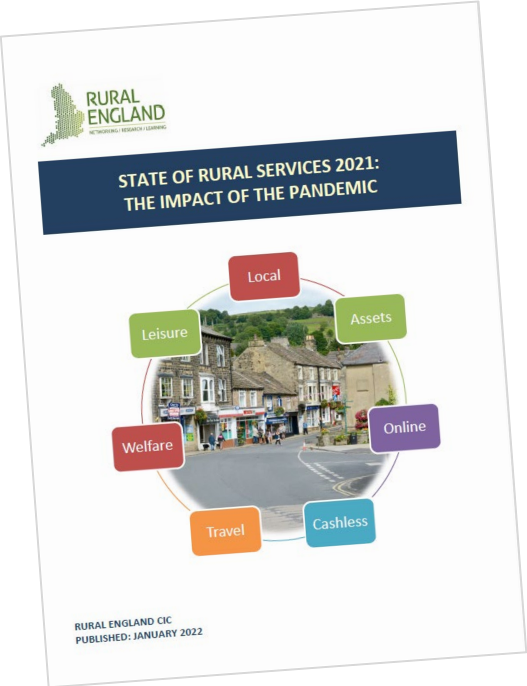
State of Rural Services 2021: The impact of the pandemic


RURAL ENGLAND

STATE OF RURAL SERVICES 2021:
THE IMPACT OF THE PANDEMIC

Local
Assets
Leisure
Online
Welfare
Cashless
Travel

RURAL ENGLAND CIC
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About the research

Research questions:

Given recent (but pre-pandemic) service trends in rural areas of England:

a. Did the pandemic and restrictions change their provision or their use?

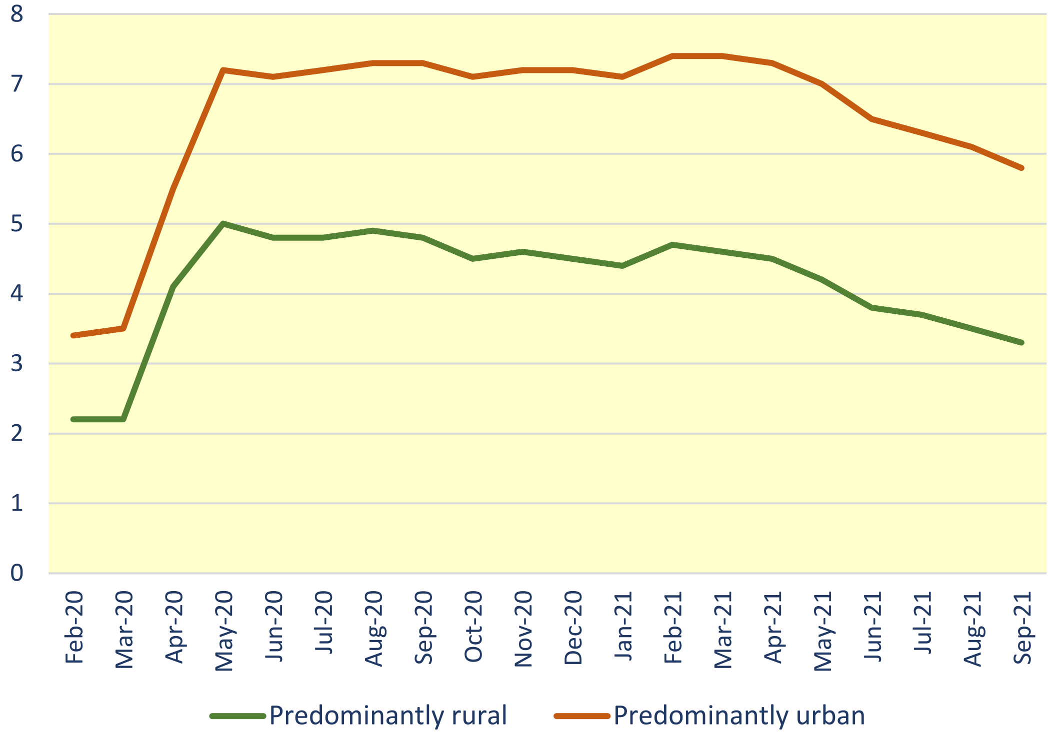
b. If they did, are those changes likely to be permanent?

