UK Competitiveness Index 2021

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Local, Urban and Regional Competitiveness in a Pandemic

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Executive Summary:

- The UK Competitiveness Index 2021 is a measure of the long-run potential of localities, cities and regions to generate economic growth and well paid employment. This edition accounts for the disruption caused by the twin shocks of Brexit and the Covid-19 global pandemic.
- The most competitive localities are situated in London and the South East, with the City of London remaining the most competitive locality in the UK followed some distance back by Westminster and Camden.
- The least competitive localities in 2021 tend to be a mix of old industrial towns and more rural areas. The old industrial area of Blaenau Gwent in Wales is the least competitive locality by some margin. Redcar and Cleveland in the North East and Mansfield in the East Midlands have similar industrial heritage and also display lower levels of competitiveness. The rural areas of East Lindsey (East Midlands), Torridge (South West), Torbay (South West) are also among the least competitive.
- Covid-19 restrictions are likely to have impacted the sectors that are dominant in older industrial areas with Brexit causing problems with access to the cheap labour that agriculture, hospitality and tourism sectors are reliant on in the more rural areas.
- At the urban scale, cities with specialisms in growing sectors such as green technology and finance remain at the top of the city rankings. St Albans, Winchester and Edinburgh lead the city rankings in 2021. Larger and mid-sized cities such as Leicester (+62 places) and Nottingham (+46 places) have seen improvements in their rankings.
- The least competitive cities are those old industrial cities that are not regional centres, such as Kingston on Hull (compared to Yorkshire and the Humber Core Cities of Leeds and Sheffield), Stoke-on Trent (compared to dominance of Birmingham in the West Midlands), and Sunderland (compared to Newcastle upon Tyne in the North East).
- At the Local Enterprise Partnership (LEP) and City Region level, Worcestershire and Leicester and Leicestershire LEPs have boosted their rankings, other LEPs and City Regions that have seen increases in competitiveness are those which have received funding through their City Deals such as Liverpool City Region, Glasgow and Clyde Valley City Region and Leeds City Region. LEPs that have seen a decline in competitiveness have tended to be more rural locations such as Lancashire and Inverness and Highland City Region.
- The UKCI growth forecasts indicate that in all scenarios the Boroughs of London are expected to grow the fastest. There are exceptions, e.g. Copeland and Knowsley in the North West are likely to continue to remain highly competitive and provide a high standard of living for residents due to specialisms in particular sectors of continuing

importance (Nuclear and Logistics). Localities that are forecast to have lower rates of growth in GVA per capita tend to be old industrial towns and seaside resorts.

- In conclusion, the trends in competitiveness differences suggest that the economic levelling of the UK economy over the coming years is unlikely and can only be addressed through significant additional investment in the local areas of the UK that have been left behind.

1. Introduction

First introduced and published in 2000, this UK Competitiveness Index (UKCI) report represents the 2021 edition of the report. The UKCI provides a benchmarking of the competitiveness of the UK's localities,[1] and it has been designed to be an integrated measure of competitiveness focusing on both the development and sustainability of businesses and the economic welfare of individuals. In this respect, competitiveness is considered to consist of the capability of an economy to attract and maintain firms with stable or rising market shares in an activity, while maintaining stable or increasing standards of living for those who participate in it.

The above definition makes clear that competitiveness is not a zero-sum game, and does not rely on the shifting of a finite amount of resources from one place to another. Competitiveness involves the upgrading and economic development of all places together, rather than the improvement of one place at the expense of another. However, competitiveness does involve balancing the different types of advantages that one place may hold over another, i.e. the range of differing strengths that the socio-economic environment affords to a particular place compared to elsewhere.

1.1. Period of Coverage

This report publishes competitiveness indices that incorporate the most up-to-date data available in 2021. These data will largely relate to the period since the UK's departure from the European Union (EU) and the beginning of the Covid-19 Pandemic and associated economic downturn in 2020.

As a comparator prior to these major unforeseen (Covid-19 Pandemic) and foreseen (UK's departure from EU) economic events, an updated UKCI is also generated for 2018. This UKCI will provide a measure of competitiveness prior to these shocks and before the period of greatest uncertainty associated with the UK's departure from the EU. This provides a means of comparison and an examination of the UK's changing competitiveness landscape.

[1] It should be noted that although the term 'UK' is used, due to a lack of compatible data, localities from Northern Ireland are excluded from the index.

The UKCI seeks to provide a measure of the on-going competitiveness of localities across the UK, and to begin to analyse how the Covid-19 Pandemic, and to some extent Brexit, have impacted upon existing geographic patterns of economic performance.[2] As such it might be expected that a comparison of the UKCI for 2018 and 2021 will show greater changes than comparisons in previous editions of the UKCI.

Given lags in data it should be noted that the UKCI for 2021 will by and large not identify those localities that are recovering more quickly than others. This is not problematic as the UKCI is not designed to focus on short term changes, but it will provide insight into those areas best placed to recover from the twin shocks experienced in 2020.

1.2. Structure of the Report

After outlining the methodology utilised in creating the UKCI, the key findings of the 2021 UKCI are analysed and outlined in the following sections. For those readers interested in the score and rank of a particular locality or localities they may wish to refer directly to Appendix 2, which provides a ranked order list of all localities, and/or Appendix 3, which ranks localities within their relevant regional grouping.

[2] Bhattacharjee, A. Nguyen, D. and Venables, T. (2020) 'The prospects for regional disparities in the UK in times of Brexit and Covid-19', *National Institute Economic Review*, 253, R1-R3.
Nanda, A. Xu, Y. and Zhang, F. (2021) 'How would the Covid-19 pandemic reshape retail real estate and high streets through acceleration of e-commerce and digitalization?', *Journal of Urban Management*, 10 (2), 110-124.

2. Methodology

This section outlines the theoretical perspective that is applied to the concept of competitiveness within the UKCI reports, and how this is used to generate a measure of competitiveness at the local level. The section therefore sets out the aims and objectives of the UKCI with regard to the perspective on competitiveness to be taken. This perspective is encapsulated within the UKCI 3-Factor model underpinning the index. The data included within the UKCI is noted while outlining the model before we described how the data are brought together to produce an overall measure of competitiveness.

2.1. Aims and Objectives of the UKCI

The aim of the UKCI is to assess the relative economic competitiveness of regions and localities in the UK by constructing a single index that reflects, as fully as possible, the measurable criteria constituting place competitiveness. The UKCI considers that the competitiveness of localities and the competitiveness of firms to be interdependent concepts. Measuring such competitiveness, however, is no easy matter and, as indicators of national competitiveness have shown, cannot be reduced solely to notions of Gross Domestic Product (GDP) and productivity.

