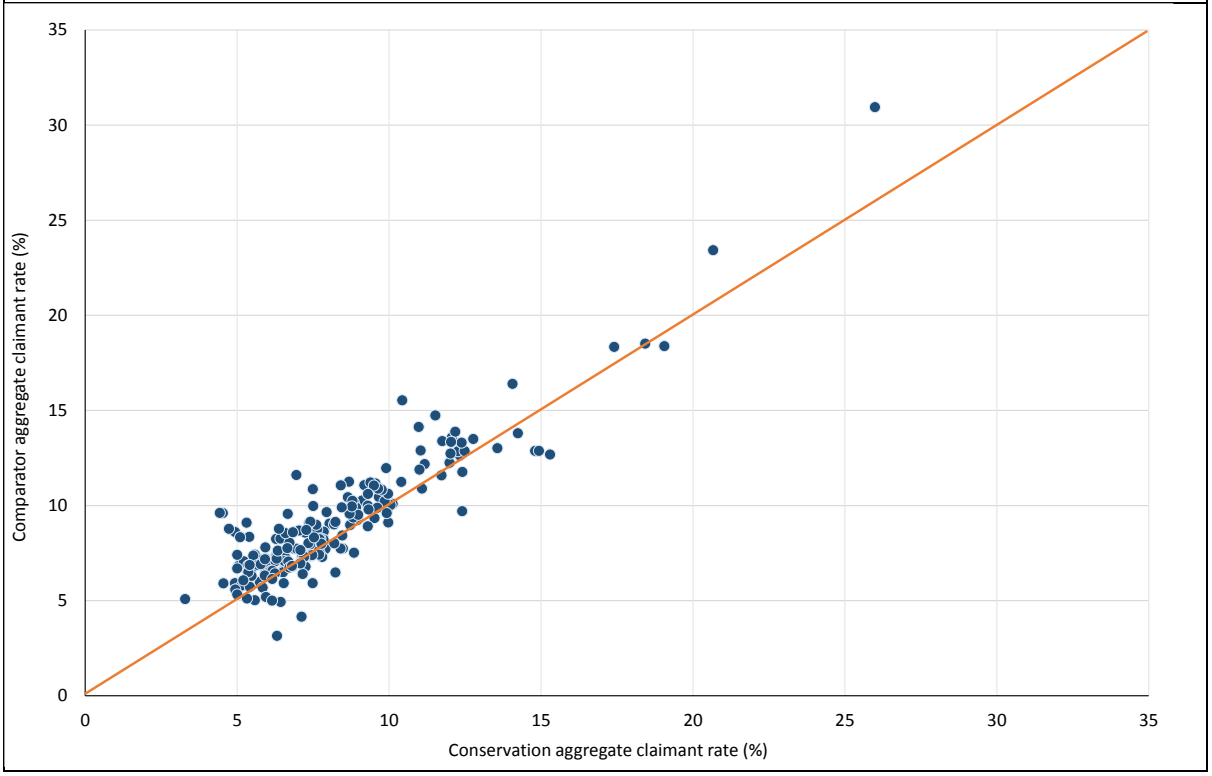


Figure 5.6 DWP benefit claimant rate in Urban Residential Conservation and Comparator Aggregates in 2005

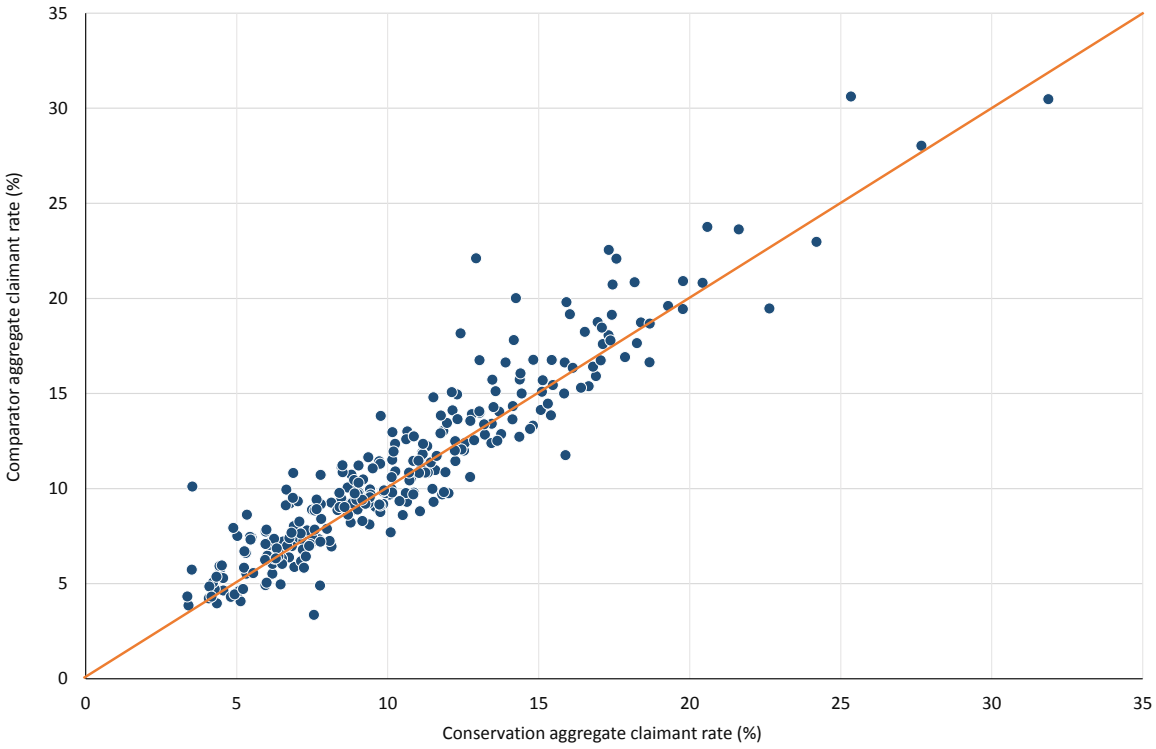
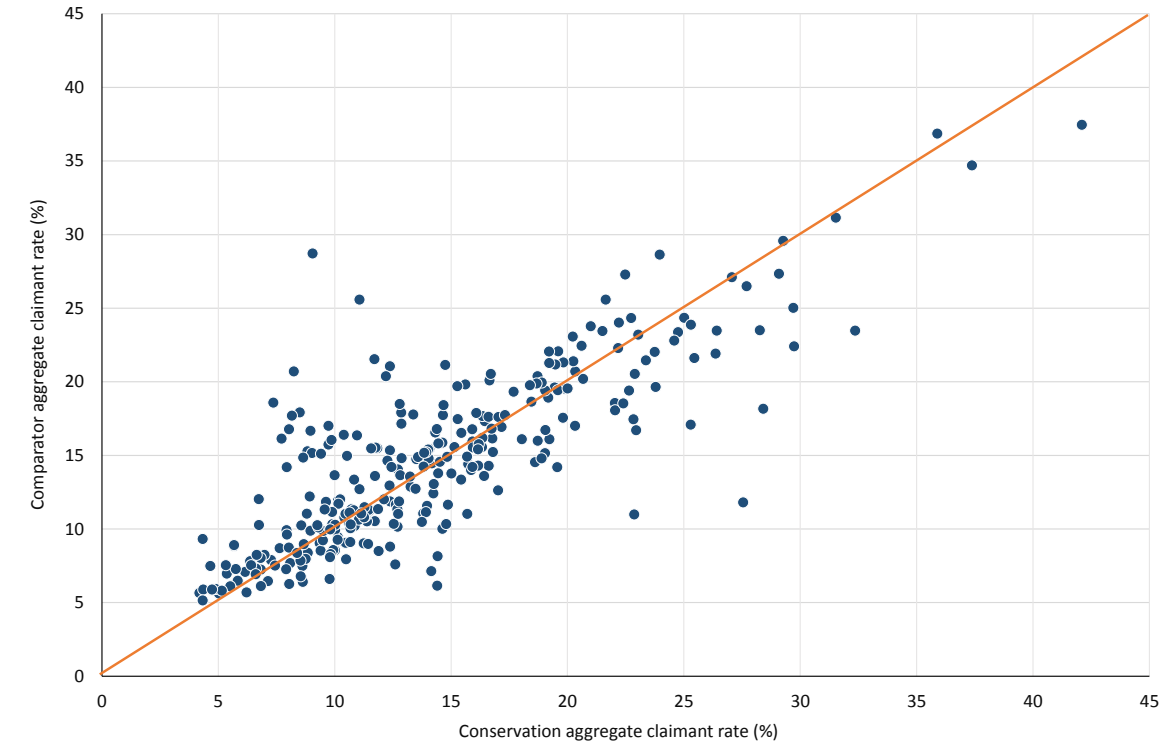


Figure 5.7 DWP benefit claimant rate in Town Centre Conservation and Comparator Aggregates in 2005



Note: for this analysis we have excluded Conservation Aggregates where we were unable to achieve a good match with Comparator Aggregates, either in terms of IMD 2007 score or overall population. See Appendix C for details.

It is evident from each of these figures that the vast majority of Rural, Urban and Conservation Aggregates had similar claimant rates to their matched Comparator Aggregates in 2005, though there was greater variation in claimant rates for Town Centre Aggregates than across the other categories.

- A total of 150 of the 199 Rural Conservation Aggregates (75%) had a DWP claimant rate within +- 1.5 percentage points of their associated Comparator Aggregate[42].
- A total of 210 of the 286 Urban Residential Conservation Aggregates (73%) having a DWP claimant rate within +- 1.5 parentage points of their associated Comparator Aggregate[43].
- A total of 135 of the 256 (53%) Town Centre Conservation Aggregates of this type had claimant rates within 1.5 percentage points of their Comparator Aggregates[44].

The difference at baseline was therefore typically slightly more pronounced for the Town Centre category than for either the Rural or Urban Residential category.

Key findings summary:

- The majority of Conservation Aggregates in had extremely similar claimant rates to their matched Comparator Areas at a baseline point in time.
- However, Town Centre Conservation and Comparator Aggregates were less well matched than across other categories

How has the profile of Conservation Areas changed over time?

The charts below compare the percentage point change in DWP claimant rates across each of the Conservation Aggregates between 2005 and 2015.

The size of the bars are calculated by subtracting DWP claimant rate in Conservation Aggregates in 2015 by the equivalent Conservation Aggregate rate in 2005. A score of greater than zero indicates DWP claimant rates are increasing across a Conservation Aggregate, a score of less than zero indicates DWP claimant rates are decreasing.

[42] The Rural Conservation Aggregate with the highest DWP claimant rate relative to their Comparator Aggregate was Epsom and Ewell (with a DWP claimant rate 3.2 percentage points higher than the Comparator Aggregate). The Rural Conservation Aggregate with the lowest DWP claimant rate relative to their Comparator Aggregate was Northumberland (with a DWP claimant rate 5.1 percentage points lower than the Comparator Aggregate).

[43] The Urban Conservation Aggregate with the highest DWP claimant rate relative to their Comparator Aggregate was Broadland. The claimant rate in Barrow-in-Furness was 4.2 percentage points higher than the Comparator Aggregate. The Urban Conservation Aggregate with the lowest DWP claimant rate relative to their Comparator Aggregate was Exeter (with a claimant rate 6.6 percentage points lower than the Comparator Aggregate).

[44] The Town Centre Conservation Aggregate with the highest DWP claimant rate relative to their Comparator Aggregate was Rochdale, where claimant rates in the Conservation Aggregates was 10.2 percentage points higher than the Comparator Aggregate. The Town Centre Conservation Aggregate with the lowest DWP claimant rate relative to their Comparator Aggregate was Wakefield (with a claimant rate 6.4 percentage points lower than the Comparator Aggregate).

Figure 5.8 Percentage point change in DWP benefit claimant rate in Rural Conservation Aggregates between 2005 and 2015

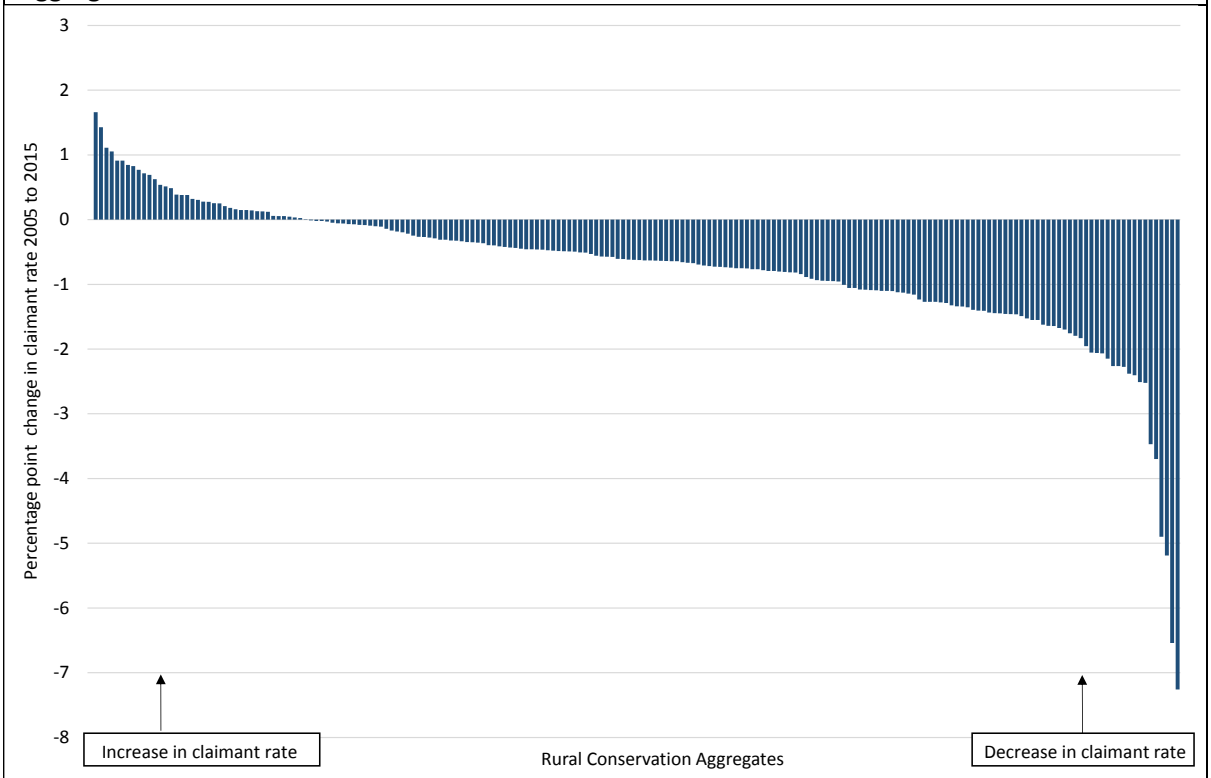


Figure 5.9 Percentage point change in DWP benefit claimant rate in Urban Residential Conservation Aggregates between 2005 and 2015

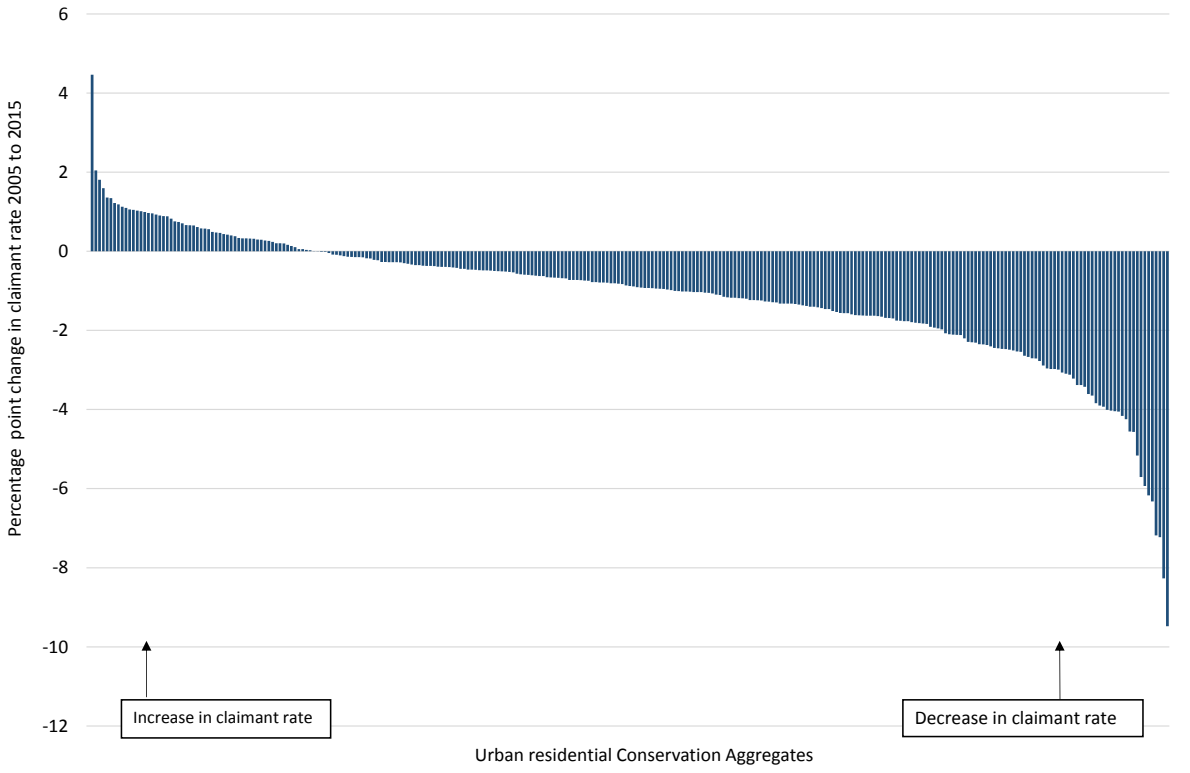
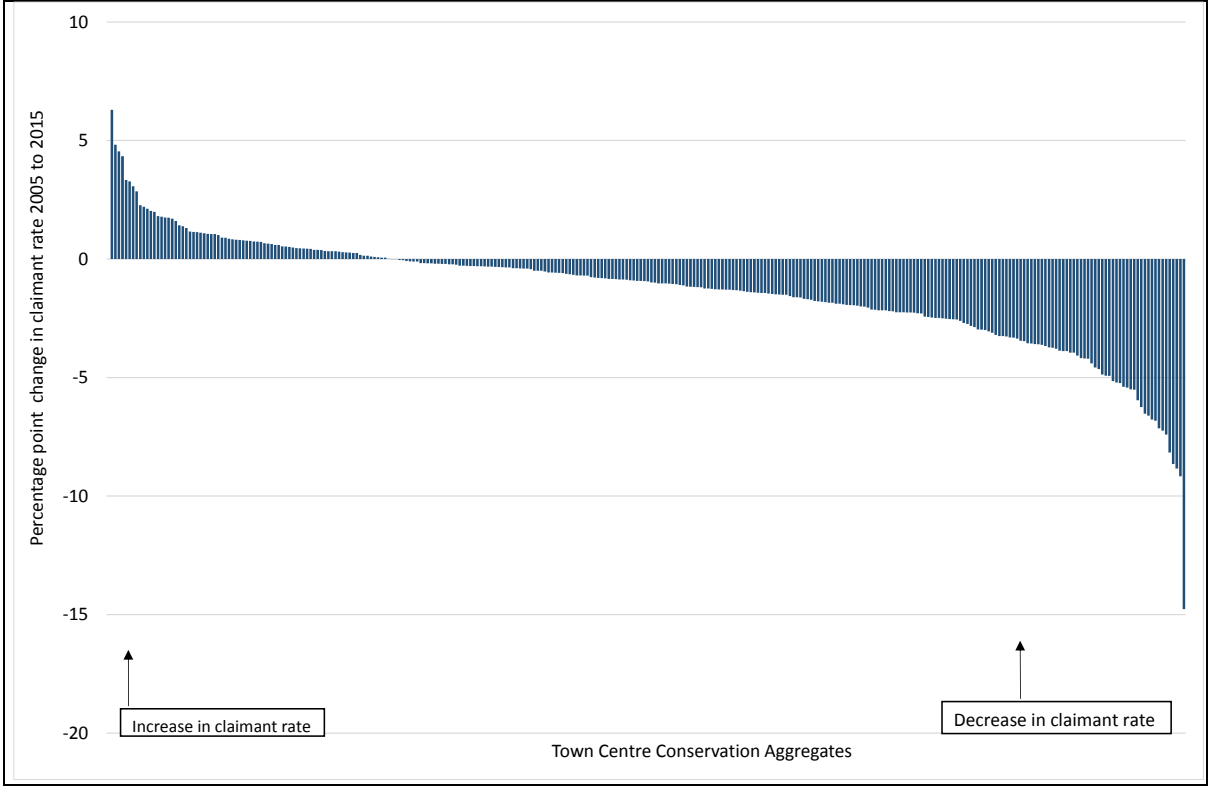


Figure 5.10 Percentage point change in DWP benefit claimant rate in Town Centre Conservation Aggregates between 2005 and 2015



As illustrated in the charts above, the overall distribution in terms of percentage point change in DWP Benefit claimant rate is similar across Rural, Urban Residential and Town Centre Conservation Aggregates alike. The majority of Conservation Aggregates in each category experienced an overall fall in DWP claimant rates between 2005 and 2015, with a notable minority experiencing an increase in claimant rates over the period.

The majority of Rural Conservation Aggregates had a similar DWP claimant rate in 2015 compared with the base period. Indeed 66% of Rural Areas had claimant rate in 2015 within +-1.0 percentage points of their 2005 claimant rate.

The percentage point change in DWP claimant rate in Rural Conservation Aggregates ranged from an increase of 1.7 percentage points in Havant to a decrease in claimant rate of 7.7 percentage points in North Tyneside. The data underpinning the chart also reveal interesting geographical patterns, with the Rural Conservation Aggregates seeing the largest increase in claimant rate were concentrated in the South and East of England with five of the 10 Conservation Aggregates with the largest increases located in the East region (see maps on the following pages for more details). By contrast, the Rural Conservation Aggregates experiencing the largest falls in claimant rate were predominantly located in the North, with 3 of the 10 Local Authorities with the largest falls within the North East region and three in the North West.

The majority of Urban Residential Conservation Aggregates also had a similar DWP benefit claimant rate in 2015 compared with the base period. Indeed, 53% of Urban Residential areas had a DWP benefit claimant rate in 2015 within +-1.0 percentage points of their 2005 claimant rate. The percentage point change in DWP benefit claimant rate in Urban Residential Conservation Aggregates ranged from an increase of 4.5 percentage points in Mansfield to a decrease in claimant rate of 9.5 percentage points in Barking and Dagenham. The Conservation Aggregates showing the greatest

reduction in claimant rates were predominantly located in London, with 10 of the 14 Conservation Aggregates experiencing falls of 4 percentage point or more located within London.

As identified above, Town Centre Conservation Aggregates experienced greater changes in claimant rate, with just under 60% experiencing changes of greater than +-1.0 percentage points. The percentage point change in DWP claimant rates in Town Centre Conservation Aggregates ranged from an increase of 6.3 percentage points in West Lindsey (Lincolnshire), to a decrease in claimant rate of 14.8 percentage points in Barrow-in-Furness (Cumbria). The largest increases in claimant rates were found in Town Centre Conservation Aggregates in the East Midlands, with six of the 10 Conservation Aggregates with the largest increases in claimant rate located in the East Midlands. As with the Urban Residential category, Town Centre Conservation Aggregates showing the greatest reduction in DWP claimant rate were disproportionately located in the London (seven of the 14 Conservation Aggregates experiencing falls in claimant rate of 6 percentage points or more were located in London).

Key findings summary:

- The majority of Conservation Aggregates had a lower DWP claimant rate in 2015 compared with 2005, but with a notable minority experiencing an increase in claimant rates over the period.
- For most of the areas the magnitude of change was quite small, although for each category there were a minority of cases where the change was notably more pronounced.
- Town Centre Conservation Aggregates experienced a greater scale of change with larger increases at one end of the distribution and larger falls at the other end
- The largest falls in the proportion of people claiming DWP benefits in Urban Residential Conservation Areas over the period were seen in London.
- The largest falls claimant rates in Rural Conservation Areas over the period were seen in the North of England.
- Areas experiencing notable increases in benefit claimants were particularly concentrated in the Eastern part of the country, with Rural Conservation Aggregates in East Anglia and Town Centre aggregates in the East Midlands disproportionately ranked among the areas seeing the largest increases in DWP benefit claimant rates.

The maps below show this geographical spread in more detail – showing change in DWP claimant rates between 2005 and 2015 in Rural, Urban Residential and Town Centre Conservation Aggregates. Conservation Aggregates shaded pink on the map are characterised as showing notable decreases in DWP claimant rates over the period (absolute improvement). Conservation Aggregates shaded blue are characterised as having notable increases in DWP claimant rates (absolute worsening of position). Conservation Aggregates shaded light green have not experienced appreciable change between 2005 and 2015. For detail of how the map colours are calculated see Appendix C.

Figure 5.11 Change in DWP claimant rates 2005 to 2015 in in Rural Conservation Aggregates

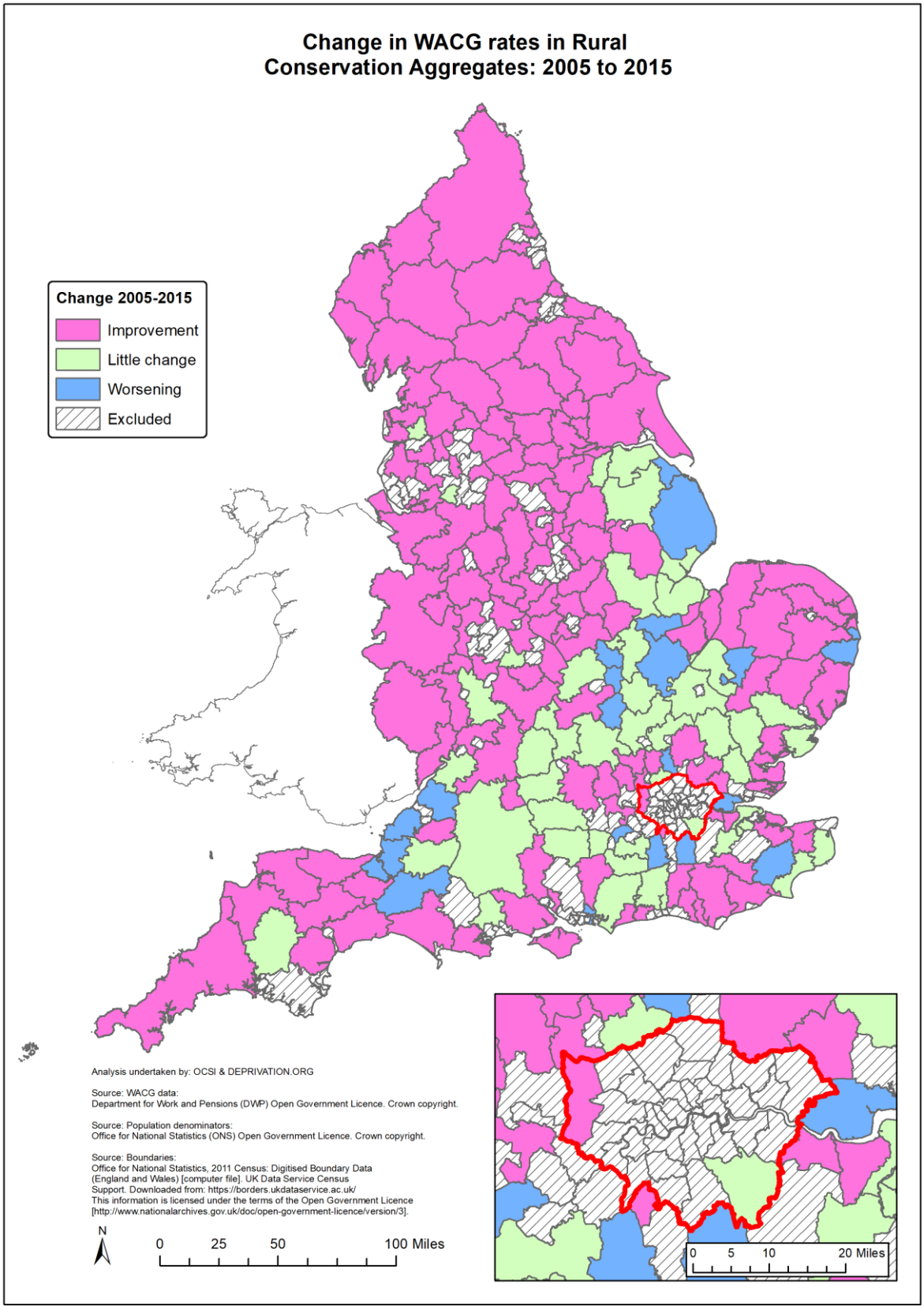


Figure 5.12 Change in DWP claimant rates 2005 to 2015 in Urban Residential Conservation Aggregates

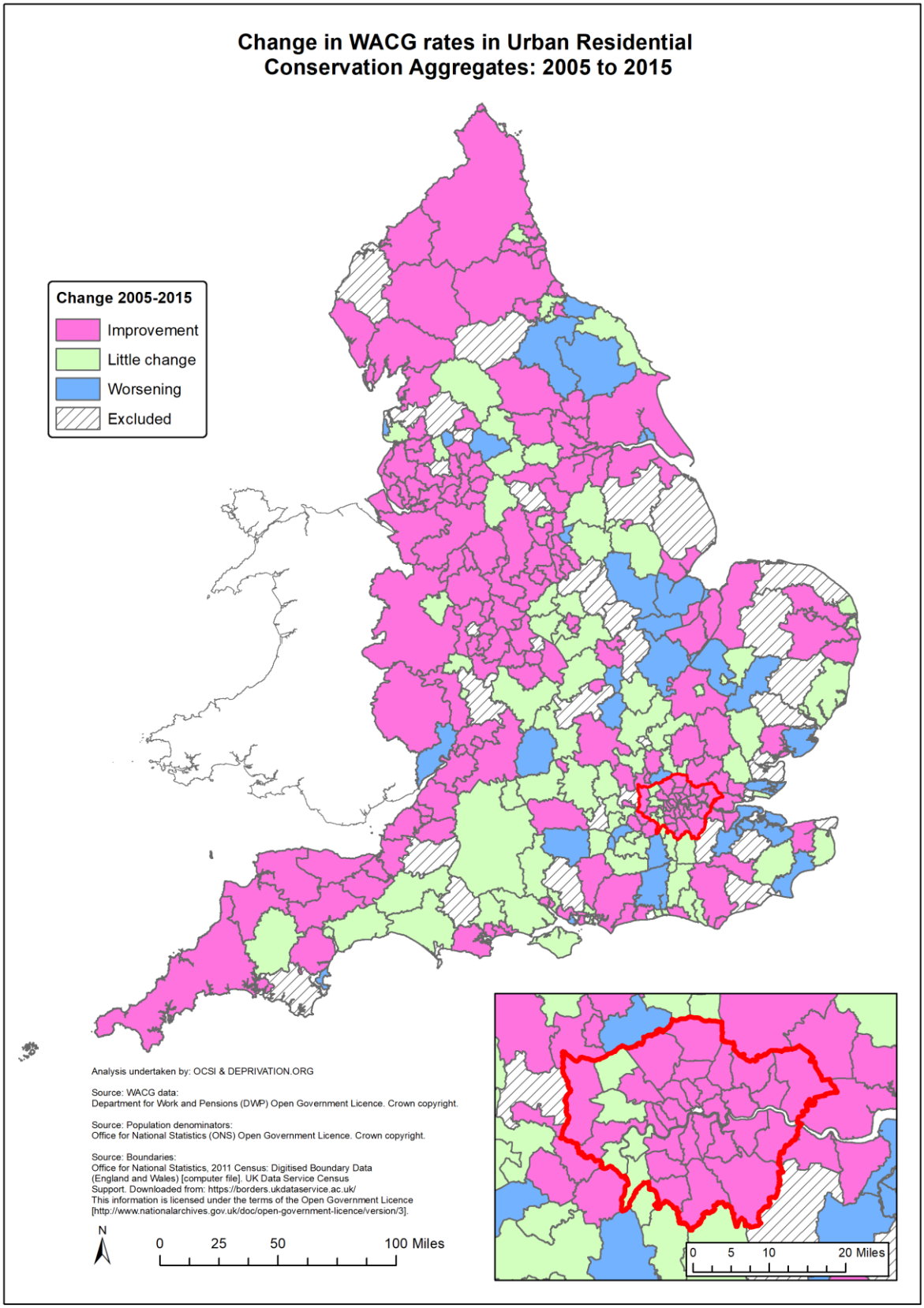
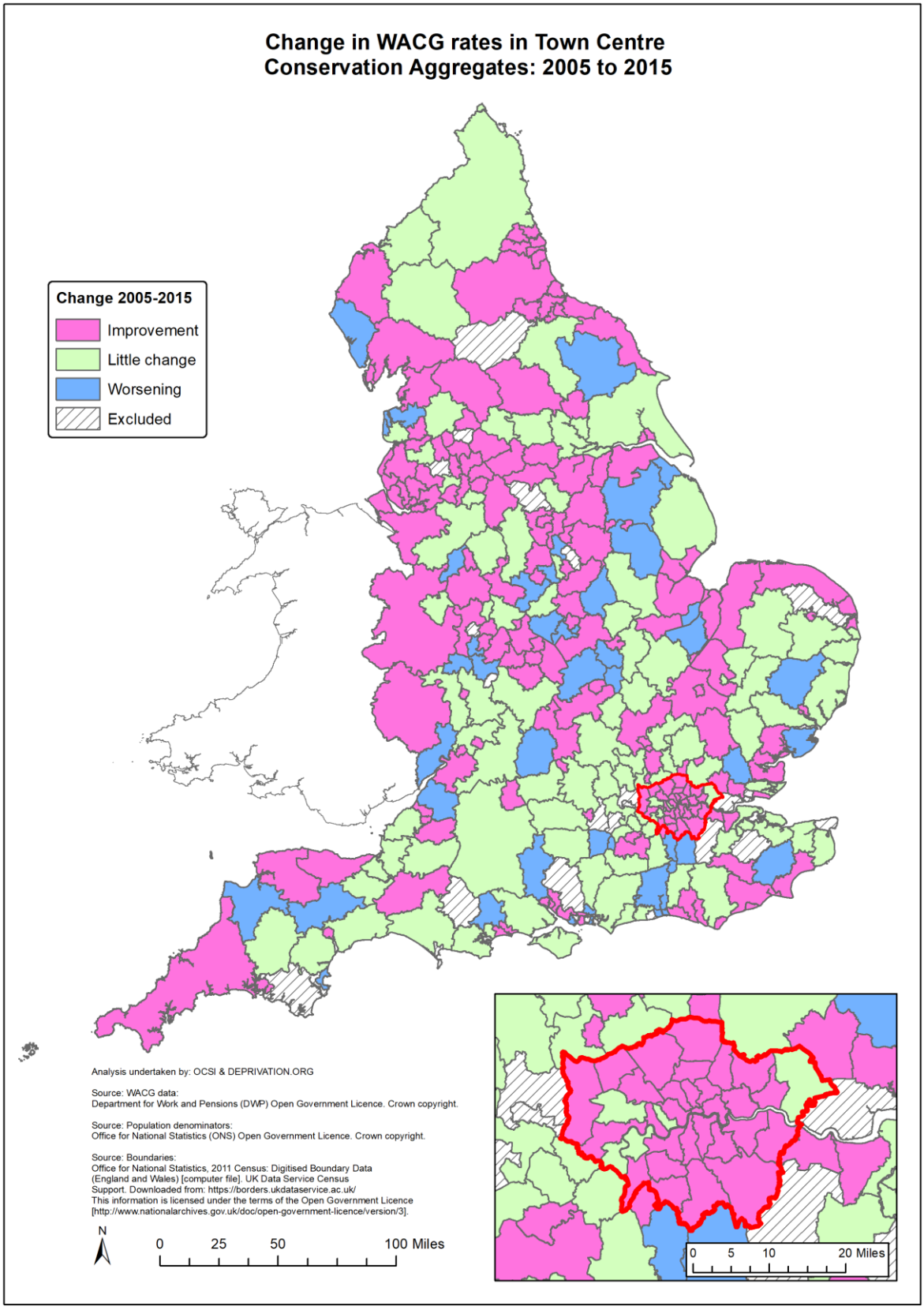


Figure 5.13 Change in DWP claimant rates 2005 to 2015 in Town Centre Conservation Aggregates



How are Conservation Areas changing relative to matched Comparator Aggregates?

The table below summarises overall performance of Rural, Urban Residential and Town Centre Comparator Aggregates in terms of change in DWP claimant rates. Conservation Aggregates are grouped into four categories:

1) Areas experiencing both reduction in DWP claimant rates and improvement relative to their matched Comparator Aggregates over the period. Conservation Aggregates in this group could be said to be achieving *Good Growth* as they had both a positive direction of travel and were experiencing this improvement at a faster rate than non-Conservation Aggregates in the same locality.
2) Areas which have seen an improvement in terms of reduction in DWP claimant rates, but where this improvement has been smaller than across their matched Comparator Aggregates. Conservation Aggregates in this group have had a positive direction of travel but there is less evidence to suggest that their Conservation Area status has been a factor in this improvement, as similar non-Conservation Areas have experienced a greater level of improvement.
3) Areas experiencing an increase in DWP claimant rates but not to the same extent as in their matched Comparator Aggregates over the period. Conservation Aggregates in this group have seen an overall worsening in rates over the period; however, similar areas within the same locality have been experienced a more notable increase in claimant rate (suggesting that the Conservation Aggregate has proved more resilient than the surrounding area). These areas are likely to have experienced wider socio-economic challenges over the period which have impacted on overall claimant rates.
4) Areas experiencing both an increase in DWP claimant rates and where they have not been performing as well as their matched Comparator Aggregates over the period. This group is the most concerning, as they have experienced worsening both in absolute terms and also relative to their matched Comparator Aggregates.

Table 5.2: Absolute and relative performance of Conservation Aggregates

	Rural	Urban Residential	Town Centre
1) Reduction in claimant rates in Conservation Aggregates & Conservation Aggregates outperform Comparator Aggregates	42.3%	49.4%	48.4%
2) Reduction in claimant rates in Conservation Aggregates & Comparator Aggregates outperform Conservation Aggregates	39.4%	30.9%	22.6%
3) Increase in claimant rates in Conservation Aggregates & Conservation Aggregates outperform Comparator Aggregates	2.3%	2.9%	3.2%
4) Increase in claimant rates in Conservation Aggregates & Comparator Aggregates outperform Conservation Aggregates	16.0%	16.9%	25.8%
Total	100%	100%	100%

Please see Scatterplots F.17 to F.19 in Appendix F for more detailed exploration of the distribution of Conservation Aggregates in each of these four groups.

It can be seen from Table 5.2 that just under half of all Conservation Aggregates in Rural (42%) Urban Residential (49%) and Town Centre (48%) categories experienced both absolute and relative

improvement over the period, seeing a reduction in benefit claimant rates and at a pace which was faster than their associated Comparator Aggregates.

By contrast, approximately one in four Conservation Aggregates in Town Centre areas (26%) and less than one in six in Rural (16%) and Urban Residential (17%) categories experienced both absolute and relative worsening over the period, seeing an increase in proportion of people on benefits and a worsening of position relative to their matched Comparator Aggregates.

The charts below which show the range of differences in performance in terms of change in DWP claimant rates across the Conservation Aggregates and their comparators. Note: The size of the bars are calculated by subtracting change in DWP claimant rates in Conservation Aggregates between 2005 and 2015, by change in DWP claimant rates in Comparator Aggregates – a score of less than zero indicates a Conservation Aggregate is outperforming a Comparator Aggregate i.e. DWP claimant rate levels in the Conservation Aggregate are improving relative to the Comparator Aggregate, a score of greater than zero indicates a Comparator Aggregate is outperforming a Conservation Aggregate.