Methodology:

- **Review of existing evidence** (research and statistics)
- **Secondary (rural) analysis of data sets**
- **Survey of rural residents** (June 2021)
- **Survey of market towns** (July 2021)

Rural economic trends and support

Per cent of working age population claiming UC or JSA whilst required to search for work



Business and employment Covid-19 support provided in predominantly rural areas

- Business support grants (LRSG, ARG and Restart) = total value £2.7 bn
- Self-Employment Income Support Scheme = initially claimed by 74% of eligible businesses
- Coronavirus Job Retention Scheme = supported almost 800,000 employees in January 2021

Main rural impacts of the pandemic:
Winners and losers

	Service types:	Impact, relative to the pre-pandemic period:
Winners	Online services	*Existing growth in use made faster still*
	Cashless payments	*Existing growth in use made faster still*
	Rural food shops/village stores	*Increased custom from local residents*
	Parks and outdoor spaces	*Highly valued by many during this period*
	Market town centres	*Mixed picture, but many recovering well*
	Village or community halls	*Recovering, but likely some permanent closures*
	Cafes and restaurants	*Clients mostly returning, but some permanent closures*
	Rural bus services	*Passenger numbers nosedived, then slowly recovered*
	Rural pubs	*Further additional permanent closures*
Losers	Theatres, cinemas and music venues	*Initial closure and some audiences hesitant to return*

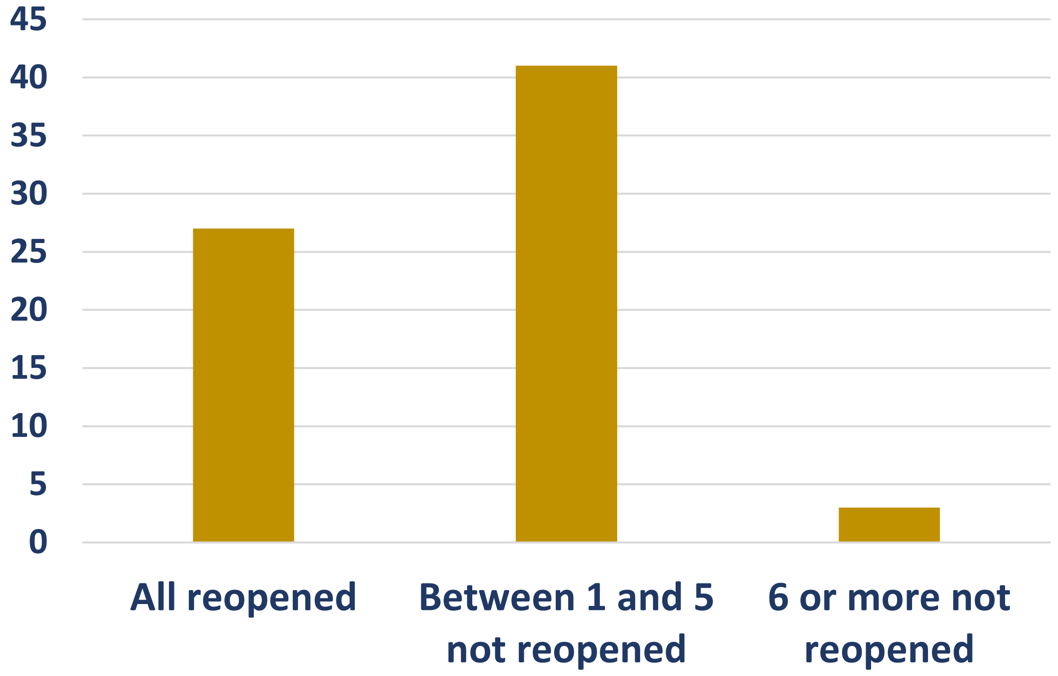
Local rural food shops

- Highly valued, especially during lockdown period
- Customers visiting more often and buying wider range of products
- Adapted and innovated e.g. online orders, home deliveries
- Trends hold true for commercial, community-run and farm shops

Net change (%) in extent to which, during the pandemic, rural residents used:

Rural market towns
(based on 72 town responses to survey)

Closures: number of shops or hospitality businesses which had closed and not reopened (June/July 2021)