Similarly, place competitiveness cannot be measured by ranking any one variable in isolation, since it is the result of a complex interaction between input, output, and outcome factors. Clearly, not all of these factors are readily measurable, given that as well as consisting of economic variables, they also include political, social and cultural parameters. However, since the focus of the UKCI is on relative competitive performance within the UK, the assumption can be made that these factors will have an identifiable effect on key economic measures. For example, the cultural differences between a traditional manufacturing economy and a knowledge-based economy should have an obvious bearing on their relative economic performance.

The key concern with the design process of the UKCI is to develop a series of indices incorporating data that are available and comparable at the local level, and that go some way towards reflecting the link between macro-economic performance and innovative business behaviour. Consideration also has to be given to the overall 'value' of indicators, and their relative effectiveness as performance measures. In particular, the interrelationships between the 'measure-chain' of inputs, outputs and outcomes, and the underlying ability of the index to be updated as frequently as possible, are of major significance.

2.2. UKCI 3-Factor Model of Competitiveness

Given the methodological parameters, a number of different modes of creating the index, and the variables to be included, have been considered. After testing, the 3-Factor model for measuring competitiveness as shown in Figure 2.01 is adopted. The 3-Factor model consists of a linear framework for analysing competitiveness based on: (1) input; (2) output; and (3) outcome factors.

FIGURE 2.01: THE 3 FACTOR MODEL UNDERLYING THE UK LOCAL COMPETITIVENESS INDEX

Input factors
Economic Activity Rates Business Start-up Rates per 1,000 Inhabitants Number of Business per 1,000 inhabitants Proportion of Working Age Population with NVQ Level 4 or Proportion of Knowledge-Based Business
↓
Output factors
Gross Value Added per head at current basic prices Productivity - Output per Hour Worked Employment Rates
↓
Outcome factors
Gross weekly pay Unemployment rates

Source: Huggins, R. and Thompson, P. (2013) UK Competitiveness Index 2013, School of Planning and Geography, Cardiff University: Cardiff

In order to achieve a valid balance between each of the indicators, in terms of their overall significance to the composite index, each of the three measures - Measure 1: Inputs; Measure 2: Output; and Measure 3: Outcomes - are given an equal weighting, since it is hypothesised that each will be interrelated and economically bound by the other.[3]

[3] Huggins, R. (2003) 'Creating a UK Competitiveness Index: regional and local benchmarking', *Regional Studies*, 37 (1), 89-96.

2.3. Calculating UKCI Scores

For each measure an index is calculated with a UK average base of 100, and the distribution range for each measure calculated (in the case of unemployment rates these values are inverted). As expected, it is found that some of the ranges have both a skewed and a long distribution range, the result being that these variables would have an overly strong influence on the composite index. Therefore, each datum is transformed into its logarithmic form to produce distributions that are closer to the 'normal' curve, and that dampen out extreme values so that no single variable distorts the final composite score.

It is the case that the untransformed values are no more real or 'natural' than the transformed ones. However, in order to reflect as far as possible the scale of difference in place competitiveness, the composite scores are 'anti-logged' through exponential transformation. This is achieved by calculating the exponential difference between the mean logged and un-logged index of the fifty localities nearest the overall UK mean of 100. This resulted in a mean exponential difference slightly less than the cubed-mean of the logged index. For example, a logged index of 104 produced an unlogged index of approximately 112.5 (1043 divided by 1002) and a logged index of 90 an unlogged index of approximately 73 (903 divided by 1002).

Therefore, bearing in mind the aim of producing a frequently repeatable index, the exponential cube transformation approach is adopted. Given the above criteria and methodology, a composite competitiveness index is calculated for localities in the UK.

Section 8 also provides a set of forecasts for growth in GVA per capita using the UKCI. This approach is covered in detail in Appendix 1, but effectively it is based on previous patterns of growth experienced by localities with particular UKCI sub-index scores, and uses to predict which localities will experience growth in the future given their current UKCI sub-index scores. As is appropriate for the uncertain times we live in, four scenarios are presented which can be considered as reflecting what may happen depending on how the national and global economy respond to the current Brexit and Covid-19 challenges.

2.4. Geographical Coverage

The UKCI 2021 covers the localities in England, Scotland and Wales at the local authority district level. The areas covered are a mix of English local authority districts, English and Welsh unitary authorities, Scottish Council Areas, and London Boroughs. The areas covered are those in operation in April 2021.

This means that there will be differences between the UKCI 2021 report and its predecessors as a number of unitary authorities have been merged or otherwise reorganised since the previous report in 2019. Changes relate to localities in Buckinghamshire and Northamptonshire.

As such, when making comparisons readers should use the rankings provided in this report for 2018 where an equivalent UKCI has been estimated using the same areas that now exist in 2021. Any comparison of rankings in previous reports will in part reflect the dissolution of some localities as well as any change in competitiveness, and so may provide an inaccurate picture.

UKCI 2021 figures are estimated for all local authority district level areas with the exception of the Isles of Scilly where unfortunately data availability issues make it impossible to provide a reliable figure for this geographically very small local authority district with a small population.

As well as producing UKCI figures for individual localities, the report includes figures for the English Local Enterprise Partnerships (LEPs) and City Regions in Wales and Scotland that have City Deals in place. This means that Isles of Scilly noted above as not being covered by the UKCI individually is covered within the larger Cornwall and the Isles of Scilly LEP area to which it belongs.

As with the locality measures, care should be taken when making comparisons with figures in previous UKCI reports. This is because there have been some major revisions to the LEP areas in England since the previous report. Largely, these changes relate to the removal of many of the overlaps between LEP areas, so that in the main the localities only lie within a single LEP. The remaining exceptions are in the West Midlands. Rutland has also moved from being part of the Greater Cambridge and Greater Peterborough LEP to the Greater Lincolnshire LEP.

Other figures reported are for particular groups of localities. These comparisons are of the same locality UKCI figures, but allow comparison of localities with similar natures. Examples include those localities that include cities. These are those localities based around a single urban area classified as a city that has a population of 100,000 or more. This means that some cities are absent as they are incorporated into larger unitary authorities. This means smaller urban areas that are classified as cities for historical reasons are not included such as Wells in the Mendip, Truro in Cornwall, and St Davids in Pembrokeshire, but also means larger cities such as Durham, which is part of County Durham, and Chester in the West Cheshire and Chester unitary authority are not included. London is not included as the UKCI focuses on individual boroughs.