Figure 5.14 Difference in percentage point change in DWP claimant rates between 2005 and 2015 between Rural Conservation and Comparator Aggregates

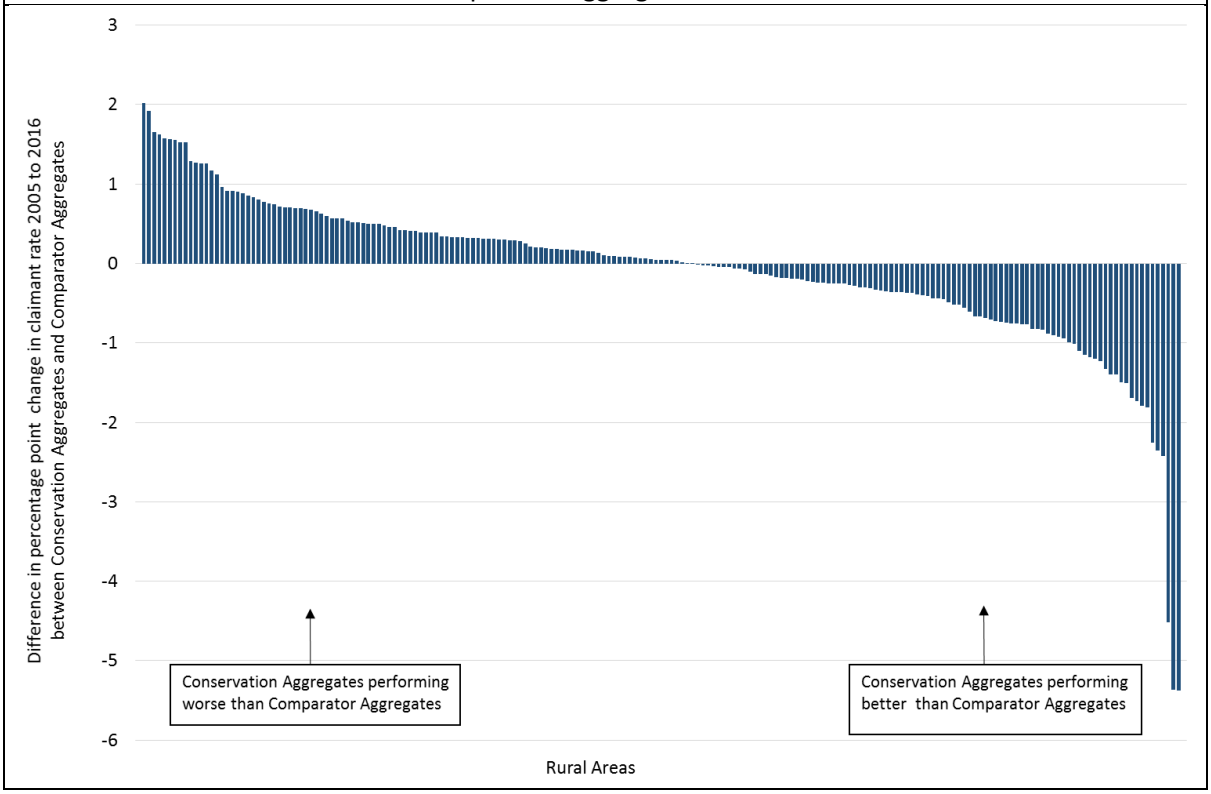


Figure 5.15 Difference in percentage point change in DWP claimant rates between 2005 and 2015 between Urban Residential Conservation and Comparator Aggregates

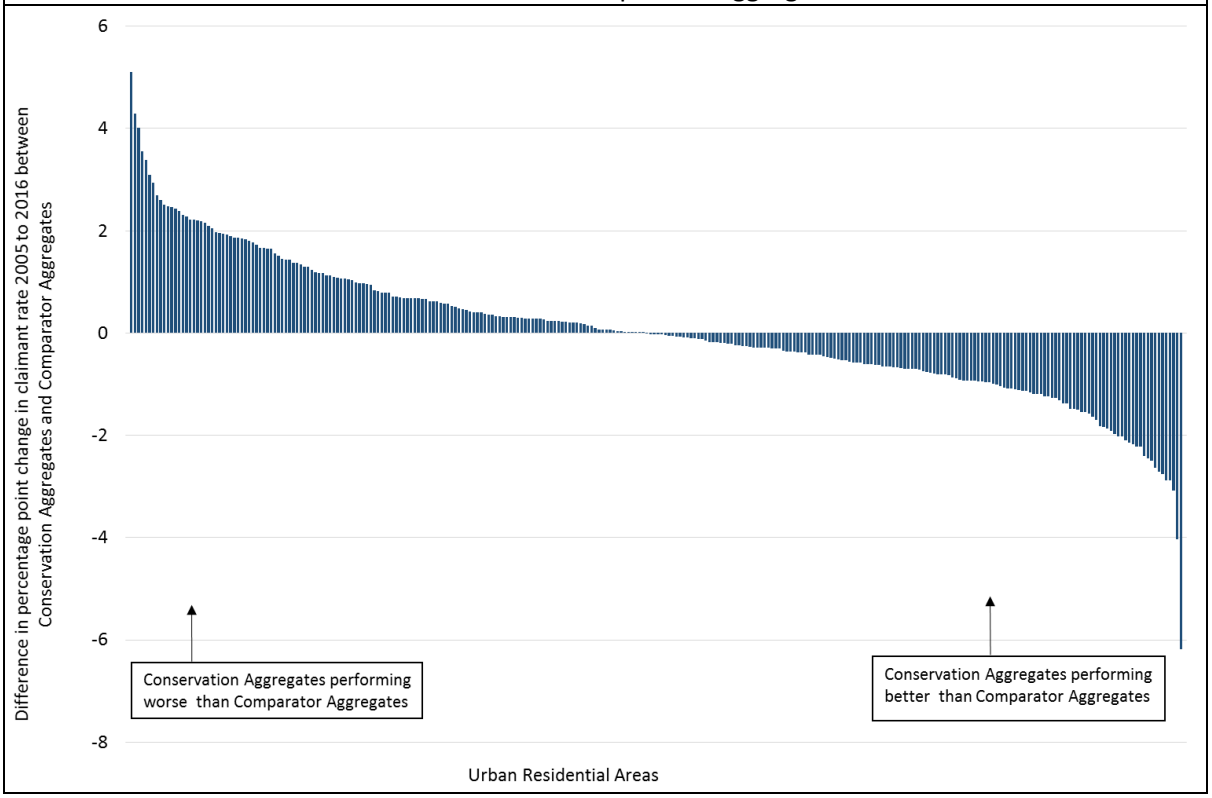
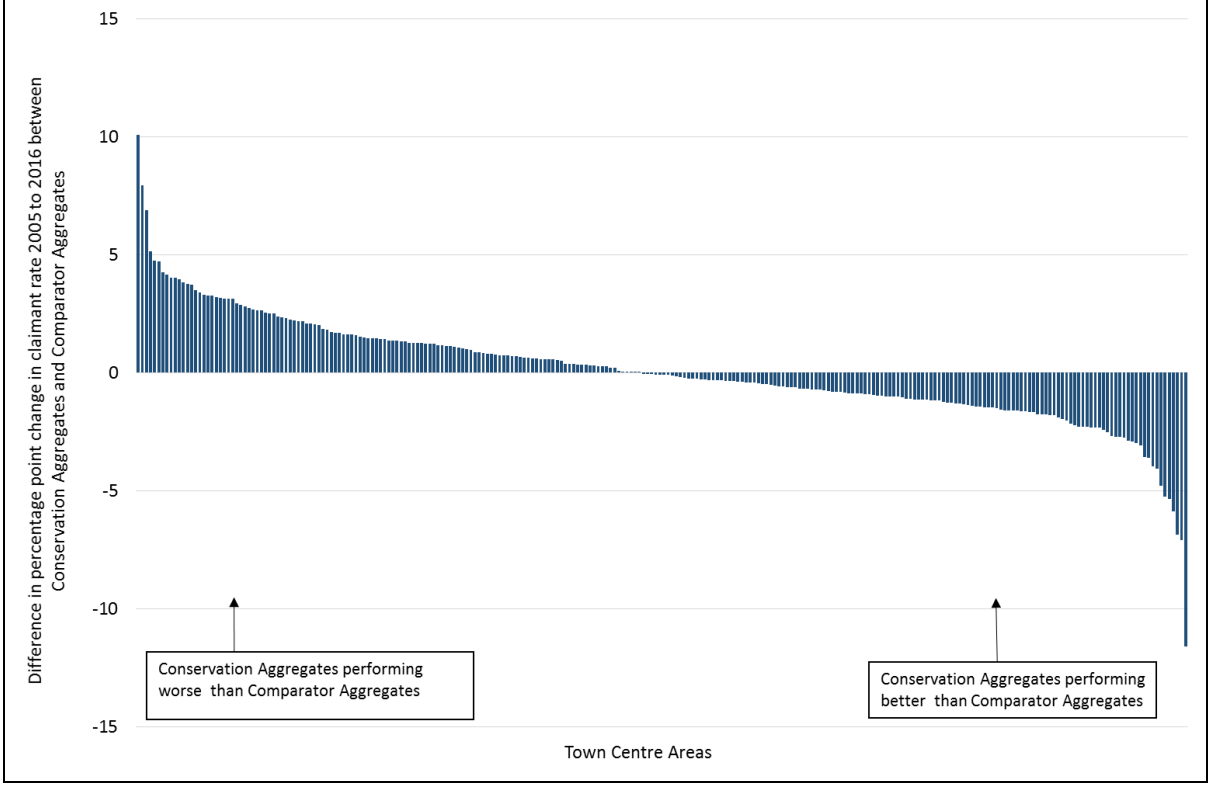


Figure 5.16 Difference in percentage point change in DWP claimant rates between 2005 and 2015 between Town Centre Conservation and Comparator Aggregates



As illustrated in the charts above, the overall distribution in terms of relative performance is similar across Rural, Urban Residential and Town Centre Conservation Aggregates alike with roughly half of Conservation Aggregates outperforming comparators and vice versa.

Each of the charts show some outliers, Conservation Aggregates which have performed notably differently from their matched Comparator Aggregates over the period. These are explored below.

Table 5.3 shows the 10 Rural Conservation Aggregates which preformed worst relative to their Comparator Aggregates.

Table 5.3: Worst performing Rural Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in DWP Benefit claimant rate 2005 to 2015 (% point change)		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Surrey Heath	South East	0.5	-1.5	2.0
Forest Heath	East	1.1	-0.9	1.9
Allerdale	North West	-1.7	-3.3	1.7
North Somerset	South West	0.9	-0.7	1.6
Kettering	East Midlands	1.4	-0.2	1.6
Waveney	East	0.8	-0.7	1.6
Solihull	West Midlands	-0.1	-1.6	1.6
Copeland	North West	-2.1	-3.7	1.5
Pendle	North West	-0.9	-2.5	1.5
South Staffordshire	West Midlands	-0.4	-1.7	1.3

Not all of the worst performing Conservation Aggregates in relative terms experienced a negative overall direction of travel in absolute terms. Five of the ten worst performing areas saw a reduction in DWP benefit claimants over the period but they did not improve at the same rates as their Comparator Aggregates. The remaining five Conservation Aggregates experienced an increase in proportion of working age people receiving benefits while similar non-Conservation Areas in the same locality experienced a reduction.

Table 5.4 shows the ten Rural Conservation Aggregates which performed notably best relative to their Comparator Aggregates.

Table 5.4: Best performing Rural Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in DWP Benefit claimant rate 2005 to 2015 (% point change)		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
North Tyneside	North East	-7.3	-1.9	-5.4
Halton	North West	-5.2	0.2	-5.4
Mansfield	East Midlands	-6.5	-2.0	-4.5
Blaby	East Midlands	-0.5	2.0	-2.4
Bolsover	East Midlands	-3.5	-1.1	-2.4
Oldham	North West	-2.3	0.0	-2.3
Bury	North West	-2.0	-0.1	-1.8
Gateshead	North East	-2.5	-0.7	-1.8
Warwick	West Midlands	-0.8	0.9	-1.7

All of the best performing Rural Conservation Aggregates experienced an overall reduction in DWP Benefit claimant rates over the 2005 to 2015 period. In three of these areas, the Conservation Aggregate experienced a decrease in claimant rate, while their Comparator Aggregate experienced an increase. North Tyneside Rural Conservation Aggregate performed better than all other Conservation Aggregates relative to its associated Rural Comparator, with DWP claimant rates decreasing by 7.3 percentage points between 2005 and 2015 compared with a smaller 1.9 percentage point fall over the same period in the Comparator Aggregate. Halton (area around Runcorn/Widnes) Rural Conservation Aggregate also notably outperformed their Comparator Aggregate, seeing a fall in excess of 5 percentage points in the context of stability in the Comparator Aggregate.

The best performing Rural Conservation Aggregates were generally found in the North and Midlands.

Table 5.5 shows the 10 Urban Residential Conservation Aggregates which preformed worst relative to their Comparator Aggregates.

As with rural areas, not all of the worst performing Urban Residential Aggregates in relative terms experienced an increase in claimant rate in absolute terms. Two of the 10 worst performing areas experienced a fall in proportion of people receiving DWP benefits (albeit at a slower rate than the Comparator Aggregates). Mansfield Urban Residential Conservation Aggregate performed worst relative to their associated Comparator Aggregate with DWP Benefit claimant rates in the Conservation Aggregate increasing by 4.5 percentage points, while claimant rates in the Urban Residential Comparator Aggregate fell by 0.6 percentage points over the same period.

Table 5.5: Worst performing Urban Residential Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in DWP claimant rate 2005 to 2015 (% point change)		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Mansfield	East Midlands	4.5	-0.6	5.1
Great Yarmouth	East	0.5	-3.8	4.3
South Holland	East Midlands	1.0	-3.0	4.0
Hinckley and Bosworth	East Midlands	0.1	-3.5	3.5
North Lincolnshire	Yorkshire Humber	-1.7	-5.1	3.4
Wakefield	Yorkshire Humber	0.3	-2.8	3.1
Blackburn with Darwen	North West	0.4	-2.5	2.9
East Staffordshire	West Midlands	-1.8	-4.5	2.7
Rochford	East	0.9	-1.7	2.6
Ashford	South East	0.3	-2.2	2.5

Table 5.6 below shows the 10 Urban Residential Conservation Aggregates which performed best relative to Comparator Aggregates.

Table 5.6: Best performing Urban Residential Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in DWP Benefit claimant rate 2005 to 2015 (% point change)		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Bolsover	East Midlands	-5.9	0.3	-6.2
Sunderland	North East	-3.1	0.9	-4.0
Havant	South East	-0.5	2.6	-3.1
Epping Forest	East	-1.2	1.7	-2.9
West Somerset	South West	-1.0	1.9	-2.9
Rugby	West Midlands	-3.0	-0.2	-2.8
Preston	North West	-4.2	-1.5	-2.7
Sandwell	West Midlands	-3.4	-0.7	-2.6
Bournemouth	South West	-3.6	-1.1	-2.5
Thurrock	East	-4.0	-1.6	-2.4

All of the best performing areas saw a reduction in claimant rates, with five of these areas seeing a reduction in the context of an increase in claimant rates across their matched comparator. Bolsover Conservation Aggregate was the best performing, with DWP benefit claimant rates decreasing by 5.9 percentage points between 2005 and 2015 compared with a 0.3 percentage point increase over the same period in the Comparator Aggregate.

Table 5.7 below shows the 10 Town Centre Conservation Aggregates which preformed worst relative to their Comparator Aggregates.

Table 5.7: Worst performing Town Centre Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in DWP Benefit claimant rate 2005 to 2015 (% point change)		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Blackpool	North West	4.8	-5.3	10.1
West Lindsey	East Midlands	6.3	-1.7	8.0
Melton	East Midlands	3.3	-3.6	6.9
Newcastle-under-Lyme	West Midlands	1.6	-3.5	5.1
Daventry	East Midlands	1.7	-3.1	4.8
Sefton	North West	-2.2	-6.9	4.7
Copeland	North West	1.2	-3.1	4.3
Ashfield	East Midlands	2.3	-1.9	4.2
Tendring	East	4.5	0.5	4.0
North Kesteven	East Midlands	1.1	-2.9	4.0

Eight of the 10 Town Centre Conservation Aggregates experienced an increase in DWP benefits claimant rates in contrast to a fall in claimant rates in their matched Comparator Aggregate, with one experiencing a fall (at a slower rate than the Comparator Aggregate) and one experiencing a rise while the Comparator Aggregate also experienced a rise).

Blackpool was the worst performing area, with the proportion of people receiving benefits increasing by 4.8 percentage points, while claimant rates in the Comparator Aggregate fell by 5.3 percentage points over the same period. Nine of the ten worst performing areas were located in the North or Midlands (see maps at the end of the chapter for more detailed geographical distribution).

Table 5.8 below shows the 10 Town Centre Conservation Aggregates which performed best relative to Comparator Aggregates.

Table 5.8: Best performing Town Centre Conservation Aggregates (relative to their Comparators)

LA	Region	Change in DWP Benefit claimant rate 2005 to 2015 (% point change)		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Barrow-in-Furness	North West	-8.6	2.9	-11.6
Chesterfield	East Midlands	-7.1	-0.1	-7.1
North Norfolk	East	-9.2	-2.3	-6.9
Barking and Dagenham	London	-14.8	-8.9	-5.9
Ipswich	East	-5.4	-0.1	-5.3
Gateshead	North East	-7.2	-2.0	-5.3
Nottingham	East Midlands	-5.4	-0.6	-4.8
Harborough	East Midlands	-1.9	2.2	-4.1
Tamworth	West Midlands	-2.5	1.5	-4.0
Northampton	East Midlands	-3.1	0.5	-3.6

All of the best performing areas saw a reduction in proportion of people receiving DWP benefits, with four of these areas seeing a reduction in the context of an increase in claimant rate across their matched Comparator Aggregate. Barrow-in-Furness was the best performing Town Centre Conservation Aggregate, with the claimant rate decreasing by 8.6 percentage points between 2005 and 2015 compared with a 2.9 percentage point increase over the same period in the Comparator Aggregate. There is no strong geographic pattern in terms of best performing areas, with Town Centre Conservation Aggregates from 10 different counties/metropolitan areas represented among the 10 best performing areas.

Key findings summary:

- Just under half of all Conservation Aggregates in each category experienced both absolute and relative improvement over the period, seeing a reduction in benefit claimant rate faster than their associated Comparator Aggregates
- By contrast, approximately one in four of all Conservation Aggregates in Town Centre areas and one in six in Rural and Urban Residential categories experienced both absolute and relative worsening over the period
- However, the magnitude of difference in performance between Conservation Aggregates and Comparators was small in the majority of cases.
- There was no clear geographical pattern in terms of relative performance, with Conservation Aggregates from all regions represented among the best and worst performing areas.

The maps below show the geographical pattern in more detail – Each map compares the performance of the Conservation Aggregates relative to their matched Comparator Aggregates on DWP claimant rate between 2005 and 2015. Conservation Aggregates shaded pink on the maps are characterised as showing notable improvement relative to their Comparator Aggregates. Areas shaded blue are characterised as seeing an appreciable worsening in their position relative to matched Comparator Aggregates. Conservation Aggregates shaded light green have experienced small relative change between 2005 and 2015. For further details, see Appendix C.

Figure 5.17 Change in DWP claimant rates 2005 to 2015 in Rural Conservation Aggregates relative to matched Comparator Aggregates

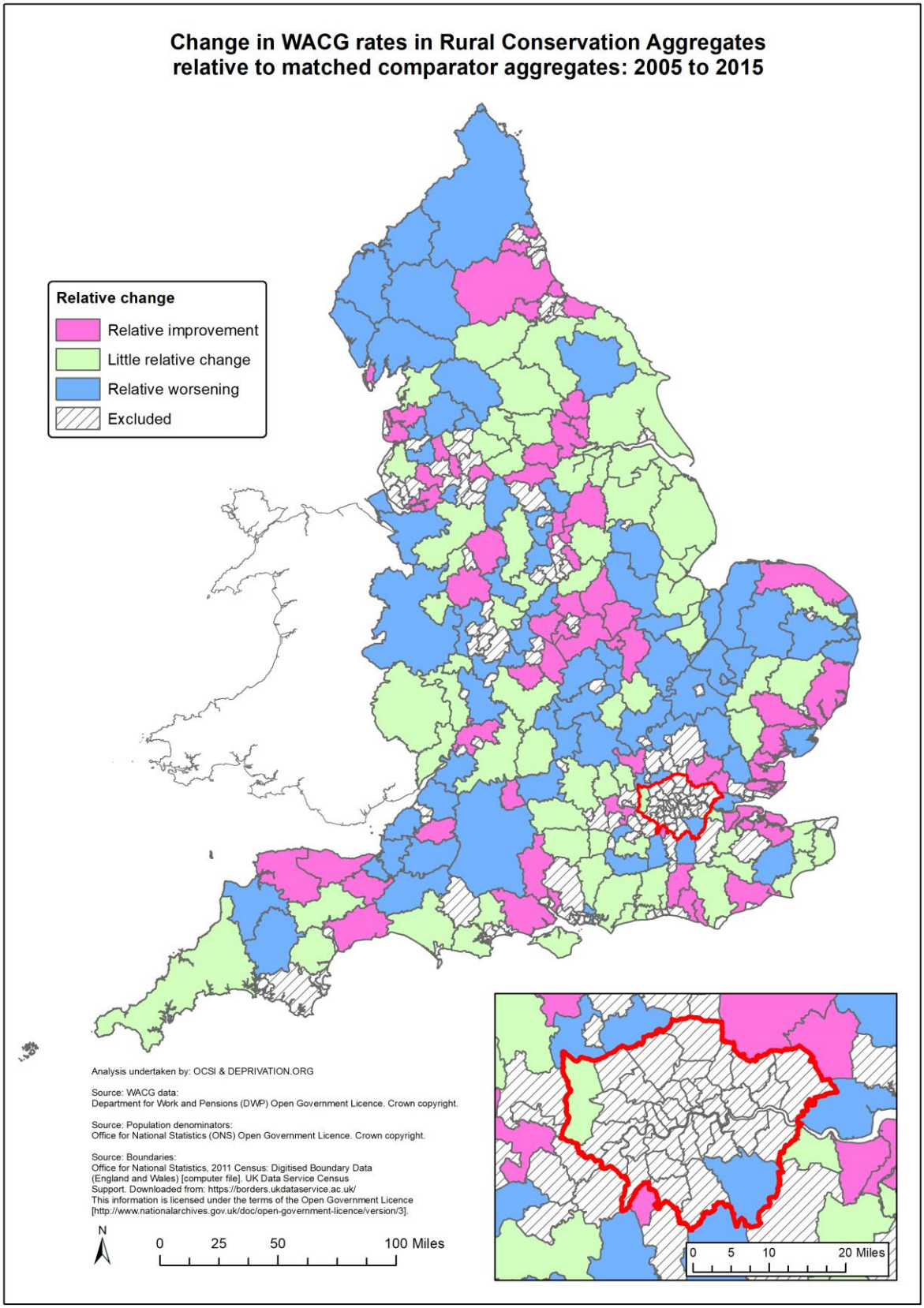


Figure 5.18 Change in DWP claimant rates 2005 to 2015 in Urban Residential Conservation Aggregates relative to matched Comparator Aggregates

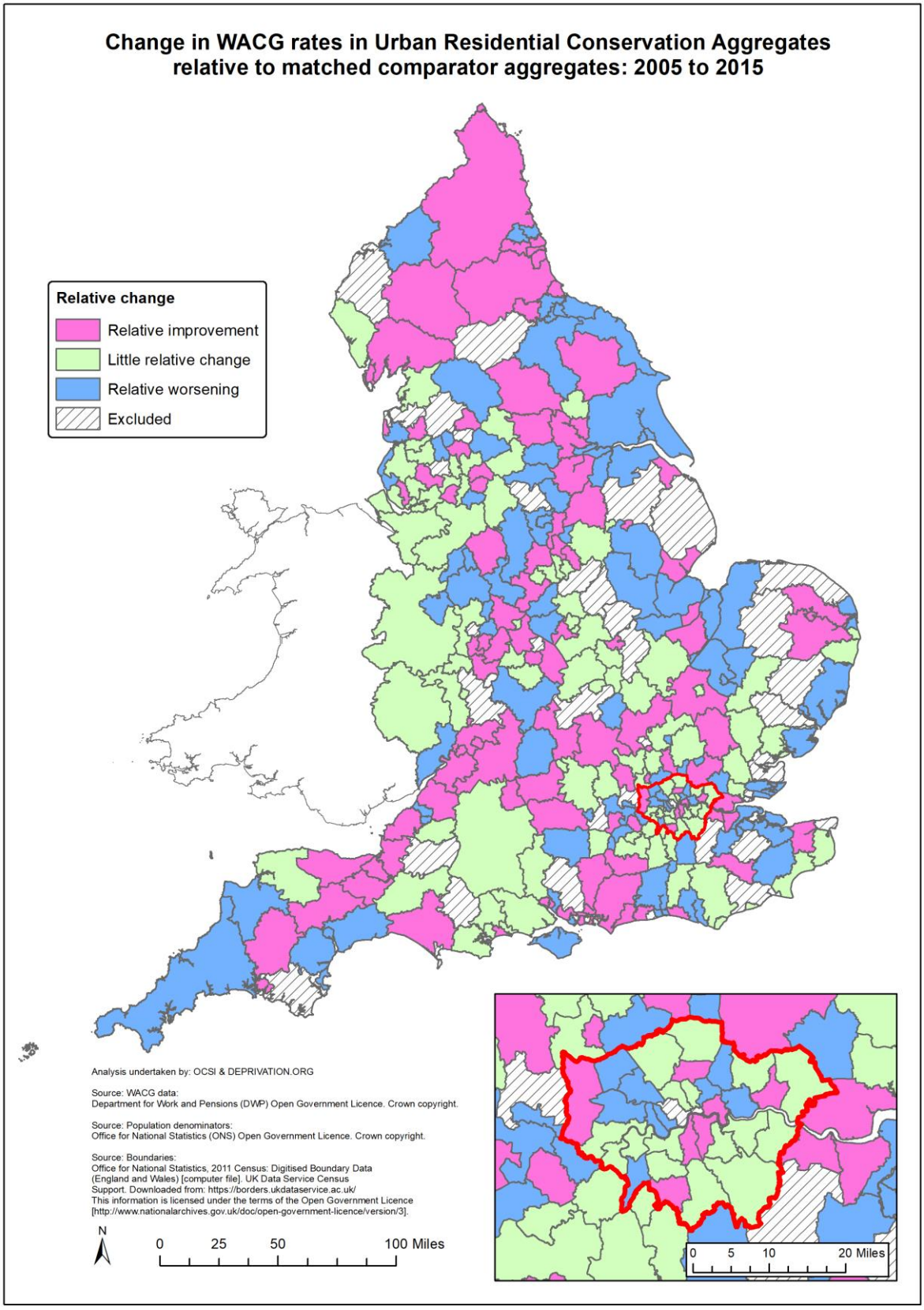
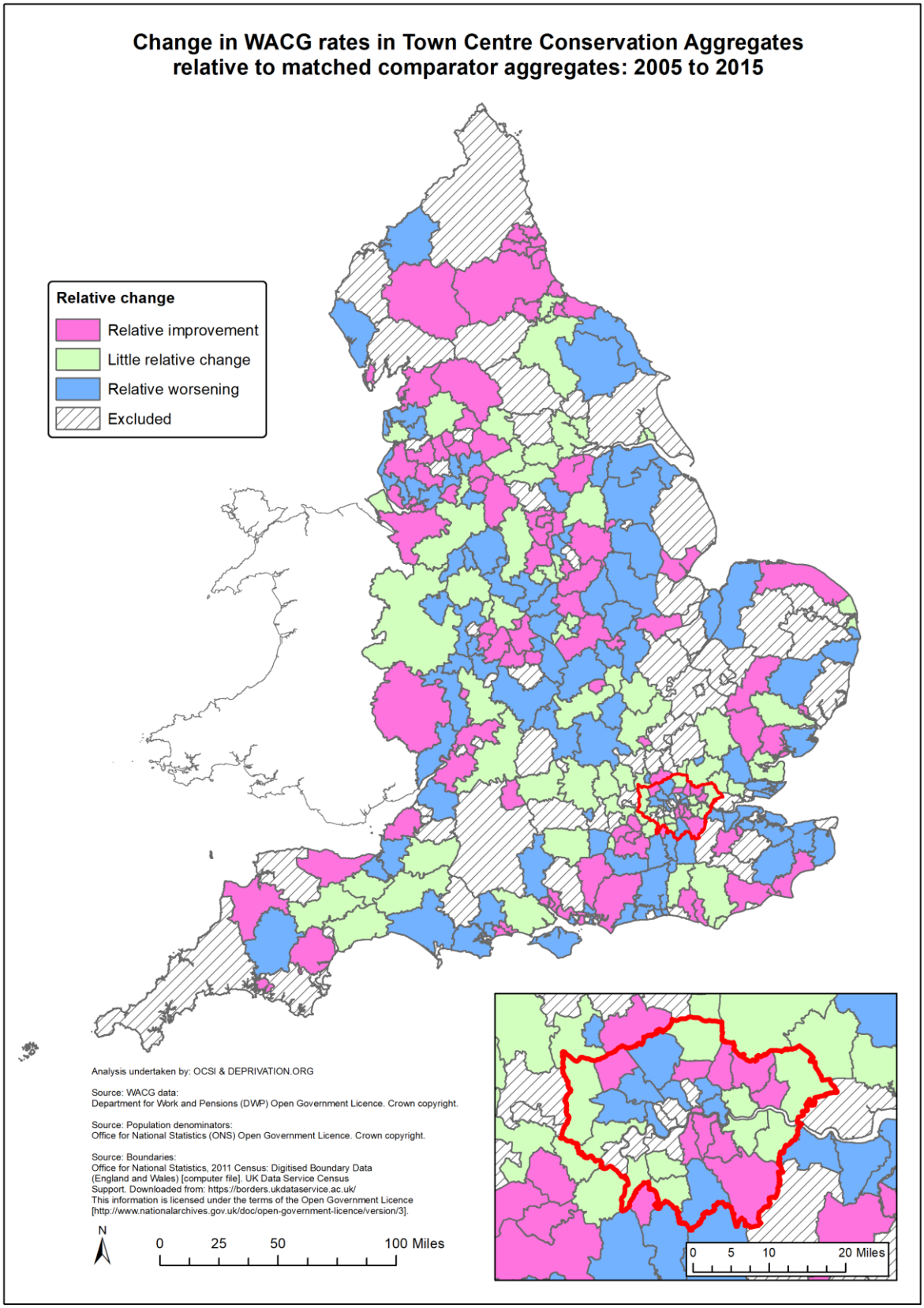


Figure 5.19 Change in DWP claimant rates 2005 to 2015 in Town Centre Conservation Aggregates relative to matched Comparator Aggregates



Conclusion

In this chapter we have explored changes in the proportion of working age people receiving DWP Benefits for low income, poor health and disability, worklessness and caring responsibilities. The purpose of this analysis was to determine how the socio-economic characteristics of Conservation Areas have changed over time and whether there was any evidence that Conservation Area status promotes and facilitates inclusive growth.

In order to address these questions we looked both at how Conservation Aggregates were changing in absolute terms (i.e. their 'direction of travel') and in relative terms (compared to similar non-Conservation Areas in the same locality).

The analysis showed that Conservation Aggregates had a better base position than Comparator Aggregates, with a lower proportion of people claiming DWP benefits. The Conservation Aggregates with the highest claimant rates were generally located in former manufacturing and coastal areas, but there were also notably high proportions of benefit claimants in Urban Residential Conservation Aggregates in North East London in 2005.

Conservation and Comparator Aggregates follow broadly similar trajectories over the period: a period of stability followed by a sharp increase during the financial crash followed by another period of stability (at above pre-crash levels) followed by a recovery to slightly below the baseline period.

The majority of Conservation Aggregates had lower DWP claimant rates in 2005 compared with 2015. Town Centre Conservation Aggregates saw more notable improvement over the period than across other categories. Conservation Aggregates in London featured prominently among urban areas showing the greatest levels of improvement, while the most improving Rural Conservation Aggregates were typically located in the North.

While Conservation Aggregates generally saw improvement in absolute terms, the performance relative to matched Comparator Aggregates was more mixed. Just under half of all Conservation Aggregates in each category experienced both absolute and relative improvement over the period, seeing a reduction in DWP Benefit claimant rate faster than their associated Comparator Aggregates. There were also regional differences in terms of relative performance, particularly for the Town Centre category, with Town Centre Conservation Aggregates in the North East outperforming Comparator Aggregates, while Town Centre Conservation Aggregates in London and the East were showing slower reductions in claimant count than Comparator Aggregates.

In the last section we identified a set of Conservation Aggregates which improved at a significantly faster rate than their comparator areas. Each of these could be considered as potential case studies of areas where Conservation Area status was helping to drive inclusive growth.

We also identified a set of Conservation Aggregates which saw notable worsening relative to their Comparator Aggregates. Each of these could be considered as potential case studies in future research of areas where Conservation Area status was providing a barrier to delivering inclusive growth.

Chapter 6: Analysis of 'Affordable Growth'

Introduction

In this chapter we examine whether Conservation Areas are experiencing 'Affordable Growth' using an indicator derived from administrative data.

First we highlight our approach to measuring affordable growth, introducing the indicator used in this part of the analysis.

Next, we provide an overview of the main trends on the selected indicator of Affordable Growth. This section presents the *national average* baseline position, direction of travel and performance of Conservation Aggregates compared to the respective groups of Comparator Aggregates for each of the three categories of Conservation Aggregate (Rural, Urban Residential or Town Centre).

We then go on to look at whether the patterns observed nationally, also hold across each of the *regions*.

Finally we drill down to the individual Conservation Aggregates and explore the following key questions:

1) What is the profile of the Conservation Areas at a baseline point in time?
2) How has the profile of Conservation Areas changed over time?
3) How are Conservation Areas changing relative to matched Comparator Aggregates (are they experiencing a different rate of growth to similar areas in their locality)?

Measuring affordable growth

In Chapter 2 – *Phase 2: review of literature on Good Growth; review of data sources on Good Growth* we summarised the process that was adopted for identifying a short list of key indicators under each of the dimensions of *Good Growth*.

Six indicators were shortlisted from this stage:

- Average house price (Land Registry)
- Total price/salary ratio (average house) (Land Registry/Office for National Statistics)
- Proportion of properties in Council Tax Band A (Valuation Office Agency)
- Fuel Poverty (Dept for Business, Energy & Industrial Strategy)
- Housing lacking central heating (Census 2011)
- Age of property (Valuation Office Agency)

It was necessary to further narrow down this shortlist, to ensure that the final indicators selected for analysis were available at sufficient granularity[45] and temporal coverage[46] to enable us to observe

[45] Published down to Lower layer Super Output Area (LSOA) level

[46] Covering a long enough time period for us to observe a trend over the period.

annual changes in economic performance at Lower layer Super Output Area (LSOA) level (the building block for defining the Conservation Aggregates[47]).

Only one of the indicators shortlisted fully exhibited this criteria:

Average House Price: derived from transaction data published by the Land Registry

House purchase data (published by the Land Registry) provides details of all individual property transactions broken down by type of property, date of transaction and price paid. It is possible to aggregate this individual transaction data to the Conservation and Comparator Aggregates to provide and annually updated measure of housing costs for assessing the performance of Conservation Areas

Appendix A provides details of each of these indictors including a more detailed description, methodology for producing the indicators, source, time period covered, key strengths and issues to consider when using the indicator to track change over time, and examples of where the indicator has been used in other measures of *Good Growth*.

A note on analysing change in property prices

The average property price measure is used in this section as a proxy measure of *affordability* i.e. the cost of living in the area. Housing costs are a key component of how affordable an area is to live in, estimates from the ONS Family Spending survey estimate that approximately 20% of household income is spent on housing costs[48]. While high and rising house prices can be seen to be a marker of strong economic growth, they have a detrimental impact on affordability, with high and rising house prices putting an additional expenditure burden of people living in the area and increase the likelihood that people will be priced out of the area. In other word, high and increasing average property price when measured as in indicator of affordable growth can be interpreted as a negative outcome. In this section, when we refer to "positive direction of travel" or areas "outperforming" others in terms of changes in property prices, we are talking about areas with *lower* prices or areas experiencing a *fall or slower increase* in property prices, rather than high and rising property prices i.e. high is bad and low is good when average property price is used as a measure of affordable growth.

We acknowledge that this measure of 'affordability' should ideally be constructed to take into account average earnings as well as average property prices, as 'affordability' is determined by earnings as well as house prices. Unfortunately, however, no reliable earnings data exists at a detailed geographical level and so it was regrettably not possible to take this into account in the consideration of house price patterns and trends.

Overview of trends in average property price between 2005 and 2016?

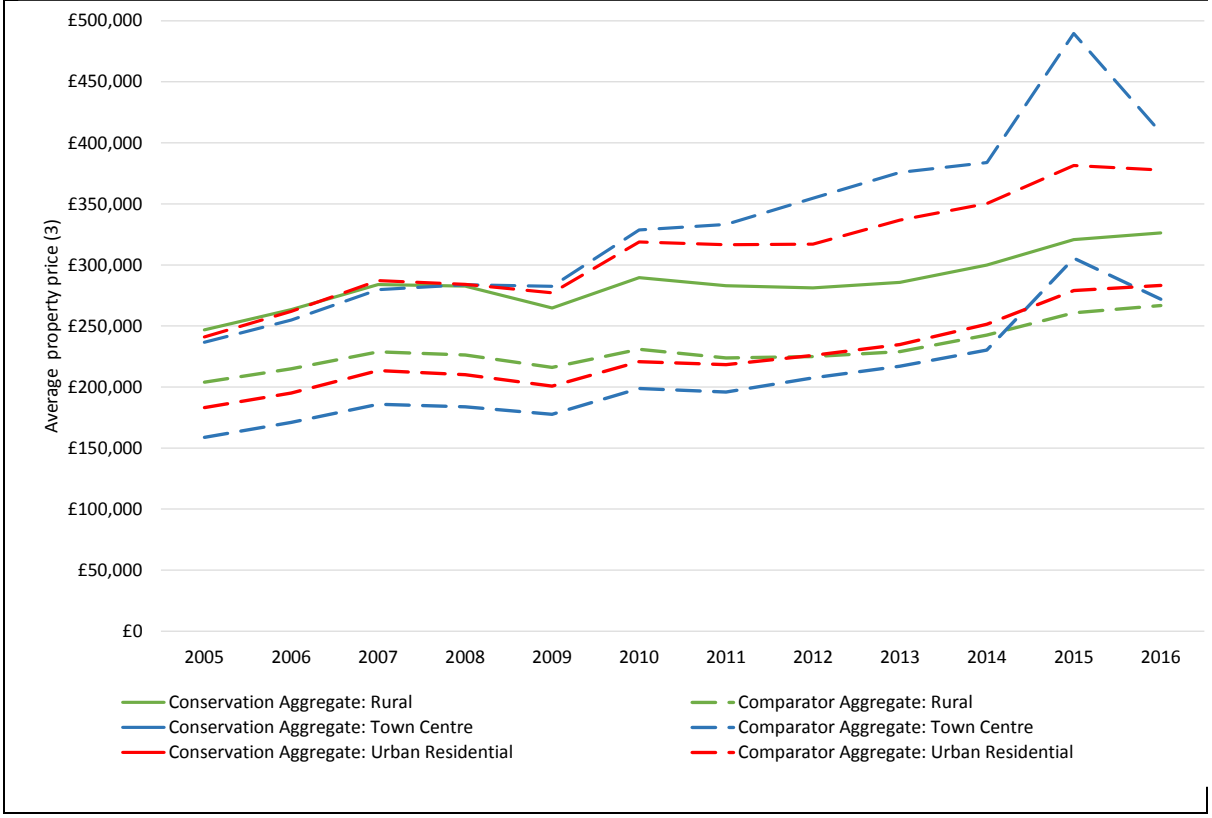
The property price data from Land Registry is available over a lengthy time period, enabling a detailed examination of trends in average property price from 2005 to 2016. Figure 6.1 below shows

[47] see Chapter 1 for details of how these geographies have been developed

[48]https://www.ons.gov.uk/peoplepopulationandcommunity/personalandhouseholdfinances/incomeandwealth/compendium/familyspending/2015/chapter2housingexpenditure

the average property price across each of the Conservation and Comparator Aggregate categories. Each line represents one of the six typology categories, with solid lines representing Conservation Aggregates, dashed lines representing Comparator Aggregates, green lines representing Rural categories, red lines representing Urban Residential and blue lines representing Town Centres.

Figure 6.1 Average property price (all property types) Conservation and Comparator Aggregates 2005 to 2016



The trend lines presented in Figure 6.1 highlight commonalities and differences between categories at the 2005 start point and the 2016 end point, and showing the trajectories that each category grouping has followed during this period. A number of key findings are evident from Figure 6.1. Firstly, and with a particular focus on the Conservation Aggregates, at the baseline time-point, Rural Conservation Aggregates exhibit the highest average property price (of the three categories) followed by Urban Residential, followed by Town Centre. However, property prices are similar across each of the three Conservation Area types. This ordering is reversed over the period so that by 2016 average property prices are highest in Town Centre Conservation Areas and lowest in Rural Conservation Areas. This reversal occurs between 2007 and 2008. This is likely to be driven by the large increases in property prices across London relative to the rest of the UK (this will be explored in more detail as we drill down locally). Conservation Aggregates have seen an appreciable increase between 2005 and 2016 across all categories. However, the year on year trend is not consistent. There is a steady increase seen between 2005 and 2007, followed by a slowdown and slight decline between 2007 and 2009 (coinciding with the financial crash), with this decline being most notable in the Rural group. Each category then experienced an increase between 2009 and 2015, with the largest increase occurring in Town Centre Conservation Aggregates. This rise continued in Rural Conservation Aggregates between 2015 and 2016 while there was a slight decline in Urban Residential Conservation Aggregates and a steeper decline in Town Centre Aggregates between 2015 and 2016. Town Centre Conservation Aggregates saw the largest average rise over the period - from an average price of £237,000 in 2005 to £408,000 in 2016 (an increase of £172,000). Rural

Conservation Aggregates saw a smaller though still considerable rise - from an average price of £247,000 in 2005 to £326,000 in 2016 (an increase of £80,000).

It should be noted, however, that data presented in Figure 6.1 represent totals for all Conservation Aggregates per category and that the individual Conservation Aggregates may show different trajectories (which we explore later in this chapter).

Having explored how Conservation Aggregates have changed over the period, it is also important to consider this trend in the context of change in Comparator Aggregates over the same period.

