

INSIGHTS

Q1

NATIONAL INFRASTRUCTURE, LOCAL BENEFITS

Creating vibrant regions
and economic growth
through infrastructure





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Jason is responsible for Major Programmes and Infrastructure (MP&I) and is driving our goal to be the UK's leading programme manager by 2020. He has over 20 years' industry experience and leads on some of the UK's most significant projects alongside the largest global programmes. Under his leadership, MP&I has seen 43% growth over the last three years. He was CLM's programme director for the London 2012 Olympic and Paralympic Games, responsible for the delivery of the Games venues and the commercial closure of the most successful Olympics ever.

Prior to joining Mace he was CEO of Bovis Lend Lease while also holding the role of CEO of Catalyst Lend Lease.

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Steve Gillingham

Regional Director

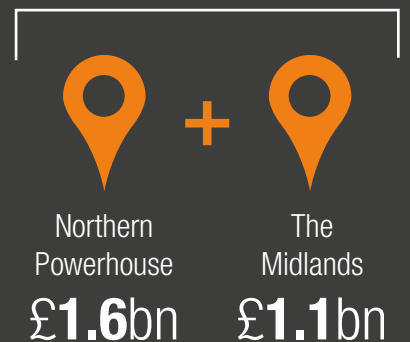
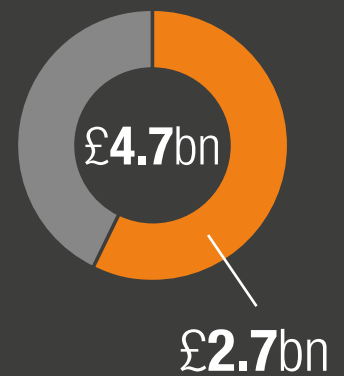
Steve Gillingham is the regional director of Mace for the North of the UK, holding responsibility for strategic and operational management of a team of over 100, based in Manchester, Leeds and Edinburgh.

Steve is also a member of the regional panel advisory board to the Bank of England MPC, regional spokesperson for the RICS, Director of the Seashell Trust and an Executive Advisory Board member of Salford Business School.

If journey times outside of London (not just the North) were reduced by...



the economic benefit would be...



INTRODUCTION

People and businesses around the world are more connected than ever. They are more mobile, and have better access to services and information. This makes infrastructure – both nationally and locally – paramount to the UK economy and the wellbeing and productivity of the British public. As the rest of the world accelerates, we must allow our economy to do the same.

Yet the UK is often criticised for lagging behind on the world stage. There are a number of historic reasons: costly development, policy instability, the burdensome planning system and NIMBYs have all played a role.ⁱ The result has been slow progress in developing critical infrastructure. Longstanding debates around HS2 and airport expansion in the South East of England demonstrate some of the issues.

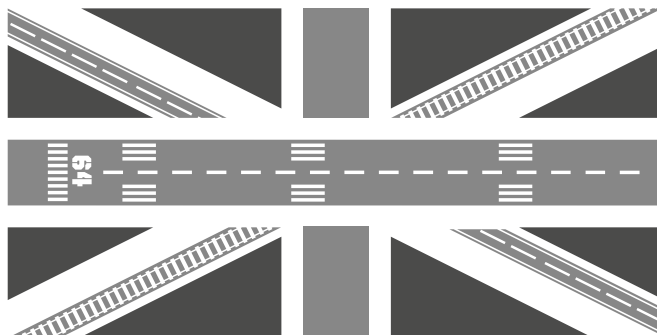
This situation benefits nobody. The UK now ranks just 27th in the World Economic Forum's assessment of the quality of overall infrastructure.

Looking specifically at transport infrastructure, the UK is ranked 16th for rail, 30th for road and 28th for its airports.ⁱⁱ Overall, the quality of transport infrastructure needs to improve if the government is to achieve its goals of raising growth and productivity across the country.