We also focus on the largest cities of the UK. This includes the Core Cities of England, Cardiff in Wales and the two largest Scottish agglomerations Edinburgh and Glasgow. Belfast in Northern Ireland is also included as a further addition to this extended set of Core Cities.

3. The Most and Least Competitive Localities

This section of the report concentrates on the extremes of the rankings of the UKCI for 2021 by focusing on those localities that display the highest and lowest levels of competitiveness.

3.1. The Most Competitive Localities

Table 3.01 shows that localities in London continue to account for nine of the ten most competitive places in Britain, headed by some distance the City of London, and followed by Westminster, Camden, and Tower Hamlets. The only non-London locality to feature in the top ten is nearby Runnymede. Given the impact of the Covid-19 Pandemic on working habits it is of little surprise that there has been a sizeable fall in the City of London's UKCI between 2018 and 2021 of 63.6 points. This fall is also evident for the next five more competitive localities down to Hammersmith and Fulham.

The City of London, with its dominant finance sector, is likely to remain far above the other localities in Britain. However, these results are consistent with those of researchers who have indicated that although the dominance of localities within global cities, such as London, is likely to remain, it may be lessened to some extent as the benefits of knowledge exchange through close proximity to others is offset against fears of the Covid-19 virus, and similar future diseases.[4] Similarly, the previous success of city centres in attracting and retaining highly skilled and creative people by providing access to cultural amenities such as theatres and restaurants is now being offset by the desire for more space.

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[4] Although it is not yet possible to ascertain whether changes in working patterns that have been imposed due to the Covid-19 Pandemic and the associated government policies, such as lockdowns, will be permanent, a number of studies have considered what the likely patterns might be. Examples, of these studies include:

Florida, R. Rodríguez-Pose, A. and Storper, M. (2021) 'Cities in a Post-COVID world', *Urban Studies*, doi:10.1177/00420980211018072

Garrett G. (2020) 'The Post-COVID-19 world will be less global and less urban', Knowledge@Wharton, https://knowledge.wharton.upenn.edu/article/post-covid-19-world-will-less-global-less-urban/.

Huggins, R. and Thompson, P. (2021) 'Cities innovation and behavioural change: how the machine is evolving', in P. McCann and T. Vorley (eds.), *Productivity and the Pandemic: Challenges and Insights from Covid-19*, Cheltenham: Edward Elgar Publishing, pp. 173-190.

Having noted that there is some evidence of changing competitiveness for city centre locations, the results of UKCI in 2018 and 2021 indicate that the most competitive localities in the UK are relatively stable. This stability may reflect the enduring benefits both on the work and social perspective of these localities, but outside the global city of London this pattern may be more acute, as will be considered in later sections of this report.

TABLE 3.01: UKCI 2018 AND 2021 TOP 10 LOCALITIES (UK=100)

Rank 2021	Locality	Region	UKCI 2021	UKCI 2018	Rank 2018	Change 2018-2021 UKCI	Change 2018-2021 Rank
1	City of London	London	928.3	991.9	1	-63.6	0
2	Westminster	London	205.7	207.1	2	-1.3	0
3	Camden	London	167.7	172.4	3	-4.7	0
4	Tower Hamlets	London	151.7	153.5	4	-1.8	0
5	Islington	London	148.2	149.7	5	-1.5	0
6	Hammersmith and Fulham	London	134.0	135.2	6	-1.2	0
7	Kensington and Chelsea	London	132.4	129.2	9	3.2	+2
8	Southwark	London	131.7	130.2	8	1.5	0
9	Runnymede	South East	130.0	126.9	12	3.1	+3
10	Hounslow	London	128.0	130.2	7	-2.1	-3

3.2. The Least Competitive Localities

In terms of those localities displaying the lowest levels of competitiveness, and therefore least well placed to withstand and recover from the shock of the Covid-19 Pandemic, Blaenau Gwent in the South Wales Valleys remains the least competitive locality in Great Britain (Table 3.02). In recent editions of the UKCI, Blaenau Gwent has been the least competitive locality by a relatively large margin and this remains the case in 2021. For those that are the next in the rankings there is a group of localities with similar UKCI scores in 2021, Redcar and Cleveland 74.3 in the North East with East Lindsey (74.4) and Mansfield (74.6) both in the East Midlands.

Comparisons of the 2021 and 2018 UKCI are shown in Table 3.02, and indicate that there is more fluidity in which localities are ranked than previously. This is understandable as weaker localities might be reliant on a relatively smaller number of key employers and industries for their remaining competitiveness. Shocks can lead to the loss of precious knowledge intensive employment, and with it the ability to retain more skilled members of the population. In other words these less competitive localities are also some of the most vulnerable.

Examples of localities that have experienced large falls in the rankings include Redcar and Cleveland in the North East (a drop of 13 places) and Torridge in the South West (a drop of 12 places). In the case of Redcar and Cleveland the loss of the Teesside Steelworks in 2015 will have left the remaining businesses serving the population and local economy more widely vulnerable to the Covid-19 shock. Torridge, as a more peripheral locality, is reliant on micro and small businesses concentrated in the retail and hospitality sector serving the local population and tourism industry,[5] both of which have been hit hard by lockdowns and enforced business closures.

TABLE 3.02: UKCI 2018 AND 2021 BOTTOM 10 LOCALITIES (UK=100)

			UKCI			Change 2018-2021	
Rank 2021	Locality	Region	2021	2018	Rank 2018	UKCI	Rank
353	Tendring	East of England	76.1	74.8	358	1.3	+5
354	South Tyneside	North East	75.7	74.9	357	0.8	+3
355	Gosport	South East	75.6	75.2	355	0.4	0
356	Torbay	South West	75.2	75.5	354	-0.3	-2
357	Torridge	South West	75.2	78.0	345	-2.8	-12
358	Merthyr Tydfil	Wales	75.2	74.3	359	0.9	+1
359	Mansfield	East Midlands	74.6	74.1	360	0.4	+1
360	East Lindsey	East Midlands	74.4	75.1	356	-0.7	-4
361	Redcar and Cleveland	North East	74.3	77.3	348	-2.9	-13
362	Blaenau Gwent	Wales	70.8	69.3	362	1.5	0

[5] North Devon and Torridge District Council (2014) *Northern Devon Economic Strategy 2014-2020*, Bideford: North Devon and Torridge District Council.