Table 6.1 shows the average house price for each category of Conservation Aggregate and Comparator Aggregate in 2005 and 2016 and shows the difference in property price over between the 2005 start point and 2016 end point.

Table 6.1: Conservation Aggregate average house prices at baseline and end point

		2005	2016	Difference 2005-2016
Conservation Aggregates	Rural	£246,779	£326,308	£79,529
	Urban Residential	£240,998	£377,695	£136,697
	Town Centre	£236,709	£408,492	£171,783
Comparator Aggregates	Rural	£203,903	£266,673	£62,770
	Urban Residential	£183,067	£283,264	£100,196
	Town Centre	£158,735	£271,917	£113,183

A number of key features emerge through the consideration of the trends observed in Comparator Aggregates in conjunction with the trends in Conservation Aggregates discussed above. Firstly, it is evident that each of the Conservation Aggregates types had notably higher average property prices than each of the Comparator Aggregates at a baseline point in time and across each year between 2005 and 2016. This suggests that the presence of Heritage buildings and assets may have a notable impact on affordability of an area.

The second key finding is that the Comparator Aggregates follow a similar trend to the Conservation Aggregates over the time period, with an increase between 2005 and 2007 followed by a slight decline between 2007-2009 followed by another increase between 2010 and 2016. As with the Conservation Aggregates, there is a change in the relative ordering of the Comparator Aggregate Categories in terms of affordability, with Rural Comparators more expensive then Town Centre Comparators in 2005, while the situation is reversed by 2016.

Conservation Aggregates have on average seen a larger increase in property prices than their equivalent Comparator Aggregates across each of the three category types, suggesting that there may be a Heritage impact on relative affordability over time.

It should be noted, however, that data presented in Figure 6.1 represent totals for all Conservation Aggregates per category and that the individual Conservation Aggregates may show different trajectories (which we explore later in this chapter).

Key findings summary:

- Property prices were highest in Rural Conservation Aggregates and lowest in Town Centre Conservation Aggregates in 2005, but this situation had reversed by 2016.
- There were large increases in property prices across each of the six typology groups, with the largest increases in Town Centre Conservation Aggregates

- Conservation and Comparator Aggregates followed broadly similar trajectories over the period: A steady rise punctuated by a slowdown during the financial crash
- However, all Conservation Aggregates saw greater increases than their equivalent Comparator Aggregates, suggesting Conservation Aggregates are experiencing increasing challenges in terms of affordability.

Trends in property prices at regional level

The presentation of property prices for each category of Conservation and Comparator Aggregate across the entire country necessarily masks variations observed between individual Conservation Aggregates and Comparator Aggregates. The focus now turns to sub-national analyses of average property prices and trends in the categories of Conservation and Comparator Aggregate. Before turning to focus on average property prices in each of the individual areas, it is first instructive to consider patterns and trends at regional level. Other research has shown how different regions across the country have experienced different trends in the housing market over the period (e.g. see ONS Statistical Bulletin House price index, UK[49]), albeit without a focus on Conservation Areas. The objective here is to assess whether the broad patterns of change presented through Figure 6.1 hold when the data are broken down into each of the nine regions of England. To aid the readability of this report, the charts showing average property prices in the regions are presented in Appendix G and the key points are picked out and presented in a narrative here in the main body of the report. Figures G.1-G.6 in Appendix G show average property prices for Conservation and Comparator Aggregates for the Rural, Urban Residential and Town Centre categories respectively at a baseline point in time and change over time.

It is evident from comparing across the charts that each of the nine regions show a similar pattern and trend as was observed in Figure 6.1. Specifically, in each of the nine regions, average property prices were a) higher in Conservation Aggregates than Comparator Aggregates b) increasing across Conservation Aggregates and Comparator Aggregates alike c) increasing at a faster rate across Conservation Aggregates than Comparator Aggregates.

With regards to the Rural category of Conservation Aggregates, the South East region saw the largest increase in average property prices, with average sale prices more than £141,000 higher in 2016 compared with 2005. Property prices in Rural Conservation Aggregates in the South East rose significantly more sharply than across Rural Comparator Aggregates in the region, which increased by £106,000, equating to a difference of £35,000 (considerably larger than across the other regions). Differences in performance between Conservation Aggregates and Comparator Aggregates were smaller across the other regions; however, in each of the regions Rural Conservation Aggregates saw a larger increase in property prices than Comparator Aggregates.

There was a notable North-South divide in terms of property price changes in Urban Residential areas, with the largest increases in average property prices occurring in London and the surrounding regions (South East and East) in Conservation and Comparator Aggregates alike. However, Urban Residential Conservation Aggregates in London saw substantially larger increases in property price

[49] https://www.ons.gov.uk/economy/inflationandpriceindices/datasets/housepriceindexmonthlyquarterlytables1to19

than Comparator Aggregates with prices increasing by an average of £368,000 in Conservation Aggregates compared with a smaller (though still considerable) increase of £248,000 in Comparator Aggregates. The other regions also saw a divergence in performance between Urban Residential Conservation and Comparator Aggregates but not to the same extent.

A similar pattern could be observed for Town Centres, with Conservation Aggregates in London again exhibiting a substantial increase in property prices (with properties selling for approximately £521,000 more in 2016 than in 2005 – almost double the increase in Comparator Aggregates over the same period - £261,000). The North East region also saw a large difference in performance between Conservation and Comparator Aggregates, with large increases in property prices in Town Centre Conservation Aggregates (by more than £111,000 between 2005 and 2016) compared with a much smaller increase in Town Centre Comparator Aggregates (£11,000) over the same period.

Town Centre Conservation Aggregates generally experienced greater increases in property prices relative to Comparator Aggregates than was seen for Rural and Urban Residential Conservation Areas compared to their comparator groups. However, this was not evident in the South East region, where Town Centre Conservation and Comparator Areas alike experienced similar increases in property prices over the period.

Key findings summary:

- Across each of the regions, Conservation Aggregates experienced a similar pattern to the national average both in terms of overall trajectory and relative position of Rural, Urban and Town Centre Aggregates.
- In each of the regions average property prices were a) higher in Conservation Aggregates than Comparator Aggregates b) increasing across Conservation Aggregates and Comparator Aggregates alike c) increasing at a faster rate across Conservation Aggregates than Comparator Aggregates.
- Conservation Aggregates in London and surrounding regions experienced larger increases in property prices than across the North of England
- London saw the largest difference in performance between Conservation Aggregates and Comparator Aggregates, with Conservation Aggregates experiencing substantially larger increases in property prices than comparators in the same region.
- However, there were notable divergences in trends in other regions e.g. between Rural Conservation and Comparator Aggregates in the South East and Town Centre Conservation and Comparator Aggregates in the North East

The analyses presented so far in this chapter have focused on patterns and trends in average property prices for national and regional groupings of the three categories of Conservation and Comparator Aggregates. Exploration of this information has demonstrated the overall trends in property prices over the period. However, as noted throughout this report, national and regional summaries are averages of many individual area trends and patterns and these summaries can mask substantial variations at the more detailed geographical level. In order to ascertain the extent to which individual Conservation Aggregates followed similar or divergent trends to other areas in the same category, and to ascertain the extent to which Conservation Aggregates followed similar or divergent trends to the respective Comparator Aggregates, it is necessary to move beyond the

national and regional summaries. In the remainder of this chapter the analyses therefore turn to examine patterns and trends using the data for each individual Conservation Aggregate and Comparator Aggregate. The objective is to assess the degree of commonality or difference between individual areas at specified points in time and in terms of change over time, firstly with a focus solely on the Conservation Aggregates, and then through comparing the Conservation Aggregates to the respective matched Comparator Aggregates.

What is the profile of the Conservation Areas at a baseline point in time?

The charts below show the distribution of property prices across Conservation Aggregates (by category) in 2005. The Conservation Aggregates are ordered highest to lowest in terms of property prices, with the height of the bars representing the property price (£) in 2005.

The three horizontal reference lines show the average value for three groups of areas. The red horizontal reference line relates to the average for all Conservation Aggregates of that type (i.e. Rural, Urban Residential or Town Centre), the green horizontal reference line relates to the average for all Comparator Aggregates of that type, and the orange horizontal reference line relates to the average for all non-Conservation Aggregate areas of that type across the country. As such, the value depicted by the orange horizontal reference line includes the Comparator Aggregates and all other non-Conservation Aggregate areas of that category type. The Comparator Aggregates represent a particular subset of the group of areas depicted by the orange horizontal reference line.

Figure 6.2 Average property price in Rural Conservation Aggregates in 2005

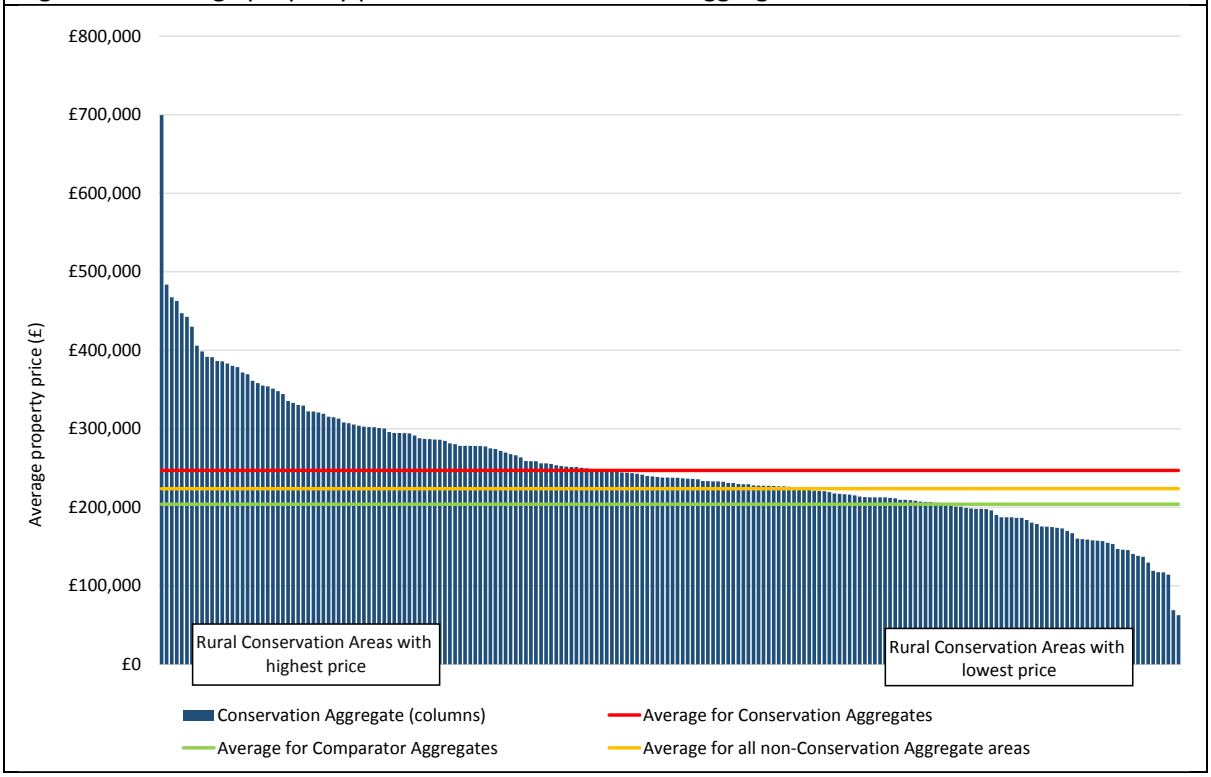


Figure 6.3 Average property price in Urban Residential Conservation Aggregates in 2005

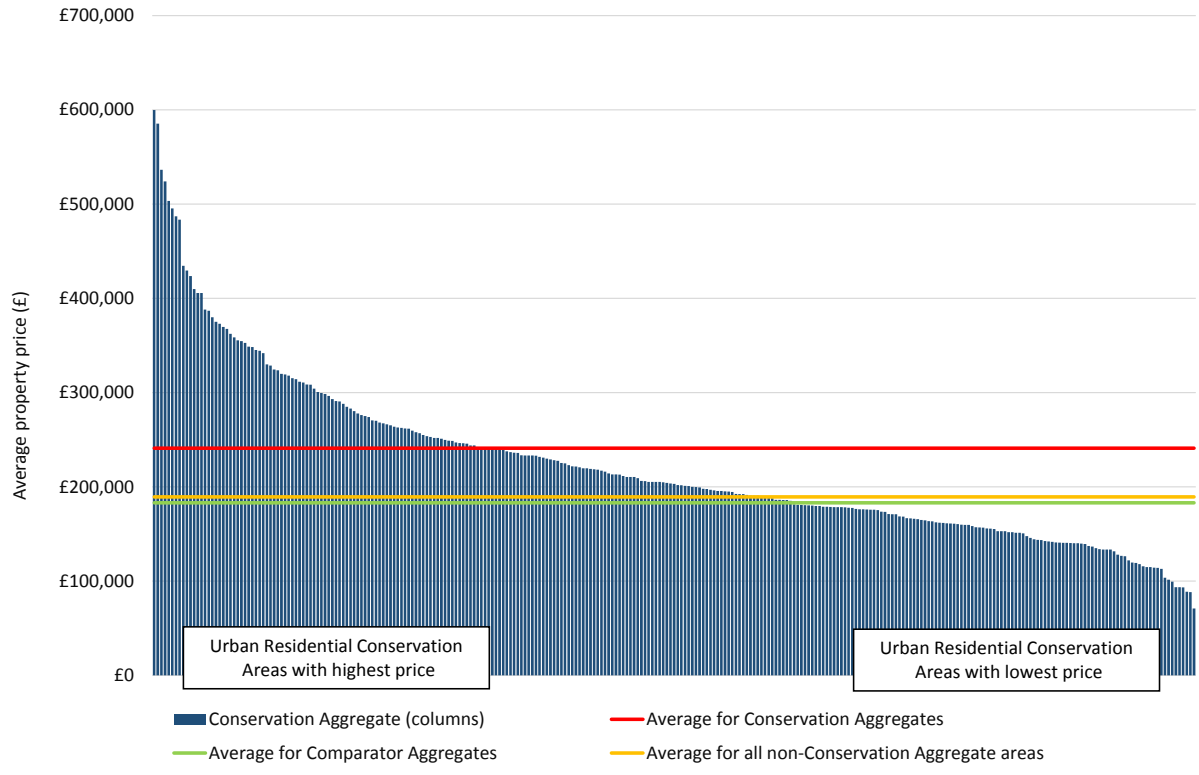
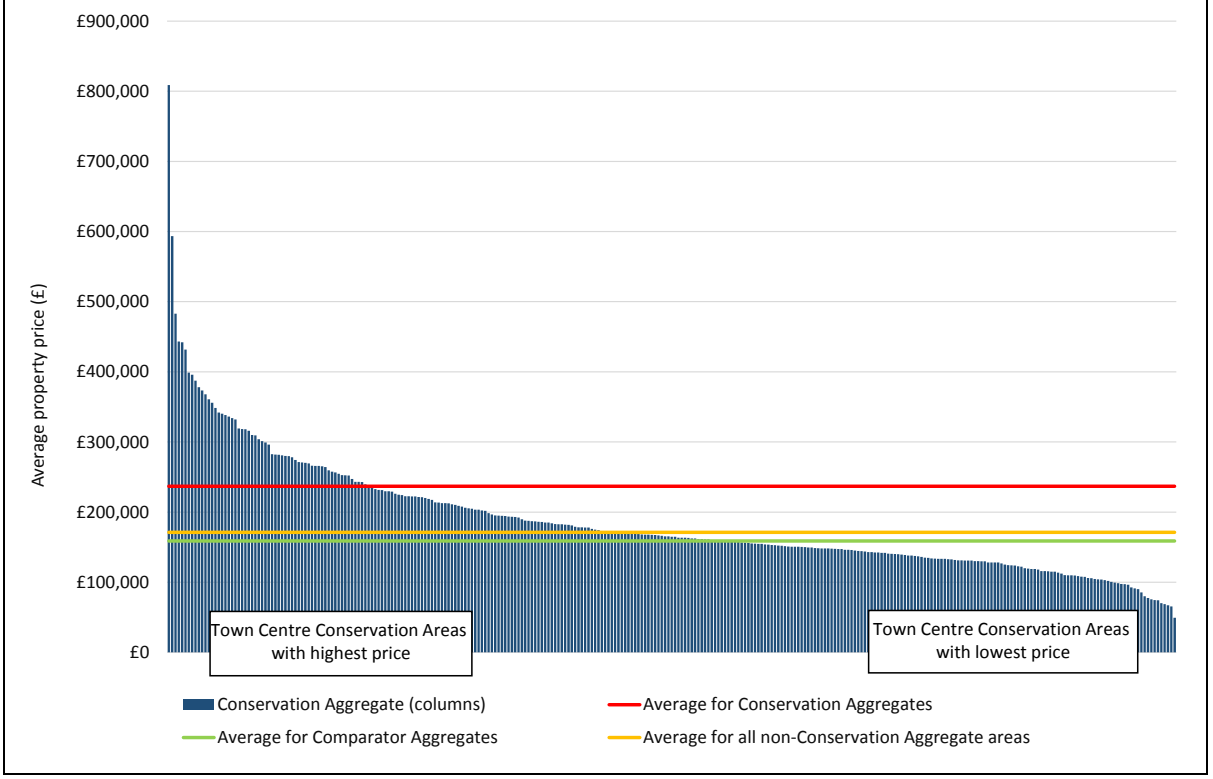


Figure 6.4 Average property price in Town Centre Conservation Aggregates in 2005



It was apparent from Figure 6.1 and Table 6.1 that the average house price rate for all three groups of Conservation Aggregates were notably higher than the average rates in the respective groups of

Comparator Aggregate at the baseline point in time. These findings are shown again in Figures 6.2 to 6.4 as the red horizontal reference lines (Conservation Aggregate average) can be seen to be placed higher than the green horizontal reference lines (Comparator Aggregate average). It is further evident from Figures 6.2 to 6.4 that average house prices were higher in the groups of Conservation Aggregate than in the respective groups of 'all non-Conservation Aggregate areas' of the relative types. So at the baseline point in time, average house prices were typically higher in Conservation Aggregates than in the rest of the country (assessed separated by typology category).

Each of the three charts shows a similarly shaped distribution of average property prices, albeit stretching across different ranges of values up the vertical y-axis. On all three charts, the property prices increase gradually across the Conservation Aggregates from right to left along the horizontal axis, then increase much more steeply at the top end of the distribution (on the far left of each chart). These distributions indicate that in each of the three area type categories there are a relatively small number of Conservation Aggregates across England that exhibit notably higher property prices that the majority of the other Conservation Aggregates of that type.

Seven of the ten Rural Conservation Aggregates with the highest average property price in 2005 were located in the South East. However, the Rural Conservation Aggregate with the highest average property price was Trafford in the North West. At the other end of the spectrum two Rural Conservation Aggregates were notably more affordable: Hyndburn (Lancashire) and Mansfield, with average property prices of £62,000 and £65,000 respectively. By contrast, property prices in each of the other Rural Conservation Areas was above £110,000.

With regards to Urban Residential Conservation Aggregates in 2005, the average property price ranged from £600,000 in Barnet to £71,000 in North Lincolnshire. While the majority of least affordable areas were concentrated in London and the Home Counties, there were a number of Urban Residential Conservation Areas outside of London with very high property prices including Lichfield (£504,000), Trafford (£410,000), Poole (£388,000) and Tewkesbury (£380,000). By contrast each of the 30 most affordable Conservation Aggregates were North or Midlands.

There was a wider range in average property prices in Town Centre areas with prices ranging from £810,000 in Kensington and Chelsea, to £49,000 in Barrow-in-Furness. Again, there was evidence of a strong regional pattern, with 13 of the 20 Town Centre Conservation Aggregates with the highest property prices being located in London, while each of the four Town Centre Conservation Aggregates with the lowest property prices being located in the North West. However, as with Urban Residential areas, there were some notable exceptions, with Trafford Town Centre Conservation Aggregate in the North West again having one of the highest average property prices (£373,000).

For more details on the geographic distribution of property prices in Conservation Aggregates at a baseline point in time see, Maps G7 to G9 in Appendix G.

Key findings summary:

- Conservation Aggregates in London and the Home Counties feature prominently among the Rural, Urban Residential and Town Centre Conservation Aggregates with the highest average property prices.
- By contrast, Conservation Aggregates in the North and Midlands were typically more affordable.

- However, there were some exceptions, notably Trafford which featured among the Rural, Urban Residential and Town Centre Conservation Aggregates with the highest average property prices.
- Town Centre Conservation Aggregates saw a greater spread in average property prices compared with other categories, while there was less variation in Rural Conservation Aggregates.

How do Conservation Aggregates compare with their Comparator Aggregates at a baseline point in time?

The Comparator Aggregates were designed to be as similar as possible to their Conservation Aggregate in terms of levels of multiple deprivation and population size in 2005. Before turning to analyse change in each Conservation Aggregate relative to its matched Comparator Aggregate, it is first instructive to consider the degree to which individual Comparator Aggregates match their Conservation Aggregate on the average property prices at the 2005 baseline time point.

The bar charts below compare the average property prices in 2005 in Conservation Aggregates and their matched Comparator Aggregates. The charts show where property prices are higher in Conservation Aggregates than matched Comparator Aggregates and vice versa. Conservation Aggregates with the highest property prices relative to their matched Comparator Aggregates are shown on the left of the graph, with Conservation Aggregates with lower property prices relative to matched comparators shown on the right of the chart. The size of the bars in Figures 6.5-6.7 are calculated by taking the average house price in Conservation Aggregates in 2005 and subtracting the average house price in Comparator Aggregates in 2005. Therefore, in cases where the price was higher in Conservation Aggregates than Comparator Aggregates the value will be positive, whereas in cases where the price was lower the value will be negative. Conservation Aggregates with a value close to zero had similar property prices to matched Comparator Aggregates in 2005.

Note: for this analysis we have excluded Conservation Aggregates where we were unable to achieve a good match with Comparator Aggregates, either in terms of IMD 2007 score or overall population. See Appendix B for details.

It is evident from Figures 6.5-6.7 that the vast majority of Conservation Aggregates had higher property prices than matched Comparator Aggregates in 2005 with approximately 80% of Rural, Urban Residential and Town Centre Conservation Aggregates alike having higher property prices than their equivalent Comparator Aggregates. Given that these areas are matched in terms of overall deprivation levels, there is some evidence to suggest that Conservation Areas are disproportionately afflicted by high property prices compared to other similar non-Conservation Areas in the same general locality.

The differences are in some cases quite large, with 20 Rural Conservation Aggregates, 33 Urban Residential Conservation Aggregates and 16 Town Centre Conservation Aggregates having average house prices in excess of £100,000 higher than their matched Comparator Aggregates.

Figure 6.5 Bar Chart: Difference in average property price between Rural Conservation and Comparator Aggregates in 2005

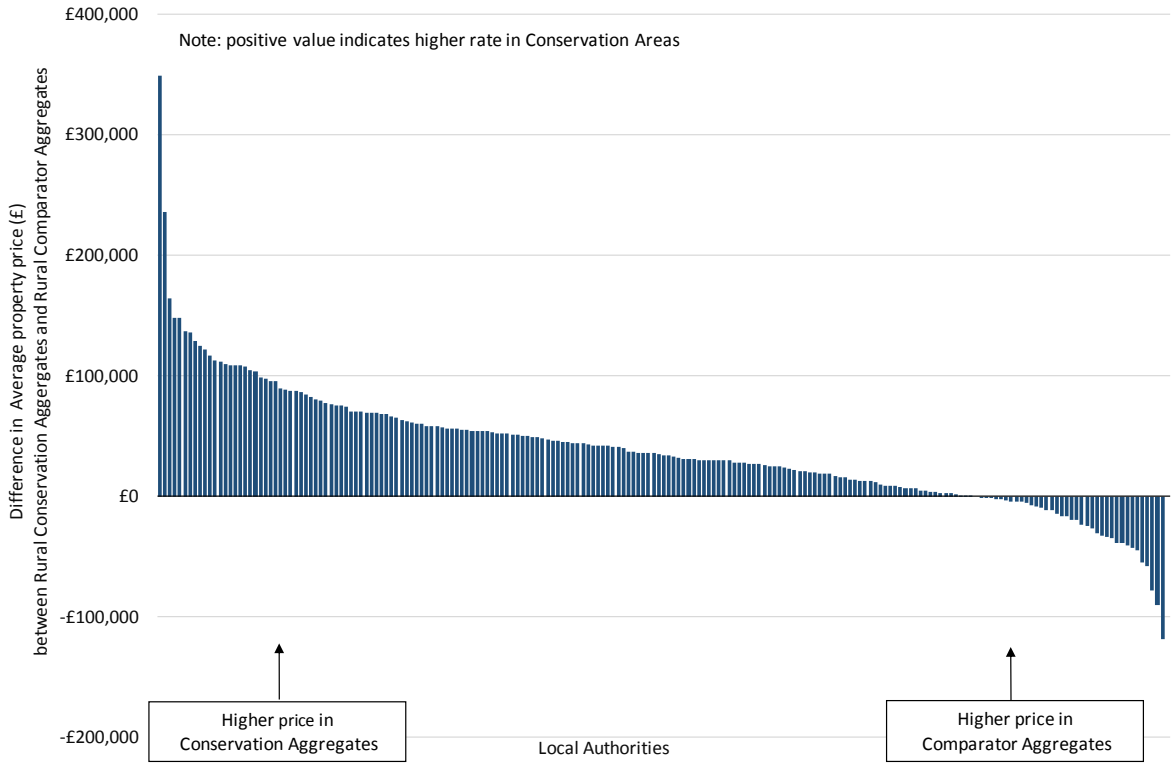


Figure 6.6 Bar Chart: Difference in average property price between Urban Residential Conservation and Comparator Aggregates in 2005

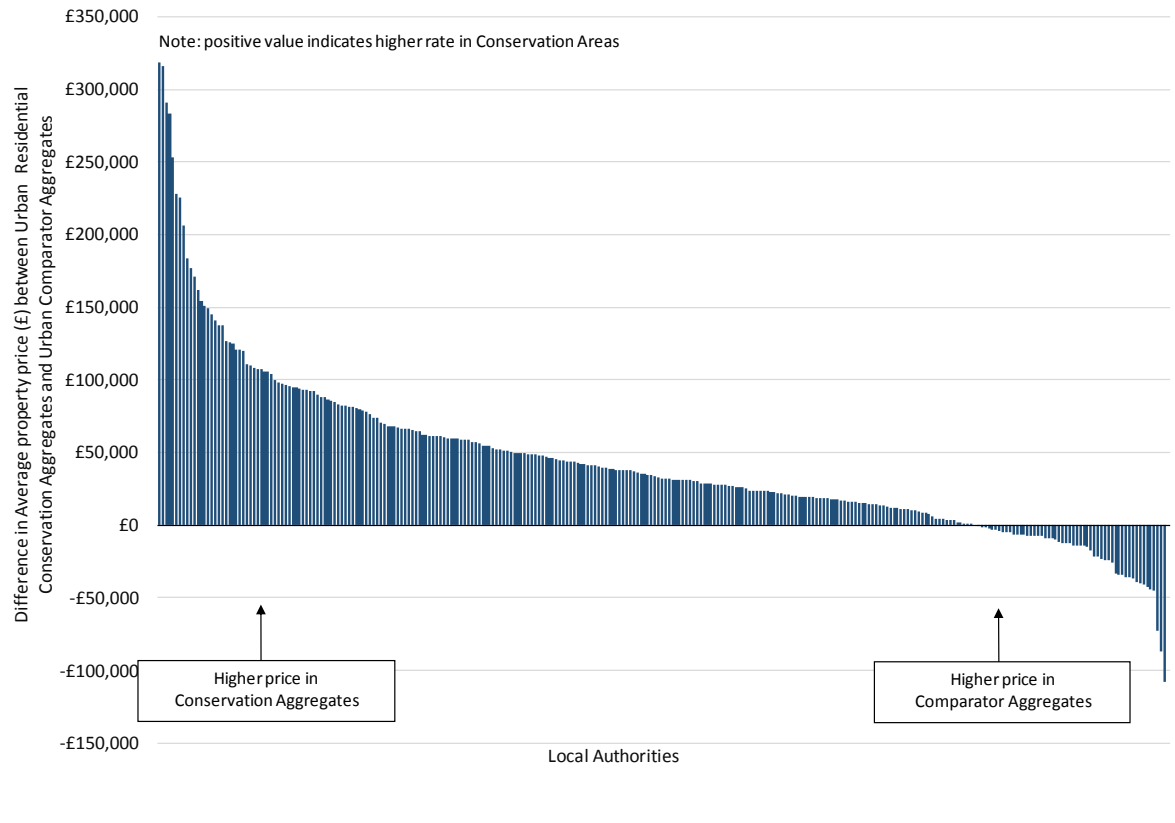
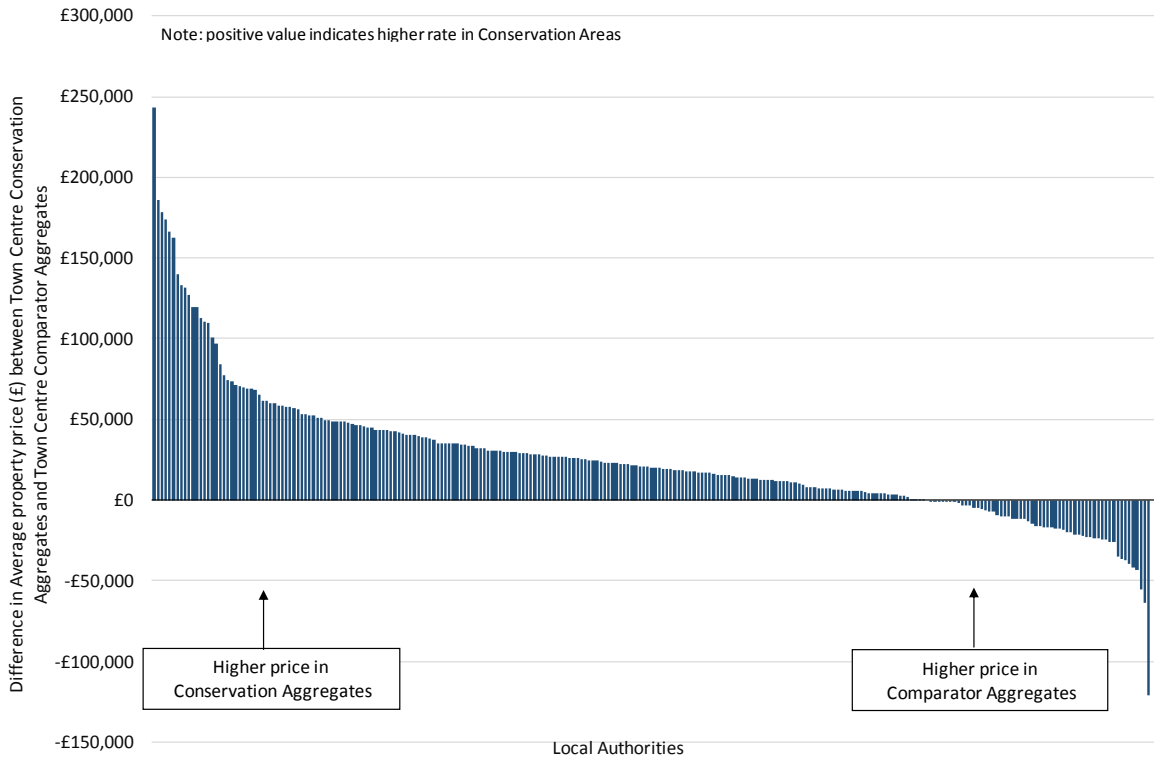


Figure 6.7 Bar Chart: Difference in average property price between Town Centre Conservation and Comparator Aggregates in 2005



There were some notable geographic patters, with the Urban Residential and Town Centre Conservation Aggregates with the highest property prices relative to their comparators located in areas where property prices are generally high, including much of London and the South East. Certain individual Conservation Aggregates featured among those with high relative property prices across each of the three categories (including Trafford, Three Rivers (Hertfordshire), Chiltern (Buckinghamshire), Barnet and Camden).

Key findings summary:

- The majority (approximately 80%) of Conservation Aggregates had higher average house prices than their matched Comparator Aggregates across each of the categories.
- The Conservation Aggregates with the highest property prices relative to their Comparator Areas also tended to have high property values in absolute terms

How has the profile of Conservation Areas changed over time?

The general trends in property prices across the three categories of Conservation Aggregate (and the three categories of Comparator Aggregate) were revealed through Figure 6.1 and the accompanying discussion. Those general patterns and trends were subsequently seen to hold when looking at regional groupings. The following analyses are concerned with unpicking these high-level summaries to show the patterns and trends experienced within each individual Conservation Aggregate over

the time period considered. Again, the focus is on the period 2005 to 2016. The charts below compare the change in average property price across each of the Conservation Aggregates between 2005 and 2016 and therefore show the distribution of values that underpin the national and regional summarised presented earlier in this chapter.

The size of the bars in Figures 6.8-6.10 are calculated by taking the average house price in 2016 and subtracting the average house price in 2005. Therefore, in cases where the property price was higher in the Conservation Aggregate in 2016 than in 2005 the change value will be positive, whereas in cases where the property price was lower in 2016 than in 2005 the change value will be negative.

Figure. 6.8 Percentage point change in average property price in Rural Conservation Aggregates between 2005 and 2016

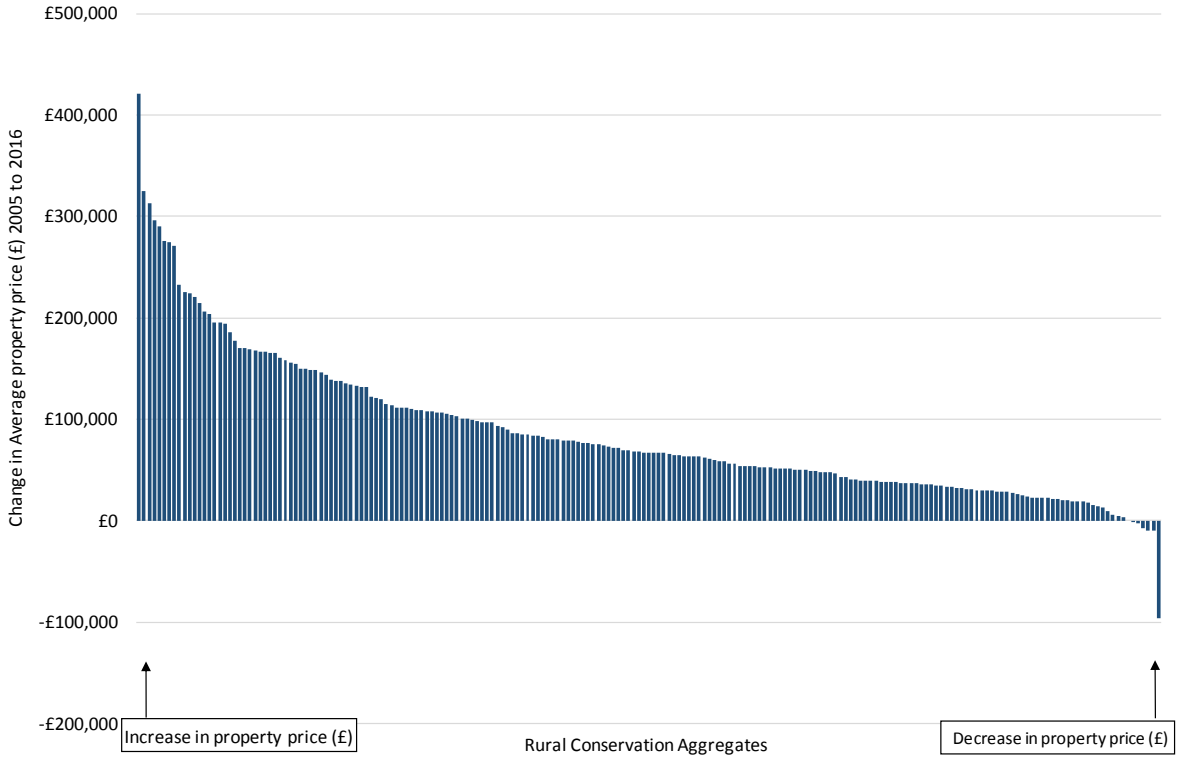


Figure 6.9 Percentage point change in average property price in Urban Residential Conservation Aggregates between 2005 and 2016

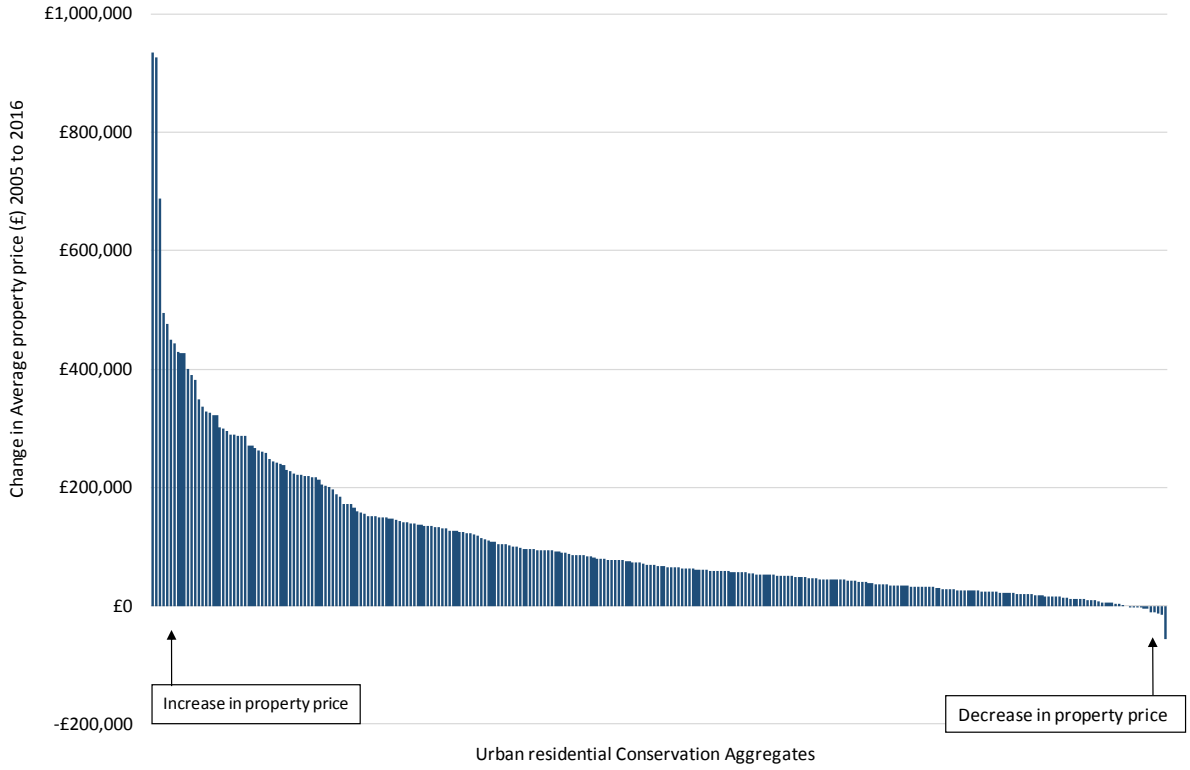
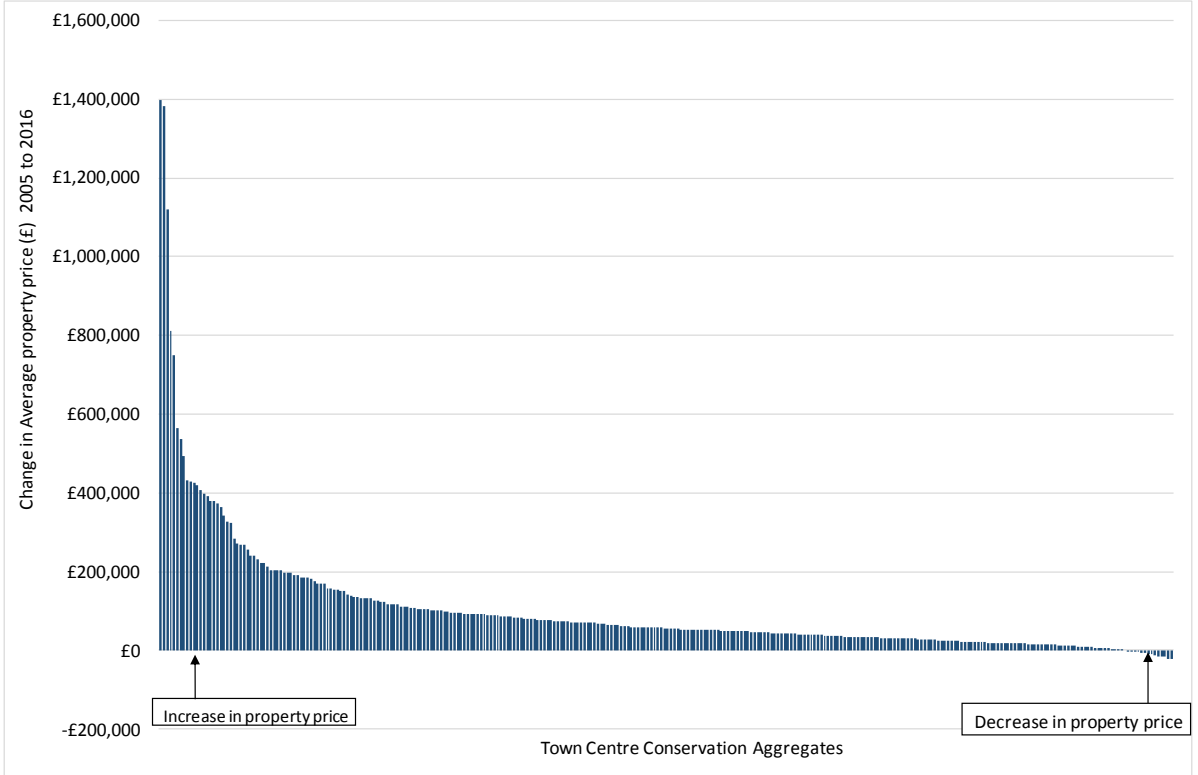


Figure 6.10 Percentage point change in average property price in Town Centre Conservation Aggregates between 2005 and 2016



As illustrated in the charts above, the overall distribution in terms of percentage point change in average house price is similar across Rural, Urban Residential and Town Centre Conservation Aggregates alike. The overwhelming majority of Conservation Aggregates in each category experienced a notable increase in average property prices between 2005 and 2016, with 97% of Rural Conservation Aggregates, 96% of Urban Residential Conservation Aggregates and 95% of Town Centre Conservation Aggregates experiencing an increase in average property price between 2005 and 2016.