This is particularly true outside of London. Transport infrastructure is a vital component in creating more geographically balanced growth, including through the government's Northern Powerhouse initiative. Here the government has made a strong start: it has created Transport for the North which has launched its Northern Transport Strategy; HS2 is taking strong steps forward; and the National Infrastructure Plan outlines a significant investment pipeline for the coming years.

It is also important to recognise the role of infrastructure in enabling new housing to be built, for example the Homes and Communities Agency's planned new town, Northstowe, in Cambridgeshire, is dependent on the upgrade of the nearby A14.

However, there are also challenges ahead. Decisions are highly political and new structures like the National Infrastructure Commission are still in their infancy. Public support for schemes also varies widely across the country. In this report we look at the case for investment in transport as a catalyst, not just for growth, but for productivity, aspiration and wellbeing, and as a way to rebalance the UK's national economy. We look at what practical steps can be taken to make some of these schemes less contentious, and at how a greater focus on local benefits for nationally significant infrastructure can help to demonstrate its role in transforming our cities for the better.



16th
quality of railroad

28th
quality of air transport

30th
quality of roads

THE POWER OF DEVOLUTION

The Northern Powerhouse, and the government's broader approach to devolution, is at the heart of the UK's contemporary approach to driving transport investment for our cities.

Simply put, there is a significant gap between the economic performance of London and the rest of the UK. London creates more growth (both overall and per capita), has more job opportunities and higher levels of aspiration. It has a higher skilled, more productive workforce and attracts more investment from both home and abroad than anywhere else in the UK.

Generations of governments have tried to close this gap. Enterprise Zones, Regional Development Agencies, industrial strategies and a host of other initiatives have been introduced over the last few decades, but significant gaps stubbornly persist.

This was the backdrop to the Chancellor's announcement of the Northern Powerhouse initiative. The idea is clear: a number of medium sized cities in the North of England perform relatively well individually. But, with better transport infrastructure and a more coordinated approach to planning, skills and economic development across the North, there is a real opportunity to build on these individual strengths, raise aspiration levels and take advantage of agglomeration effects. By doing so we can create a more productive, vibrant area body that's larger than the sum of its parts.

The potential is enormous: the combined amount added to the economy (GVA) by the North West, North East and Yorkshire and Humber, which make up the Northern Powerhouse, is approaching £300bn, compared to the latest estimate for London of £338bn.ⁱⁱⁱ

Of course, the North of England is not alone in lagging behind the performance of London. Empowering cities and regions outside of London is the key aspect of the government's wider approach to City Devolution Deals and there is now talk of a similar Powerhouse approach for the Midlands.

£338bn
London



£300bn
Northern
Powerhouse



North East
+
North West
+
Yorkshire and
the Humber



£40,215
GVA per head
in London



£19,428
GVA per head
in the West
Midlands



£18,790
GVA per head in the
Northern Powerhouse

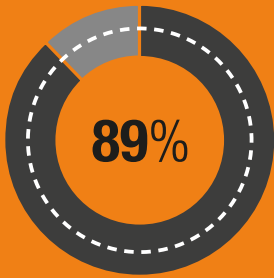


0.93
Job density
in London

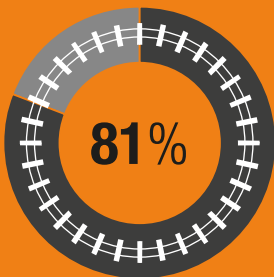


0.71
Job density in
the Northern
Powerhouse

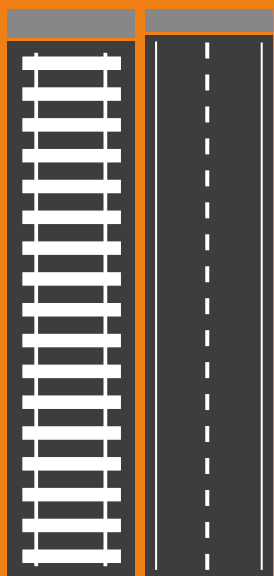
THE IMPORTANCE OF TRANSPORT



89%
of UK firms see roads as "crucial or important" to their business



81%
of UK firms see rail as "crucial or important" to their business



95% 96%

of UK firms think that capital spending on rail and roads should be either maintained or increased beyond what was promised in the last parliament

The government's agenda on the Northern Powerhouse, the City Regions and growth across the UK has focused heavily on the role of investment in transport infrastructure. There are clear reasons for doing so: transport infrastructure is vital for growth, increasing opportunity, the economy and wellbeing in the UK.