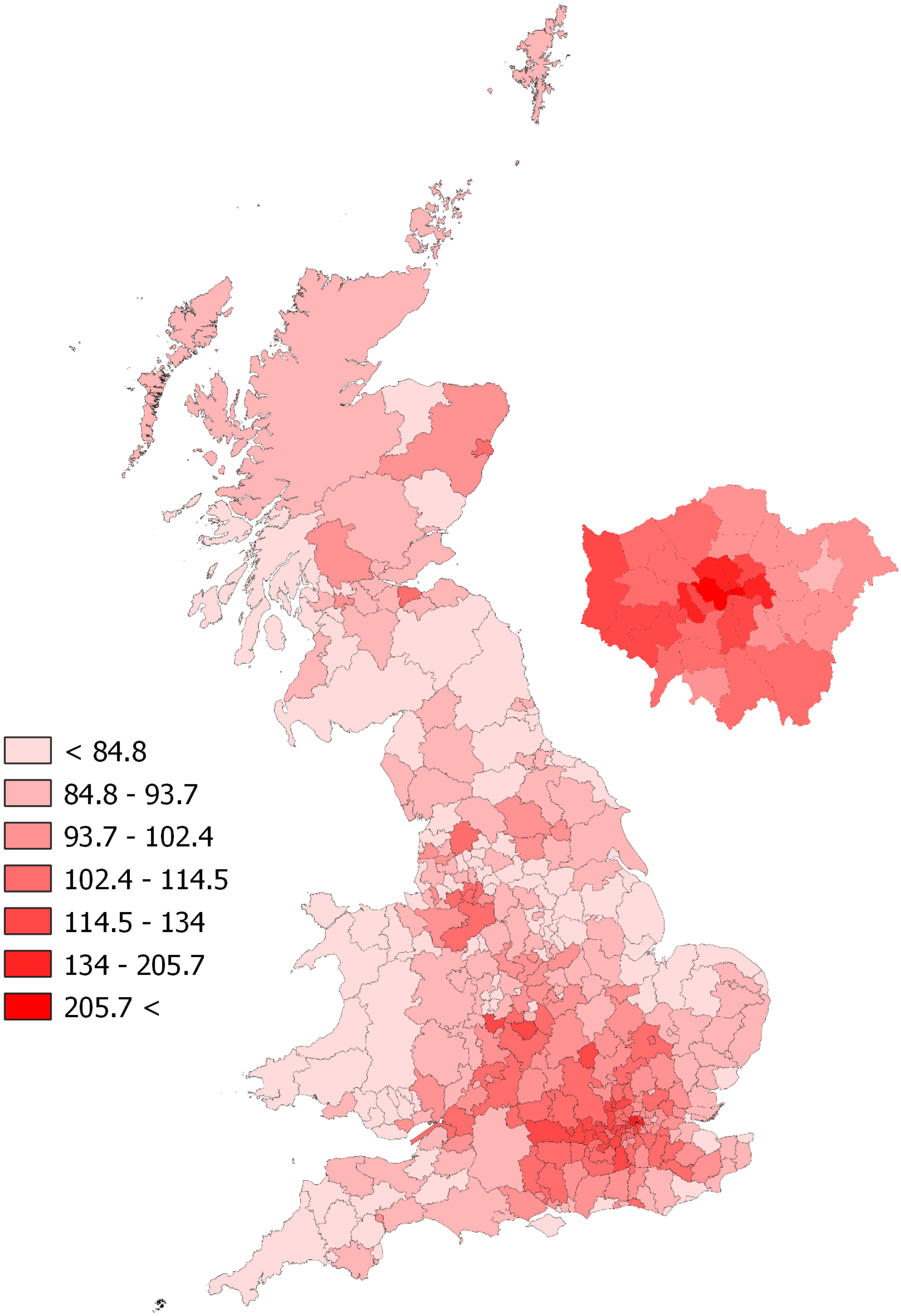
3.3. Geographical Distribution of Competitiveness in Britain

As the preceding subsections have indicated, there is an uneven geographical distribution of competitiveness across the UK. The most competitive localities are clearly concentrated in London and the South East. However, the data in sub-section 3.2 above shows that there is also variation within regions, which means that there are less competitive localities found in a considerable range of regions. Figure 3.01 provides a visual representation of the distribution of competitiveness as captured by the UKCI.

It is obvious that the most competitive localities continue to be those within the boundaries of, or nearby to, London including those along the main motorway arteries into the capital. Other areas of competitiveness can be found in those localities towards the south of both the Birmingham and Greater Manchester agglomerations in localities such as Bromsgrove (West Midlands), East Cheshire and Manchester (both North West). Within Scotland, the Aberdeen oil industry cluster and Edinburgh finance clusters are also associated with higher levels of competitiveness.

Regions such as Wales, the South West and North East although having relatively more competitive localities generally centred around their main urban areas, such as Cardiff (Wales), Exeter (South West) and Newcastle-upon-Tyne (North East), on average in absolute terms are less competitive. However, as noted above, even regions such as the East of England and South East that have competitive localities such as Cambridge (East of England) and Brighton and Hove (South East), also have their own less competitive localities such as Great Yarmouth (East of England) and Gosport (South East).

FIGURE 3.01: GEOGRAPHICAL DISTRIBUTION OF COMPETITIVENESS IN 2021



4. Biggest Climbers and Fallers

The previous section, when discussing the 10 least competitive localities in the UKCI 2021, noted how some localities have experienced larger falls in competitiveness between the pre-pandemic and pandemic periods. In particular, Redcar and Cleveland in the North East and Torridge in the South West fell 13 and 12 places in the rankings respectively. It should be noted that in both cases these localities experienced falls in their UKCI score between 2018 and 2021, suggesting that they are becoming relatively less competitive when compared to the UK average (100). In the case of Redcar and Cleveland the UKCI 2021 score was 74.3, a fall of 2.9 points from 77.3 in 2018, while Torridge fell 2.8 points from 78.0 in 2018 to 75.2 in 2021. This means that these localities displayed lower competitiveness in 2018 compared to the UK average, and from this lower starting position in the rankings their competitiveness has further worsened, dropping into the bottom 10. These localities, however, are not necessarily those that have experienced the largest loss of competitiveness due to the combined impact of Brexit and the Covid-19 Pandemic accelerating existing processes.