The Conservation Aggregates experiencing the largest increases were overwhelmingly concentrated in London and the neighbouring regions (South East and East of England). The 37 Rural Conservation Aggregates with the largest increases in average house prices were located in the South East, East or London; 78 of the 80 Urban Residential Conservation Aggregates with the largest increases were located in these three regions and 47 of the 50 Town Centre Conservation Aggregates were located in these three regions.

Conservation Aggregates in the North West feature predominantly among those which became more affordable (experienced a fall in property prices) over the period. Three of the six Rural, eight of the eleven Urban Residential and five of the 14 Town Centre Conservation Aggregates experiencing a fall in property prices located in the North West region.

Key findings summary:

- The vast majority of Conservation Aggregates experienced a large increase in average property prices between 2005 and 2016.
- The largest increases were overwhelmingly concentrated in London and the neighbouring regions (South East and East)
- Less than 3% of Conservation Aggregates saw a fall in property prices over the period. The majority of these were concentrated in the North West region.

The maps below show this geographical spread in more detail – showing change in average property price between 2005 and 2016 in Rural, Urban Residential and Town Centre Conservation Aggregates. Conservation Aggregates shaded pink on the map are characterised as showing notable decreases in property price over the period (absolute improvement in terms of affordability). Conservation Aggregates shaded blue are characterised as having notable increases in property prices over the period (absolute worsening of position). Conservation Aggregates shaded light green have not experienced appreciable change between 2005 and 2016. For detail of how the map colours are calculated see Appendix C.

Figure 6.11 Change in average property price 2005 to 2016 in in Rural Conservation Aggregates

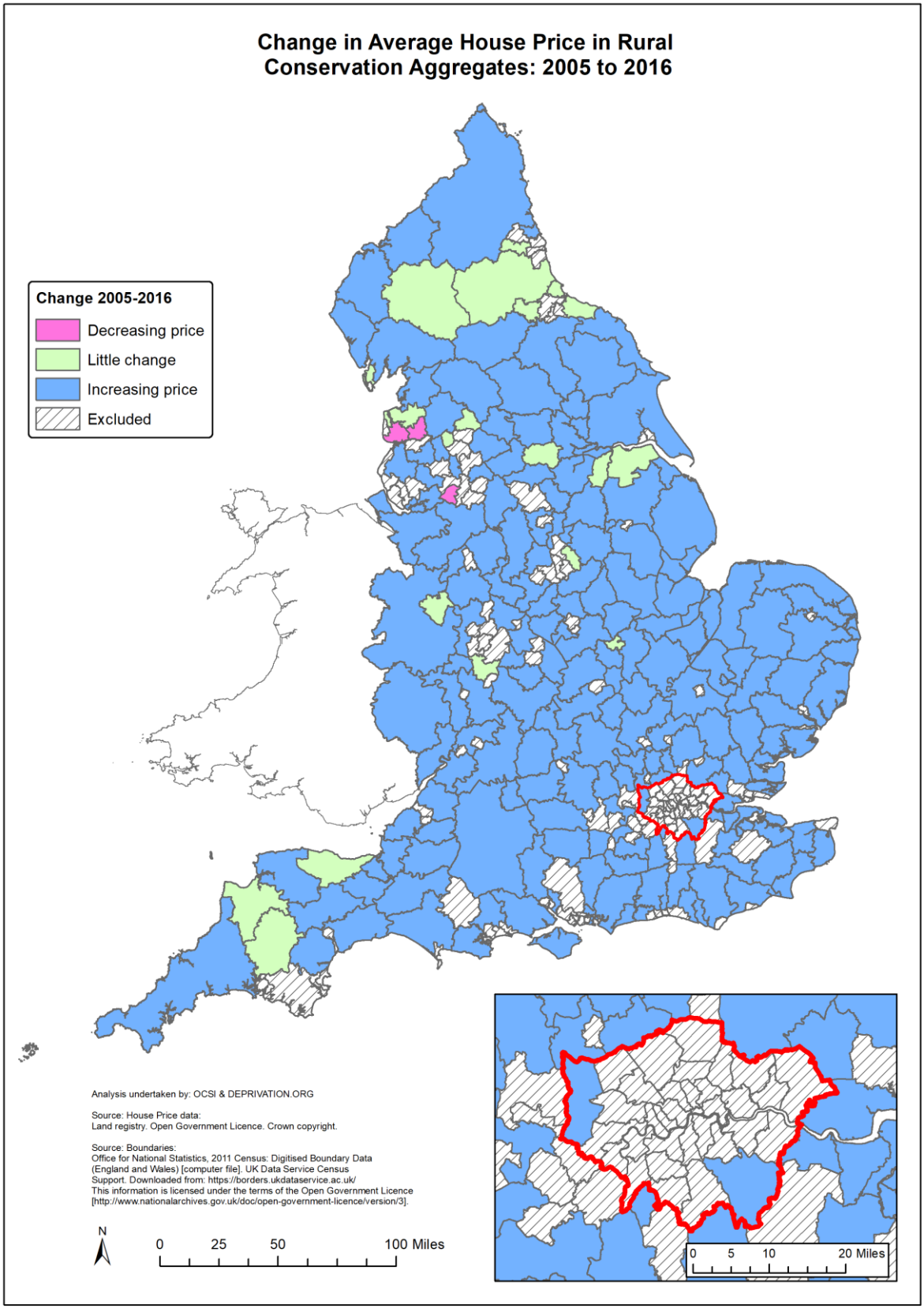


Figure 6.12 Change in average property price 2005 to 2016 in Urban Residential Conservation Aggregates

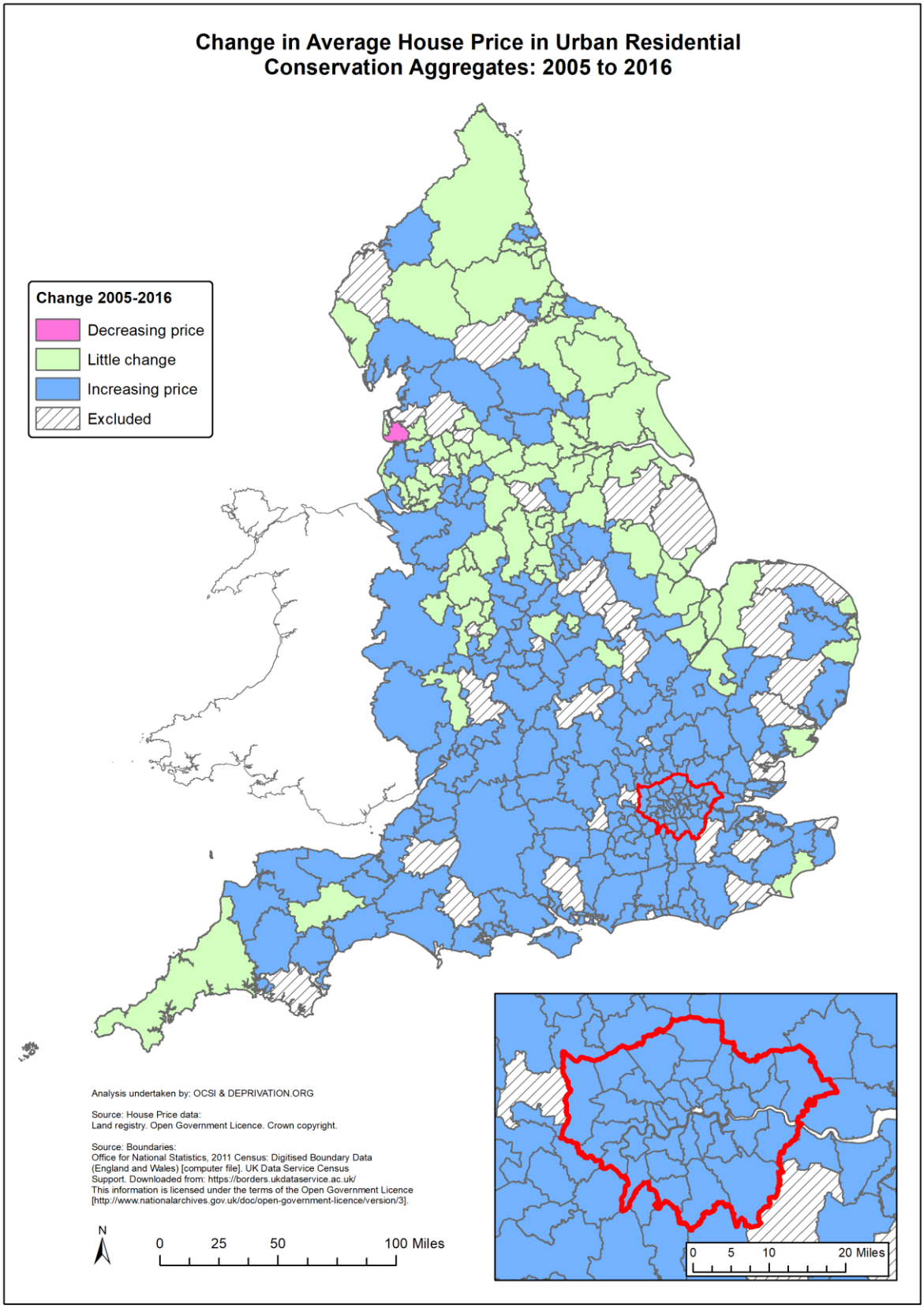
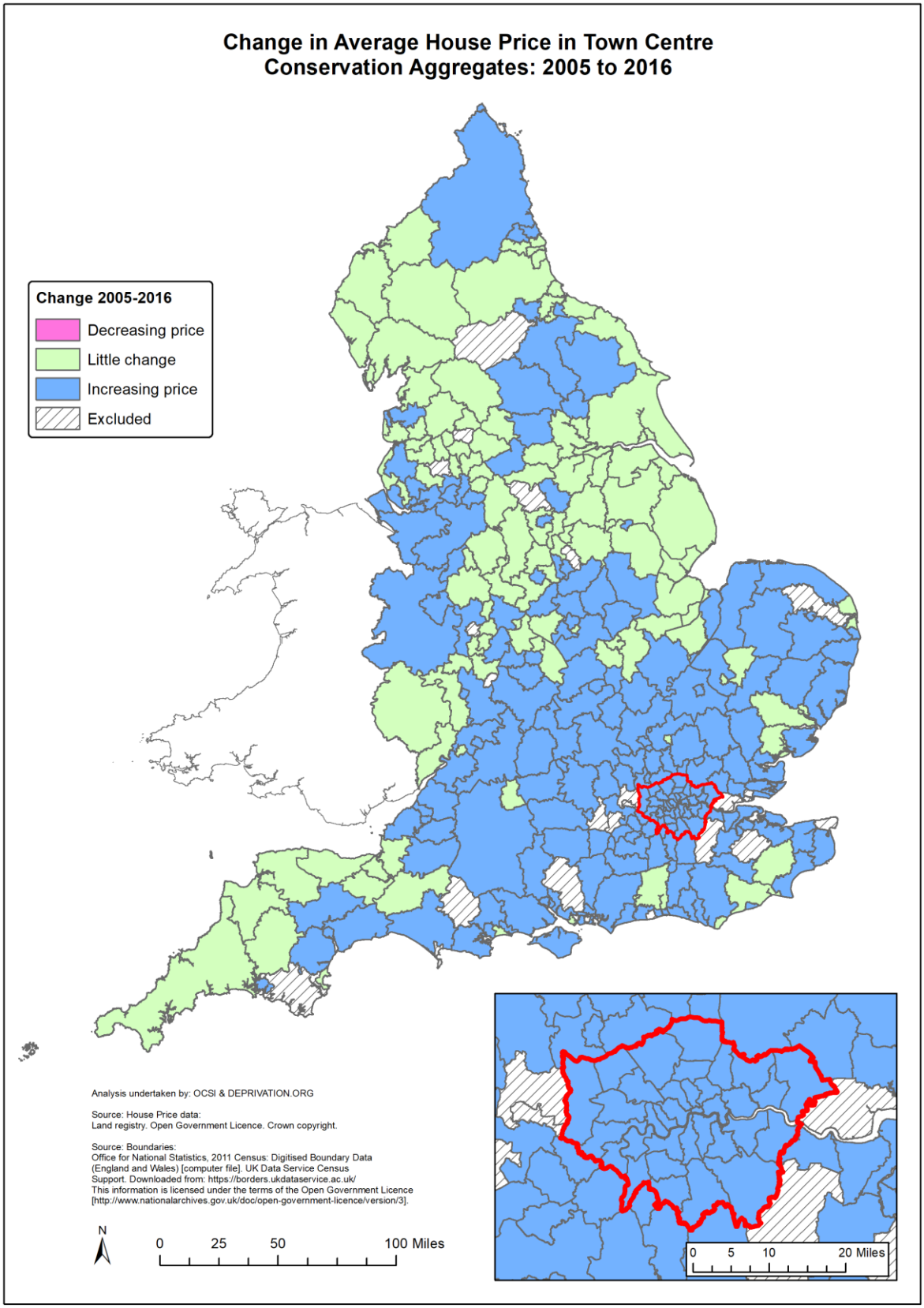


Figure 6.13 Change in average property price 2005 to 2016 in Town Centre Conservation Aggregates



These findings are helpful in setting the context in terms of how Conservation Aggregates have changed over time on the property price indicator. However, in order to assess whether Conservation Aggregates were simply following the broader trends or alternatively experiencing more (or indeed less) pronounced trends, it is necessary to consider each Conservation Aggregate relative to its matched Comparator Aggregate. This is the focus of the following analytical section.

How are Conservation Areas changing relative to matched Comparator Aggregates?[50]

The starting assumption is that, if Conservation Area designation has no effect on property prices (either positively or negatively), then property price trends in each Conservation Aggregate are likely to be of similar magnitude (and direction) to the matched Comparator Aggregate. The focus in this section of the analysis is to observe whether property price trends in Conservation Aggregates are indeed similar to their matched Comparator Aggregates or whether there is evidence of more pronounced changes across Conservation Aggregates than across Comparator Aggregates. If there is any clear patterning whereby Conservation Aggregates show larger increases than their matched Comparator Aggregates then this is worthy of further research. Equally, if there is any clear patterning that property price rises in Conservation Aggregates are occurring at a slower rate than across matched Comparator Aggregates then this would also be worthy of further research. Whilst these analysis presented here cannot reveal anything about causation and cannot permit any direct attribution of impact, they do provide an important overview of how Conservation Aggregates are changing over time relative to other similarly deprived, similarly sized geographical areas in the same general geographical vicinity.

Table 6.2 below summarises the overall trend in Rural, Urban Residential and Town Centre Conservation Aggregates relative to their matched Comparator Aggregate. The areas are grouped into four categories:

1) Conservation Aggregates experiencing both reduction in property prices and are becoming less expensive relative to their matched Comparator Aggregates over the period. Conservation Aggregates in this group could be said to be achieving *Good Growth* as they are both becoming more affordable in absolute terms and also compared with similar non-Conservation Aggregates in the same locality.
2) Conservation Aggregates experiencing a fall in property prices, but where this fall is smaller than in their matched Comparator Aggregate. Conservation Aggregates in this group are becoming more affordable but there is less evidence to suggest that their Conservation Area status has been a factor in this change, as similar non-Conservation Areas have experienced a greater reduction in property prices.
3) Conservation Aggregates experiencing an increase in average property prices but at a slower rate relative to their matched Comparator Aggregates over the period. Conservation Aggregates in this group have become less affordable over the period; however, similar areas within the same locality have been experienced an even greater increase in property prices.

[50] Note: for this analysis we have excluded Conservation Aggregates where we were unable to achieve a good match with Comparator Aggregates, either in terms of IMD 2007 score or overall population. See Appendix B for details.

4) Conservation Aggregates experiencing both an increase in average property prices and this increase is faster than across their matched Comparator Aggregates over the period. This group are more concerning in terms of attaining overall *Good Growth*[51] as they are becoming less affordable both in absolute terms and compared to similar areas around them suggesting that potentially the areas' Conservation Area status may be contributing to making the area less affordable for those living in the area, with implications in terms of retaining young people, and key workers.

Table 6.2: Absolute and relative performance of Conservation Aggregates

	Rural	Urban Residential	Town Centre
1) Reduction in property prices in Conservation Aggregates & prices falling faster in Conservation Aggregates than Comparator Aggregates	2.0%	3.5%	4.3%
2) Reduction in property prices in Conservation Aggregates but prices are falling at a slower rate than in Comparator Aggregates	1.0%	0.3%	1.2%
3) Increase in property prices in Conservation Aggregates & prices increasing more slowly in Conservation Aggregates than Comparator Aggregates	33.2 %	33.2%	37.1%
4) Increase in property prices in Conservation Aggregates & prices increasing faster in Conservation Aggregates than Comparator Aggregates	63.8%	62.9%	57.4%
Total	100%	100%	100%

Please see Scatterplots G.17 to G.19 in Appendix G for more detailed exploration of the distribution of Conservation Aggregates in each of these four groups.

It can be seen from Table 6.2 that only a small proportion of Conservation Aggregates have become more affordable between 2005 and 2016 in absolute terms (rows 1) and 2)). This is unsurprising as the period has been characterised by large increases in property prices nationwide.

However, it is interesting to note that the majority of Conservation Aggregates have not only experienced rises in property prices, but that these rises have exceeded those in similar neighbouring non-Conservation Areas. This is the case for 64% of Rural Conservation Aggregates, 63% of Urban Residential Conservation Aggregates and 57% of Town Centre Conservation Aggregates.

The magnitude of the difference between changes in property prices in Conservation Aggregates and their matched Comparator Aggregates is explored in the charts below. The heights of the bars represent the difference between the Conservation Aggregate and the matched Comparator Aggregate in terms of change in average property price between 2005 and 2016. The bars essentially convey the change in each Conservation Aggregate net of the change in the matched Comparator Aggregate. For example, if a Conservation Aggregate saw its property price increase by £200,000 over the period, and its matched Comparator Aggregate saw its average property price increase by £100,000 percentage points over the period, then the net change in the Conservation Aggregate would equal +£100,000. Alternatively, if a Conservation Aggregate saw property prices fall by £100,000 over the period, and their matched Comparator Aggregate saw average prices fall by

[51] Please not however, that high house price increases can also be driven by strong economic growth. Of particularly concern would be areas which perform badly in terms of affordable growth and also in terms of the other growth measures.

£50,000 then the net change in the Conservation Aggregate wold equal -£50,000. If the change was identical in the Conservation Aggregate and its matched Comparator Aggregate then the net change over the period in the Conservation Aggregate would be zero.

Figure 6.14 Difference in change in average property price between 2005 and 2016 between Rural Conservation and Comparator Aggregates

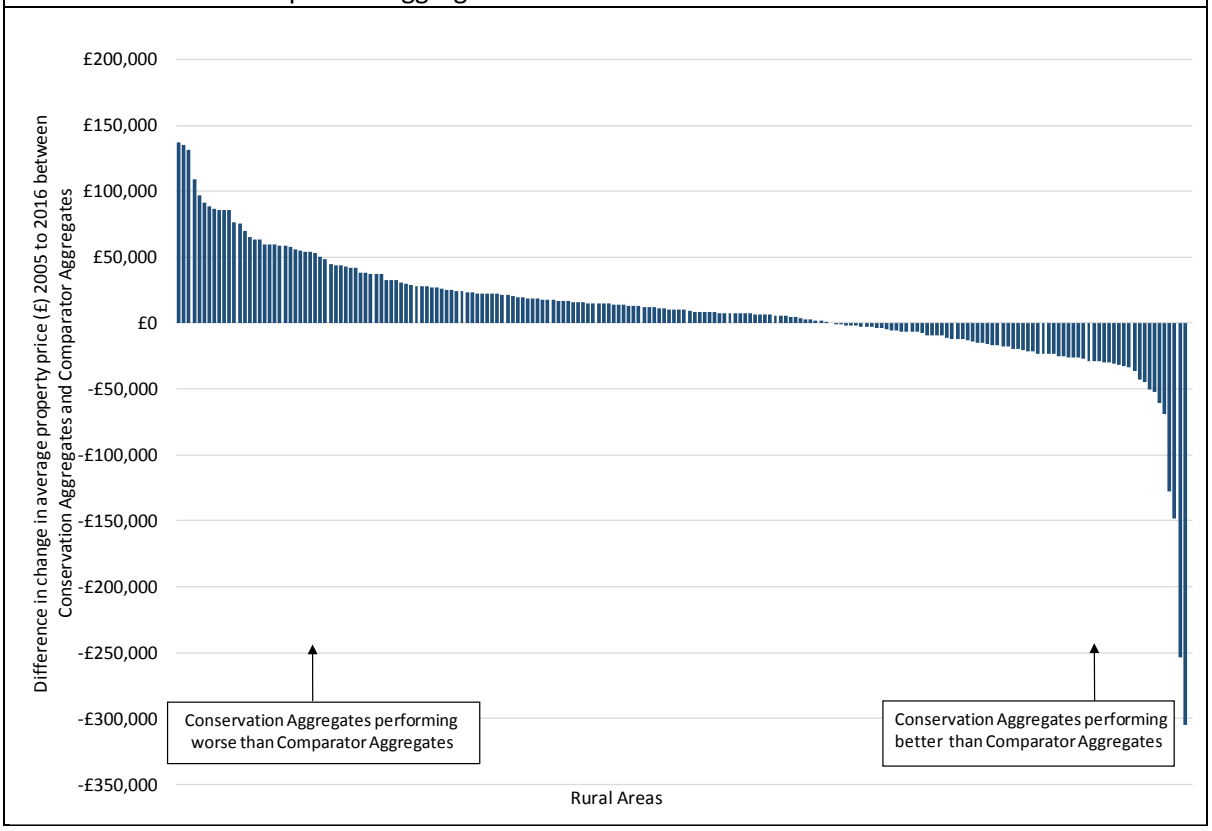


Figure 6.15 Difference in change in average property price between 2005 and 2016 between Urban Residential Conservation and Comparator Aggregates

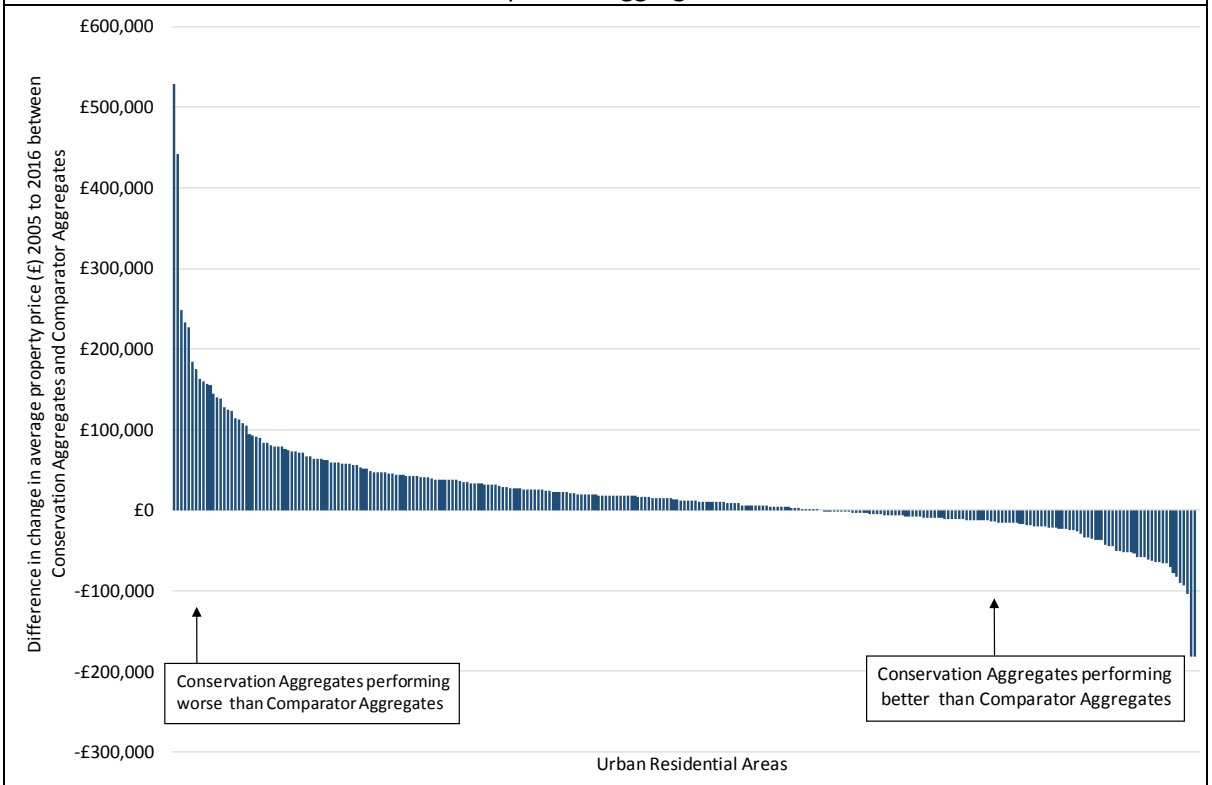
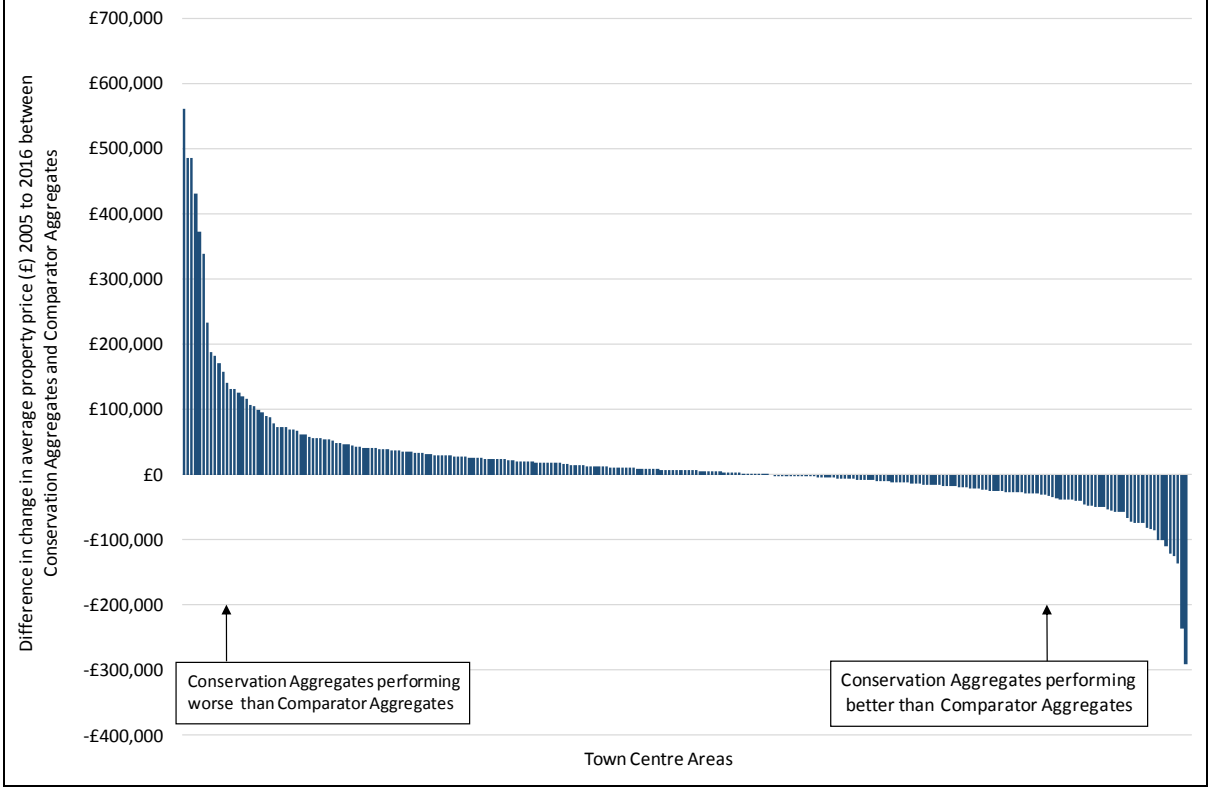


Figure 6.16 Difference in change in average property price between 2005 and 2016 between Town Centre Conservation and Comparator Aggregates



As illustrated in the charts above, the overall distribution in terms of relative performance is similar across Rural, Urban Residential and Town Centre Conservation Aggregates alike with roughly 60% of Conservation Aggregates becoming less affordable relative to Comparator Aggregates.

Tables 6.3 to 6.8 below show the best and worst performing Conservation Aggregates in each category.

Table 6.3 shows the 10 Rural Conservation Aggregates which performed worst (becoming relatively less affordable) relative to their Comparator Aggregates; these are shown in Table 6.3 below.

Table 6.3: Worst performing[52] Rural Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in average property price 2005 to 2016		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Dartford	South East	£290,081	£153,122	£136,960
Chiltern	South East	£274,064	£138,900	£135,164
Brentwood	East	£275,976	£144,933	£131,043
Chelmsford	East	£203,248	£94,049	£109,199
Windsor and Maidenhead	South East	£325,581	£228,256	£97,324
Guildford	South East	£296,301	£204,702	£91,598
South Oxfordshire	South East	£220,107	£131,719	£88,388
Test Valley	South East	£177,123	£90,821	£86,302
Dacorum	East	£225,222	£139,188	£86,034
Bromley	London	£270,833	£184,954	£85,878

All of the worst performing areas in relative terms experienced an increase in property prices in absolute terms.

Areas from the South East featured prominently among the worst preforming Rural Conservation Aggregates with six of the eight worst performing areas located in the South East region (see maps at the end of the chapter for more detailed geographical distribution). This reflects the predominance of areas in the South East among the Conservation Aggregates with the greatest increases in average property price over the period.

Table 6.4 shows the ten Rural Conservation Aggregates which performed best relative to their Comparator Aggregates (became relatively more affordable).

Only three of the 10 best performing Rural Conservation Aggregates in relative terms experienced an fall in property prices in absolute terms, while the other seven experienced a rise in property prices (but at a slower rate than the Comparator Aggregates).

Trafford in the North West region saw the biggest divergence in performance with the Conservation Aggregate becoming more affordable (experiencing a fall in property prices of just under £100,000 over the period) while the Comparator Aggregate experienced an increase of more than £200,000 over the same period.

[52] Note the worst performing areas, are those that have seen the greatest relative increases in property price i.e. have become relatively less affordable compared with their matched Comparator Aggregates

Table 6.4: Best performing[53] Rural Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in average property price 2005 to 2016		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Trafford	North West	-£96,785	£208,050	-£304,835
Surrey Heath	South East	£119,473	£372,841	-£253,368
Hertsmere	East	£313,224	£461,881	-£148,658
Telford and Wrekin	West Midlands	-£7,188	£120,096	-£127,284
Corby	East Midlands	-£9,603	£59,333	-£68,936
Pendle	North West	£18,260	£78,639	-£60,379
Bromsgrove	West Midlands	£19,918	£72,557	-£52,639
Epsom and Ewell	South East	£215,124	£265,378	-£50,254
Torridge	South West	£14,356	£59,519	-£45,163
Gedling	East Midlands	£5,249	£48,421	-£43,171

Table 6.5 shows the 10 Urban Residential Conservation Aggregates which preformed worst (became less affordable) relative to their Comparator Aggregates.

Table 6.5: Worst performing Urban Residential Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in average property price 2005 to 2016		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Kensington and Chelsea	London	£926,167	£397,903	£528,264
Camden	London	£688,147	£246,567	£441,581
Hackney	London	£426,613	£178,871	£247,742
Hammersmith and Fulham	London	£476,403	£242,779	£233,623
Elmbridge	South East	£494,731	£267,553	£227,178
Richmond upon Thames	London	£450,499	£266,708	£183,792
Ealing	London	£427,834	£253,319	£174,515
South Cambridgeshire	East	£258,119	£95,543	£162,576
Kingston upon Thames	London	£399,232	£239,396	£159,836
Poole	South West	£270,615	£113,723	£156,893

As with Rural areas, all of the worst performing areas in relative terms experienced an increase in property prices in absolute terms.

All Urban Residential Conservation Aggregates which saw largest increases relative to Comparator Aggregates were located in areas with high and increasing property prices in the wider area (suggesting that the Conservation Area status could be contributing to the overall lack of affordability in the area).

Seven of the 10 worst performing areas were located in London, with the largest divergence seen in Kensington and Chelsea – where property prices increased on average by more than £920,000

[53] Note the best performing areas, are those that have seen the greatest relative falls in property price i.e. have become relatively more affordable compared with their matched Comparator Aggregates

between 2005 and 2016 compared to a more modest (though still considerable) rise of just under £400,000 for non-Conservation Areas with similar characteristics in the same borough.

Table 6.6 below shows the 10 Urban Residential Conservation Aggregates which performed best (became more relatively affordable) compared with Comparator Aggregates.

Table 6.6: Best performing Urban Residential Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in average property price 2005 to 2016		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Uttlesford	East	£151,878	£333,890	-£182,013
Forest Heath	East	£50,899	£232,498	-£181,599
Selby	Yorkshire Humber	-£10,511	£93,060	-£103,571
Horsham	South East	£140,132	£232,699	-£92,567
Wellingborough	East Midlands	£58,634	£148,884	-£90,249
Knowsley	North West	-£10,414	£72,556	-£82,970
Rushmoor	South East	£77,663	£155,361	-£77,698
Derbyshire Dales	East Midlands	-£5,541	£65,377	-£70,918
Copeland	North West	-£5,450	£60,712	-£66,163
Test Valley	South East	£80,702	£146,433	-£65,731

Only four of the best performing areas saw a reduction in property prices in absolute terms.

The best performing Conservation Aggregate (Uttlesford in Essex) saw a large increase in property prices, but this increase was notably smaller than the increase in the matched Comparator Aggregate suggesting that the Conservation Area status was not a key driver of property price rises in the area.

The best performing Urban Residential Conservation Aggregates which saw an absolute increase in property prices were generally located in the Southern part of England, while the best performing Conservation Aggregates which also experienced a fall in property prices in absolute terms were generally located in Northern England (see maps at the end of the chapter for more detailed geographical distribution). This reflects wider regional trends.

Table 6.7 below shows the 10 Town Centre Conservation Aggregates which preformed worst (became less affordable) relative to their Comparator Aggregates.

Eight of the 10 worst performing Town Centre Areas saw large increases in property prices in Conservation Aggregates and Comparator Aggregates alike.

The exception were Darlington and Newcastle, where property prices rose sharply in Conservation Aggregates compared to more modest rises in Comparator Aggregates over the same period. Property prices in these Conservation Aggregates are higher than might be expected given average property prices in the wider area (suggesting these may be distorted by the purchase of large Town Centre properties).

By contrast, each of the remaining eight Local Authorities with large relative increases in property process were located in London and the increases in property prices are likely to reflect wider property rises in the area. However, the fact that prices have risen to a greater extent in the Conservation Aggregates suggest that Conservation Area status may have been a contributing factor in making these areas less affordable.

Table 6.7: Worst performing Town Centre Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in average property price 2005 to 2016		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Camden	London	£812,547	£250,334	£562,213
Southwark	London	£750,541	£264,278	£486,263
City of London	London	£1,119,538	£633,454	£486,084
Darlington	North East	£430,726	£304	£430,422
Newcastle upon Tyne	North East	£392,722	£19,102	£373,620
Hammersmith and Fulham	London	£565,143	£227,221	£337,923
Brent	London	£407,148	£174,037	£233,111
Haringey	London	£419,478	£231,028	£188,450
Ealing	London	£379,218	£196,194	£183,024
Barnet	London	£341,940	£170,247	£171,693

Table 6.8 below shows the 10 Town Centre Conservation Aggregates which performed best relative to Comparator Aggregates.

Table 6.8: Best performing Town Centre Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in average property price 2005 to 2016		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Dartford	South East	£83,859	£375,360	-£291,501
North West Leicestershire	East Midlands	£75,585	£312,043	-£236,458
Derbyshire Dales	East Midlands	£18,803	£154,598	-£135,795
Ashford	South East	-£15,738	£109,041	-£124,780
Lambeth	London	£322,409	£443,664	-£121,255
Barking and Dagenham	London	£58,034	£167,958	-£109,924
Surrey Heath	South East	£59,827	£160,914	-£101,087
Hounslow	London	£191,704	£291,361	-£99,657
Runnymede	South East	£140,111	£224,869	-£84,759
Sedgemoor	South West	-£400	£82,828	-£83,229

Only two of the best performing areas saw a reduction in property prices in absolute terms.

The remaining Conservation Aggregates saw notable increases in average property price (but these increases were smaller than those experienced across their matched comparator areas). In each of these areas, the Conservation Area status is unlikely to be driving property price rises or contributing towards making the area less affordable.

Key findings summary:

- While property price rises were experienced across Conservation Aggregates and Comparator Aggregates alike, Conservation Aggregates are in general seeing larger rises than Comparator Aggregates

- This increase in property prices in Conservation Areas over and above neighbouring areas with similar characteristics suggests that Conservation Area status could be contributing to areas becoming less affordable
- This effect is particularly evident in areas which have experienced high and rising property prices overall (including much of London and the wider South East) suggesting Conservation Areas in these parts of the country are at greater risk of failing to achieve affordable growth.
- While rising property prices are often a symptom of wider economic growth – some areas have experienced relative increases in property prices whilst experiencing a relative worsening on other *Good Growth* measures. Areas experiencing poor performance on multiple *Good Growth* indicators will be explored in more detail in chapter 8 below.

The maps below show the geographical pattern in more detail – each map compares the performance of the Conservation Aggregates relative to their matched Comparator Aggregates on average property price between 2005 and 2016 in Rural, Urban Residential and Town Centre categories. Conservation Aggregates shaded pink on the maps are characterised as showing notable improvement (becoming more affordable) relative to their Comparator Aggregates. Areas shaded blue are characterised as seeing an appreciable worsening in their position (becoming less affordable) relative to matched Comparator Aggregates. Conservation Aggregates shaded light green have experienced small relative change between 2005 and 2016. For detail of how the map colours are calculated see Appendix C.