Transport is critical to where businesses invest and set up offices. These are complex decisions but, alongside a wide range of factors (including workforce skills, access to finance, the tax system and regulation) the quality of transport infrastructure is vital. The vast majority of UK firms see rail (81%) and roads (89%) as crucial or important to their business and many believe that investment in infrastructure should be increased.^{iv}

The benefits to our national economy are well established. Without the ability to transport goods, for employees to commute to where they are needed and attract the best talent from across the UK and globally, doing business in the 21st century would be impossible. But it's not just business that stands to gain from better transport infrastructure.

On one hand, attracting firms and driving growth increases household incomes and living standards. But less considered is that the quality of infrastructure and level of connectivity also has broader impacts on our wellbeing. Recent research from the Office for National Statistics has shown that each extra minute of commute

is associated with an increase in anxiety levels and falls in life satisfaction and happiness.^v Other work has looked at the impact of crowding on public transport and found that crowded travel can increase stress levels and reduce passenger wellbeing.^{vi}

This has important implications for the passenger experience. It also has a knock-on effect on productivity and growth. Recent research has demonstrated the links between happiness, wellbeing and worker productivity levels.^{vii}

Outside of work, by providing better access to what people want to do in their free time and allowing the growth in housing where people want to live, world class transport infrastructure has clear links to the overall wellbeing of the population. For a population that is more connected than ever to its services through the internet, transport must now become an enabler and not a frustration if it's to keep pace with the experience people have in the rest of their daily lives.

THE QUALITY OF TRANSPORT INFRASTRUCTURE IN THE UK

Despite the opportunities that transport investment presents, our business community remains frustrated by the reality of our current networks. Nearly all firms are worried about congestion on the roads and nine in ten worry that the train system is full.^{viii} Other research has found that over half of businesses say that transport infrastructure in the UK has been deteriorating.

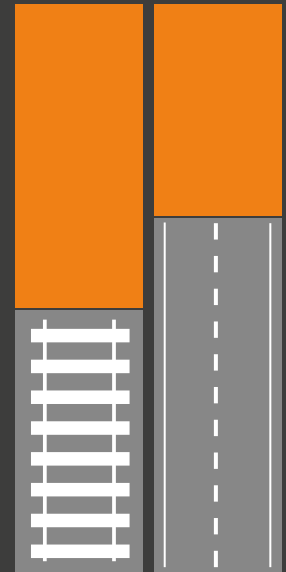
Some of our most prominent business groups have echoed this sentiment. The CBI and British Chambers of Commerce (BCC) have highlighted that Britain's infrastructure is not up to scratch.^{ix} The BCC recently said that despite a welcome great personal effort by the Chancellor and things starting to improve, Britain's infrastructure still "...remains woefully inadequate for a dynamic economy with a growing population" and that "...current levels of investment are inadequate to deliver the transport capacity, energy security, and digital connectivity that UK businesses and households require". Research from the CBI supports this point of view, suggesting that the vast majority of firms are strongly supportive of the government's continued investment in rail and road infrastructure. However, they are not confident that existing commitments will translate into better infrastructure on the ground.^x

The public also think that current transport infrastructure is not adequate. Over 54% of people say that the UK's railways are ageing and not good enough.