In this section of the report the concentration is on localities that have experienced the largest improvements and falls in UKCI score between 2018 and 2021. As the UKCI score is measured relative to the UK average it should be noted that this does not necessarily reflect an absolute improvement or fall in competitiveness, but rather these are the localities that have improved or declined in competitiveness relative to others. Although not competing in the same manner as companies do, this is the appropriate manner to measure competitiveness for localities as they are competing for resources such as skilled labour and high value added companies and in creating a platform for them to succeed.[6] The ultimate aim of policy makers seeking to increase competitiveness should be to improve the welfare of their resident population,[7] so this means increases in the UKCI are about the potential to increase employment and wages rather than shedding jobs and reducing wages to cut costs.

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[6] Huggins, R. and Thompson, P. (2012) 'Well-being and competitiveness: are the two linked at a place-based level?', *Cambridge Journal of Regions, Economy and Society*, 5 (1), 45-60.

[7] Annoni, P. and Dijkstra, L. (2017) 'Measuring and monitoring competitiveness in the European Union', in R. Huggins and P. Thompson (eds.) *Handbook of Regions and Competitiveness: Contemporary Theories and Perspectives on Economic Development*, Cheltenham: Edward Elgar, pp. 49-79.

Aiginger, K. and Firgo, M. (2017) 'Regional competitiveness: connecting an old concept with new goals', in R. Huggins and P. Thompson (eds.) *Handbook of Regions and Competitiveness: Contemporary Theories and Perspectives on Economic Development*, Cheltenham: Edward Elgar, pp. 155-191.

4.1. Biggest Climbers 2018 to 2021

A number of localities have increased their ranking considerably between 2018 and 2021. It is noticeable that all the localities displaying the largest improvements in their rankings over this period are localities with competitiveness below the UK average (Table 4.01). In this regard, it is positive that it is not the above average localities that are pulling ahead of the others.

These localities have all improved their UKCI score in 2021 compared to 2018. This means that they have all improved their position relative to the UK average. However, it is worth remembering that these improvements are relative, so need not reflect increases in the absolute quality of inputs, outputs achieved with these, and in particular the outcomes achieved for the population over this period. For example, unemployment rates have increased for most localities between 2018 and 2021 due to the dual shocks experienced.

When considering the rankings, it may be worth contextualising these results in terms of those discussed in sub-section 4.2 below relating to the localities falling down the rankings. The localities in Table 4.01 have improved their position relative to the UK average, but their very large movements up the rankings may also reflect localities with similar UKCI scores in 2018 experiencing declining competitiveness and dropping down the rankings.

Leading this list is Knowsley in the North West where an 8.5 point increase in the UKCI to 94.2 has led to a jump of 101 places in the rankings. Such a strong performance is potentially driven by strengths in industries that were of growing importance, but which has been accelerated through the Covid-19 Pandemic such as transport and logistics. This sector benefits from Knowsley's geographical location and transport links to the large urban centres of Liverpool and Manchester in particular, but also a little further afield Birmingham. These connections are part of the reason for the success of the Knowsley Business Park.[8] This has seen a large increase in the median wages of those working in Knowsley.

[8] Knowsley Metropolitan Borough Council (2016) *Knowsley: Our Plan for Accelerating Economic Growth 2016-2021*, Huyton: Knowledge Metropolitan Borough Council.

Second in the list is Wyre Forest (West Midlands), which has improved its UKCI score from 80.2 in 2018 to 86.6 in 2021. This move towards the UK average has resulted in a 76 place improvement in the rankings. Wyre Forest is an interesting case as its important retail sector has meant that others have estimated that the initial impact on output as captured by Gross Value Added (GVA) will be relatively high.[9] The full extent of the impact on output is still to be ascertained due to lags in the data and the fact that the Covid-19 Pandemic is yet to be fully over. However, the rise in the UKCI for 2021 reflects the strong improvements in business creation and business presence per head of population in the locality.

The remaining localities on the list of highest climbers include a variety of different types of area. In the East Midlands the urban centres of Leicester and Nottingham are both included. These cities have both seen increases in their economic activity rates, so that their resources are being put to work more fully. It is too early to establish if this is linked to Brexit and the local workforce mobilising to fill the gap left by returning EU nationals, but this is one explanation.

As well as urban localities those more rural localities such as Somerset West and Taunton in the South West and Denbighshire in Wales have also improved their positions by 49 and 47 places respectively. These localities have seen a rise in business registrations, but some of their improvement in UKCI scores between 2018 and 2021 appears to reflect local economies that were never highly reliant on the close networks and connectivity of urban centres that have been affected so greatly by the Covid-19 Pandemic.[10]

[9] Centre for Progress Policy (2020) Which local authorities face the biggest immediate economic hit? https://www.progressive-policy.net/publications/which-local-authorities-face-biggest-immediate-economic-hit

[10] Huggins, R and Thompson, P. (2021) *The Future of Innovation in the City: Entrepreneurship, Ecosystems and the Pandemic*, Sheffield: Productivity Insight Network.

TABLE 4.01: UKCI TOP 10 RANKING CLIMBERS (UK=100)

Rank 2021	Locality	Region	UKCI 2021	UKCI 2018	Rank 2018	Change 2018-2021 UKCI	Change 2018-2021 Rank
146	Knowsley	North West	94.2	85.6	247	8.5	+101
237	Wyre Forest	West Midlands	86.6	80.2	313	6.5	+76
163	Leicester	East Midlands	92.2	87.6	225	4.6	+62
186	Somerset West and Taunton	South West	90.7	86.8	235	3.9	+49
257	Denbighshire	Wales	84.7	80.9	304	3.8	+47
169	Nottingham	East Midlands	91.9	88.4	215	3.5	+46
185	Gravesham	South East	90.7	87.4	228	3.4	+43
216	Canterbury	South East	88.2	84.2	259	4.0	+43
196	Mendip	South West	90.0	86.6	238	3.4	+42
251	Chesterfield	East Midlands	85.2	82.1	291	3.1	+40

4.2. Biggest Fallers 2018 to 2021

When considering those localities that have experienced large falls in their UKCI rankings between 2018 and 2021 it is interesting to note that of the 12 localities shown in Table 4.02 with the greatest falls, 11 have UKCI scores in 2018 and 2021 indicating they are less competitive than the UK average. This means that the localities in question are similar to those experiencing the greatest relative improvements in competitiveness over the period in terms of their starting competitiveness. Worryingly, this means that some of those localities which were struggling prior to the twin shocks of the Covid-19 Pandemic and Brexit are likely to have seen the processes associated with their diminished competitiveness accelerated.