Figure 6.17 Change in average property price 2005 to 2016 in Rural Conservation Aggregates relative to matched Comparator Aggregates

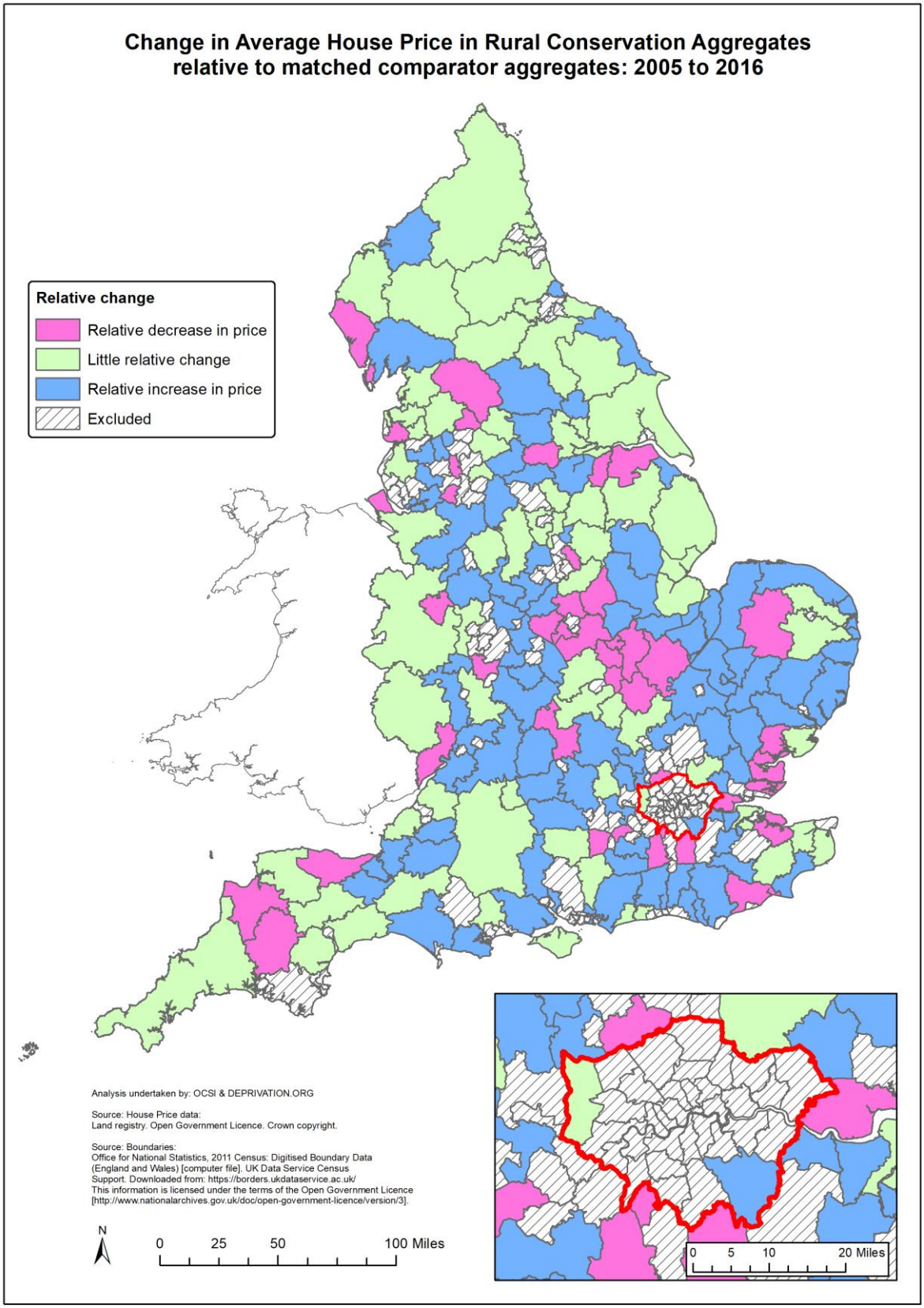


Figure 6.18 Change in average property price 2005 to 2016 in Urban Residential Conservation Aggregates relative to matched Comparator Aggregates

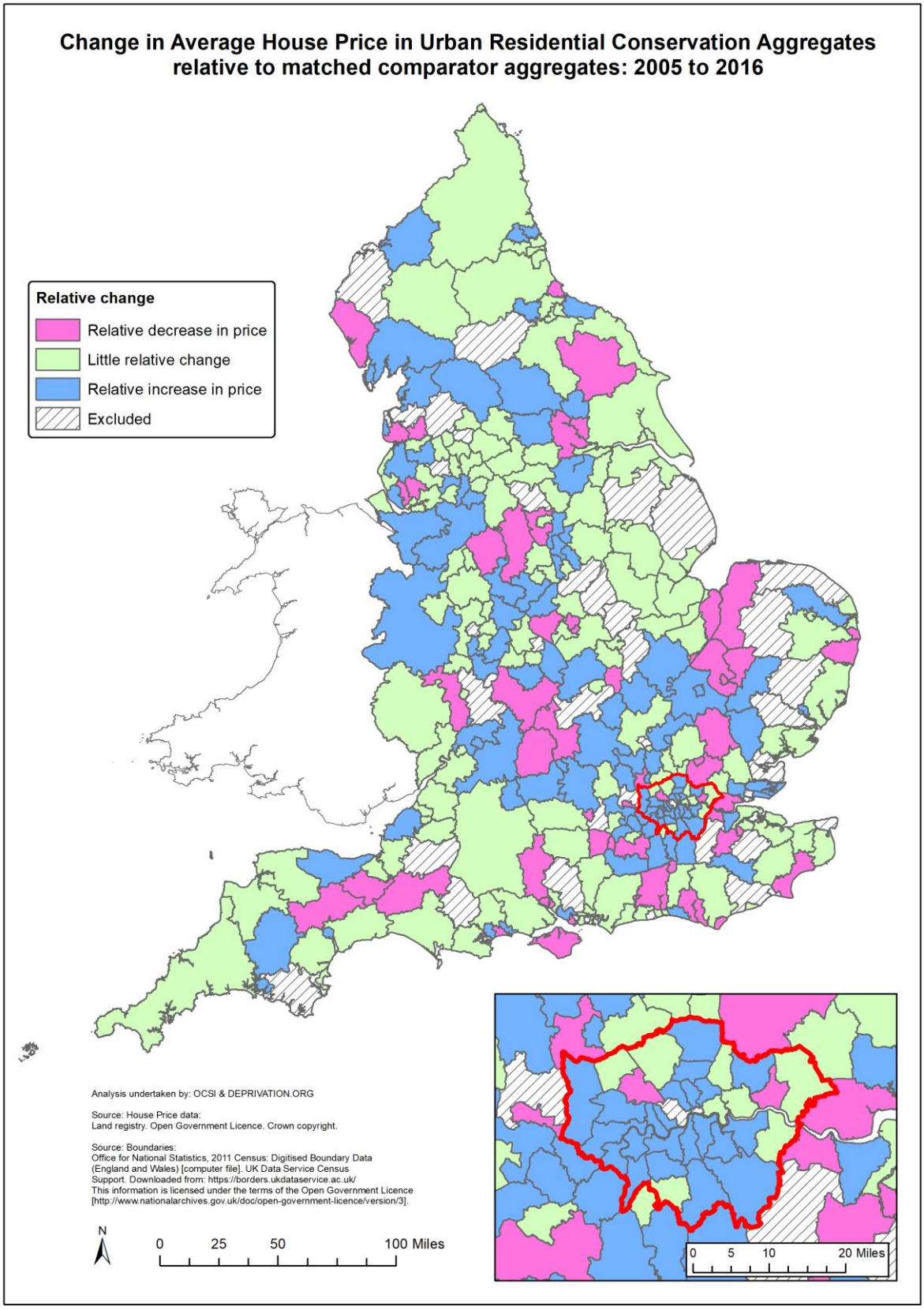
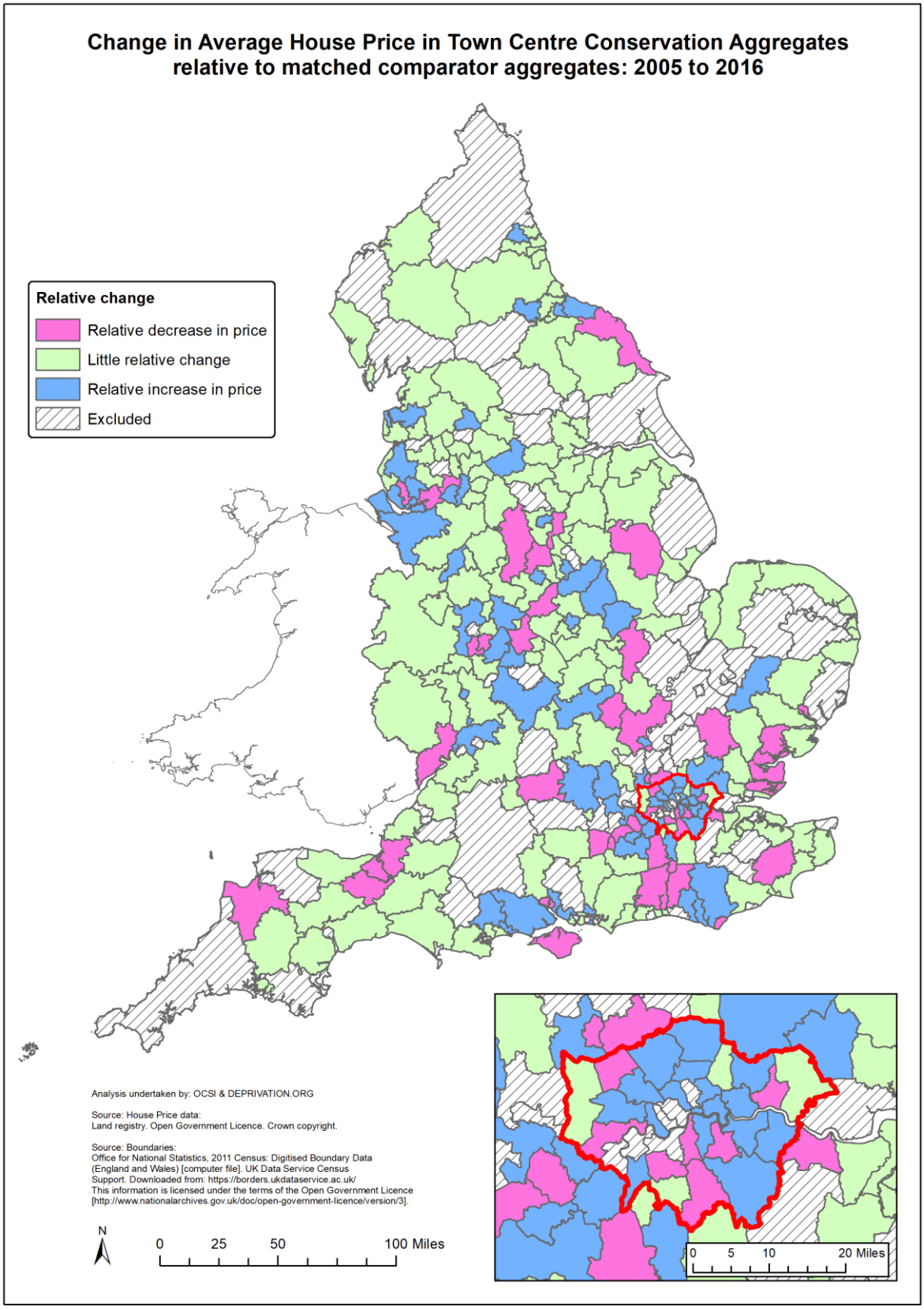


Figure 6.19 Change in average property price 2005 to 2016 in Town Centre Conservation Aggregates relative to matched Comparator Aggregates



Conclusion

In this chapter we have explored changes in the changes in average property prices in order to determine how Conservation Areas changed over time in terms of affordability and whether there was any evidence that Conservation Area status promotes and facilitates affordable growth.

In order to address these questions we looked both at how Conservation Aggregates were changing in absolute terms (i.e. their 'direction of travel') and in relative terms (i.e. compared to similar non-Conservation Areas in the same locality).

The analysis showed that property prices were higher in Conservation Aggregates than Comparator Aggregates at a baseline point in time and the gap became wider between 2005 and 2016 with Conservation Aggregates increasing at a faster rate than Comparator Aggregates.

The increase was particularly noticeable in Town Centre Conservation Aggregates which went from having on average the most affordable accommodation in 2005 to the least affordable in 2016 (largely driven by extremely high property price rises in London). However, increases were widespread, with approximately 97% of Conservation Aggregates becoming less affordable between 2005 and 2016.

While property price rises were experienced across Conservation Aggregates and Comparator Aggregates alike, Conservation Aggregates are in general seeing larger rises in relative terms than Comparator Aggregates. The increase in property prices in Conservation Areas over and above neighbouring areas with similar characteristics suggests that Conservation Area status could be contributing to areas becoming less affordable. This effect is particularly evident in areas which have experienced high and rising property prices overall (with Conservation Aggregates in London not only experiencing the largest price rises in absolute terms but also relative to their matched Comparator Aggregates). A similar effect was seen in much of the South East and East, suggesting that Conservation Areas within or in close proximity of London were at greater risk of failing to achieve affordable growth.

Comparison with other dimensions of *Good Growth* suggests achieving affordable growth is likely to be a particular challenge of Conservation Aggregates, with only 2% of Rural Conservation Aggregates, 3.5% of Urban Residential Conservation Aggregates and 4.3% of Town Centre Conservation Aggregates achieving both a positive direction of travel (becoming more affordable) and a positive performance (becoming more affordable relative to similar areas in the locality). Based on current trajectories this is likely to be a growing challenge in Conservation Areas going forward.

Chapter 7: Analysis of 'Wider Growth'

Introduction

In this chapter we examine whether Conservation Areas are experiencing 'Wider Growth' using an indicator derived from administrative data.

First we highlight our approach to measuring wider growth, introducing the key indicator used in this part of the analysis.

Next, we provide an overview of the main trends on the selected indicator of Wider Growth. This section presents the *national average* baseline position, direction of travel and performance of Conservation Aggregates compared to the respective groups of Comparator Aggregates for each of the three categories of Conservation Aggregate (Rural, Urban Residential or Town Centre).

We then go on to look at whether the patterns observed nationally, also hold across each of the *regions*.

Finally we drill down to the individual Conservation Aggregates and explore the following key questions

4) What is the wider growth profile of the Conservation Areas at a baseline point in time?
5) How has the wider growth profile of Conservation Areas changed over time?
6) How are Conservation Areas changing relative to matched Comparator Aggregates (are they experiencing different changes to wider growth levels compared to similar areas in their locality?)

Measuring wider growth

In Chapter 2 – *Phase 2: review of literature on Good Growth; review of data sources on Good Growth* we summarised the process that was adopted for identifying a short list of key indicators under each of the dimensions of "*Good Growth*".

Eight indicators of wider growth were shortlisted from this stage:

- Recorded crime rates (Home Office www.police.uk data repository)
- People working 49+ hours (Census 2011)
- % working age pop unable to work due to disability/long-term illness: Employment Support Allowance/Incapacity Benefit (Dept for Work and Pensions)
- Distance travelled to work (Census 2011)
- Personal wellbeing indicators (Office for National Statistics)
- Voting in local elections (Electoral Commission)
- Public transport travel time to key services (Dept for Transport)
- Healthy life expectancy (Office for National Statistics)

It was necessary to further narrow down this shortlist, to ensure that the final indicators selected for analysis were available at sufficient granularity[54] and temporal coverage[55] to enable us to observe

[54] Published down to Lower layer Super Output Area (LSOA) level
[55] Covering a long enough time period for us to observe a trend over the period.

annual changes in economic performance at Lower layer Super Output Area (LSOA) level (the building block for defining the Conservation Aggregates[56]).

Following this stage, one indicator has been selected to measure 'wider growth' in Conservation Areas:

> **Police Recorded Crime rate: Number of recorded crimes - of selected crime categories - occurring per 1,000 resident population**.

An overall composite crime count was calculated by adding together the numbers of violent crimes, sexual offences, burglaries, robberies and vehicle crimes. Other crime types, such as criminal damage, were excluded from this overall crime count due to lack of available data for the requisite time periods. The composite crime count was then expressed as a crime rate per 1,000 resident population.

Appendix A provides metadata for this indictor including a more detailed description, methodology for producing the indicator, source, time period covered, key strengths and issues to consider when using the indicator to track change over time and examples of where the indicator has been used in other measures of *Good Growth*.

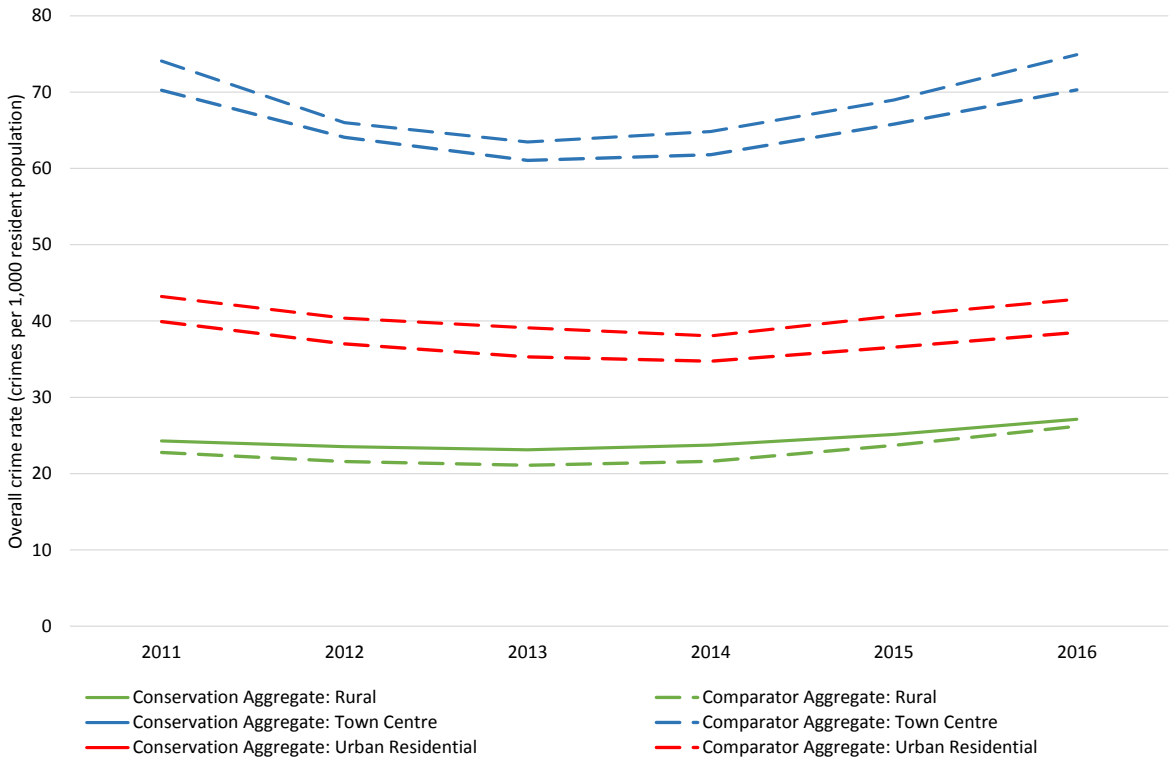
A key consideration to bear in mind throughout the analyses presented here is that changes in recorded crime rates can be due a number of factors, including: real change (i.e. a real increase or decrease in the rate of offending); changes to how crimes are coded by the police (see the Home Office Counting Rules for more information on this); changes to the propensity of the public to report crimes (i.e. under-reporting); and changes to policing priorities and detection strategies (e.g. prioritising burglary in one year, but vehicle crime another year etc). When looking at absolute changes in crime rates in Conservation Aggregates the reader should bear in mind that various combinations of these factors may have influenced the data time series. However, the advantage of using the Comparator Aggregates as an analytical benchmark is that many external factors (such as crime recording rules and the rate of under-reporting of crimes) are likely to be similar in the Conservation Aggregates and matched Comparator Aggregates, meaning that any differences in trends between the Conservation and Comparator Aggregates are more likely to be due to real change.

Overview of trends in recorded crime rates between 2011 and 2016

At the time of writing, the recorded crime data from the Home Office's www.police.uk data repository is available for six full calendar years, enabling a detailed examination of trends in crime rates from 2011 through to 2016. Figure 7.1 below shows the average crime rate across each of the Conservation and Comparator Aggregate categories. Each line represents one of the six typology categories, with solid lines representing Conservation Aggregates, dashed lines representing Comparator Aggregates, green lines representing Rural categories, red lines representing Urban Residential and blue lines representing Town Centres.

[56] see Chapter 1 for details of how these geographies have been developed

Figure 7.1: Crime rate in Conservation and Comparator Aggregates 2011 to 2016



The trend lines presented in Figure 7.1 highlight some notable commonalities and differences between categories at the 2011 start point and the 2016 end point, and show the trajectories that each category grouping has followed during this six year period. A number of key findings are evident from Figure 7.1. Firstly, and with a particular focus on the Conservation Aggregates, it is clear that at the baseline time-point of 2011, the group of Town Centre Conservation Aggregates exhibit higher crime rates than the group of Urban Residential Conservation Aggregates, which in turn exhibit higher crime rates than the group of Rural Conservation Aggregates. The trend lines demonstrate that this ordering between the three categories persists in each year between 2011 and 2016. The magnitude of the differences between types of Conservation Aggregate is also quite stark, with Urban Residential Conservation Aggregates registering an average crime rate that was 1.8 times higher than the Rural category in 2011, and the Town Centre group registering an average rate that was 1.7 times higher than Urban Residential group and 3.0 times higher than the Rural group. Secondly, it is evident that although the three categories of Conservation Aggregate were notably different from each other at every annual time point, the general temporal patterns followed across the time period were actually quite similar. These trends consist a fall in crime rates between 2011 and 2013/2014, followed by an increase in crime rates through to 2016. The magnitude of the changes is most evident for the Town Centre Conservation Aggregates and least evident for the Rural Conservation Aggregates. By 2016, the crime rates in Town Centre and Rural Conservation Aggregates exceeded the respective rates in 2011, whereas in Urban Residential Conservation Aggregates the rate was just slightly below the respective position in 2011. Table 7.1 shows the crime rates for each category of Conservation Aggregate in 2011 and 2016 and shows the change in rates over this entire period.

Table 7.1: Conservation Aggregate crime rates (crimes per 1,000 population) in 2011 and 2016

		2011	2016	Change
Conservation Aggregates	Rural	24.3	27.1	2.8
	Urban Residential	43.2	42.9	-0.3
	Town Centre	74.1	74.9	0.8
Comparator Aggregates	Rural	22.8	26.2	3.4
	Urban Residential	39.9	38.5	-1.4
	Town Centre	70.2	70.3	0.0

As noted above, although all three categories of Conservation Aggregate followed the same general trend between 2011 and 2016, there was a notable difference between the three categories in the magnitude of change observed. Specifically, between 2011 and 2013 the crime rate fell by 1.2 crimes per 1,000 population for the group of Rural Conservation Aggregates, while between 2011 and 2014[57] the rate fell by 5.2 crimes per 1,000 population for the group of Urban Residential Conservation Aggregates. The fall was greatest in Town Centre Conservation Aggregates, where rates fell by 10.6 crimes per 1,000 population between 2011 and 2013.

It should be noted, however, that data presented in Figure 7.1 represent totals for all Conservation Aggregates per category and that the individual Conservation Aggregates may show different trajectories (which we explore later in this chapter).

Having explored how Conservation Aggregates have changed over the period, it is also important to consider this trend in the context of change in Comparator Aggregates over the same period (Figure 7.1 also shows crime rates for the three categories of Comparator Aggregate). It is clear that at each time point between 2011 and 2016, the crime rates in each of the three categories of Conservation Aggregate are very similar to the rates in the respective group of Comparator Aggregates. As such, when taken as a whole, the Conservation Aggregates are following very similar trends to the matched Comparator Aggregates between 2011 and 2016. However it is also clear that the crime rates are slightly higher for the groups of Conservation Aggregates than the matched group of Comparator Aggregates at each time point.

Key findings summary:

- When looking at Conservation Aggregates across the country as a whole, the average crime rates are highest for the group of Town Centre Conservation Aggregates, followed by the Urban Residential Conservation Aggregates, followed by the Rural Conservation Aggregates.
- The average crime rates in the Conservation Aggregates are slightly higher than the average rates in the respective Comparator group at each point in time.
- Although the magnitude of the rates differs between Town Centre, Urban Residential and Rural areas, the general trends over time are quite similar, albeit more pronounced in the Town Centre category.

[57] The lowest crime rate between 2011 and 2016 for Urban Residential Conservation Aggregates was observed in 2014, whereas for Town Centre and Rural Conservation Aggregates the lowest values were observed in 2013.

Trends in crime rates at regional level

The presentation of crime rates for each category of Conservation and Comparator Aggregate across the entire country necessarily masks variations observed between individual Conservation Aggregates and Comparator Aggregates. The focus now turns to sub-national analyses of crime levels and trends in the categories of Conservation and Comparator Aggregate. Before turning to focus on crime rates in each of the individual areas, it is first instructive to consider patterns and trends at regional level. Other research has shown how different regions across the country have experienced different trends in crime over the period (e.g. see ONS Statistical Bulletin Regional Crime in England and Wales[58]), albeit without a focus on Conservation Areas. The objective here is to assess whether the broad patterns of change presented through Figure 7.1 hold when the data are broken down into each of the nine regions of England. To aid the readability of this report, the charts showing crime rates in the regions are presented in Appendix H and the key points are picked out and presented in a narrative here in the main body of the report. Figures H.1- H.6 in Appendix H show crime rates for Conservation and Comparator Aggregates for the Rural, Urban Residential and Town Centre categories respectively at a baseline point in time and change over time.

It is evident from comparing across the charts that each of the nine regions[59] show a similar distinction between the three types of Conservation Aggregate as was observed in Figure 7.1. Specifically, in each of the regions, crime rates are highest for the group of Town Centre Conservation Aggregates, followed by Urban Residential Conservation Aggregates, followed by the Rural Conservation Aggregates. However, with regard to change over time between 2011 and 2016, a number of differences were observed, with these differences being seen both *between the regions* and *between the three categories of Conservation Aggregate*.

With regards to the Rural category of Conservation Areas, the regional average ranged from a low of 19.5 crimes per 1,000 population in the North East, to a high of 27.0 crimes per 1,000 population in the South East. All eight regions analysed (note that London was excluded from these Rural analyses) saw an increase in crime rates between 2011 and 2016. The North East region saw the largest increase in crime rates whilst the South East saw the smallest increase. However, there was no clear spatial patterning between the regions in respect of the magnitude of observed changes.

In respect of the Urban Residential category, the regional average ranged from a low of 24.0 crimes per 1,000 population in the North East to a high of 61.5 crimes per 1,000 population in London. As such, the disparity between regional averages was greater for the Urban Residential group than was observed for the Rural group. In terms of trends over time between 2011 and 2016, the regional averages for London and the South East reduced over the period, for the East Midlands the regional average was almost unchanged, whilst the remaining six regional averages increased over the period.

Finally, the charts for the Town Centre category show that regional average crime rates ranged from a low of 59.0 in the North East to a high of 90.3 in the East Midlands. It is therefore clear that the

[58] See: https://www.ons.gov.uk/peoplepopulationandcommunity/crimeandjustice/datasets/policeforceareadatatables

[59] Note that London is excluded from the regional rural analysis due to there being very few rural Conservation Areas within the region

disparities between regional averages for the Town Centre group is larger than was observed for the Rural group but smaller than was observed for the Urban Residential group. In terms of change over time in the regional averages for Town Centre Conservation Aggregates, London, East Midlands and the South West each saw a fall in crime rates, whereas the remaining six regions each saw average crime rates rise. The greatest fall in regional average crime rates amongst the Town Centre group of Conservation Aggregates was seen in London while the greatest rise was seen in the North East. This finding mirrors that noted for Urban Residential group above.

A comparison of the patterns and trends observed for the regional groupings of Conservation Aggregates with the respective regional groupings of their matched Comparator Aggregates reveals a number of notable features. First, when focusing on the average crime rates in 2011, it is apparent that, on the whole, the regional groups of Conservation Aggregates have relatively similar levels of crime to the regional groups of matched Comparator Aggregates. However, it is also evident that the regional averages for Conservation Aggregates were almost always slightly higher[60] than the regional averages for the Comparator Aggregates. Indeed, when looking across all three categories together, there were only four instances where the regional Comparator Aggregate average exceeded the regional Conservation Aggregate average in 2011 (these being: Yorkshire and the Humber in the Rural group; and Yorkshire and the Humber, East and London in the Town Centre group). In all the other 22 cases the Conservation Aggregate regional average exceeded the Comparator regional average. In terms of change over time, the Comparator regional averages almost always followed relatively similar trajectories to the respective Conservation Aggregate regional average. Looking across all three categories, there was only one case where the regional averages for Conservation Aggregates and Comparator Aggregates moved in different directions (specifically, the case of the South West in respect of the Urban Residential group, where the Conservation Aggregate average exhibited a slight increase but the Comparator average exhibited a slight decrease – however the magnitude of these changes were very small).

Key findings summary:

- In each of the nine regions, average Conservation Aggregate crime rates were highest for the Town Centre group, then the Urban Residential group, and finally the Rural group.
- All nine regions saw average crime rates increase between 2011 and 2016 for the group of Rural Conservation Aggregates.
- Six regions saw average crime rates increase between 2011 and 2016 for the group of Urban Residential Conservation Aggregates, whilst rates fell in two regions and stayed the same in one region.
- Six regions saw average crime rates increase between 2011 and 2016 for the group of Rural Conservation Aggregates, with the other three regions seeing rates fall.
- The respective groups of Comparator Aggregates had similar, albeit typically slightly lower, crime rates to the groups of Conservation Aggregates in 2011 and then tended to follow broadly similar trends over time when assessed in terms of regional averages.

The analyses presented so far in this chapter have focused on patterns and trends in crime rates for national and regional groupings of the three categories of Conservation and Comparator Aggregates.

[60] And in some cases the disparity was somewhat more substantial.

Exploration of this information has demonstrated the overall trends in crime rates over the period. However, as noted throughout this report, national and regional summaries are averages of many individual area trends and patterns and these summaries can mask substantial variations at the more detailed geographical level. In order to ascertain the extent to which individual Conservation Aggregates followed similar or divergent trends to other areas in the same category, and to ascertain the extent to which Conservation Aggregates followed similar or divergent trends to the respective Comparator Aggregates, it is necessary to move beyond the national and regional summaries. In the remainder of this chapter the analyses therefore turn to examine patterns and trends using the data for each individual Conservation Aggregate and Comparator Aggregate. The objective is to assess the degree of commonality or difference between individual areas at specified points in time and in terms of change over time, firstly with a focus solely on the Conservation Aggregates, and then through comparing the Conservation Aggregates to the respective matched Comparator Aggregates.

What is the profile of the Conservation Areas at a baseline point in time?

The charts below show the distribution of crime rates across Conservation Aggregates (by category) in 2011. The Conservation Aggregates are ordered highest to lowest in terms of crime rate, with the height of the bars representing the crime rate (i.e. number of crimes per 1,000 population) in 2011.

The three horizontal reference lines show the average value for three groups of areas. The red horizontal reference line relates to the average for all Conservation Aggregates of that type (i.e. Rural, Urban Residential or Town Centre), the green horizontal reference line relates to the average for all Comparator Aggregates of that type, and the orange horizontal reference line relates to the average for all non-Conservation Aggregate areas of that type across the country. As such, the value depicted by the orange horizontal reference line includes the Comparator Aggregates and all other non-Conservation Aggregate areas of that category type. The Comparator Aggregates represent a particular subset of the group of areas depicted by the orange horizontal reference line.

Figure 7.2 Crime rate in Rural Conservation Aggregates in 2011

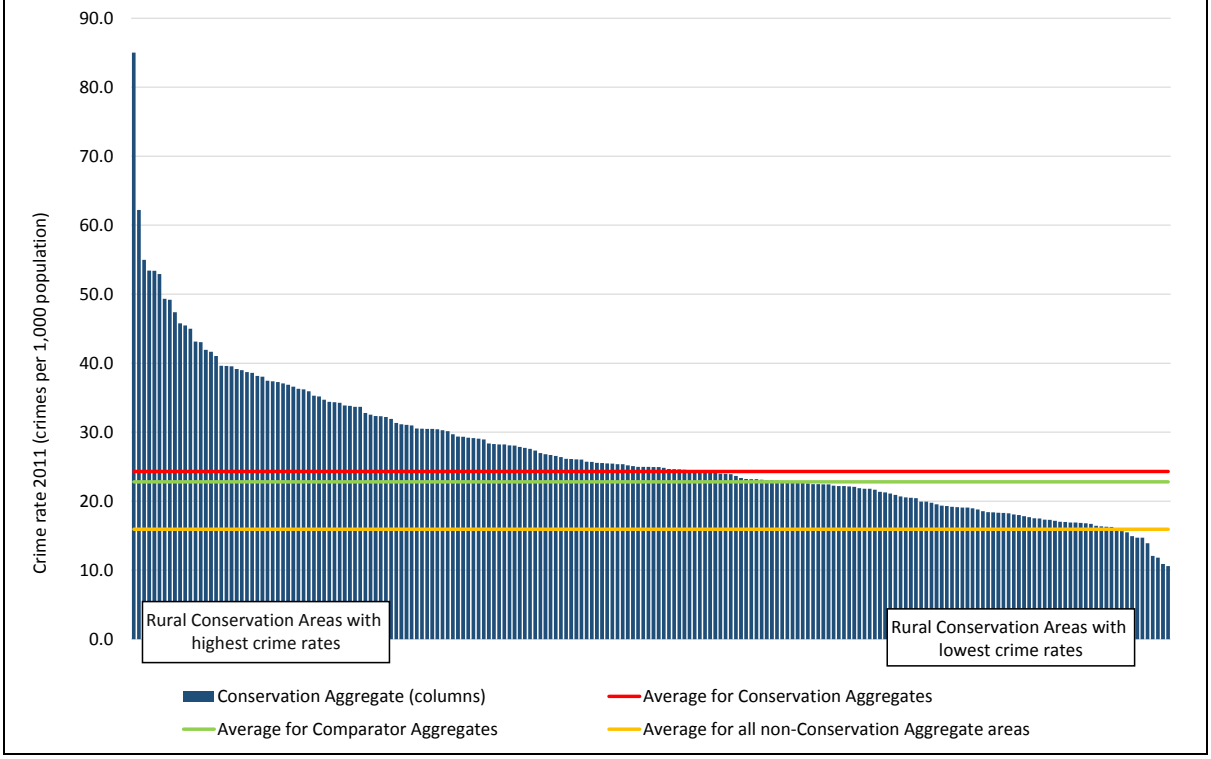


Figure 7.3 Crime rate in Urban Residential Conservation Aggregates in 2011

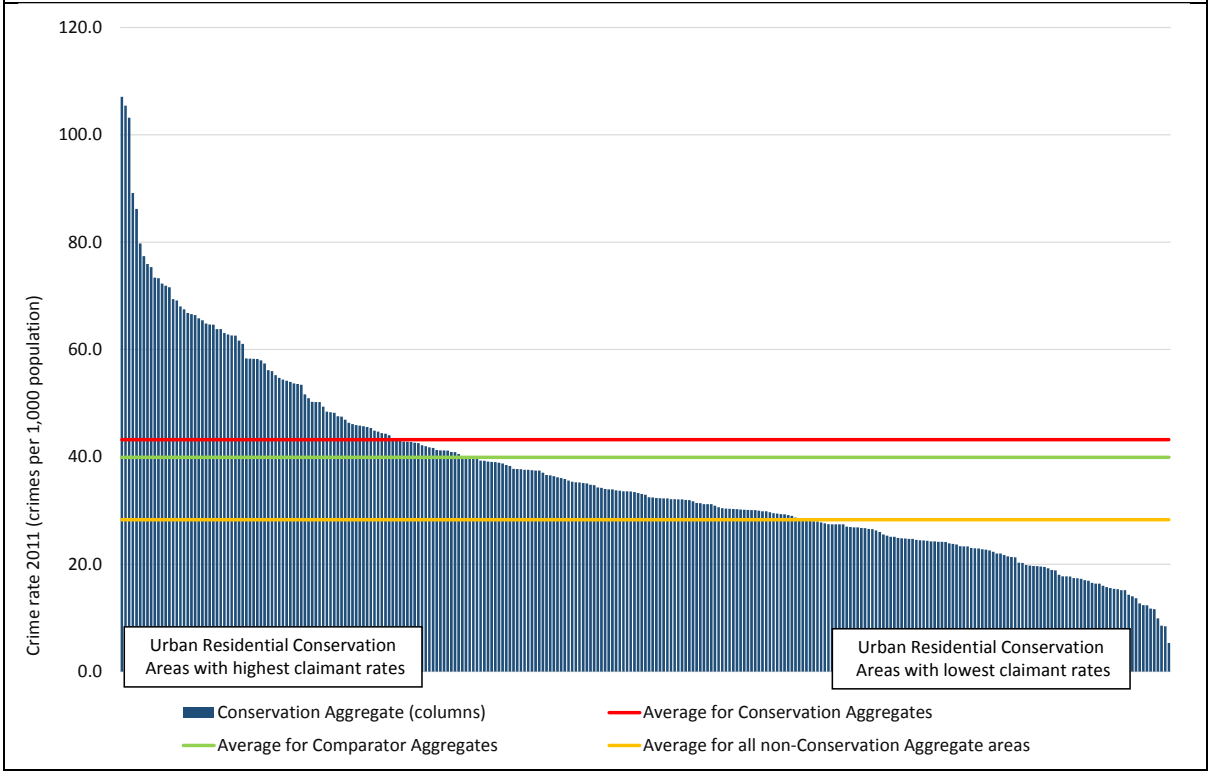
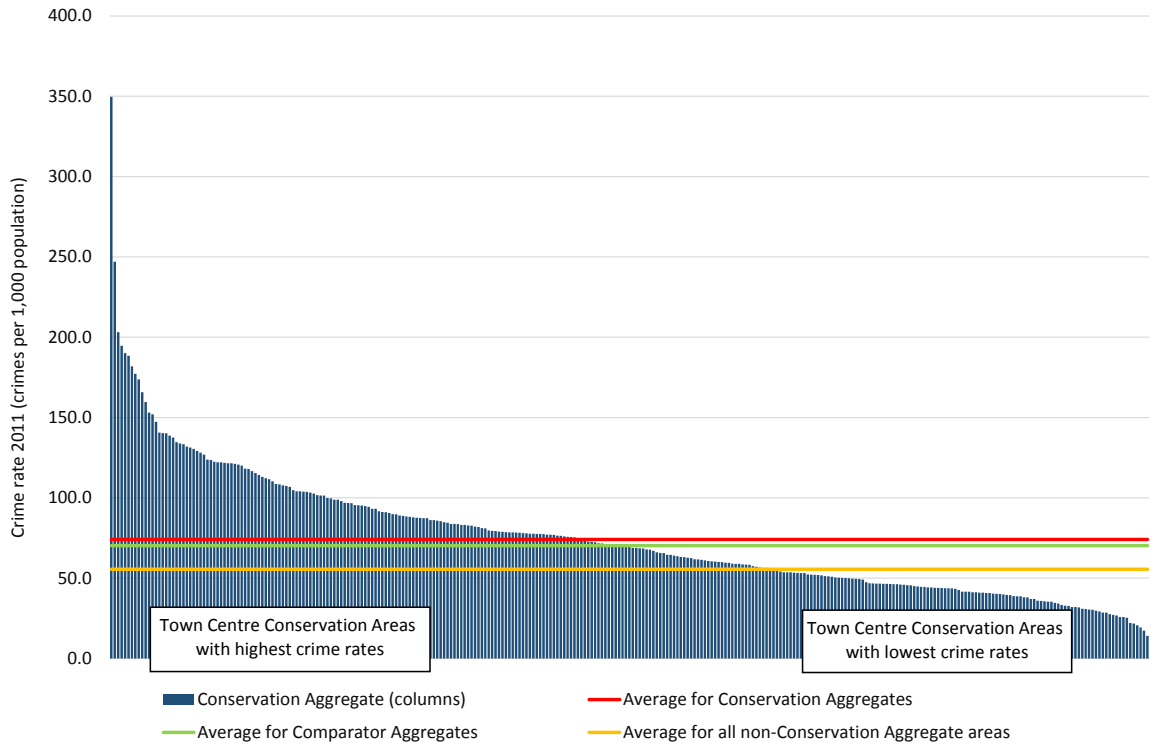


Figure 7.4 Crime rate in Town Centre Conservation Aggregates in 2011



It was apparent from Figure 7.1 and Table 7.1 that the average crime rate for all three groups of Conservation Aggregate were higher than the average rates in the respective groups of Comparator Aggregate at the baseline point in time. These findings are shown again in Figures 7.2 to 7.4 as the red horizontal reference lines (Conservation Aggregate average) can be seen to be placed higher than the green horizontal reference lines (Comparator Aggregate average). It is further evident from Figures 7.2 to 7.4 that the crime rate was higher in the groups of Conservation Aggregate than in the respective groups of 'all non-Conservation Aggregate areas' of the relative types. So at the baseline point in time, crime was typically higher in Conservation Aggregates than in the rest of the country (assessed separated by typology category).

Each of the three charts shows a similarly shaped distribution of crime rates, albeit stretching across different ranges of values up the vertical y-axis. On all three charts, the crime rates increase gradually across the Conservation Aggregates from right to left along the horizontal axis, then increase much more steeply at the most deprived end of the distribution (on the far left of each chart). These distributions indicate that in each of the three area type categories there are a relatively small number of Conservation Aggregates across England that exhibit notably higher crime rates that the majority of the other Conservation Aggregates of that type.

With regard to the Rural Conservation Aggregates, the crime rates in 2011 ranged from a high of 85.0 crimes per 1,000 population in Windsor and Maidenhead, to a low of 10.6 crimes per 1,000 population Fylde. It is evident that Windsor and Maidenhead is somewhat of an outlier, as the second-highest crime rate observed 62.2 crimes per 1,000 population in Hyndburn, followed by 55.0 crimes per 1,000 population in Mansfield. Even excluding these outliers, the chart shows

considerable variation in crime rates across Rural Conservation Aggregates, with some areas registering rates that were four or five times as high as those seen in the lowest crime areas.

The general picture for Urban Residential Conservation Aggregates is similar to that seen for Rural areas, in that there are notable tails at both ends of the crime rate distribution. Although crime rates at the lower end of the distribution were of similar magnitude to those seen at the lower end of the Rural group of areas, the values seen at the higher end far exceeded the Rural equivalents. This results in a notably wider range between the area with the highest and lowest crime rate in the Urban Residential areas than in the Rural areas. The Urban Residential Conservation Aggregates in the North East London Boroughs of Newham, Barking and Dagenham, and Waltham Forest each registered crime rates of greater than 100 crimes per 1,000 population in 2011. At the other end of the distribution, the Urban Residential Conservation Aggregates in West Devon, Uttlesford, Staffordshire Moorlands and South Lakeland each registered crime rates of less than 10 crimes per 1,000 population.