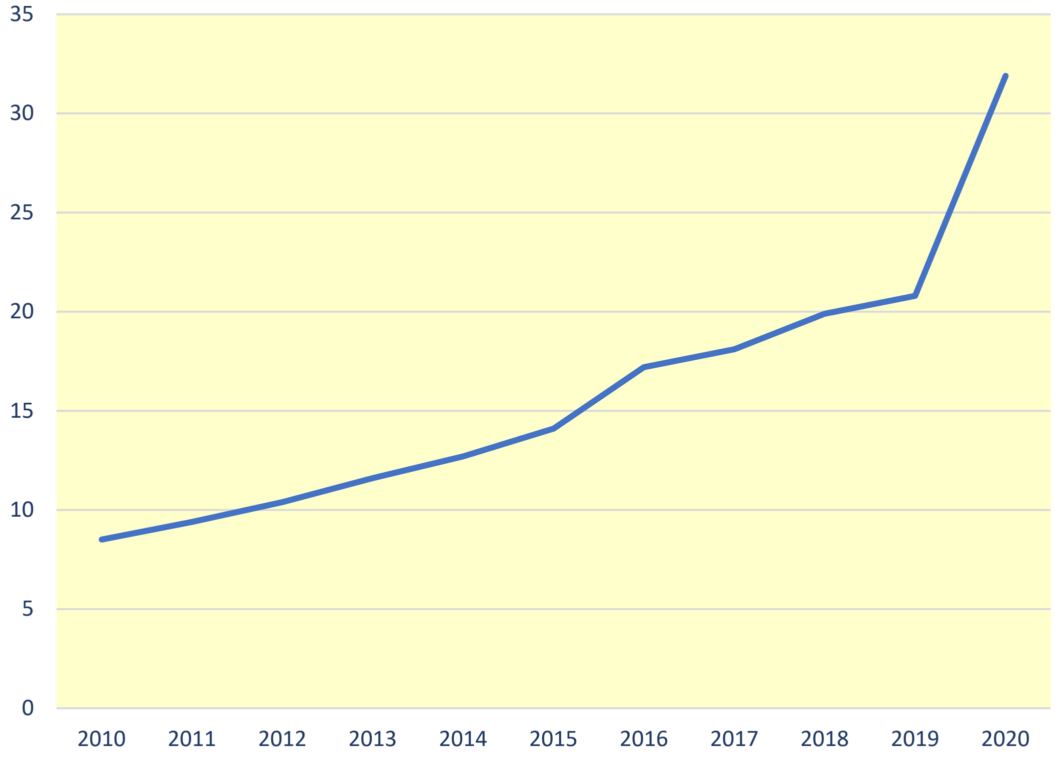


Footfall: people visiting or using market town centres in June/July 2021 compared with pre-pandemic

More people in 2021	23 towns
Same numbers	12 towns
Fewer people in 2021	30 towns

Use of online services

Internet sales as a proportion of all retail sales, GB (2010 to 2020)



Per cent of rural residents who said that during the pandemic they:

- **Used some type of online service for the first time = 51%**
- **Made significantly greater use of a type of online service they already used = 93%**

Examples include online shopping, banking, GP consultation, etc.

State of Rural Services 2021 report

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Rural residents' views about pubs

29% Were aware of a nearby permanent pub closure due to the pandemic

54% Had visited a pub since the pandemic started (asked in June 2021)

25% Considered a pub as necessary or vital to them in the pandemic

21% Expect to visit pubs less often in future than prior to the pandemic

Travel and bus services

Pre-pandemic context:

Local bus services running in predominantly rural areas over eight years 2011/12 to 2019/20:

- **Vehicle miles travelled fell by 16%**
- **Passenger journeys made fell by 15%**

Pandemic impacts:

Mode of travel	Short-term impact (2020)	Since initial impact
Local bus	*Big decrease*	*Slow, partial return*
Car	*Big decrease*	*Return to normal*
Cycling	*Increase*	*Return to normal*
Walking	*Big increase*	*Not known*

Expectations of future service use among rural residents:

- Many expect to keep on using local shops more often
- Despite boost for online services, some keen to return to face-to-face
- A minority remain cautious about going back into social settings
- A minority have been put-off from using public transport

Per cent of rural survey respondents who agreed with statements, when asked about their likely use of services once all pandemic restrictions are lifted (as compared with their use of those services prior to the pandemic):

	I will visit town centres less often	53%
	I will use local shops more often	47%
	I will use online services more often	44%
	I will use farm shops more often	33%
	I will have shopping delivered to my home more often	28%
	I will visit cinemas, theatres and music venues less often	26%
	I will visit pubs and bars less often	21%
	I will visit cafes and restaurants less often	20%
	I will use public transport less often	20%

Conclusions and policy recommendations

- Importance of social and physical infrastructure
- Ability of local services to address isolation and wellbeing
- Some hopeful findings and many communities resilient
- But not universal: some places and services in need of support
- Pandemic impacts continue to play out, especially with latest variant

Town centres:	*Government initiatives should target small (as well as large) towns in need e.g. Towns Fund*
Digital skills and access:	*Address connectivity gaps and a National Digital Skills Strategy so everyone can acquire skills*
Community-owned assets:	*Legislation needs strengthening with a Community Right to Buy*
Hospitality businesses:	*Sector needs careful monitoring and perhaps extended financial support e.g. business rates or VAT*