There have been a number of studies that have suggested that the Covid-19 Pandemic has challenged the dominance of urban areas with people wishing to make fewer face-to-face contacts with others and a desire for more space at home.[11] The results presented in Table 4.02 complement those in Table 4.01 and are consistent with other studies that suggest cities will remain the focus of much economic and social activity.[12] Many of the areas with the largest ranking falls are those that are more rural in nature, often in the areas surrounding larger cities such as: South Somerset (close to Bristol) in the South West; and Melton (close to Leicester) and Gedling (close to Nottingham) both in the East Midlands; and the only locality with competitiveness above the UK average is East Hertfordshire, where more than one in five employed residents work in London.[13] Although workers may be operating from home in these localities, their production will be brought together with their co-workers in the nearby cities. Localities such as South Somerset with weaker road or rail connections have seen larger drops in their ranking.

[11] Batty, M. (2020) 'The coronavirus crisis: what will the post-pandemic city look like?', *Environment and Planning B: Urban Analytics and City Science*, 47 (4), 547–552.

Florida, R. Rodríguez-Pose, A. and Storper, M. (2021) 'Cities in a Post-COVID world', *Urban Studies*, doi:10.1177/00420980211018072

Nathan, M. and Overman, H. (2020) 'Will coronavirus cause a big city exodus?', *Environment and Planning B: Urban Analytics and City Science*, 47 (9), 1537-1542.

[12] Huggins, R. and Thompson, P. (2021) 'Cities, innovation and behavioural change: how the machine is evolving', in P. McCann and T. Vorley (eds.), *Productivity and the Pandemic: Challenges and Insights from COVID-19*, Cheltenham: Edward Elgar, pp. 173-190.

[13] 22.3% of East Hertfordshire residents who are in employment work in the Greater London region according to the 2011 Census.

In the more 'satellite' localities, the businesses based there tend to serve the local and tourist populations. This means they have been more strongly affected by lockdowns as workers did not have the options to continue to work from home. This has meant enforced closure for some and others such as manufacturers have suffered from supply chain interruptions from both Covid-19 closures and Brexit disruption.[14] Employee shortages will also have affected particular sectors with the loss of EU labour, or from employees self-isolating, such as in the fresh produce and food processing sector.[15] However, some studies suggest that these sectors have also shown an ability to adapt and may therefore partly mitigate the loss of competitiveness.[16]

These factors have translated into a loss of resources for many of these localities. This includes falls in the proportion of the population holding university degree qualifications or higher while the UK average rose over the period. At the same time, the economic activity rate has fallen for a number of the localities noted above, while again the UK average has risen very slightly. Although furlough schemes and government support to businesses and the self-employed may cloud the picture, median full time wages have also fallen for some localities, contrasting with a slight rise for the UK overall.

This is not to say that cities will necessarily return to their position before the Covid-19 Pandemic as patterns of home working may remain present to some degree.[17] This means that those businesses based on city centre footfall may struggle, but the most advanced knowledge intensive activities appear likely to remain operating through cities even if workers are not located physically in the cities as often.

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[14] Meier, M. and Pinto, E. (2020) 'Covid-19 supply chain disruptions', *Discussion Paper Series Collaborative Research Center Transregio 224*, #239.

Nikolopoulos, K. Punia, S. Schäfers, A. Tsinopoulos, C. and Vasilakis, C. (2021) 'Forecasting and planning during a pandemic: COVID-19 growth rates, supply chain disruptions, and governmental decisions', *European Journal of Operational Research*, 290, 99-115.

Leeson, T. (2021) 'Paperwork is the enemy as Brexit becomes a reality'. http://www.open-access.bcu.ac.uk/11233/1/Paperwork%20is%20the%20enemy%20as%20Brexit%20becomes%20a%20reality.pdf

[15] Korir, L. Drake, A. Collison, M. Camacho-Villa, T. C. Sklar, E. and Pearson, S. (2021) 'Current and emergent economic impacts of Covid-19 and Brexit on UK fresh produce and horticultural businesses', arXiv:2101.11551.

[16] Do, Q. N. Mishra, N. Wulandhari, N. B. I. Ramudhin, A. Sivarajah, U. and Milligan, G. (2021) 'Supply chain agility responding to unprecedented changes: empirical evidence from the UK food supply chain during COVID-19 crisis', *Supply Chain Management*, 26 (6), 737-752.

[17] Barrero, J. M. Bloom, N. and Davis, S. J. (2021) 'Why working from home will stick', *NBER Working Paper Series*, #28731.