As might be expected, crime rates in Town Centre Conservation Aggregates are typically much higher than rates observed in the Urban Residential and Rural groups. Again, notable tails are evident at both ends of the distribution, particularly in relation to the highest crime areas. In the City of London Conservation Aggregate the crime rate was approximately 350 crimes per 1,000 population, however, City of London is acknowledged to be a special case due to the very low resident population relative to the total numbers of people visiting the area (for work etc), which influences the calculation of crime rates. The second- and third-highest crime rates observed across the Town Centre Conservation Aggregates were seen in Blackpool and Dartford, respectively, which both registered crime rates of over 200 crimes per 1,000 population. Blackpool town centre is a major tourist destination and is characterised by a high concentration of leisure and entertainment enterprises which are known to be crime generating factors. In contrast, the Town Centre Conservation Aggregates in Hart, North Tyneside and Ribble Valley registered crime rates of less than 20 crimes per 1,000 population.

For more details on the geographic distribution of crime rates in Conservation Aggregates at a baseline point in time see, Maps H 7 to H 9 in Appendix H.

Key findings summary:

- There is considerable variation in Conservation Aggregate crime rates. Variation is apparent both *between* the typology groups and also *within* each of the typology groups.
- In terms of variation between typology groups, Town Centre areas typically have the highest rates and Rural areas typically have the lowest rates.
- In terms of variation within typology groups, there are tails at both the upper and lower end of each distribution. The tail at the upper end of the distribution shows that some areas experience notably higher crime rates than the majority of the Conservation Aggregates of that type, and these might be regarded as 'hotspots' in relation to other Conservation Aggregates of that type.
- The Conservation Aggregates with the highest crime rates were the Town Centre areas in City of London and Blackpool. However, both these areas have relatively large non-resident population who are potentially at risk of victimisation and yet do not live in the

area, thus skewing the crime rates which are based on crimes per 1,000 resident population.

How do Conservation Aggregates compare with their Comparator Aggregates at a baseline point in time?

The Comparator Aggregates were designed to be as similar as possible to their Conservation Aggregate in terms of levels of multiple deprivation and population size in 2005. Before turning to analyse change in each Conservation Aggregate relative to its matched Comparator Aggregate, it is first instructive to consider the degree to which individual Comparator Aggregates match their Conservation Aggregate on the crime rate indicator at the 2011 time point. While it would have been preferable to undertaken these comparisons on a 2005 time point, regrettably the earliest crime data available from www.police.uk relates to the calendar year 2011.

The scatterplots below compare the crime rate in 2011 in Conservation Aggregates and their matched Comparator Aggregates. The charts show how closely the baseline crime rate in Conservation Aggregates is mirrored in their associated Comparator Aggregates, with areas plotted close to the red diagonal reference line showing a very good match between Conservation and Comparator Aggregates, areas displayed above the diagonal reference line showing higher crime rates in Comparator Aggregates than Conservation Aggregates (and vice versa).

Note: for this analysis we have excluded Conservation Aggregates where we were unable to achieve a good match with Comparator Aggregates, either in terms of IMD 2007 score or overall population. See Appendix B for details.

Figure 7.5 Crime rate in Rural Conservation and Comparator Aggregates in 2011

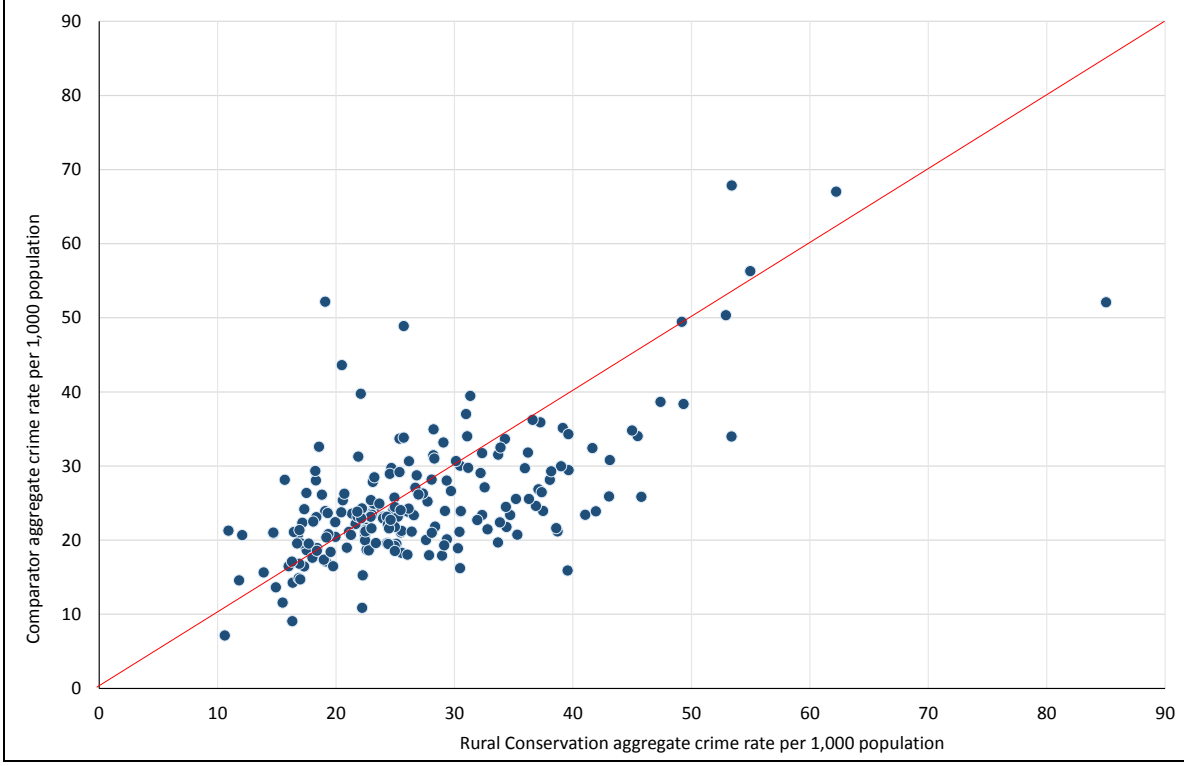


Figure 7.6 Crime rate in Urban Residential Conservation and Comparator Aggregates in 2011

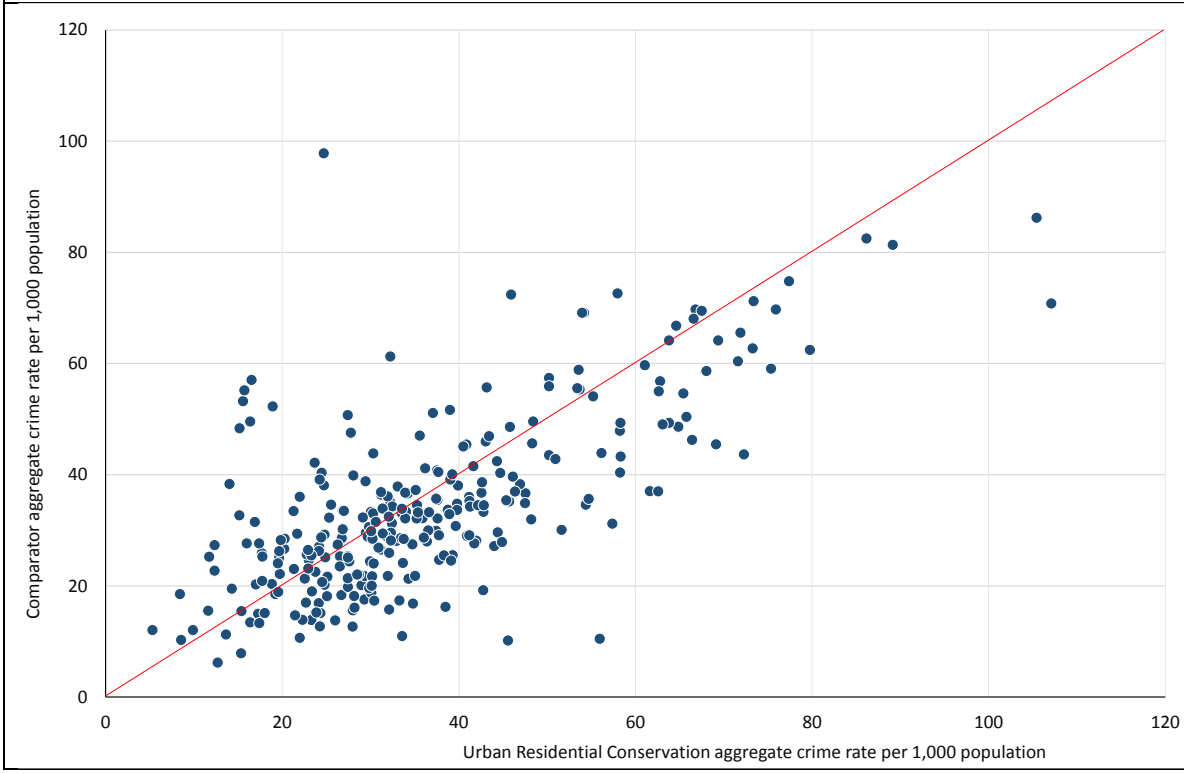
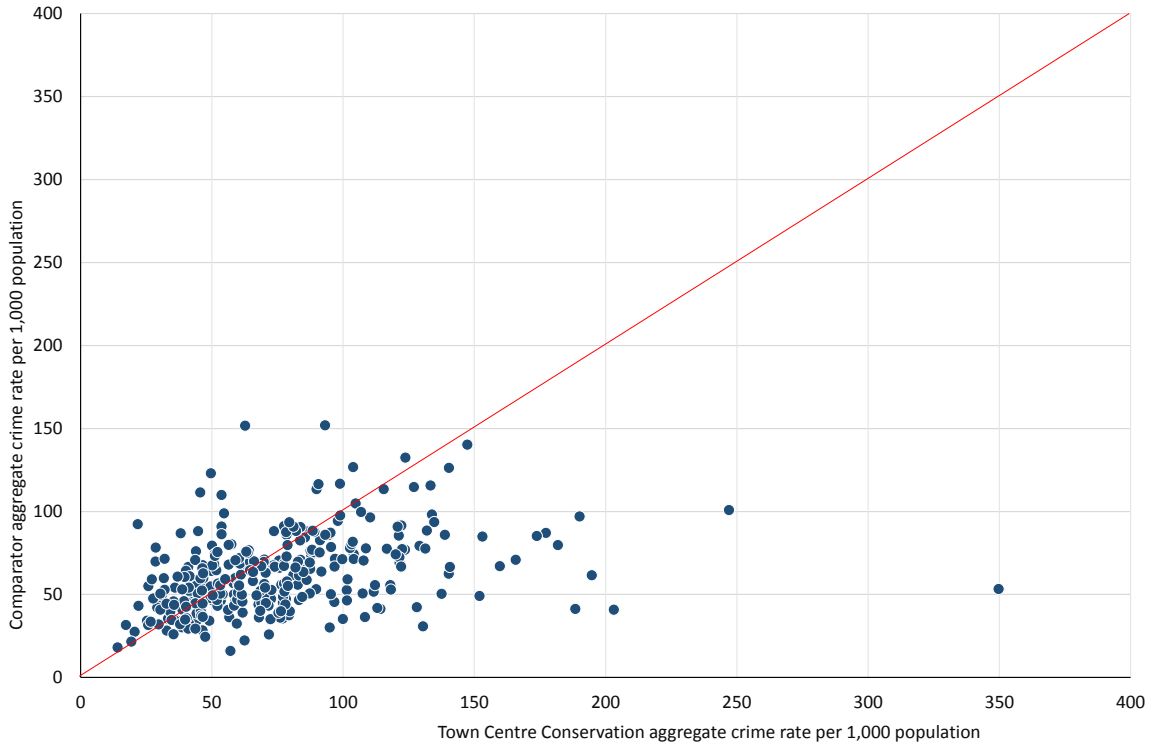


Figure 7.7 Crime rate in Town Centre Conservation and Comparator Aggregates in 2011



Although Figures 7.5, 7.6 and 7.7 show clear positive and linear relationships between the crime rates for Conservation Aggregates and the respective crime rates for their matched Comparator Aggregates, it must be acknowledged that there is a notable amount of scatter. In other words, there are some cases where, at the 2011 starting point for the crime rate time series, the crime rate for the Conservation Aggregate is considerably different to the crime rate for the matched Comparator Aggregate. These discrepancies between the Conservation Aggregates and Comparator Aggregates may in part be due to the fact that the data for the crime rate time series is only available from 2011 onwards, whereas the matching of Comparators to Conservation Aggregates was based on data for 2005, and crime rates may have changed considerably between 2005 and 2011. However, the discrepancies may also be partly attributable to the physical environment of the Conservation Aggregates and their matched Comparators, as crime is known to be partly determined by factors such as land use function, and it may be that a Town Centre Conservation Aggregate was characterised by predominantly office buildings, while its matched comparator contained a concentration of nightlife economy facilities, or vice versa. As such, readers are advised to acknowledge the potential mis-match between Conservation and Comparator Aggregates when interpreting the results below. It is important to note, however, that many Conservation Aggregates *are* well matched to their Comparator Aggregates in terms of crime rates at 2011 and that there are only relatively few cases where the match is clearly very poor.

Key findings summary:

- The scatterplots show a positive relationship between the Conservation Aggregate crime rate and matched Comparator Aggregate crime rate in 2011 across all three typology groups.
- In some instances the difference between the Conservation Aggregate and Comparator Aggregate is quite sizeable.
- These differences in crime rates may be due to multiple factors, such as change prior to the 2011 start point for the crime data series, or differences in the land use function of the Conservation Aggregate and Comparator Aggregate that could not be taken into account when designing the Comparator Aggregates.
- The reader should acknowledge that some Conservation Aggregates are not very well matched to their Comparator Aggregate at the 2011 baseline time point. However, most Conservation Aggregates are relatively well matched to their Comparator Aggregate.

How has the profile of Conservation Areas changed over time?

The following analyses are concerned with unpicking the high-level national and regional summaries presented in Figure 7.1 and Figures H.1 to H.6 in Appendix H in order to show the patterns and trends experienced within each individual Conservation Aggregate over the time period considered. Again, the focus is on change over the period 2011 to 2016. The charts below compare the change in crime rates across each of the Conservation Aggregates between 2011 and 2016 and therefore show the distribution of values that underpin the national and regional summaries discussed above.

The size of the bars in Figure 7.8 are calculated by taking the Conservation Aggregate crime rate in 2016 and subtracting the Conservation Aggregate crime rate in 2011. Therefore, in cases where the crime rate was higher in 2016 than in 2011 the change value on the chart will be positive, whereas in cases where the crime rate was lower in 2016 than in 2011 the change value on the chart will be negative.

Figure. 7.8 Change in crime rate in Rural Conservation Aggregates between 2011 and 2016

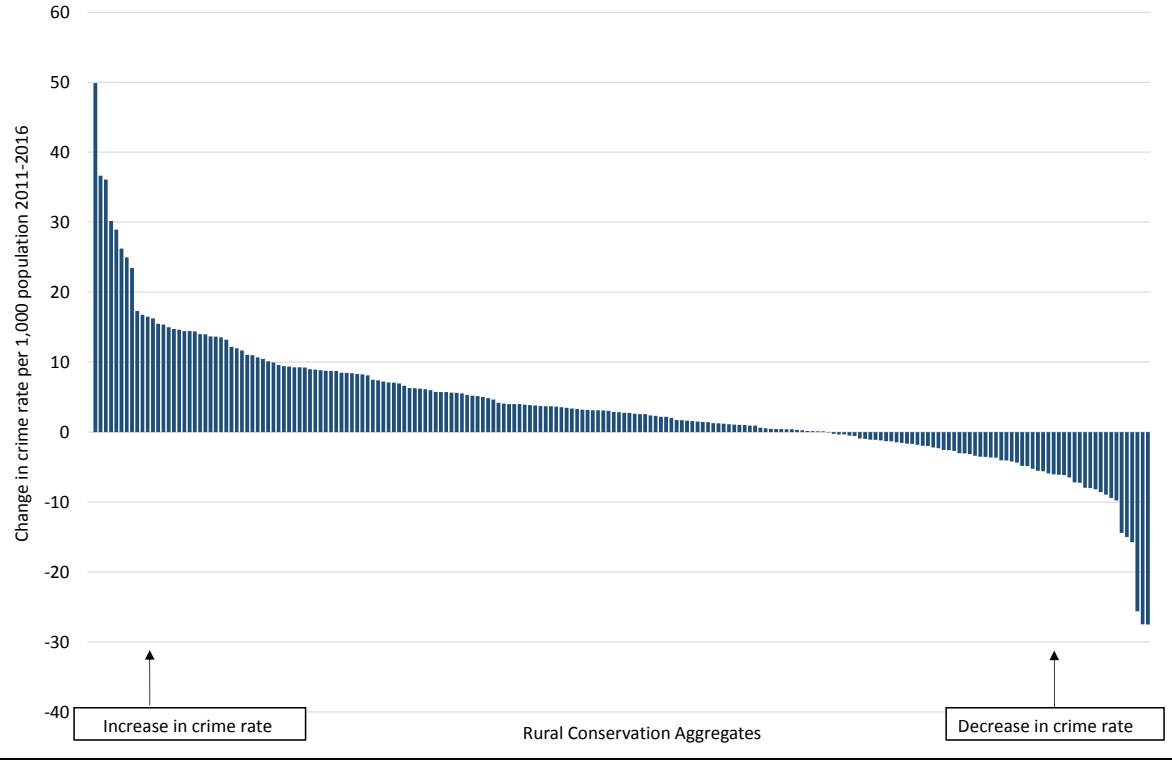


Figure 7.9 Change in crime rate in Urban Residential Conservation Aggregates between 2011 and 2016

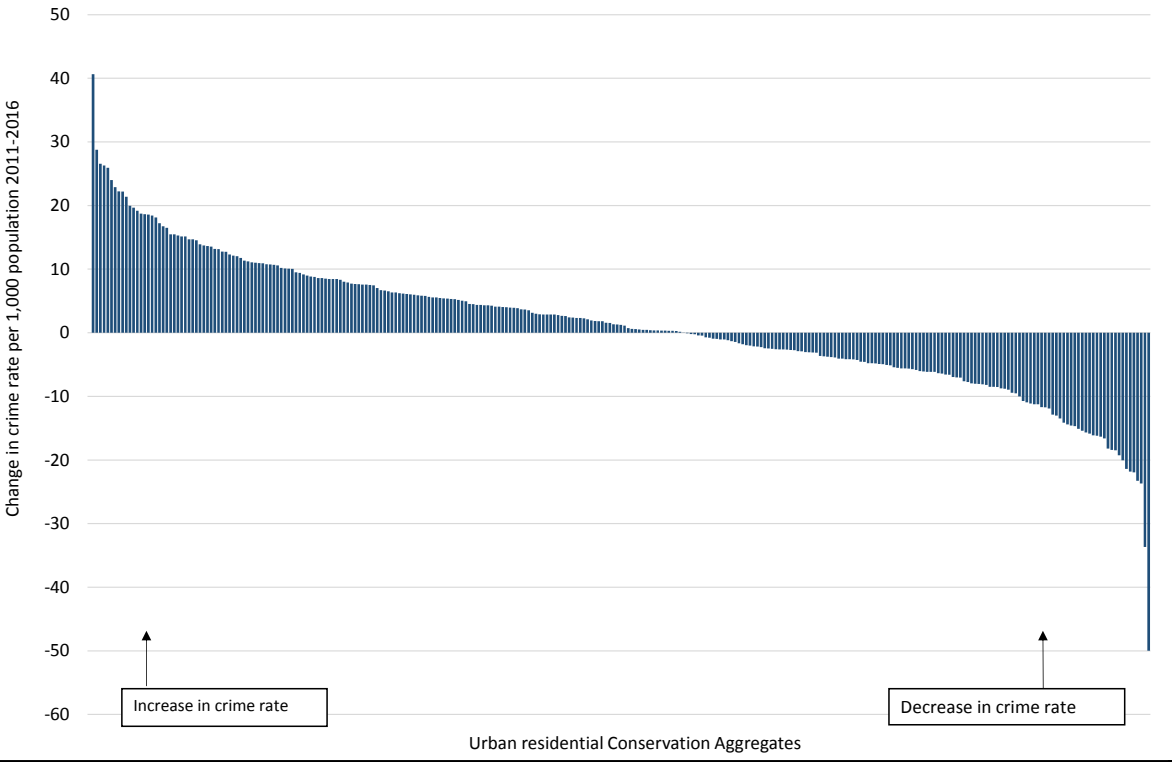
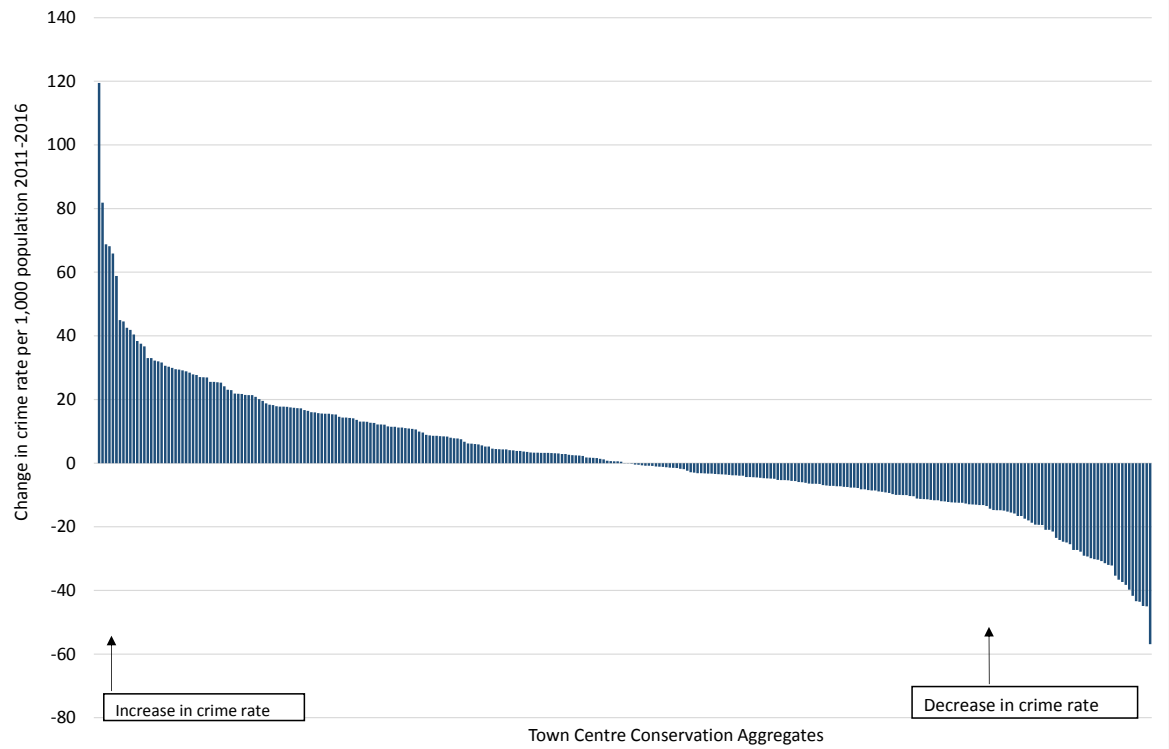


Figure 7.10 Change in crime rate in Town Centre Conservation Aggregates between 2011 and 2016



First, in relation to change over time in Rural Conservation Aggregates, it is evident from Figure 7.8 that a clear majority of areas saw an increase in crime rate between 2011 and 2016, depicted through the bars on the left-hand side of the chart, above the zero line. Indeed, 69% of the Rural Conservation Aggregates saw the crime rate rise over the period, with the remaining 31% of areas seeing the crime rate fall. The magnitude of change in Rural Conservation Aggregate crimes rates between 2011 and 2016 can be seen to range from an increase of almost 50 crimes per 1,000 population in the Wirral through to a decrease of over 25 crimes per 1,000 population in Windsor and Maidenhead, Hyndburn and Bromley. Note, Windsor and Maidenhead and Hyndburn were the Rural Conservation Aggregates with the highest crime rates in 2011 and the large fall between then and 2016 may be attributable to many factors, possible including changes to policing priorities and/or detection strategies. Just six areas saw crime rates fall by over 10 crimes per 1,000 population, whereas 34 areas saw crime rates rise by over 10 crimes per 1,000 population.

The pattern of change observed in Urban Residential Conservation Aggregates is somewhat similar to that observed for the Rural areas, although a greater proportion of Urban Residential areas saw crime rates fall over the period (44% of Urban Residential areas) as compared to the Rural areas. In terms of the magnitude of change, 36 Urban Residential Conservation Aggregates saw the crime rate fall by over 10 crimes per 1,000 population, with the largest decreases registered in Waltham Forest and Newham. Again, it can be noted that these areas also were the Urban Residential Conservation Aggregates with the highest crime rates in 2011. Conversely, 55 areas saw the crime rate rise by over 10 crimes per 1,000 population, with the largest increases seen Great Yarmouth and Test Valley.

Analyses presented earlier in this chapter highlighted how crime rates were typically higher in the Town Centre Conservation Aggregates than in either the Urban Residential or Rural Conservation Aggregates. When looking at change over time it is also evident that the magnitude of changes seen

in Town Centre areas are typically greater than for the other two groups, with the greatest increase in crime rates being seen in the Oldham Town Centre Conservation Aggregate (an increase of 119 crimes per 1,000 population) and the greatest decrease in crime rates occurring in the Woking Town Centre Conservation Aggregate (a reduction of 57 crimes per 1,000 population). Exactly half the areas saw crime rates fall and half saw crime rates rise. Of those Conservation Aggregates where the rates fell, 74 areas saw reductions of 10 crimes per 1,000 population or more, whereas of those Conservation Aggregate where rates rose, 92 areas saw increases of 10 crimes per 1,000 population or more.

Key findings summary:

- Exactly half of the Town Centre Conservation Aggregates saw crime rates fall between 2011 and 2016.
- Just less than half of the Urban Residential Conservation Aggregates saw crime rates fall over the period, meaning that just over half saw crime rates rise.
- Over two-thirds of Rural Conservation Aggregates saw crime rates rise over the period, meaning that less than a third of areas saw rates fall.
- The magnitude of change (either increase or decrease) was quite small for many Conservation Aggregates.

The maps below show the geographical spread in more detail – showing change in crime rate between 2011 and 2016 in Rural, Urban Residential and Town Centre Conservation Aggregates. Conservation Aggregates shaded pink on the map are characterised as showing notable decreases in the crime rate over the period (i.e. absolute improvement). Conservation Aggregates shaded blue are characterised as having notable increases in the crime rate (i.e. absolute worsening of position). Conservation Aggregates shaded light green have not experienced appreciable change between 2011 and 2016. For detail of how the map colours are calculated see Appendix C.

Figure 7.11 Change in crime rates 2011 to 2016 in in Rural Conservation Aggregates

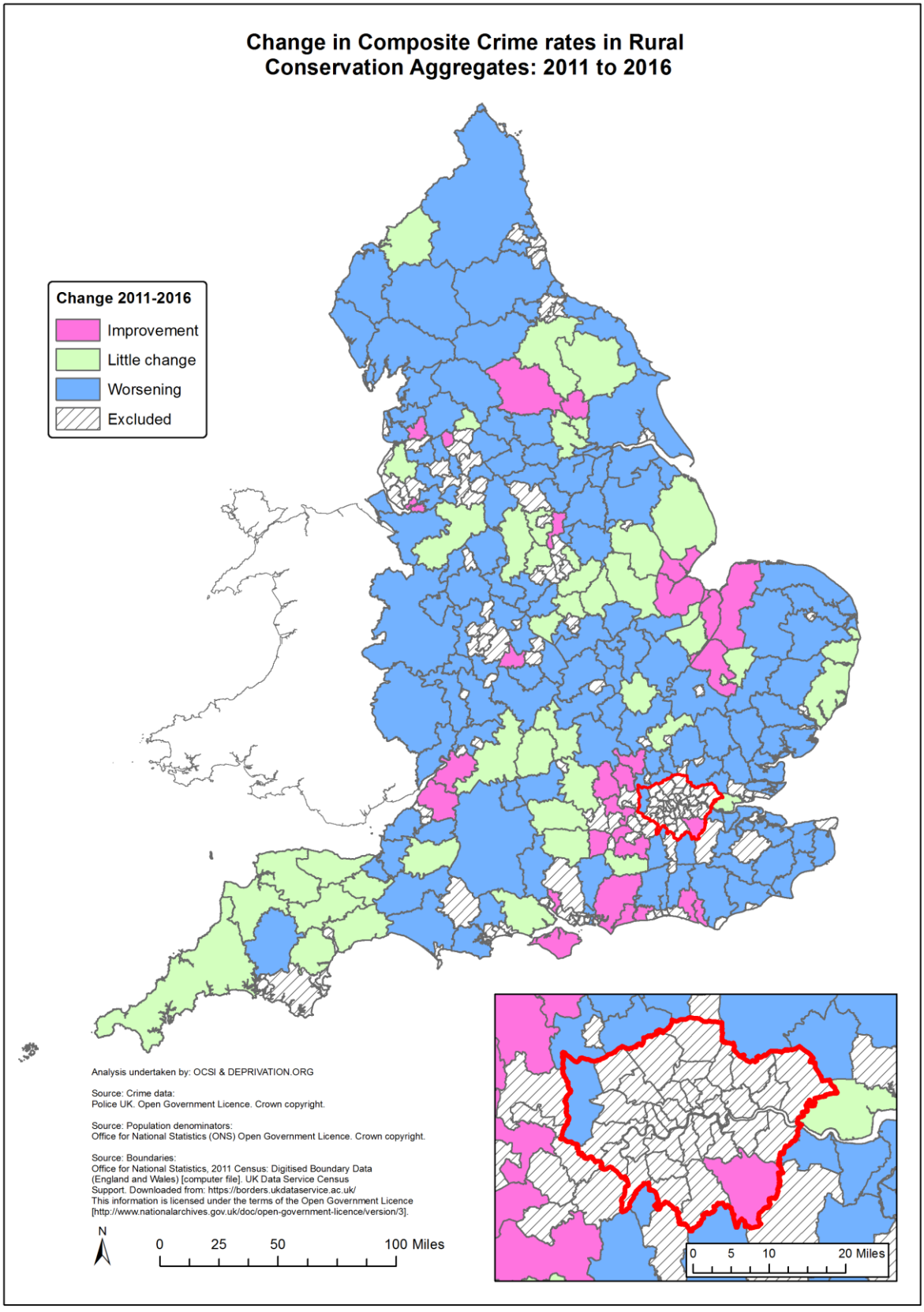


Figure 7.12 Change in crime rates 2011 to 2016 in Urban Residential Conservation Aggregates

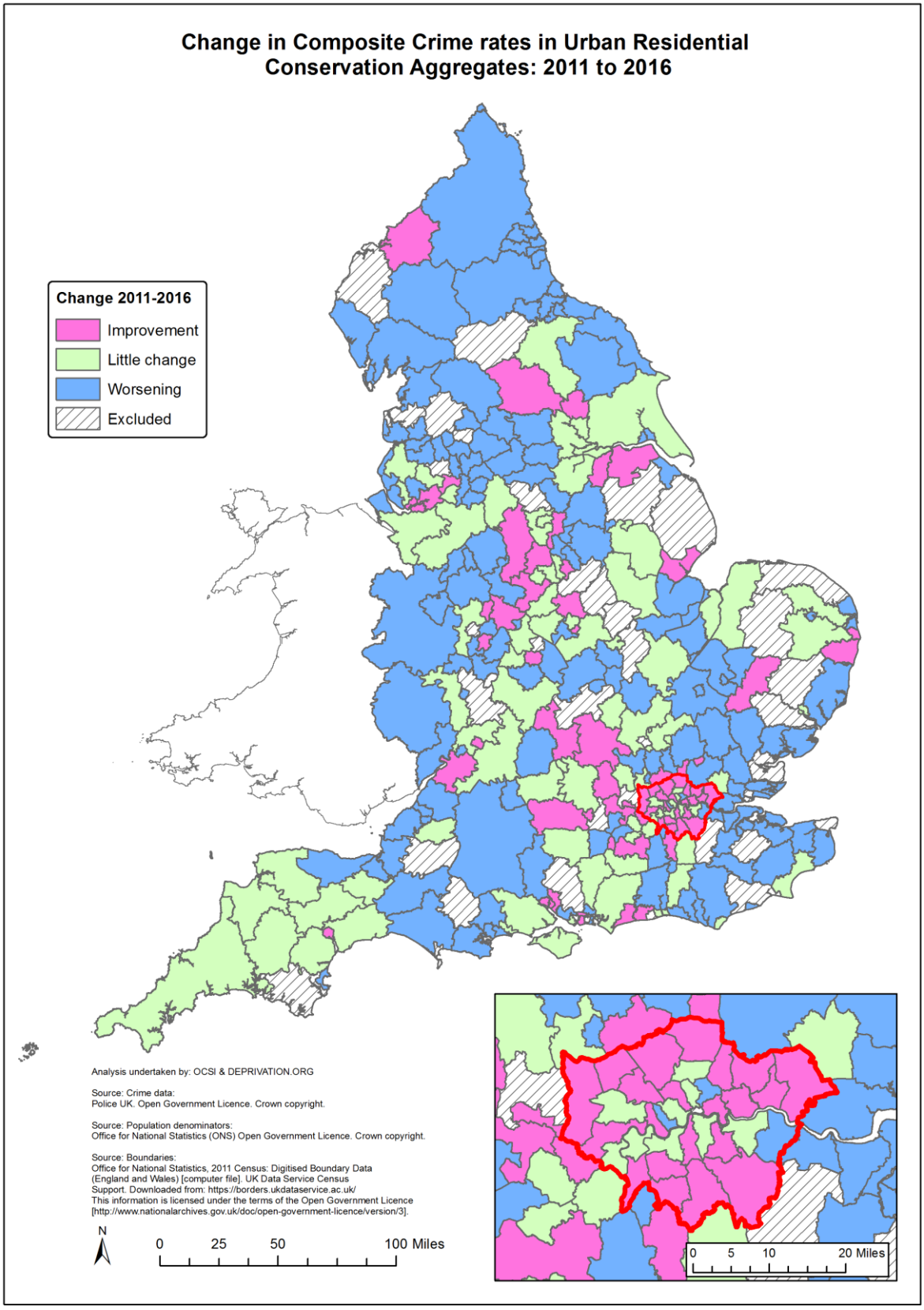
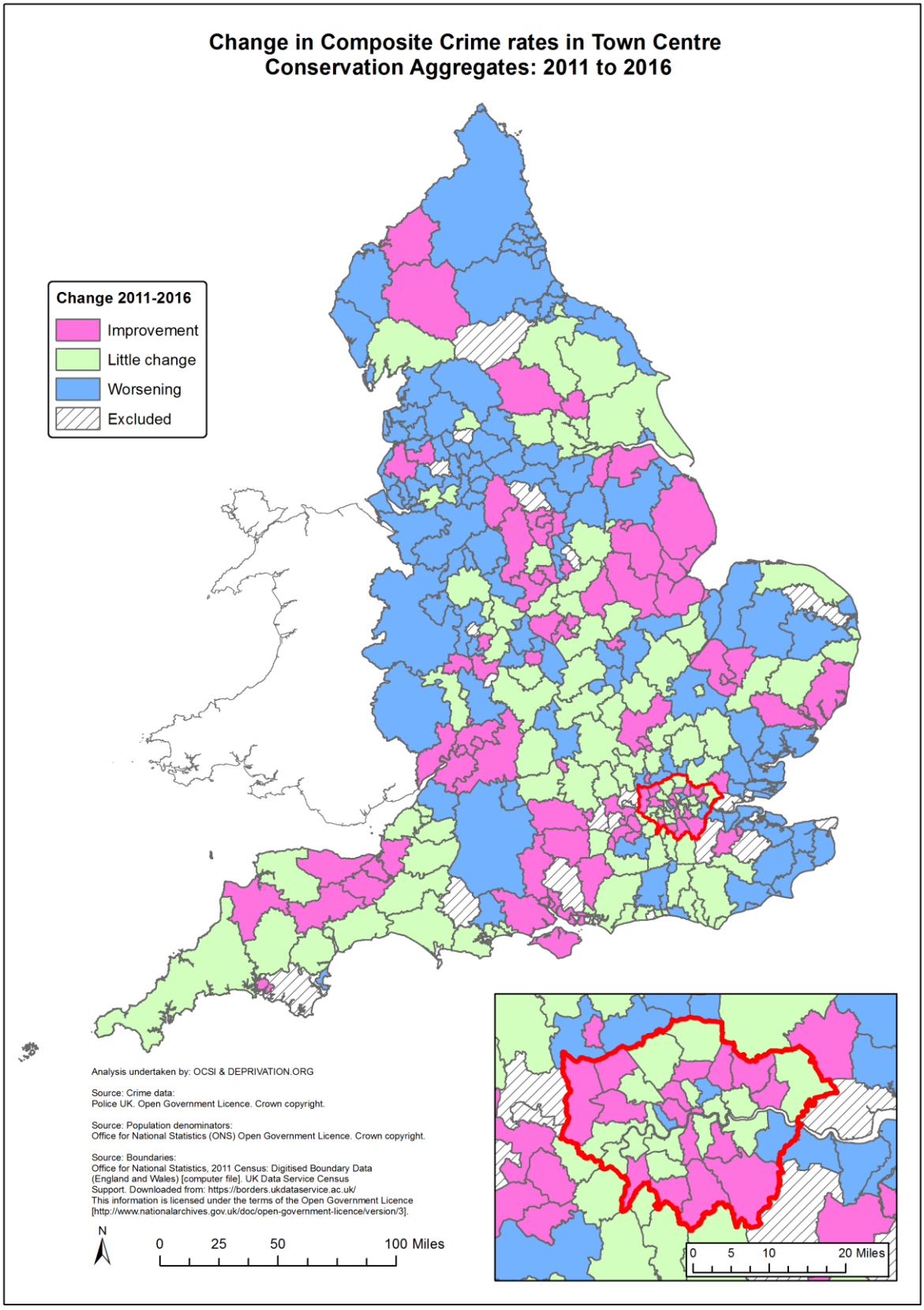


Figure 7.13 Change in crime rates 2011 to 2016 in Town Centre Conservation Aggregates



These findings are helpful in setting the context in terms of how Conservation Aggregates have changed over time on the crime rate indicator. However, in order to assess whether Conservation Aggregates were simply following the broader trends or alternatively experiencing more (or indeed less) pronounced trends, it is necessary to consider each Conservation Aggregate relative to its matched Comparator Aggregate. This is the focus of the following analytical section.

How are Conservation Areas changing relative to matched Comparator Aggregates?[61]

It was observed earlier in this chapter that many Comparator Aggregates registered similar rates of crime to their matched Conservation Aggregate at the 2011 baseline time point, although in a minority of cases the differentials between the Conservation Aggregate and Comparator Aggregate were more pronounced. The starting assumption is that, if Conservation Area designation has no effect on crime rates (either positively or negatively), then crime trends in each Conservation Aggregate are likely to be of similar magnitude (and direction) to the matched Comparator Aggregate. The focus in this section of the analysis is to observe whether crime rate trends in Conservation Aggregates are indeed similar to their matched Comparator Aggregates or whether there is evidence of more pronounced changes across Conservation Aggregates than across Comparator Aggregates. If there is any clear patterning whereby Conservation Aggregates show better outcomes than their matched Comparator Aggregates then this is worthy of further research. Equally, if there is any clear patterning that Conservation Aggregates fare worse than their matched Comparator Aggregates then this would also be worthy of further research. Whilst these analysis presented here cannot reveal anything about causation and cannot permit any direct attribution of impact, they do provide an important overview of how Conservation Aggregates are changing over time relative to other similarly deprived, similarly sized geographical areas in the same general geographical vicinity.

Table 7.2 below summarises the overall trend in Rural, Urban Residential and Town Centre Conservation Aggregates relative to their matched Comparator Aggregate. The areas are grouped into four categories:

1) Conservation Aggregates experiencing both reduction in crime rate and improvement relative to their matched Comparator Aggregates over the period. Conservation Aggregates in this group could be said to be achieving *Good Growth* as they had both a positive direction of travel and were experiencing this improvement at a faster rate than non-Conservation Aggregates in the same locality.
2) Conservation Aggregates which have seen an improvement in terms of reduction in crime, but where this improvement has been smaller than in their matched Comparator Aggregate. Conservation Aggregates in this group have had a positive direction of travel but there is less evidence to suggest that their Conservation Area status has been a factor in this improvement, as similar non-Conservation Areas have experienced a greater level of improvement.

[61] Note: for this analysis we have excluded Conservation Aggregates where we were unable to achieve a good match with Comparator Aggregates, either in terms of IMD 2007 score or overall population.

3) Conservation Aggregates experiencing an increase in crime rates but an improvement relative to their matched Comparator Aggregates over the period. Conservation Aggregates in this group have seen an overall worsening of crime rates over the period; however, similar areas within the same locality have been experienced an even greater increase in crime (suggesting that the Conservation Aggregate may have proved more resilient than the surrounding area).
4) Conservation Aggregates experiencing both an increase in crime rate and where they have not been performing as well as their matched Comparator Aggregates over the period. It could be argued that this group is the most concerning, as these areas have experienced a worsening both in absolute terms and also relative to their matched Comparator Aggregate.

It should be noted that in this particular part of the analysis, a simply binary distinction is made as to whether the crime rate in each area increased or decreased. As an area will be regarded as having seen an increase in crime rates even if the increase is very small, and the same for areas that have seen a decrease in crime rates.