The equivalent figure for motorways and A-roads is 37%.^{xi} These results are unsurprising when you consider that:

- Railways in the UK now carry more passengers than at any time in the past six decades, on a network that is around 40% smaller than it was in 1950;^{xii}
- The number of passengers on peak trains into many northern and Midlands cities is in excess of capacity. For example, in Leeds, Manchester, Newcastle and Birmingham peak trains frequently have well in excess of 10% of passengers standing;^{xiii} and
- The average UK driver spends around 30 hours stuck in traffic.^{xiv} With over 7.2m hours a year are wasted in traffic jams on the strategic road network alone – a significant impact on productivity.^{xv}

The public also think that more investment is needed: 85% want to see improvements driven by higher levels of investment (like HS2, the A14 improvement scheme and a new runway for the South East).^{xvi}



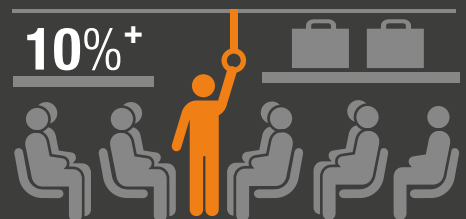
37% 54%

Public say that railways and motorways/A-roads are ageing and are not good enough



85%

of the UK public want to see improvements in transport infrastructure driven by higher levels of investment



of passengers frequently have to stand on peak trains in Leeds, Manchester and Birmingham

In the North West and Yorkshire and the Humber...

< 60%



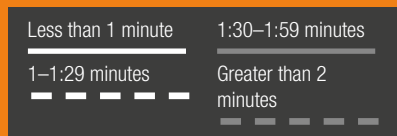
of the population can access an employment centre (with over 5,000 jobs) within half hour by public transport.

In London the number is...

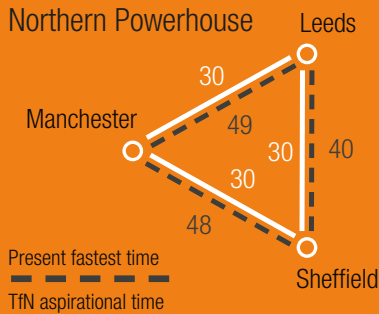
80%



Journey times (per mile) from Manchester



Journey times in the Northern Powerhouse



Infrastructure outside of London and in the Northern Powerhouse

There is also a clear difference in connectivity across the UK. For example, in the North West of England and in Yorkshire and the Humber, less than 60% of the population is within 30 minutes of an area with over 5,000 jobs available. Compared to London where the equivalent statistic is 80%.^{xvii}

The full extent of these transport and connectivity problems have been outlined extensively in documents on the Northern Powerhouse from the government, research and publications from Transport for the North and in analysis by Sir David Higgins at HS2. Sir David's report highlights the slow travel times going across the North of England and that these – and some other factors – are severely limiting journeys and job opportunities between different cities in the North. For example, the analysis suggests that movements between Greater Manchester and the Leeds city region are much lower than would be expected given the size and significance of these cities.^{xviii, xix} One of the reports find that:

“Common sense suggests that there is huge untapped potential for much more trade and commerce across the Pennines, but that would require better connections than currently exist.”

Tackling this has been one of the key drivers of the government's approach to the Northern Powerhouse. For instance, the aspiration to cut journey times

by train between Manchester and Leeds from 49 minutes to 30 minutes and Sheffield to Hull from 86 minutes to 60 minutes. It is also important not to forget the importance of local transport links, which allow people to get from their homes to well connected transport hubs, preventing the existence of so called 'career cul-de-sacs' which limit opportunity and aspiration.

If connectivity was improved across large parts of the North of England it could lead to agglomeration effects that have been shown to substantially increase productivity. Research suggests that doubling the size of the area from which people are willing to travel from to work increases productivity by 4%–8%.^{xx}

The potential of this increased connectivity to attract investment and increase growth is clear, with historic examples such as the development of the Jubilee Line and Crossrail showing the magnetic effect of better transport links. There are also broader growth benefits. For instance, Transport for the North has already identified the need for a coordinated approach to future investment in freight and logistics in the North of England.

Improved links across the North and Midlands and faster connections with other parts of the UK could also improve the experience of commuter and business travel. This is much needed given the overcrowding at peak times in many Midlands and Northern cities and the potentially significant negative wellbeing impacts.