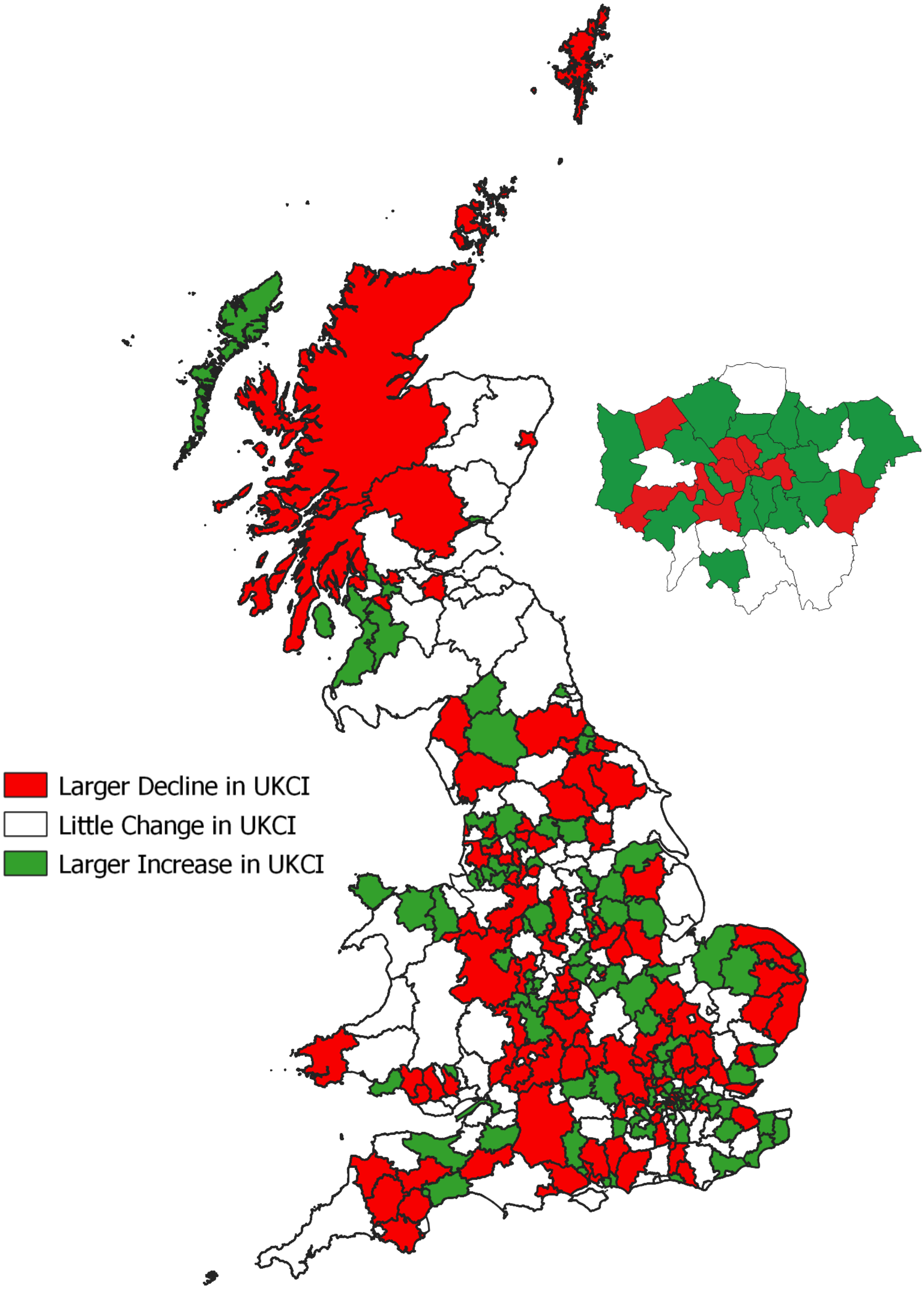
Table 4.02: UKCI 12 Largest Ranking Fallers (UK=100)

Rank 2021	Locality	Region	UKCI 2021	UKCI 2018	Rank 2018	Change 2018-2021 UKCI	Change 2018-2021 Rank
323	Rhondda Cynon Taff	Wales	79.9	82.8	282	-2.9	-41
195	South Hams	South West	90.0	93.4	154	-3.4	-41
224	Mid Suffolk	East of England	87.7	91.4	183	-3.7	-41
148	Chichester	South East	93.8	99.1	107	-5.2	-41
264	East Dunbartonshire	Scotland	84.4	87.7	222	-3.3	-42
210	Melton	East Midlands	88.7	92.4	168	-3.8	-42
319	Gedling	East Midlands	80.3	83.6	274	-3.3	-45
312	Mid Devon	South West	80.9	84.1	264	-3.2	-48
176	Preston	North West	91.3	96.5	126	-5.2	-50
92	East Hertfordshire	East of England	101.1	110.8	40	-9.7	-52
343	West Devon	South West	78.1	82.4	288	-4.3	-55
263	South Somerset	South West	84.5	89.7	199	-5.1	-64

4.3. Geographical Distribution of Competitiveness Changes

Figure 4.01 below shows that geographically those localities showing the larger changes in UKCI score (defined as an absolute change in UKCI score of more than 1) between 2018 and 2021 are not primarily located in particular regions. It is clear from the figure that all regions have localities that have seen declines and improvements in competitiveness. Some regions have clusters of localities that have seen losses in competitiveness, such as the South West and East of England, or gains such as the North West and London.

FIGURE 4.01: GEOGRAPHICAL DISTRIBUTION OF LOCAL AUTHORITIES DISPLAYING LARGER INCREASES AND DECREASES IN UKCI BETWEEN 2018 AND 2021



5. A City Perspective

As outlined in sub-section 2.4, within the localities covered by the UKCI are those that cover the cities of Great Britain. The next sub-section focuses on these localities to allow a closer comparison of similarly urbanised areas. There are also comparisons of the average competitiveness of larger urban areas with that found for the more rural areas (sub-section 5.2). This will give a first indication of whether the dual shocks of Brexit and the Covid-19 Pandemic have accelerated any on-going changes in the competitiveness of these areas compared with the traditional dominance of urban areas. Sub-section 5.3 concentrates on the largest cities within the UK, which in previous years have been transforming from their historical strengths towards service orientated economies.

5.1. Cities in Great Britain

Table 5.01 ranks larger localities (with populations exceeding 100,000 people) of Great Britain designated as being cities. It is topped by St Albans (East of England) as was the case in the 2019 UKCI report. In 2018 it was ranked 3rd of the cities and has managed to achieve its present ranking by improving its position relative to the UK average, with its UKCI score improving from 111.6 in 2018 to 114.5. Some of this may reflect an increase in business creation and limited increase in unemployment compared to that experienced on average in the UK. This suggests that those industries, such as green technology, that are relatively important for the city,[18] are the type that will generate on-going competitiveness and new opportunities.

Second, third and fourth in 2021 are Winchester, Edinburgh and Cambridge. All three of these cities have important professional, scientific and technical businesses that are increasing in number.[19] As such, all have above the UK average presence of knowledge-based businesses (Winchester 29.1%; Edinburgh 37.2%; Cambridge 37.1% compared to a UK average of 25.7% of all businesses). These are the types of business for which there is a growing national and international demand for their output, and in many cases this demand increases during periods of economic instability, rather than contracting. They are likely to be digital, so will be able to continue to operate throughout periods of instability.

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[18] SADC (2018) *St Albans City & District Council Economic Development Strategy 2018-2021*, St Albans: St Albans City & District Council.

[19] Winchester City Council (2017) *Winchester Sub-Area Economic Profile – July 2017*, Winchester: Winchester City Council.

The City of Edinburgh Council (2018) *Edinburgh Economy Strategy: Enabling Good Growth*, Edinburgh: The City of Edinburgh Council.