Table 7.2: Absolute and relative performance of Conservation Aggregates

	Rural	Urban Residential	Town Centre
1) Reduction in crime in Conservation Aggregates & Conservation Aggregates outperform Comparator Aggregates	27.1%	30.4%	36.7%
2) Reduction in crime in Conservation Aggregates & Comparator Aggregates outperform Conservation Aggregates	3.5%	14.0%	12.1%
3) Increase in crime in Conservation Aggregates & Conservation Aggregates outperform Comparator Aggregates	24.1%	15.0%	14.8%
4) Increase in crime in Conservation Aggregates & Comparator Aggregates outperform Conservation Aggregates	45.2%	40.6%	36.3%
Total	100.0%	100.0%	100.0%

Please see Scatterplots H.17 to H.19 in Appendix H for more detailed exploration of the distribution of Conservation Aggregates in each of these four groups.

It can be seen from Table 7.2 that in almost half (45.2%) of the Rural Conservation Aggregates the crime rates rose over the period 2011 and 2016 *and* the change was less favourable than the change observed in the area's matched Comparator Aggregate. In other words, almost half the Rural Conservation Aggregates saw crime rates rise in both absolute and relative terms. At the other end of the scale, just over a quarter (27.1%) of Rural Conservation Aggregates experienced lower crime rates in 2016 than 2011 *and* the magnitude of change was more favourable than the matched Comparator Aggregate. In these cases the Conservation Aggregates saw both absolute and relative improvements in the crime rate. The picture is similar, albeit less marked, for Urban Residential Conservation Aggregates (where 40.6% of areas saw both absolute and relative increases in crime, versus 30.4% that saw absolute and relative decrease in crime). For the group of Town Centre Conservation Aggregates, the proportion seeing absolute and relative increases in crime rates was almost identical to the proportion seeing absolute and relative decreases in crime rate (36.3% and 36.7%, respectively).

The magnitude of the difference between Conservation Aggregates and their matched Comparator Aggregates is explored in the charts below. The heights of the bars represent the difference between the Conservation Aggregate and the matched Comparator Aggregate in terms of change in

crime rate between 2011 and 2016. The bars essentially convey the change in each Conservation Aggregate net of the change in the matched Comparator Aggregate. For example, if a Conservation Aggregate saw its crime rate decrease by 20 crimes per 1,000 population over the period, and its matched Comparator Aggregate saw its rate decrease by 15 crimes per 1,000 population over the period, then the net change in the Conservation Aggregate would represent a reduction of 5 crimes per 1,000 population. Alternatively, if a Conservation Aggregate saw its rate increase by 30 crimes per 1,000 population over the period, and its matched Comparator Aggregate saw its rate increase by 10 crimes per 1,000 population then the net change in the Conservation Aggregate wold represent an increase of 20 crimes per 1,000 population. If the change was identical in the Conservation Aggregate and its matched Comparator Aggregate then the net change over the period in the Conservation Aggregate would be zero.

Figure 7.14 Relative change in crime rate between 2011 and 2016 for Rural Conservation Aggregates compared to their matched Comparator Aggregates

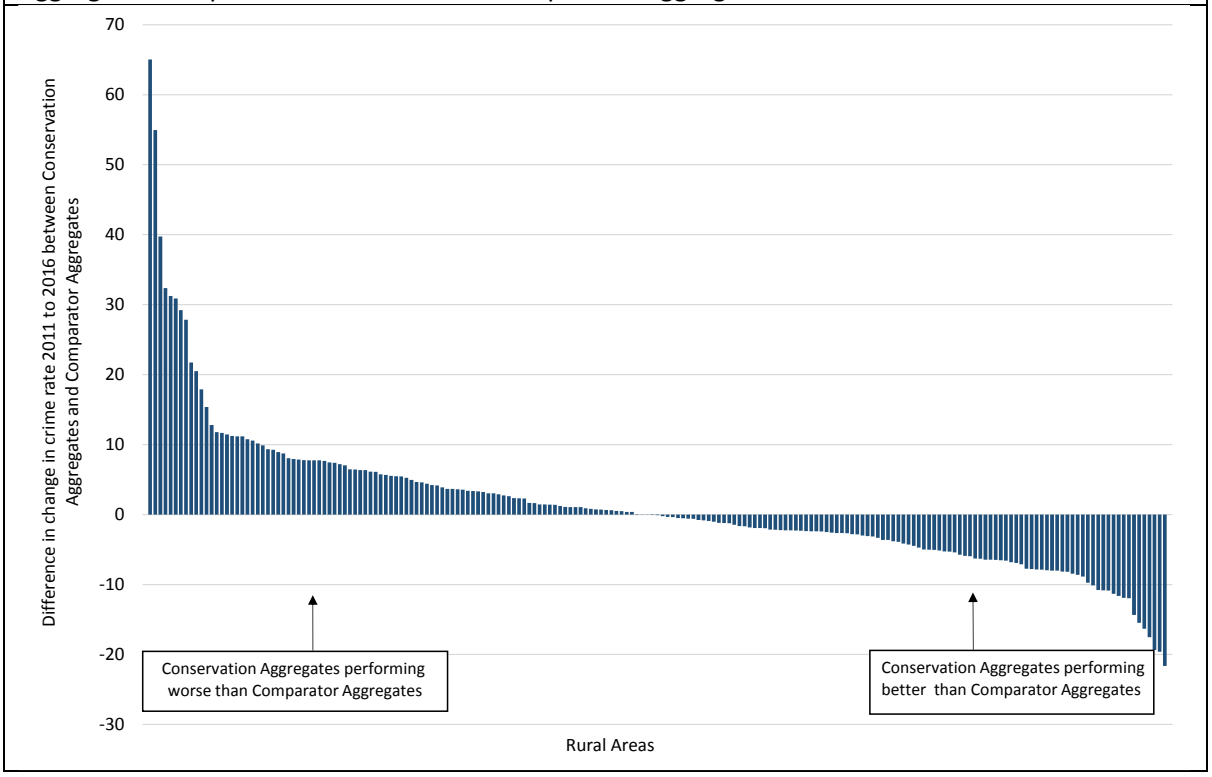


Figure 7.15 Relative change in crime rate between 2011 and 2016 for Urban Residential Conservation Aggregates compared to their matched Comparator Aggregates

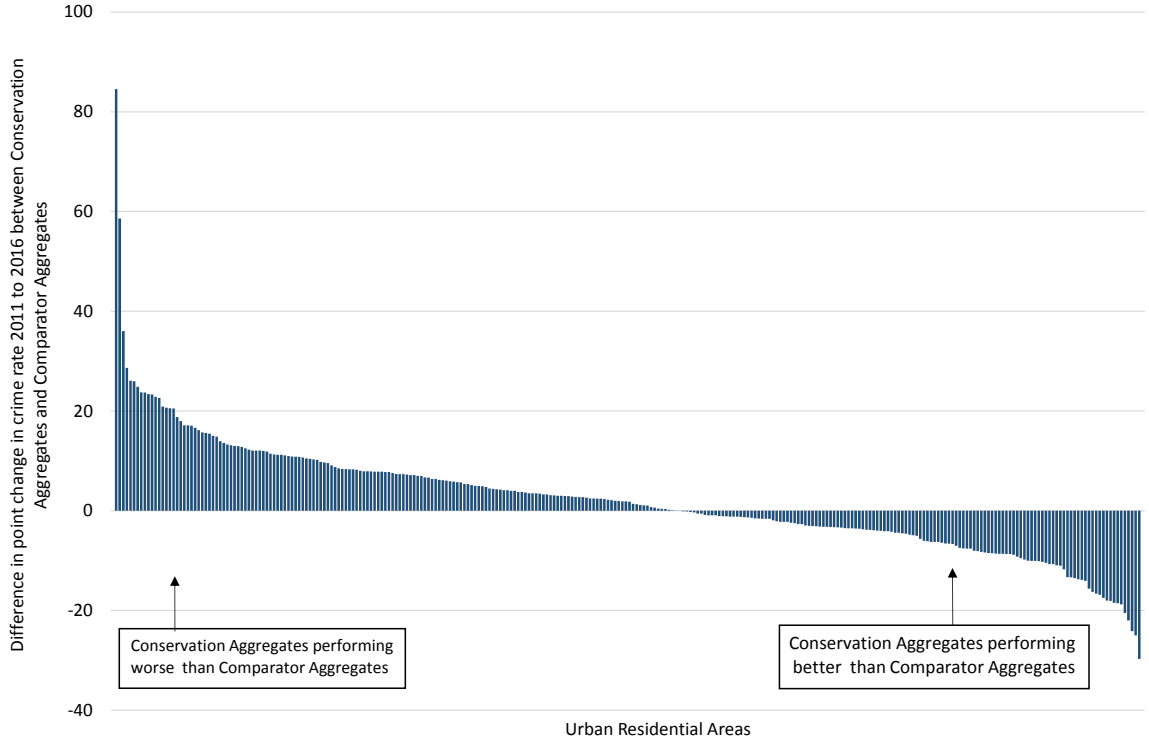
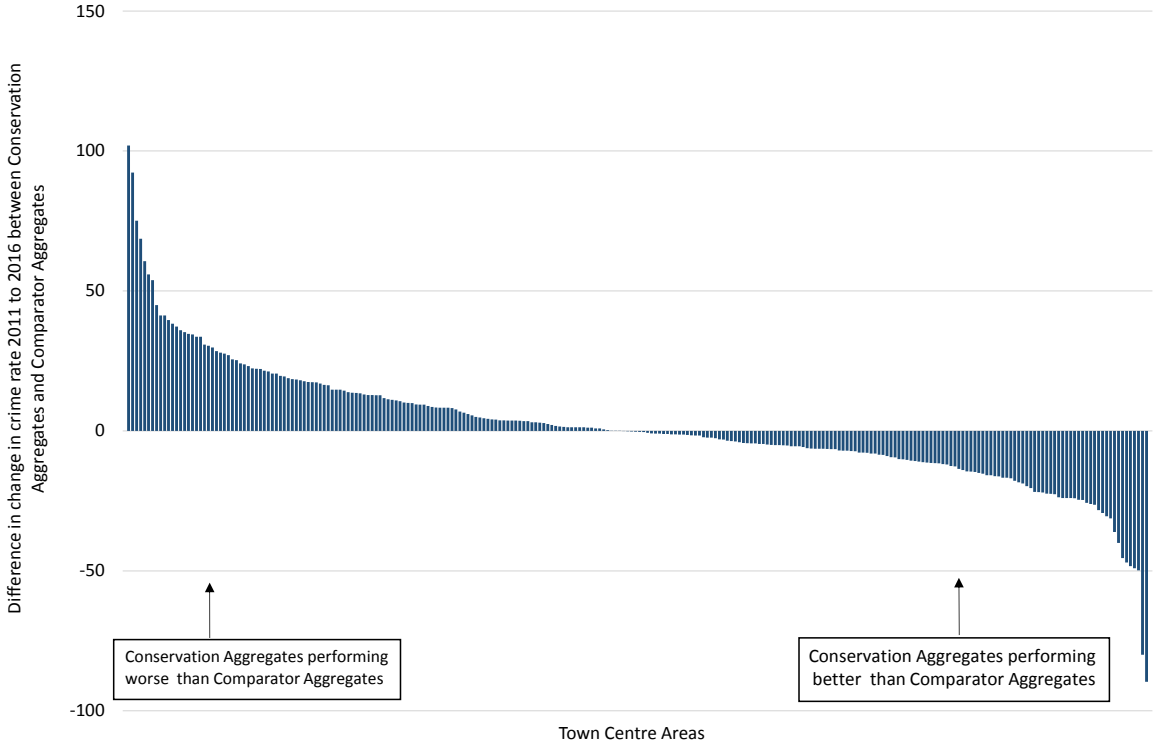


Figure 7.16 Relative change in crime rate between 2011 and 2016 for Town Centre Conservation Aggregates compared to their matched Comparator Aggregates



As illustrated in the charts above, the overall distribution in terms of relative performance is similar across Rural, Urban Residential and Town Centre Conservation Aggregates alike with roughly half of Conservation Aggregates outperforming comparators and vice versa. The difference is greatest for the Urban Residential group, where approximately 55% of Conservation Aggregates performed worse than the matched Comparator Aggregate, with the remaining 45% of Urban Residential areas performing better than the matched Comparator.

Fifteen Rural Conservation Aggregates saw a net improvement in crime rates of over 10 crimes per 1,000 population between 2011 and 2016, whereas 22 areas saw a net worsening of crime rates of over 10 crimes per 1,000 population. The three Rural Conservation Aggregates that saw the greatest relative improvement were Preston, Darlington and Lewes, which each recorded a net improvement of around 20 crimes per 1,000 population. In contrast, Trafford, North East Lincolnshire and Wirral all recorded a net worsening in crime rates of between 40 and 65 crimes per 1,000 population.

Thirty-two Urban Residential Conservation Aggregates saw a net improvement in crime rates of over 10 crimes per 1,000 population between 2011 and 2016, whereas 57 areas saw a net worsening of crime rates of over 10 crimes per 1,000 population. In the Waltham Forest, South Derbyshire, Aylesbury Vale, Southend-on-Sea and Bolsover Urban Residential Conservation Aggregates, the net improvement in crime rates exceeded 20 crimes per 1,000 population, while in the Forest of Dean, Tewkesbury and Great Yarmouth Urban Residential Conservation Aggregates, the net change in crime rate represented a worsening of over 30 crimes per 1,000 population.

Sixty-three Town Centre Conservation Aggregates registered a net improvement in crime rates of over 109 crimes per 1,000 population, with the West Lancashire and Corby areas seeing a net improvement of over 80 crimes per 1,000 population. In contrast, 71 areas saw their crimes rates worsen relative to the matched comparator by a margin of 10 crimes per 1,000 population or more, of which the Dartford, Wellingborough and Oldham areas saw their crime rates worsen by more than 75 crimes per 1,000 population relative to their comparator.

Tables 7.3 to 7.8 below show the ten best performing and ten worst performing Conservation Aggregates in each category.

Table 7.3: Worst performing Rural Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in crime rate 2011 to 2016 (crimes per 1,000 population)		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Wirral	North West	+49.9	-15.2	+65.0
North East Lincolnshire	Yorkshire Humber	+36.6	-18.3	+54.9
Trafford	North West	+30.2	-9.6	+39.7
Swindon	South West	+29.0	-3.4	+32.4
Wellingborough	West Midlands	+36.1	+4.9	+31.2
Bassetlaw	East Midlands	+26.2	-4.7	+30.9
Hartlepool	North East	+14.0	-15.2	+29.2
Dartford	South East	+23.4	-4.4	+27.8
Bury	North West	+13.7	-8.1	+21.7
Havant	South East	+6.3	-14.2	+20.5

It is evident from Table 7.3 that all of the ten worst performing Rural Conservation Aggregates saw an absolute increase in crime rate between 2011 and 2016 while in all but one (Wellingborough) the matched Comparator Aggregate saw crime rates fall over this same period. In Wirral, for example, the Conservation Aggregate crime rate increased by 49.9 crimes per 1,000 population while the matched Comparator Aggregate saw the crime rate fall by 15.2 crimes per 1,000 population. As such, the net difference between the Conservation Aggregate and the Comparator Aggregate in Wirral amounted to a difference in performance of +65.0 crimes per 1,000 population[62]. In Wellingborough the Conservation Aggregate and the Comparator Aggregate both saw crime rates rise, but the magnitude of the rise was far greater in the Conservation Aggregate than the Comparator Aggregate.

Table 7.4: Best performing Rural Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in crime rate 2011 to 2016 (crimes per 1,000 population)		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Preston	North West	-9.4	+12.2	-21.6
Darlington	North East	+14.4	+34.0	-19.6
Lewes	South East	-15.0	+4.4	-19.4
Blaby	East Midlands	-2.0	+15.5	-17.5
Guildford	South East	-15.7	+0.6	-16.3
Chiltern	South East	-3.5	+11.9	-15.5
Hyndburn	North West	-27.5	-13.1	-14.4
Pendle	North West	+0.1	+12.1	-12.0
East Cambridgeshire	East	-7.2	+4.7	-11.9
Solihull	West Midlands	-8.9	+2.7	-11.6

With regards to the ten best performing Rural Conservation Aggregates relative to their matched Comparator Aggregates, it is evident from Table 7.4 that eight of the Conservation Aggregates saw an absolute decrease in crime rates over the period (with Darlington and Pendle being the exceptions) while in nine cases the crime rate in the Comparator Aggregate increased over the period (with Hyndburn being the exception). In Preston, for example, the crime rate in the Conservation Aggregate fell by 9.4 crimes per 1,000 population while the matched Comparator Aggregate saw an increase of 12.2 crimes per 1,000 population. The difference between the Preston Conservation and Comparator Aggregates therefore equated to a net improvement of 21.6 crimes per 1,000 population in the Conservation Aggregate relative to the Comparator Aggregate. The second largest net improvement in Rural Conservation Aggregate crime rates was seen in Darlington, where the crime rate actually increased by 14.4 crimes per 1,000 population over the period, but this increase was much smaller in magnitude than the increase observed in the matched Comparator Aggregate (an increase of 34.0 crime per 1,000 population). There was some interesting geographic patterns, with three of the 10 best performing Rural Conservation Aggregates located in Lancashire.

Turning now to look at the ten worst performing Urban Residential Conservation Aggregates relative to their matched Comparator Aggregates, Table 7.5 shows that all ten Conservation Aggregates saw crime rates rise over the period combined with a fall in crime rates in eight of the ten Comparator

[62] Note that each of the cells in the tables are rounded independently to 1 decimal place.

Aggregates (with Test Valley and Kettering being the exceptions). By far the greatest net worsening of position amongst the Urban Residential Conservation Aggregates was seen in Great Yarmouth, where the crime rate increased by 40.6 crimes per 1,000 population and yet the rate in its matched Comparator Aggregate fell by 43.9 crimes per 1,000 population. It is noteworthy that Preston Urban Residential Conservation Aggregate was one of the worst performers (as seen in Table 7.5) and yet the Preston Rural Conservation Aggregate was one of the best performers (as seen in Table 7.4).

Table 7.5: Worst performing Urban Residential Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in crime rate 2011 to 2016 (crimes per 1,000 population)		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Great Yarmouth	East	+40.6	-43.9	+84.5
Tewkesbury	South West	+0.4	-58.2	+58.6
Forest of Dean	South West	+8.8	-27.2	+36.0
Test Valley	South East	+28.8	+0.1	+28.7
Bedford	East	+24.0	-2.1	+26.1
Preston	North West	+18.6	-7.4	+26.0
Rugby	West Midlands	+3.0	-21.9	+24.9
Ashfield	East Midlands	+18.1	-5.6	+23.7
Kettering	East Midlands	+25.9	+2.2	+23.7
Barrow-in-Furness	North West	+22.2	-1.2	+23.4

Table 7.6: Best performing Urban Residential Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in crime rate 2011 to 2016 (crimes per 1,000 population)		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Waltham Forest	London	-50.0	-20.3	-29.7
South Derbyshire	East Midlands	-16.2	+8.8	-25.0
Aylesbury Vale	South East	-8.8	+15.4	-24.2
Southend-on-Sea	East	+2.9	+24.9	-22.0
Bolsover	East Midlands	-16.3	+4.2	-20.5
Carlisle	North West	-11.1	+7.6	-18.8
Southampton	South East	-14.1	+4.4	-18.5
West Berkshire	South East	-19.2	-0.8	-18.5
North Warwickshire	West Midlands	-9.5	+8.6	-18.1
St Edmundsbury	East	-4.8	+13.2	-18.0

In relation to the ten best performing Urban Residential Conservation Aggregates, Table 7.6 shows that nine of the Conservation Aggregates saw the crime rate fall over the period (with Southend-on-Sea being the exception) combined with an increase in the Comparator Aggregate rate in eight of the areas (with Waltham Forrest and West Berkshire being the exceptions). In Waltham Forrest, both the Conservation Aggregate and the Comparator Aggregate saw sizeable reductions in the

crime rate, but the improvement observed in the Conservation Aggregate was of a much larger magnitude than the change in the Comparator, hence Waltham Forrest is shown as experiencing the largest net improvement of all Urban Residential Conservation Aggregates.

Finally, Tables 7.7 and 7.8 show the ten worst and ten best performing Town Centre Conservation Aggregates. Focusing first on the worst performers, it is evident from Table 7.7 that all ten areas listed in the table saw crime rates rise over the period, with the Oldham Conservation Aggregate seeing by far the highest increase. Five of the ten areas listed in the table saw crime rate rises in the Comparator Aggregate too, including in Oldham where the Comparator Aggregate crime rate increased by 17.5 crimes per 1,000 population. The relative change in crime rate in Wellingborough (+92.3 crimes per 1,000 population) was slightly less than observed in Oldham (+102.0 crimes per 1,000 population), but in Wellingborough the Conservation Aggregate saw a rise in crime rate coupled with a fall in crime in the Comparator Aggregate.

Table 7.7: Worst performing Town Centre Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in crime rate 2011 to 2016 (crimes per 1,000 population)		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
Oldham	North West	+119.5	+17.5	+102.0
Wellingborough	West Midlands	+58.8	-33.5	+92.3
Dartford	South East	+41.9	-33.2	+75.1
Nuneaton & Bedworth	West Midlands	+42.5	-26.1	+68.6
Kettering	East Midlands	+81.8	+21.2	+60.7
South Tyneside	North East	+68.2	+12.3	+55.9
Mansfield	East Midlands	+33.0	-20.8	+53.8
Rochdale	North West	+68.8	+23.8	+44.9
West Lindsey	East Midlands	+33.0	-8.2	+41.3
Medway	South East	+45.0	+3.7	+41.2

Table 7.8 below shows the 10 Town Centre Conservation Aggregates which performed best relative to Comparator Aggregates. All ten Conservation Aggregates listed registered a decrease in crime rate over the period, and in all but one case (with Woking being the exception) this was coupled with an increase in the Comparator Aggregate crime rate. By far the largest net improvements were seen in West Lancashire and Corby, where the difference between the Conservation Aggregate and the matched Comparator Aggregate exceeded 80 crimes per 1,000 population. Woking Conservation Aggregate registered a larger absolute fall in crime rate than either West Lancashire or Corby, but the crime rate also fell in the Woking Comparator Aggregate meaning that the net difference in Woking was not as large as in either West Lancashire or Corby. Town Centre Conservation Aggregates from the North West appeared prominently among the best performing areas, with three of the best performing Conservation Aggregates located in Lancashire.

Table 7.8: Best performing Town Centre Conservation Aggregates (relative to their Comparator Aggregates)

LA	Region	Change in crime rate 2011 to 2016 (crimes per 1,000 population)		Difference in performance
		Conservation Aggregate	Comparator Aggregate	
West Lancashire	North West	-38.3	+51.4	-89.6
Corby	East Midlands	-43.6	+36.4	-80.0
Ipswich	East	-37.4	+12.4	-49.8
Carlisle	North West	-24.7	+24.4	-49.1
Woking	South East	-56.9	-8.6	-48.3
Chesterfield	East Midlands	-43.4	+3.6	-47.0
Chorley	North West	-29.3	+16.1	-45.4
Brentwood	East	-19.3	+20.7	-40.0
Wyre Forest	North West	-27.8	+8.3	-36.1
Taunton Deane	South West	-30.8	+0.5	-31.3

Key findings summary:

- Across each of the three typology groups, roughly half the Conservation Aggregates performed better than their matched Comparator Aggregate, while approximately half performed worse.
- The Conservation Aggregates that exhibited the very best performance relative to their Comparator Aggregate typically (although not always) saw crime rates fall in the Conservation Aggregate and rise in the Comparator Aggregate.
- Similarly, the Conservation Aggregates that exhibited the very worst performance relative to their matched Comparator Aggregate typically saw crime rates rise in the Conservation Aggregate and fall in the Comparator Aggregate.

The maps below show the geographical pattern in more detail – each map compares the performance of the Conservation Aggregates relative to their matched Comparator Aggregates on crime rate between 2011 and 2016 in Rural, Urban Residential and Town Centre categories. Conservation Aggregates shaded pink on the maps are characterised as showing notable improvement relative to their Comparator Aggregates. Areas shaded blue are characterised as seeing an appreciable worsening in their position relative to matched Comparator Aggregates. Conservation Aggregates shaded light green have experienced small relative change between 2011 and 2016. For detail of how the map colours are calculated see Appendix C.

Figure 7.17 Change in crime rates 2011 to 2016 in Rural Conservation Aggregates relative to their matched Comparator Aggregates

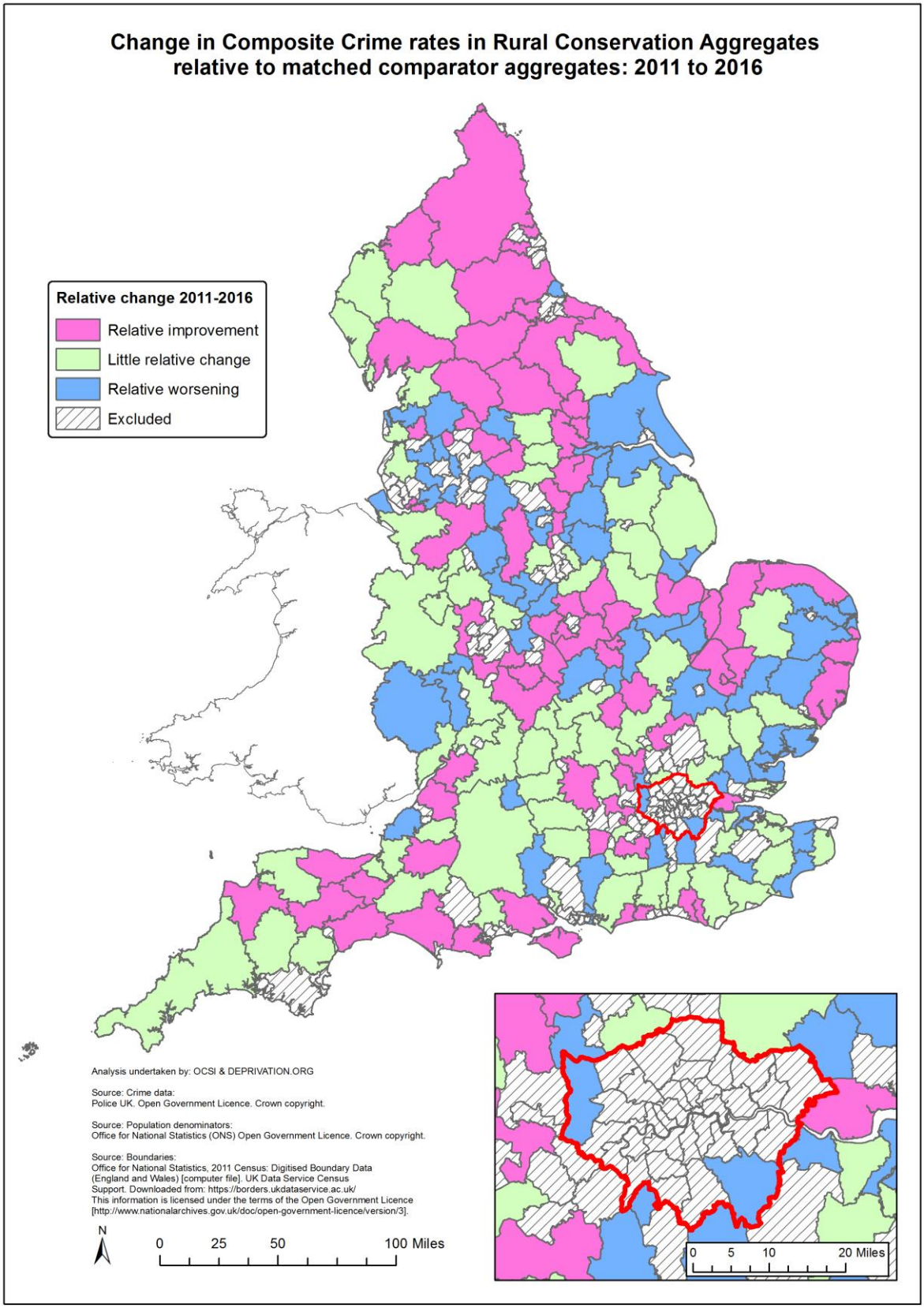


Figure 7.18 Change in crime rates 2011 to 2016 in Urban Residential Conservation Aggregates relative to their matched Comparator Aggregates

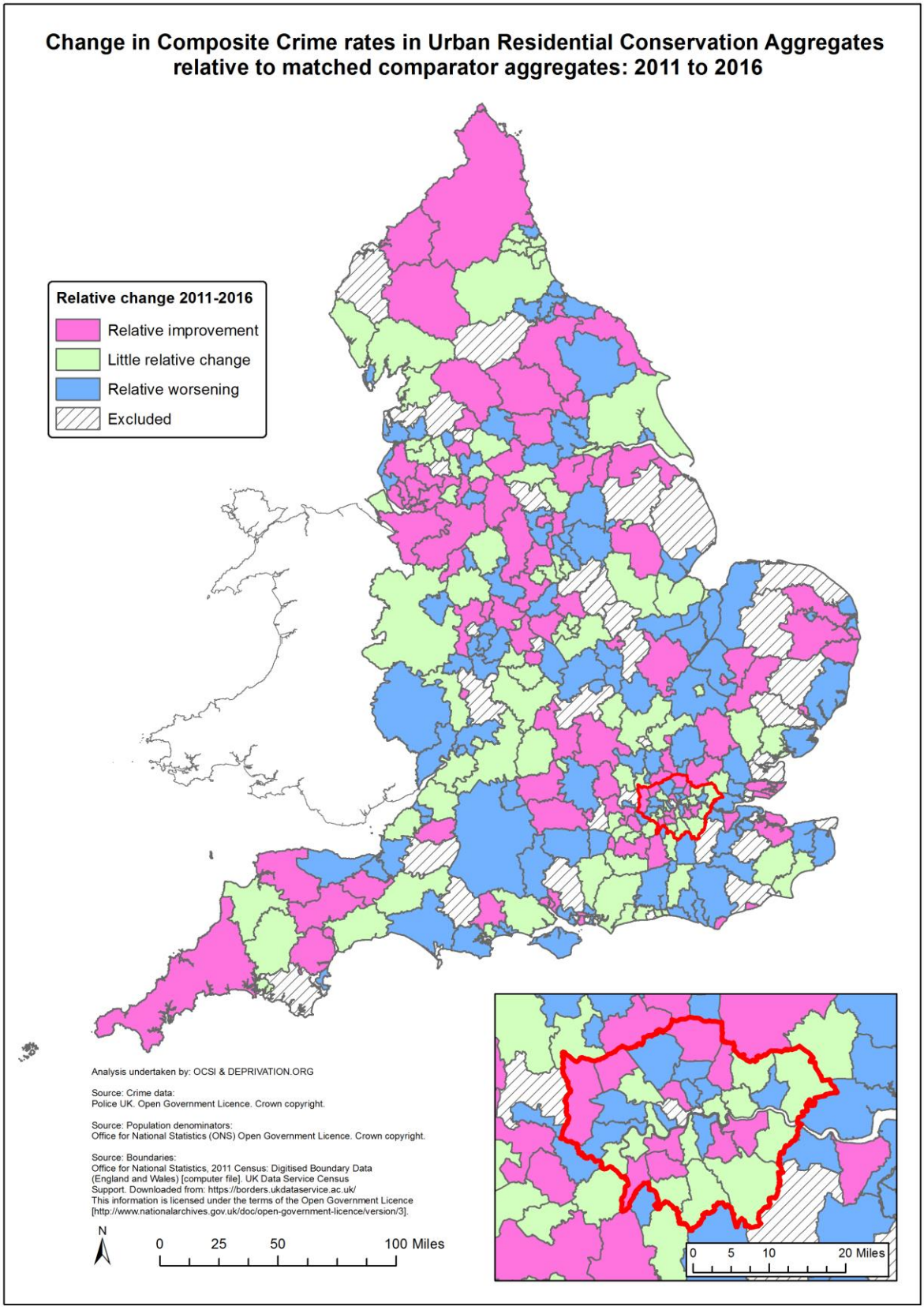
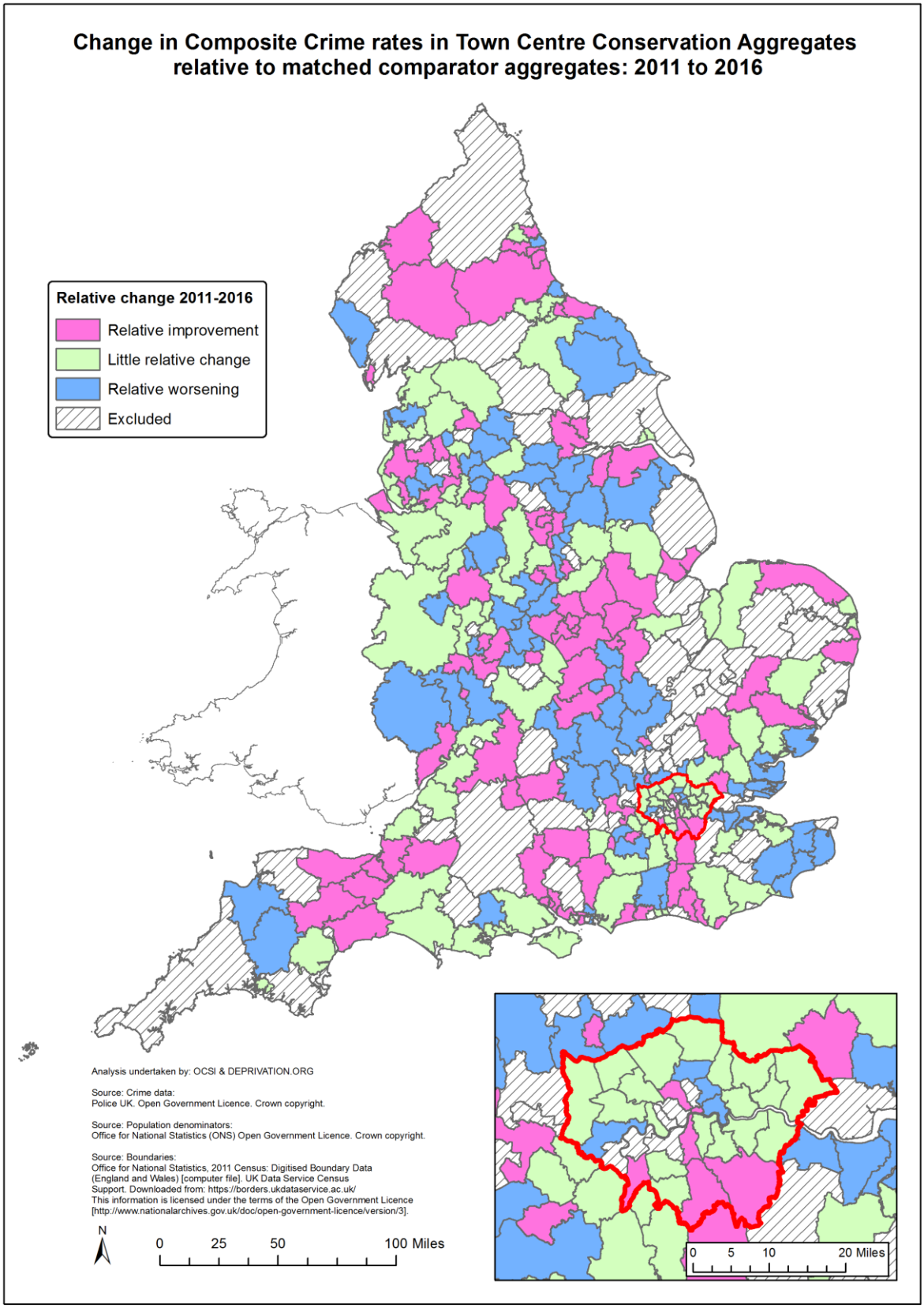


Figure 7.19 Change in crime rates 2011 to 2016 in Town Centre Conservation Aggregates relative to their matched Comparator Aggregates



Conclusion

In this chapter we have explored patterns and trends in crime rates across Conservation Aggregates and their matched Comparator Aggregates in order to comment on an indicator of wider growth.

We found that when assessed in terms of national and regional groupings, the Town Centre Conservation Aggregates had higher average crime rates than the Urban Residential Conservation Aggregates which, in turn, had higher crime rates than the Rural Conservation Aggregates. These disparities between the group averages persisted across the time period considered.

It was also evident that the three categories of Conservation Aggregate followed similar trends over time, consisting of a slight drop in the crime rate between 2011 and 2013/2014, followed by a slight increase through to 2016, leaving the 2016 average crime rates at a simile level to the 2011 baseline figures.

The respective groups of Comparator Aggregates exhibited similar levels of crime at baseline to their group of Conservation Aggregates, although the average rates in the Conservation Aggregate categories was slightly higher at each time point than the average rate in the respective Comparator Aggregate group.

In all three Conservation Aggregate category groupings there were some areas that exhibited considerably higher crime rates than the rest of the areas. The Conservation Aggregates with the highest crime rates were the Town Centre areas in City of London and Blackpool. However, both these areas have relatively large non-resident population who are potentially at risk of victimisation and yet do not live in the area, thus skewing the crime rates which are based on crimes per 1,000 resident population.

In terms of absolute changes to the crime rate over the period of analysis, half the Town Centre areas saw crime rates fall whilst the other half saw crime rates rise; just less than half the Urban Residential areas saw crime rates fall, meaning that just over half saw crime rates rise; and a clear majority of Rural areas say crime rates rise, with less than a third of such areas seeing the crime rate fall.

Finally, in terms of changes over time relative to the matched Comparator Aggregates, roughly half the Conservation Aggregates performed better than their matched Comparator Aggregate, while approximately half performed worse. There were no clear regional differences in which areas showed the best and worst performance.

Chapter 8: Synthesis across the indicators

Introduction

The preceding chapters have presented a wealth of new information on the patterns and trends in indicators and dimensions of *Good Growth* across Town Centre, Urban Residential and Rural Conservation Aggregates. The purpose of this final analytical chapter is to assess the extent to which Conservation Aggregates exhibit similar patterns and trends *across* indictors.

The approach adopted to tackle this final research objective is to draw upon the data concerning change in Conservation Aggregates relative to their matched Comparator Aggregates. In particular, the categorisation applied in the thematic maps is utilised in this chapter. As noted earlier, for the purpose of creating the maps the Conservation Aggregates were coded into one of three categories – 'Improved relative to Comparator Aggregate', 'Little change' or 'Worsened relative to Comparator Aggregate' – on each of the eight indicators analysed in this report. See *Appendix C: Constructing the maps*, for details of how these categories are defined.

In this chapter we take each type of Conservation Aggregate in turn and we report the number of indicators on which the Conservation Aggregates showed an improvement relative to their Comparator Aggregate, and a worsening relative to their Comparator Aggregate. The charts do not show those instances where Conservation Aggregates were coded as 'Little change' relative to their Comparator Aggregate.

Firstly, we compare relative performance of Conservation Aggregates across each of the eight key indicators of *Good Growth* individually in order to identify whether there were notable differences in performance across each of the four identified dimensions of *Good Growth*.

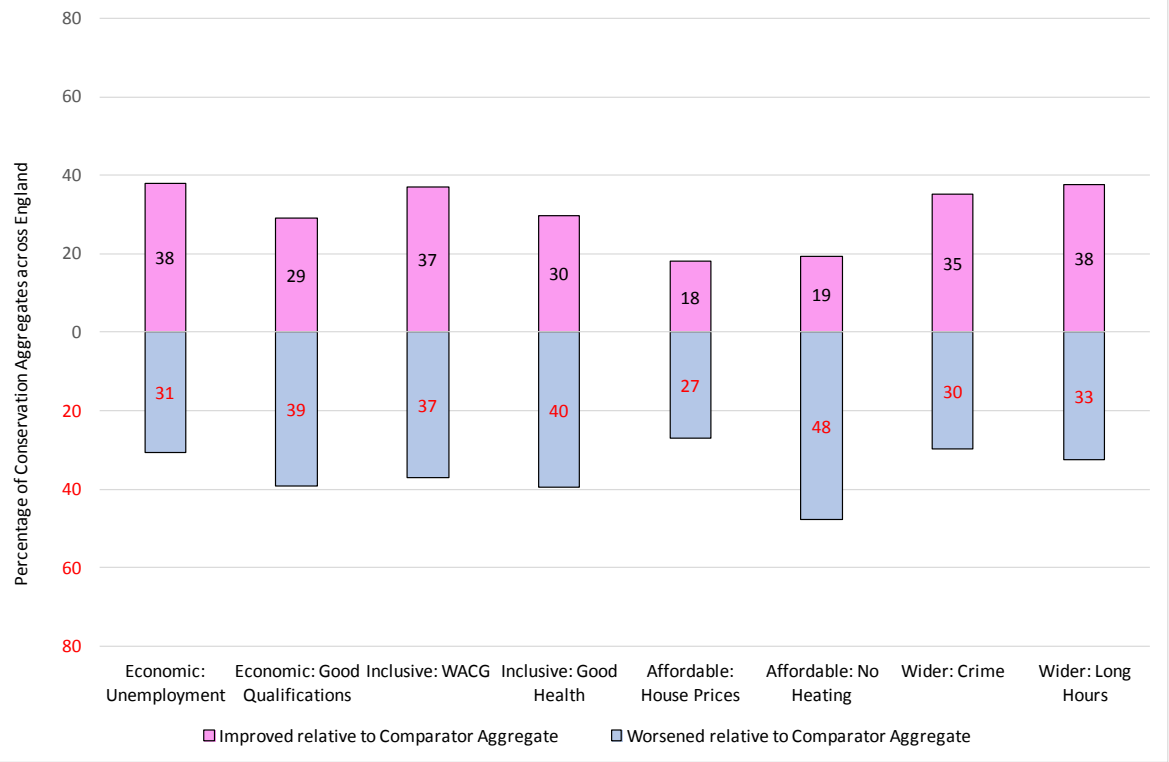
Secondly, we drill down to regional level to see if there is any regional variation in the relative performance of Conservation Aggregates across all of the indicators of *Good Growth*.