For local people, however, the cost of poor infrastructure is not to the national economy, but to the enjoyment and productivity of their daily lives. In cities across the UK, the time people spend travelling to key services (including schools, hospitals and supermarkets), are significantly higher than in London. While the differences may seem quite small, even a few minutes per journey can have significant impacts. With the majority of us undertaking at least one of these journeys each day of our lives, the potential time costs can add up quickly. Given the relationship between travel time and conditions and wellbeing and productivity, the economic and wellbeing costs can also be high.

Using estimates of the value of time from DfT research, the potential yearly economic benefit from equalising these public journey times with those in London would be significant: theoretically totalling £18.4bn across England.

It is extremely unlikely – or even impossible – that travels times could be equalised to that of London (due to its urban density), but even if journey times outside of London were reduced by one minute, with the same assumptions, the economic benefit would be £4.7bn a year.^{xxi}

There are many ways this could be achieved – and it is not just about increasing the speed of travel, level of connectivity and frequency of services. It is also about the quality of infrastructure development and the wider services that can be included in the development. For example, new train station developments are including more and more retail outlets, click-and-collect services, restaurants and bars; combining journeys to key services with existing travel. In effect, we are taking the opportunity to cluster services around people’s travel and commute lines – and adapting our transport hubs to become more intuitive and useful parts of our cities and towns.

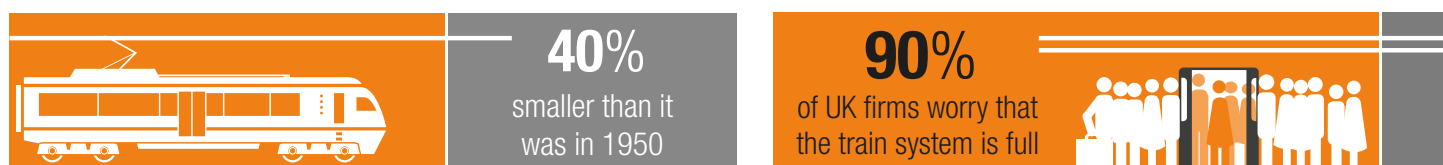
Of course, these are services that can also be used by those not travelling. Interestingly 20% of those using the facilities at Euston are not travelling by train.^{xxii} Overall, we also see that satisfaction with the “choice of shops/eating/drinking facilities available” is strongly associated with overall satisfaction of user experience at stations.^{xxiii}

Redevelopment at London Kings Cross and Birmingham New Street are prime examples. Overall satisfaction of travellers through New Street station increased from 81% to 87% in the last two years, and satisfaction with the “choice of shops/eating/drinking facilities available” has risen from 65% to 80%.

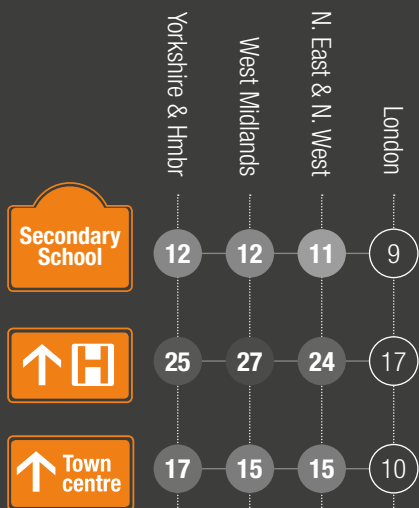
Together, better access to services and improved customer satisfaction provides an opportunity for substantial time and wellbeing impacts for passengers and non-passengers alike.



UK railways carry more passengers now than at any time in the last 60 years, on a network that is...



Average minimum travel time to local amenities (in minutes)



20%

of people using the facilities at Euston are not travelling by train



In the last two years, satisfaction with the facilities at Birmingham New Street has increased from 65% to



There are, then, clear benefits for growth, productivity and wellbeing – both through a better contribution to the national economy and in more relatable improvements in people’s everyday lives. This is especially true in the North of England and other City Regions outside of London.