Relative performance of Conservation Aggregates across all four dimensions of "Good Growth".

This section explores the extent to which Conservation Aggregates have shown a notable improvement and/or worsening of position relative to Comparator Aggregates on each of the eight indicators of *Good Growth*. These indicators were explored separately in the preceding chapters, but in this chapter we compare the performance *across* the indicators to determine whether there is any appreciable variation in Conservation Aggregate performance between the different indicators and dimensions of *Good Growth*.

Figure 8.1 shows the proportion of Town Centre Conservation Aggregates which have shown notable improvement or worsening relative to matched Comparator Aggregates across each of the eight indicators of *Good Growth*. The height of the bars represent the proportion of Conservation Aggregates showing notable relative improvement (bars shaded pink displaying values above zero), or notable relative worsening (bars shaded blue displaying values below zero).

Figure 8.1 Relative improvement/worsening[63] across each of the *Good Growth* indicators[64] in Town Centre Conservation Aggregates



It can be seen in Figure 8.1 that a lower proportion of Town Centre Conservation Aggregates have experienced relative improvement on Affordable Growth indicators compared with other *Good Growth* Indicators. Town Centre Conservation Aggregates perform particularly badly in terms of reducing the proportion of households lacking central heating, with 19% of Conservation Aggregates showing notable improvement relative to Comparator Aggregates (the lowest percentage of any of the indicators), and 48% of Conservation Aggregates showing notable worsening relative to Comparator Aggregates (the highest percentage of any of the indicators). Town Centre Conservation Aggregates also performed relatively poorly on the other Affordable Growth indicator, relative house prices, with only 18% of Conservation Aggregates showing notable improvement relative to Comparator Aggregates (the second lowest percentage of any of the indicators).

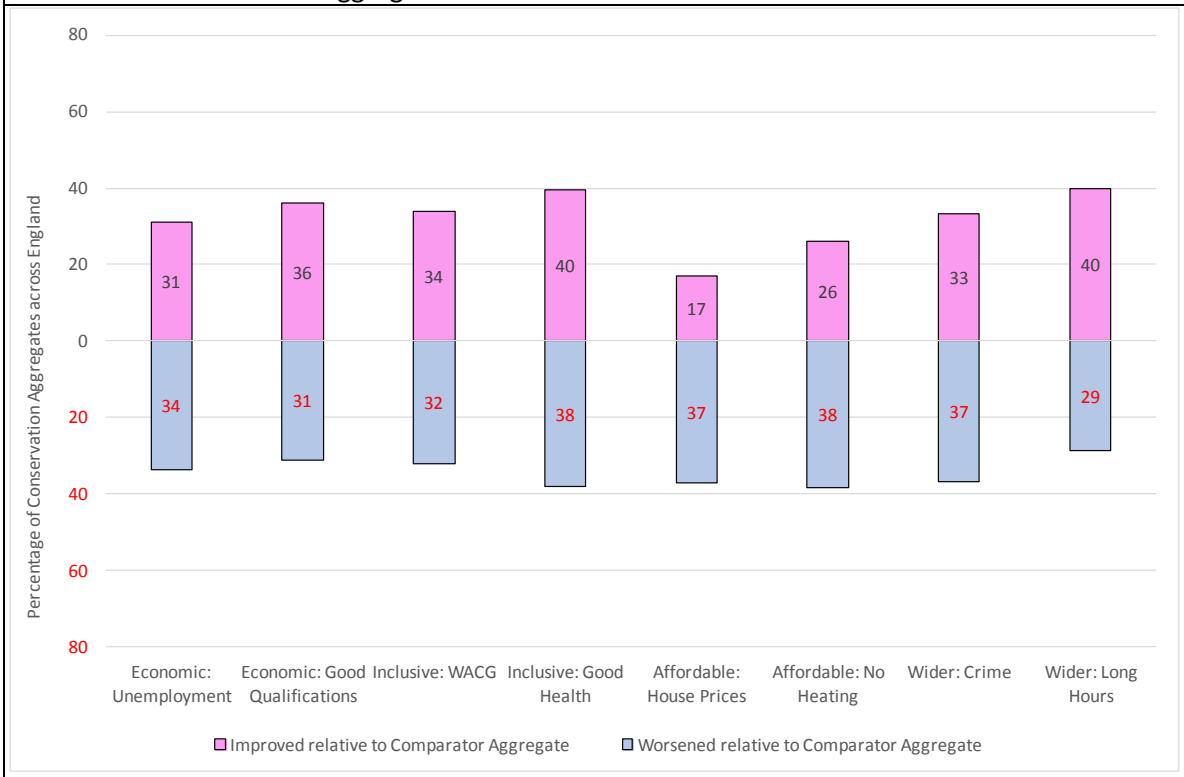
[63] Please note, the data in this chart does not match the data in tables 3.3-3.6, 4.2, 5.2, 6.2 and 7.2. This is because Conservation Aggregates which have experienced 'little change' – either positive or negative have been excluded from the analysis in this chapter. We coded those Conservation Aggregates that fell 'close to' zero on the relative change measure as showing 'little change'. To do this we needed to specify a band of values around zero which we would regard as showing little change. Firstly we calculated at the 5th and 95th percentile values on the change measure (to avoid being skewed by outliers) to give a sense of the overall spread of values. We then defined the 'little change' band as being +/-10% of the range (5th-95th percentile value range) around zero. Any Conservation Aggregate that had a change value of less than -10% below zero was classified as 'improver' while any Conservation Aggregate that had a change value of more than +10% of the range was classified as getting 'worse'.

[64] For display purposes we have shortened the names of the indicators: Unemployment=Jobseekers Allowance (JSA)/Universal Credit for jobseekers, Good qualifications= People with degree level qualifications, WACG= Working Age Client Group (working age DWP benefits), Good health= People describing their health as good or very good, House prices= Average property price (all property types), No Heating= Housing lacking central heating, Crime= Recorded crime rates, Long hours= People working 49+ hours.

Town Centre Conservation Aggregates performed relatively better on labour market indicators with 38% of Conservation Aggregates showing notable improvement in terms of reducing unemployment and the proportion of people working 49+ hours per week compared with matched Comparator Aggregates.

Figure 8.2 shows the proportion of *Urban Residential* Conservation Aggregates which have shown notable improvement or worsening relative to matched Comparator Aggregates across each of the eight indicators of *Good Growth*. As with the chart above, the height of the bars represent the proportion of Conservation Aggregates showing relative improvement (bars shaded pink displaying values above zero), or relative worsening (bars shaded blue displaying values below zero).

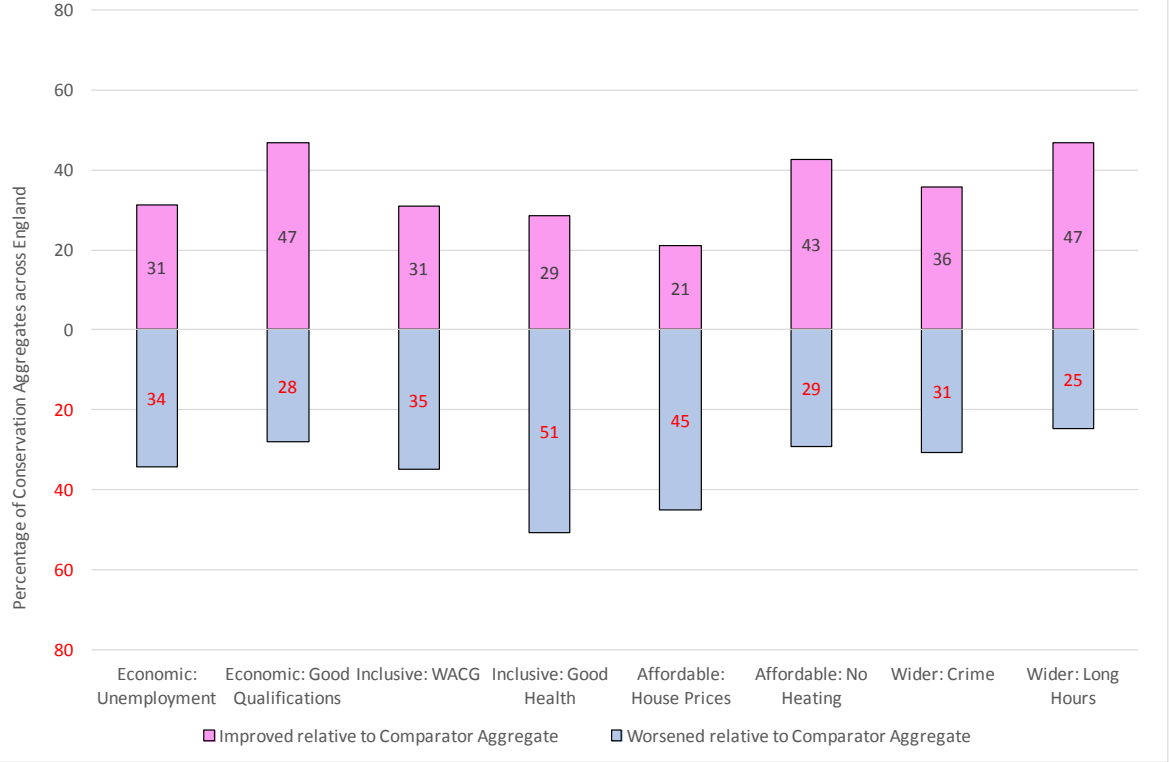
Figure 8.2 Relative improvement/worsening across each of the *Good Growth* indicators in Urban Residential Conservation Aggregates



As was observed for the Town Centre category, Urban Residential Conservation Aggregates performed notably less well on the Affordable Growth indicators than across other dimensions of *Good Growth*. Only 17% of Urban Residential Conservation Aggregates performed better than their matched Comparator Aggregates on the average property price indicator (the lowest percentage of any of the indicators), while 37% of Conservation Aggregates showed notable worsening relative to Comparator Aggregates. By contrast, Urban Residential Conservation Aggregates were more likely to perform better than their matched Comparator Aggregates in terms of reducing the proportion of people working 49+ hours per week.

Figure 8.3 shows the proportion of *Rural* Conservation Aggregates which have shown notable improvement or worsening relative to matched Comparator Aggregates across each of the eight indicators of *Good Growth*.

Figure 8.3 Relative improvement/worsening across each of the *Good Growth* indicators in Rural Conservation Aggregates



As was observed for the Town Centre and Urban Residential Conservation Aggregates, we see from Figure 8.3 that Rural Conservation Aggregates typically performed least well on the measure of housing affordability, with just 21 Rural areas showing a notable improvement compared to their matched Comparator Aggregate, but 45 areas showing a notable worsening compared to their matched comparator. However, in contrast to the picture observed for Town Centre and Urban Residential areas, Figure 8.3 shows that Rural Conservation Aggregates actually performed relatively well on the measure of affordability related to central heating. Forty-three Rural Conservation Aggregates showed a notable improvement on this indicator compared to their matched Comparator Aggregate, compared to 29 that saw a notable worsening relative to their comparator. When looking across the eight indicators, there were only two indicators where Rural Conservation Aggregates recorded a greater number of relative improvements than on the central heating indicator of affordability, with these two indicators being: Economic – good qualifications; and Wider: working long hours. The relative improvements on the indicator of working long hours is consistent with the results for Town Centre and Urban Residential Conservation Aggregates.

Key summary

- In general, roughly the same numbers of Conservation Aggregates are performing better than their matched Comparator Aggregate as are performing worse than their matched Comparator Aggregate. However, there are some indicators on which Conservation Aggregates are performing consistently better or worse than their matched comparators.
- Conservation Areas are typically performing less well than their matched comparator areas on the housing affordability indicator relating to Affordable Growth, compared with

other dimensions of *Good Growth* i.e. they are becoming less affordable than similar non-Conservation Areas in the same locality.

- By contrast, Conservation Aggregates are generally outperforming Comparator Aggregates on the wider wellbeing (working long hours) indicator.

Regional variation in relative performance of Conservation Aggregates across all four dimensions of "Good Growth".

This section explores regional patterns in performance of Conservation Aggregates, across all eight of the indicators of *Good Growth*. The analysis focuses on indicators which have experienced *consistent improvement* or *consistent worsening* measured in terms of showing notable improvement or worsening on four or more indicators.

Table 8.1 focuses on Town Centre Conservation Aggregates and shows the numbers and proportions of Conservation Aggregates per region that reported a notable improvement relative to the Comparator Aggregate on zero indicators, between 1 and 3 indicators, and on 4 or more indicators. The regions in the table are ranked in descending order according to the proportion of Conservation Aggregates in the region that saw notable improvement on 4+ indicators (with this column highlighted in bold). Although it is an arbitrary decision, we regard those Conservation Aggregates that experience a notable improvement on 4+ indicators as showing a degree of consistency in the results when looking across the eight indicators analysed in this report.

The North East region ranks highest on Table 8.1. The first point to note is that there are 11 Town Centre Conservation Aggregates in the North East region (column 'Total N'). The other columns shaded blue relate to the number of indicators on which each Conservation Aggregate saw a notable improvement relative to its Comparator Aggregate. The left-most column, titled 'Zero indicators', relates to Conservation Aggregates that experienced no notable improvements across any of the eight indicators analysed in this report. It is evident that in the North East region, just one of the 11 Town Centre Conservation Aggregates fell into this category. The next blue-shaded column, titled '1 to 3 indicators', relates to those Conservation Aggregates that experienced notable improvements relative to their Comparator Aggregate on between 1 and 3 indicators. In respect of the North East region, we see that four of the 11 Conservation Aggregates fell into this group, meaning that these six areas saw relative improvements on between 1 and 3 of the 8 indicators. The next blue-shaded column, titled '4+ indicators', relates to those Conservation Aggregates that experienced notable improvements relative to their Comparator Aggregate on between 4 and 8 indicators. Of the 11 Conservation Aggregates in the North East region, it is evident that six of these areas experienced notable improvements over four or more indicators. The columns to the right of the table, shaded in peach colour, express the same information in terms of the percentage of Conservation Aggregates per region. The column showing the percentage of Conservation Aggregates per region that improved on 4+ indicators is highlighted in bold to signify that this column is used as the basis of the ranking of regions in the table (from highest to lowest percentage).

Table 8.1: Relative notable improvement across multiple indicators in Town Centre Conservation Aggregates

Region	Indicators on which the Conservation Aggregate exhibited notable improvement relative to its Comparator Aggregate							
	Cells show number of Conservation Aggregates per Region				Cells show proportion of Conservation Aggregates per Region			
	Zero indicators	**1 to 3** indicators	**4+** indicators	**Total N**	**Zero** indicators	**1 to 3** indicators	**4+** indicators	**Total %**
North East	1	4	6	11	9%	36%	**55%**	100%
East Midlands	1	23	12	36	3%	64%	**33%**	100%
West Midlands	2	17	8	27	7%	63%	**30%**	100%
East of England	4	18	6	28	14%	64%	**21%**	100%
South West	2	17	5	24	8%	71%	**21%**	100%
London	6	17	5	28	21%	61%	**18%**	100%
North West	2	26	6	34	6%	77%	**18%**	100%
South East	4	39	9	52	8%	75%	**17%**	100%
Yorks. & Humb.	4	10	1	15	27%	67%	**7%**	100%
England	26	171	58	255	10%	67%	23%	100%

It can be seen from Table 8.1 that over half (55%) of Town Centre Conservation Aggregates in the North East region saw relative improvements on four or more indicators. It is also evident that all but one of the Town Centre Conservation Aggregates in the North East saw a notable improvement on at least one of the eight possible indicators. In contrast, only 7% of Town Centre Conservation Aggregates in Yorkshire and The Humber saw relative improvements on four or more indicators, while 27% of areas in this region failed to see a relative improvement on any of the eight indicators. For England as a whole, and for all regions except for the North East, the majority of Conservation Aggregates saw relative improvements on between one and three indicators. In the North East region the majority saw relative improvements on four or more indicators.

Table 8.2 follows the same structure as Table 8.1 above, only in Table 8.2 the data relate to the number (and percentage) of Town Centre Conservation Aggregates that registered notable worsening positions relative to their Comparator Aggregate.

West Midlands ranks highest in Table 8.2 due to almost half (44%) of its Conservation Aggregates registering a relative worsening of position across four or more of the eight indicators. The North West and London follow closely behind, with around 40% of Town Centre Conservation Aggregates in each of these regions showing worsening positions relative to their Comparators on four or more indicators. In the North East, however, only one Conservation Aggregate reported a worsening position on four or more indicators, representing just 9% of the total areas in that region.

Table 8.2: Relative notable worsening across multiple indicators in Town Centre Conservation Aggregates

Region	Indicators on which the Conservation Aggregate exhibited notable worsening relative to its Comparator Aggregate							
	Cells show number of Conservation Aggregates per Region				Cells show proportion of Conservation Aggregates per Region			
	Zero indicators	1 to 3 indicators	4+ indicators	Total N	Zero indicators	1 to 3 indicators	4+ indicators	Total %
West Midlands	2	13	12	27	7%	48%	**44%**	100%
North West	2	18	14	34	6%	53%	**41%**	100%
London	3	14	11	28	11%	50%	**39%**	100%
South East	2	32	18	52	4%	62%	**35%**	100%
East of England	1	18	9	28	4%	64%	**32%**	100%
Yorks. & Humb.	2	9	4	15	13%	60%	**27%**	100%
East Midlands	2	25	9	36	6%	69%	**25%**	100%
South West	3	16	5	24	13%	67%	**21%**	100%
North East	0	10	1	11	0%	91%	**9%**	100%
England	17	155	83	255	7%	61%	33%	100%

The key variables from Table 8.1 and Table 8.2 are placed side-by-side in Table 8.3. The regions in this table are ranked according to the percentage of areas that improved relative to their Comparator Aggregate on four or more indicators (with this column highlighted in bold).

Table 8.3: Areas showing relative notable improvement and worsening across four or more indicators in Town Centre Conservation Aggregates

Region	Improved on 4+ indicators	Worsened on 4+ indicators	All others	Total %
North East	**55%**	9%	36%	100%
East Midlands	**33%**	25%	42%	100%
West Midlands	**30%**	44%	26%	100%
East of England	**21%**	32%	47%	100%
South West	**21%**	21%	58%	100%
London	**18%**	39%	43%	100%
North West	**18%**	41%	41%	100%
South East	**17%**	35%	48%	100%
Yorks. & Humb.	**7%**	27%	67%	100%
England	23%	33%	45%	100%

It is notable from Table 8.3 that only two of the nine regions exhibited a higher percentage of areas recording 4+ improved indicators than registered 4+ worsening indicators, with these regions being the North East and the East Midlands. In the South West, the same proportion of Conservation Aggregates reported improvements on 4+ indicators are reported worsening on 4+ indicators. In the remaining six regions, a higher proportion of Conservation Aggregates reported worsening on 4+ indicators than reported improvements on 4+ indicators. Across England as a whole, 33% of Town Centre Conservation Aggregates reported a relative worsening on 4+ indicators compared to 23% that reported a relative improvement on 4+ indicators. Based on these findings we can conclude that

there are more areas performing consistently poorly than are performing consistently well, when consistency is measured in terms of commonality of change across multiple indicators. However, for an even greater proportion of areas (45%), there was little notable variation in performance between Conservation and Comparator Aggregates.

Table 8.4 shows the numbers and proportions of Urban Residential Conservation Aggregates per region that reported a notable improvement relative to the Comparator Aggregate on zero indicators, between 1 and 3 indicators, and on 4 or more indicators. The regions in the table are ranked in descending order according to the proportion of Urban Residential Conservation Aggregates in the region that saw improvement on 4+ indicators (with this column highlighted in bold).

Table 8.4: Relative notable improvement across multiple indicators in Urban Residential Conservation Aggregates

	Indicators on which the Conservation Aggregate exhibited notable improvement relative to its Comparator Aggregate							
	Cells show number of Conservation Aggregates per Region				**Cells show proportion of Conservation Aggregates per Region**			
Region	**Zero** indicators	**1 to 3** indicators	**4+** indicators	**Total N**	**Zero** indicators	**1 to 3** indicators	**4+** indicators	**Total %**
East Midlands	0	22	11	33	0%	67%	**33%**	100%
South West	1	21	10	32	3%	66%	**31%**	100%
South East	4	37	18	59	7%	63%	**31%**	100%
East of England	2	27	11	40	5%	68%	**28%**	100%
North West	0	25	9	34	0%	74%	**27%**	100%
Yorks. & Humb.	2	13	4	19	11%	68%	**21%**	100%
West Midlands	4	17	5	26	15%	65%	**19%**	100%
North East	1	9	2	12	8%	75%	**17%**	100%
London	3	25	3	31	10%	81%	**10%**	100%
England	17	196	73	286	6%	69%	26%	100%

Across England as a whole, approximately one quarter (26%) of Conservation Aggregates showed consistent improvement (this is a slightly higher proportion than was achieved across Town Centre Conservation Aggregates). There was some variation across the regions, with a higher proportion of Urban Residential Conservation Aggregates in the East Midlands showing relative improvement (33% improving on four or more indicators). By contrast, only 10% of Urban Residential Conservation Aggregates in London (3 of the 31 Urban Residential Conservation Aggregates in London) experienced improvements on four or more indicators relative to their Comparator Aggregates, suggesting that Urban Residential Conservation Areas in London are not outperforming similar non-Conservation Areas in the same locality.

Table 8.5 shows the number (and percentage) of Urban Residential Conservation Aggregates that showed worsening positions relative to their Comparator Aggregate.

Table 8.5: Relative worsening across multiple indicators in Urban Residential Conservation Aggregates

Region	Indicators on which the Conservation Aggregate exhibited notable worsening relative to its Comparator Aggregate							
	Cells show number of Conservation Aggregates per Region				Cells show proportion of Conservation Aggregates per Region			
	Zero indicators	1 to 3 indicators	4+ indicators	Total N	Zero indicators	1 to 3 indicators	4+ indicators	Total %
West Midlands	3	10	13	26	12%	39%	**50%**	100%
East of England	2	22	16	40	5%	55%	**40%**	100%
London	0	19	12	31	0%	61%	**39%**	100%
East Midlands	2	20	11	33	6%	61%	**33%**	100%
North East	1	7	4	12	8%	58%	**33%**	100%
South West	2	20	10	32	6%	63%	**31%**	100%
South East	1	42	16	59	2%	71%	**27%**	100%
Yorks. & Humb.	1	14	4	19	5%	74%	**21%**	100%
North West	1	27	6	34	3%	79%	**18%**	100%
England	13	181	92	286	5%	63%	32%	100%

Across England as a whole, just under one-third (32%) of Conservation Aggregates experienced a relative worsening (compared to Comparator Aggregates) on four or more indicators. However, there was considerable variation across the regions, with half of all Conservation Aggregates in the West Midlands showing consistent worsening (worsening relative to Comparator Aggregates on four or more indicators). By contrast, less than one-in four Conservation Aggregates in the North West and Yorkshire and The Humber showed worsening on four or more indicators relative to Comparator Aggregates.

The key variables from Table 8.4 and Table 8.5 are placed side-by-side in Table 8.6. The regions in this table are ranked according to the percentage of Urban Residential Conservation Aggregates that improved relative to their Comparator Aggregate on four or more indicators (with this column highlighted in bold).

Table 8.6: Areas showing notable relative improvement and worsening across four or more indicators in Urban Residential Conservation Aggregates

Region	Improved on 4+ indicators	Worsened on 4+ indicators	All others	Total %
East Midlands	**33%**	33%	33%	100%
South West	**31%**	31%	37%	100%
South East	**31%**	27%	42%	100%
East of England	**28%**	40%	33%	100%
North West	**27%**	18%	56%	100%
Yorks. & Humb.	**21%**	21%	58%	100%
West Midlands	**19%**	50%	31%	100%
North East	**17%**	33%	50%	100%
London	**10%**	39%	52%	100%
England	26%	32%	42%	100%

Only two of the nine regions exhibited a higher percentage of areas recording 4+ improved indicators than registered 4+ worsening indicators: the South East and North West. Of the remaining seven regions, the East Midlands, South West and Yorkshire and The Humber recorded the same proportion of Urban Residential Conservation Aggregates showing consistent improvement as showing consistent worsening. In the remaining regions a higher proportion of Conservation Aggregates reported worsening on 4+ indicators than reported improvements on 4+ indicators. Across England as a whole, 32% of Urban Residential Conservation Aggregates reported a relative worsening on 4+ indicators compared to 26% that reported a relative improvement on 4+ indicators. Based on these findings we can conclude that there are slightly more areas performing consistently poorly than are perform consistently well, when consistency is measured in terms of commonality of change across multiple indicators.

Table 8.7 shows the numbers and proportions of Rural Conservation Aggregates per region that reported a notable improvement relative to the Comparator Aggregate on zero indicators, between 1 and 3 indicators, and on 4 or more indicators.

Table 8.7: Relative notable improvement across multiple indicators in Rural Conservation Aggregates

	Indicators on which the Conservation Aggregate exhibited notable improvement relative to its Comparator Aggregate							
	Cells show number of Conservation Aggregates per Region				Cells show proportion of Conservation Aggregates per Region			
Region	Zero indicators	1 to 3 indicators	4+ indicators	Total N	Zero indicators	1 to 3 indicators	4+ indicators	Total %
North East	0	3	4	7	0%	43%	**57%**	100%
South West	1	13	10	24	4%	54%	**42%**	100%
East Midlands	2	17	11	30	7%	57%	**37%**	100%
South East	1	26	14	41	2%	63%	**34%**	100%
East of England	3	21	9	33	9%	64%	**27%**	100%
North West	3	16	6	25	12%	64%	**24%**	100%
Yorks. & Humb.	0	15	4	19	0%	79%	**21%**	100%
West Midlands	1	15	2	18	6%	83%	**11%**	100%
England	11	126	60	197	6%	64%	30%	100%

Rural Conservation Aggregates were slightly more likely to show consistent relative improvement compared with other categories, with 30% of Conservation Aggregates improving relative to Comparator Aggregates on four or more indicators (compared to 26% of Urban Residential and 23% of Town Centre Conservation Aggregates).

The North East had the highest proportion of Rural Conservation Aggregates showing relative improvement on four or more indicators (57%) and each of the seven Rural Conservation Aggregates in the region showing notable improvement on at least one of the eight possible indicators. This mirrored the strong relative performance of the region for Town Centre Conservation Aggregates.

By contrast, only two of the 18 Rural Conservation Aggregates in the West Midlands (11%) showed notable relative improvement on four or more indicators.

Table 8.8 shows the number (and percentage) of Rural Conservation Aggregates that registered notable worsening positions relative to their Comparator Aggregate.

Table 8.8: Relative notable worsening across multiple indicators in Rural Conservation Aggregates

Region	Indicators on which the Conservation Aggregate exhibited notable worsening relative to its Comparator Aggregate							
	Cells show number of Conservation Aggregates per Region				Cells show proportion of Conservation Aggregates per Region			
	Zero indicators	1 to 3 indicators	4+ indicators	Total N	Zero indicators	1 to 3 indicators	4+ indicators	Total %
North West	0	14	11	25	0%	56%	**44%**	100%
East of England	0	19	14	33	0%	58%	**42%**	100%
East Midlands	1	19	10	30	3%	63%	**33%**	100%
West Midlands	0	13	5	18	0%	72%	**28%**	100%
South East	2	32	7	41	5%	78%	**17%**	100%
South West	2	18	4	24	8%	75%	**17%**	100%
North East	1	5	1	7	14%	71%	**14%**	100%
Yorks. & Humb.	1	16	2	19	5%	84%	**11%**	100%
England	7	136	54	197	4%	69%	27%	100%

Across England as a whole, just over one-in-four (27%) of Conservation Aggregates experienced a relative worsening (compared to Comparator Aggregates) on four or more indicators. However, there was considerable variation across the regions, with over 40% of Conservation Aggregates in the North West and East of England showing consistent worsening (worsening relative to Comparator Aggregates on four or more indicators). By contrast, less than 20% of Conservation Aggregates in four of the regions - the South East, South West, North East and Yorkshire and The Humber, showed worsening on four or more indicators relative to Comparator Aggregates.

The key variables from Table 8.7 and Table 8.8 are placed side-by-side in Table 8.9 in order to determine whether Conservation Aggregates are more likely to have consistently improved or worsened relative to their matched Comparator Aggregates.

Table 8.9: Areas showing notable relative improvement and worsening across four or more indicators in Rural Conservation Aggregates

Region	Improved on 4+ indicators	Worsened on 4+ indicators	All others	Total %
North East	**57%**	14%	29%	100%
South West	**42%**	17%	42%	100%
East Midlands	**37%**	33%	30%	100%
South East	**34%**	17%	49%	100%
East of England	**27%**	42%	30%	100%
North West	**24%**	44%	32%	100%
Yorks. & Humb.	**21%**	11%	68%	100%
West Midlands	**11%**	28%	61%	100%
England	30%	27%	42%	100%

In contrast to the other categories, Conservation Aggregates in rural areas were more likely to consistently outperform their matched Comparator Aggregates, with 30% of Rural Conservation

Aggregates experiencing relative improvement on four or more indicators, compared with 27% experiencing relative worsening.

Five of the nine regions exhibited a higher percentage of areas recording improvement on four or more indicators than registered 4+ worsening indicators: North East, South West, East Midlands, South East and Yorkshire and The Humber. In remaining four regions, a higher proportion of Conservation Aggregates reported worsening on 4+ indicators than reported improvements on 4+ indicators. Based on these findings we can conclude that there are slightly more areas performing consistently well than are performing consistently poorly, when consistency is measured in terms of commonality of change across multiple indicators. This is in contrast to Urban Residential and Town Centre areas.

However, a higher percentage (between 42% and 45%) of Conservation Aggregates, in Town Centre, Urban Residential and Rural Conservation Aggregates alike, showed neither consistent improvement nor consistent worsening – suggesting that there is no clear evidence that Conservation Areas as a whole are performing considerably different from similar non-Conservation Areas in the same locality.

Key summary

- There are some interesting regional variations in performance, with Town Centre and Rural Conservation Areas in the North East region and Urban Residential and Rural Conservation Areas in the South West generally performing better relative to their comparators than those in other regions.
- Town Centre and Urban Residential Conservation Aggregates in the West Midlands were more likely to exhibit a consistently poor performance and less likely to exhibit a consistently good performance relative to their matched Comparator Aggregates.
- However, a higher percentage of Conservation Aggregates showed neither consistent improvement nor consistent worsening – suggesting that there is no clear evidence that Conservation Areas as a whole are performing considerably different from similar non-Conservation Areas in the same locality.

Conclusion

In this chapter we have explored differences in the relative performance of Conservation Aggregates across each of the four dimensions and eight individual indicators of *Good Growth* to see whether a) Conservation Areas are performing relatively well or badly on particular dimensions of *Good Growth* and b) whether Conservation Aggregates are displaying consistent patterns of performance when looking across all four dimensions of Good Growth.

We were able to draw stronger conclusions with regards to the former question than the latter, as we noted that Conservation Aggregates tended to perform relatively badly on indicators of Affordable Growth relative to their matched Comparator Aggregates (although Rural Conservation Aggregates did fare quite well on the indicator relating to central heating). The general level of consistency across the affordability indicators for the three types of Conservation Aggregate was not detected for the other dimensions of *Good Growth*.

However, from the analysis above we were not able to conclusively show that Conservation Aggregates as a whole exhibited consistently better or worse performance than Comparator Aggregates as a whole when all indicators were taken into account. In other words, there is no strong evidence to suggest that Conservation Areas are performing notably better or notably worse

in terms of achieving *Good Growth* than similar non-Conservation Areas in the same locality. The picture is a mixed one, with a similar proportion of areas performing notably better as performing notably performing worse, when all categories of Conservation Area and dimensions and indicators of *Good Growth* are taken into consideration. This is an interesting finding in itself as had we concentrated on a single indicator of *Good Growth* we may have come to a more definitive conclusion. However, by broadening the range of indicators included in the study, we have unearthed some of the complexities in terms of trends and trajectories of Conservation Aggregates, with some Conservation Aggregates showing strong performance on particular aspects of *Good Growth* but only a minority showing *consistently* positive or negative performance.

However, we have observed some regional differences, with Town Centre and Rural Conservation Areas in the North East region generally performing better relative to their comparators than those in other regions, while Conservation Aggregates in the West Midlands were more likely to exhibit a consistently poor performance relative to their matched Comparator Aggregates. We recommend further investigation to explore some of the driving reasons for these regional differences.

Chapter 9: Conclusion and recommendations

In this project for Historic England the research team from Oxford Consultants for Social Inclusion (OCSI) and deprivation.org set out to generate new insights into the patterns and trends in socio-economic measures of 'Good Growth' across the multitude of Conservation Areas in England.

The three primary research questions underpinning this research were as follows:

(4) What is the profile of Conservation Areas across selected indicators of 'Good Growth' at a baseline point in time?
(5) How has the profile of Conservation Areas changed over time on the selected indicators of 'Good Growth'?
(6) How do the changes observed over time on indicators of 'Good Growth' in Conservation Areas compare to changes in non-Conservation Area locations?

There are approximately 10,000 Conservation Areas across the country and these areas vary considerably on a number of important factors, such as population size, areal size, level of urbanisation and geographical location. The research methodology adopted in this project was designed to address the many analytical challenges posed by the heterogeneity of Conservation Areas on these important factors.

The project commenced with a review of the literature on measures of 'Good Growth' and a parallel review of data sources that could be utilised to measure 'Good Growth' at suitable spatial levels. Drawing upon the findings from these reviews of literature and data, we identified four dimensions of 'Good Growth' that we could measure using publicly available data: 'Economic Growth', 'Inclusive Growth', 'Affordable Growth' and 'Wider Growth'. The review of the data landscape revealed valuable indicators that could be constructed using the decennial censuses of 2001 and 2011 as well as valuable indicators that could be produced from routinely collected government administrative data. We selected one census-based indicator and one administrative-based indicator under each of the four dimensions of 'Good Growth', resulting in a total of eight indicators of 'Good Growth' that would form the basis of the analysis. Each of these indicators could be constructed at Lower Super Output Area (LSOA) level for the whole of England so the LSOA geography was adopted as our initial unit of analysis.

We developed a six-way typology classification which we applied to all the LSOAs in England. The six-way classification was composed of: (i) a two-category distinction according to whether an LSOA was in a Conservation Area or not; combined with (ii) a three-category distinction based on the level of urbanisation of the LSOA (Town Centre; Urban Residential; Rural). Every LSOA in the country was assigned to one of the six mutually exclusive categories.

To aid the subsequent analysis, the LSOAs that constituted Conservation Areas were then merged within each Local Authority District – separately for Town Centre, Urban Residential and Rural LSOAs – to form 'Conservation Aggregates'. Many Local Authority Districts across the country contained a Town Centre Conservation Aggregate, an Urban Residential Conservation Aggregate and a Rural Conservation Aggregate. However some Local Authority Districts did not contain all three types, for instance many of the big cities, particularly the London authorities, did not contain a Rural Conservation Aggregate. The Conservation Aggregates formed our principal unit of analysis for this project.

Whilst research questions (1) and (2) above could be addressed by analysing just the Conservation Aggregates, research question (3) required us to generate some new comparator benchmarks to enable us to assess whether the patterns and trends observed in the Conservation Areas were similar to or divergent from patterns and trends in non-Conservation Area locations. We therefore constructed a matched 'Comparator Aggregate' for every individual Conservation Aggregate in the country. The Comparator Aggregates were designed to be as similar as possible to their Conservation Aggregate on two key factors: population size in mid-2005 and level of deprivation using the Index of Multiple Deprivation 2007 (which had a data time point of mid-2005). The primary purpose of creating these new Comparator Aggregates was to generate a set of similarly sized, similarly deprived geographical units of analysis against which to compare the patterns and trends in the Conservation Aggregates. The Comparator Aggregates represent a more methodologically sound approach to benchmarking change in Conservation Aggregates than simply using national or regional averages.

With regards to assessing change over time, it must be acknowledged that Conservation Area designation does not imply any major financial resource investment in the area. Conservation Area designation is very different, therefore, to area based regeneration initiatives (such as the New Deal for Communities programme under the previous Labour government) which often aim explicitly to reduce deprivation and/or stimulate economic growth and involve considerable inward investment of financial resources. It should be noted that even area based regeneration initiatives that *do* involve substantial financial investment into target areas can struggle to achieve demonstrable impacts on many people-related outcomes, such as unemployment and education, or indeed broader outcomes such as crime (see, for instance, the final report from the national evaluation of the New Deal for Communities programme[65]). In light of this, it would be unrealistic to expect that Conservation Area designation would result in major impacts on a multitude of socio-economic indicators. The purpose of the analyses undertaken here is to review the profile of Conservation Areas at selected points in time and the temporal trends that Conservation Areas have followed, both individually and in the context of their matched comparator. The purpose of the analysis is explicitly *not* to evaluate whether there has been any measurable 'impact' or 'effect' on 'Good Growth' of Conservation Area designation as this would require a different form of research project which is outside the scope of what is feasible in this project. The analysis presented here is contextual and exploratory and establishes an important foundation on which further future research can build.

The analysis of 'Good Growth' was structured into five analytical chapters. We commenced the analysis by assessing patterns and trends in the four census-based 'Good Growth' indicators in a single chapter. We then proceeded to assess patterns and trends in each of the four administrative data-based indicators, dedicating a separate chapter to each. Finally we concluded our analyses by synthesising the results across the eight indicators to assess whether there was any evidence of commonalities or differences between areas or between typology groups.

On all of the indicators of 'Good Growth' we identified variations between Conservation Aggregates, with these variations evident both *between* and *within* the three typology groupings of Conservation Aggregate. These conclusions confirm and reinforce the finding from the start of this project that Conservation Areas are an extremely heterogeneous group of areas. This level of heterogeneity has implications for the subsequent analysis of change over time in 'Good Growth' measures and also has implications for drawing generalizable conclusions about Conservation Areas as a whole.

[65] http://extra.shu.ac.uk/ndc/downloads/general/A%20final%20assessment.pdf

On most of the indicators of 'Good Growth' there is evidence that most of the Conservation Aggregates across the country exhibited absolute improvements in the measures over the respective time periods. The exceptions to this were on housing affordability and crime, where most of the Conservation Aggregates across the country saw an increase in average house prices and most saw an increase in crime rate. Although the increases in average house prices were often quite sizeable, we acknowledge that this should ideally be considered in the context of changing average incomes, although unfortunately information of incomes is not available at the requisite spatial level so could not be taken into account. We also recognise that crime rates are affected by a variety of exogenous factors in addition to real changes in the frequency of crime occurrence and, for this reason, it is preferable to only consider crime trends in relation to a suitable comparator benchmark.

Whilst most Conservation Aggregates saw absolute improvements on most indicators of 'Good Growth' over the respective time periods, the findings were much more mixed when Conservation Aggregates were compared against their matched Comparator Aggregates. On most of the indicators, roughly half the Conservation Aggregates performed better than their matched Comparator Aggregate, while roughly half performed worse. The main exceptions to this are the 'Affordable growth' indicators, with Conservation Aggregates of all categories performing generally worse than Comparator Aggregates, and Town Centre Conservation Aggregates performing notably worse than their comparators in terms of reducing the proportion of households lacking central heating.

The finding that, overall, there is little evidence to suggest that Conservation Aggregates performed either systematically better or systematically worse than their matched Comparator Aggregates is perhaps the most important conclusion to be drawn from this research project. This finding suggests that Conservation Area designation does not appear to hinder 'Good Growth', but neither does it appear to necessarily promote it, when assessed across these eight indicators.

It should be noted, however, that the choice of indicators available for use in this research project was limited by data availability. The need to construct indicators at a detailed spatial level necessitated the use of census or administrative data. As such, the indicators analysed here all relate to what might be regarded as 'hard outcomes', such as unemployment status, crime rates, house prices etc. Whilst it appears to be the case that Conservation Area designation is not associated with systematic improvements on these 'hard outcomes' vis-a-vis the matched comparator areas, it may be the case that Conservation Area designation does have an effect on 'softer outcomes', such as people's perceived sense of wellbeing or their attachment to place. Unfortunately these 'softer outcomes' cannot be measured at a detailed spatial level using census or administrative data, but would rather require a different form of research involving new primary data collection through surveys and focus groups to delve into people's attitudes concerning life in (and around) Conservation Areas. Previous evaluations of major area based regeneration initiatives have found that 'softer outcomes' may be more receptive than 'harder outcomes' to measurable change over time, especially when the time period of analysis is relative short[66]. A recommendation emerging from this current research project into Conservation Areas is that Historic England should consider further research into the 'softer outcomes' that might be associated with living in or near to Conservation Areas.

[66] http://extra.shu.ac.uk/ndc/downloads/general/A%20final%20assessment.pdf