As we have mentioned, reducing travel times to key services by just one minute a journey could bring economic benefits of £4.7bn a year. More broadly, by reducing commuting times, joining up our major cities, improving the quality and range of services on offer at our transport hubs, we can dramatically increase growth, wellbeing and living standards across the country; whilst using these development to increase aspiration in local communities.

The government is clear that steps must be taken to improve transport infrastructure and drive this renaissance of growth outside of London and, in particular in the Midlands and the Northern Powerhouse. But what needs to happen to make these goals a reality, and what is currently standing in the way?

Building support for transport infrastructure investment

A major barrier to the success of the Northern Powerhouse remains the extent to which the public support the development of infrastructure that is needed to drive it. While public support for improved transport links is high, those in local areas affected often put up vocal opposition to development on the ground. Or do they?

Surprisingly, the answer is often no, or at least not when the positive impacts that the development could have for them and their community are effectively communicated. There are two key areas that might increase the likelihood of public support for future plans:

1. **How do we know, if you don’t tell us?**

Research has shown that local residents are more likely to support development if they understand the potential economic benefits, for instance increased employment or more apprenticeships for young people.^{xxiv} A key example is that more residents support expansion of Heathrow airport than oppose it in nine of the ten parliamentary constituencies closest to it. Support is also increased where local people feel that they have been brought into the process earlier and properly consulted. Here future developments could learn from approaches to public and community engagement in places like the United States, France and the Netherlands.^{xxv}

2. So what does it mean for me?

While national growth and jobs are important, given the potential wellbeing and opportunity impacts of transport infrastructure investment, it is strange that so much of the discussion is focused on the national economic impacts. This is best highlighted by a focus group participant discussing HS2:

“Don’t talk to me about a boost to the country’s GDP from a project. I just want to know how this will affect our local community.”^{xxvi}

Research supports these ideas, showing that people think that arguments around quality of life for local people (47%), local job opportunities (44%), the local environment (37%) and individual quality of life (35%) are much more likely to boost support for development, rather than arguments around the national economy (21%).^{xxvii} Research also shows that the quality of development is important, with people more likely to support development that they regard as high quality or that is associated with improved services for them.^{xxviii}

This means that highlighting the wellbeing and quality of life impacts of development would likely boost support. The biggest opportunities lie in design and collaboration: creating transport facilities that mirror the requirements of modern day commuters and families, and bringing together all of the parties

who can capitalise from new transport investments.

For instance, given the challenges that some people face in accessing essential services, consideration of how to locate more services and amenities in and around station hubs could provide significant time savings and wellbeing boosts. We know this work happens for many modern projects, and the priority should be to build a picture in people’s minds about transport being transformational for city centres, a more intuitive part of their daily lives, and a route to better jobs and prospects.

Who should make the decisions?

The public do not trust national politicians. When asked, just 3% of the public would trust government ministers to make the right transport infrastructure investment decisions. Significantly more people would trust either technical experts (54%) or local councillors (22%) and local MPs (19%).^{xxix}

When thinking about what would boost confidence in the process of delivering infrastructure, the public also support community engagement that discusses local needs (41%) and the creation of a local infrastructure plan.

Businesses also support the move to more local decision making and engagement, with the majority of businesses across every region of England supporting the devolution of decision making.



More

people support the expansion of Heathrow than oppose it in the 9 out of 10 parliamentary constituencies closest to it

In an HS2 focus group, when asked what would make a difference to public support for infrastructure...



47%

said the quality of life for local people...



and 44%

said local job opportunities



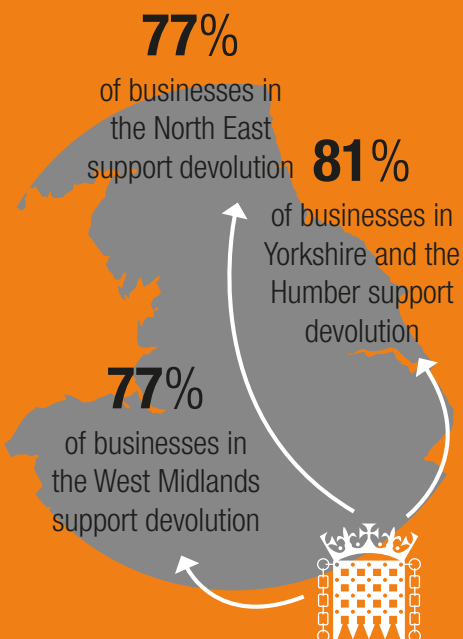
32%

of the UK public think that a local infrastructure plan would make them more confident about the process



41%

of the UK public think that better community engagement would make them more confident about the process



There are some clear ways in which these lessons could be taken forward and used to improve communication and focus on the wellbeing impacts of investment:

1. **Trust and act on expert opinion:** with strong public support for the views of experts in delivering plans for new infrastructure investment, it is vital that the National Infrastructure Commission is visibly up and running as soon as possible. Equally importantly, the government must listen and act quickly on its recommendations when they are made.
2. **Devolve responsibility where possible:** the government could also devolve more powers to local decision makers. For instance, Elected Mayors could be tasked with creating local transport infrastructure plans while engaging the public to gain support.
3. **Think local and pan-regional:** the approach of the Northern Powerhouse and setting up of Transport for the North have demonstrated the power of pan-regional thinking about transport infrastructure. To both allow coordinated plans across regions with devolved powers and build wide ranging support for vital pan-regional projects like HS2 and HS3, a similar approach should be used to create pan-regional bodies for the Midlands and South West of England.

CONCLUSION

Transport infrastructure is vital for boosting growth and increasing wellbeing. Yet the UK has a history of slow progress in delivering what is needed and the public and businesses do not believe that the right decisions will be made. That can change in future. By further devolving powers, sharing skills across cities, overcoming local politics, taking a pan-regional approach, and by focusing on the wellbeing benefits as well as impact on growth, the UK can build support from the public and businesses. Doing so would allow faster progress on essential projects: increasing connectivity, boosting productivity and opportunities, whilst creating a more geographically balanced economy and, ultimately, increasing living standards for people right across the UK.

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APPENDIX

WPI Economics calculations for Mace, based on DfT value of time research

Area	£ generated per year by reducing travel times by one minute
Northern Powerhouse	£1.6bn
Midlands	£1.1bn
South West	£0.5bn
East/South East	£1.5bn
Total	£4.7bn

WPI Economics calculations for Mace, based on DfT accessibility statistics

Area	% population within 30 minutes of employment centres with at least 5,000 jobs available by public transport/walk
London	79%
West Midlands	61%
North East	61%
North West	59%
Yorkshire and The Humber	53%
South East	46%
East	45%
South West	41%
East Midlands	41%

DfT statistics, average minimum travel time (in minutes) to reach the nearest key services by public transport/walking, region, England, 2013

Region	Employment	Primary school	Secondary school	Further education	GP	Hospital	Food store	Town centres	Average
North East	9	6	11	14	8	23	7	16	11
North West	8	6	11	14	8	25	7	14	11
Yorkshire and the Humber	9	7	12	15	8	25	7	17	12
East Midlands	9	7	13	15	9	29	7	18	13
West Midlands	9	7	12	14	8	27	7	15	12
East	9	7	14	17	9	32	8	18	14
London	7	6	9	9	6	17	6	10	8
South East	9	7	13	16	9	26	7	15	12
South West	10	7	14	18	9	26	8	17	13

Matthew Oakley

The new economic modelling commissioned by Mace in this report was done by Matthew Oakley at WPI Economics.

Matthew is a recognised expert on economics and public policy issues. He was formerly an Economic Adviser at the Treasury and before joining WPI had been Chief Economist and Head of Financial Services Policy at the consumer champion Which? and Head of Economics and Social Policy at the think tank Policy Exchange.

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