In contrast to the success of cities with a focus on new and emerging technologies, Aberdeen continues to see a decline in its competitiveness reflecting the reduction in North Sea oil and gas operations, and potentially the start of a move to a lower carbon world. This has meant that although it was traditionally the most competitive city in the UK, it is now only 5th and its UKCI score in 2021 was 107.8. This means Aberdeen remains more competitive than the UK average, but it is a fall from 109.4 in 2018. It is possible that although possessing a highly skilled workforce, with 52.3% of the population having university level qualifications, compared to a UK average of 43.0%, it may be experiencing an element of lock-in, whereby the economy is struggling to evolve from its reliance on the oil industry.[20] There are efforts though to enhance the transformation required, such as the refocusing and renaming of the Oil and Gas Technology Centre (OGTC) to become the Net Zero Technology Centre (NZTC) within the city to focus on R&D projects that reduce emissions in collaboration with the private sector.[21]

TABLE 5.01: CITY UK COMPETITIVENESS INDEX 2021 (UK=100)

City Rank 2021	City	City Rank 2018	2018 Index Score	2021 Index Score
1	St Albans	3	111.6	114.5
2	Winchester	1	115.3	113.1
3	City of Edinburgh	2	112.9	112.5
4	Cambridge	4	111.6	112.1
5	Aberdeen City	5	109.4	107.8
6	Brighton and Hove	8	104.8	106.0
7	Manchester	6	107.4	105.6
8	Oxford	7	105.9	103.7
9	Salford	10	101.4	103.2
10	Bristol, City of	9	101.9	103.1
11	Exeter	13	98.5	100.9
12	Southampton	16	96.0	100.6
13	Leeds	14	98.2	100.4
14	Chelmsford	11	100.8	99.6
15	Derby	20	95.1	98.1
16	Glasgow City	19	95.4	98.1
17	York	18	95.9	96.7
18	Cardiff	17	96.0	96.1

Cambridge City Council Planning Services (2018) *Cambridge Local Plan – October 2018*, Cambridge: Cambridge City Council Planning Services.

[20] Ambrose, J. (2020) 'Aberdeen: teetering between its high-carbon past and a green future', *Guardian Newspaper*, 29 March. https://www.theguardian.com/uk-news/2020/mar/29/aberdeen-high-carbon-past-green-future-oil-gas-reserves

[21] https://www.netzerotc.com/about-us/our-purpose/

City Rank 2021	City	City Rank 2018	2018 Index Score	2021 Index Score
19	Peterborough	22	94.1	95.4
20	Chichester	12	99.1	93.8
21	Liverpool	26	91.7	93.1
22	Portsmouth	27	91.5	92.9
23	Coventry	21	94.3	92.8
24	Norwich	28	90.7	92.5
25	Leicester	35	87.6	92.2
26	Worcester	23	92.9	92.0
27	Nottingham	33	88.4	91.9
28	Newcastle upon Tyne	30	90.3	91.6
29	Lichfield	24	92.3	91.5
30	Preston	15	96.5	91.3
31	Carlisle	31	88.9	91.1
32	Birmingham	25	91.8	91.1
33	Newport	29	90.7	89.9
34	Gloucester	32	88.7	88.7
35	Canterbury	39	84.2	88.2
36	Sheffield	34	87.6	86.8
37	Swansea	36	85.0	86.7
38	Dundee City	37	84.6	86.6
39	Lincoln	41	82.8	84.6
40	Lancaster	38	84.5	84.3
41	Wakefield	40	83.4	84.1
42	Wolverhampton	45	80.4	83.6
43	Bradford	44	80.5	83.2
44	Plymouth	43	82.1	82.8
45	Sunderland	42	82.6	82.6
46	Stoke-on-Trent	47	79.2	81.7
47	Kingston upon Hull, City of	46	80.2	80.2

At the other end of the table, cities with histories of large scale production still remain the least competitive in the UK. The least competitive city in 2021 is Kingston upon Hull in Yorkshire and the Humber, which has switched places with Stock-on-Trent in the West Midlands. Studies have shown that the large scale production that dominated these localities has left a lasting imprint on those that live there, with particular personality traits more prevalent and community cultures developing that are less conducive for entrepreneurial activities.[22]

Those towards the bottom of the city rankings tend to be the smaller cities with this form of industrial history. Cities such as Leeds (city rank 13th UKCI 100.4) and Manchester (city rank 7th UKCI 105.6) with similar economic and social histories show that it is possible for higher levels of competitiveness to be achieved, with both achieving UKCI scores in 2021 that are above the UK average. One possible explanation may be that the autonomy and power given to these cities through their inclusion in the first wave of City Deals is bearing fruit.[23] Such resources and autonomy may allow local public sector leaders to pursue initiatives appropriate for the cities, but also by working with the private and third sectors to create and empower innovative entrepreneurial individuals, such as those who allowed these cities to prosper in a similar fashion when they were in their industrial pomp by driving through appropriate change.[24]

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[22] Obschonka, M. Stuetzer, M. Rentfrow, P. J. Shaw-Taylor, L. Satchell, M. Silbereisen, R. K. Potter, J. and Gosling, S. D. (2018) 'In the shadow of coal: how large scale industries contributed to present-day regional differences in personality and well-being', *Journal of Personality and Social Psychology*, 115 (5), 903–927.

Huggins, R. Stuetzer, M. Obschonka, M. and Thompson, P. (2021) 'Historical industrialisation, path dependence and contemporary culture: the lasting imprint of economic heritage on local communities', *Journal of Economic Geography*. doi: 10.1093/jeg/lbab010

[23] Ward, M. (2020) 'City Deals', *House of Commons Library Briefing Paper* #7158.

[24] Huggins, R. and Thompson, P. (2020) 'Human agency, entrepreneurship and regional development: a behavioural perspective on economic evolution and innovative transformation', *Entrepreneurship and Regional Development*, 32 (7/8), 573-589.

5.2. Competitiveness and Rural and Urban Localities

Although the long-term ramifications of the Brexit and Covid-19 Pandemic shocks are yet to be fully established, Table 5.02 below indicates that in 2021 larger urban areas of Great Britain have retained and slightly improved their competitiveness. On average these are the only type of locality displaying competitiveness above the UK average.

The least competitive localities remain those that are largely rural locations, and in most cases the least well-connected, both physically and digitally.[25] This may limit the extent that these localities are able to benefit from any movement of working patterns from larger urban areas. The Covid-19 Pandemic shock is likely to have considerable short-term consequences for those more rural areas reliant on the tourism sector. Although output may recover relatively quickly, if fears of future pandemic shocks are present, this is likely to translate into a longer-term loss of investment. Difficulties with accessing cheap labour due to Brexit may further erode the competitiveness of these localities.[26] As such the long-term competitiveness of some rural areas that remain heavily reliant on tourism is likely to continue to weaken.[27]

TABLE 5.02: UKCI INDEX BY RURAL/URBAN NATURE OF LOCALITIES (UK=100)

	2018	2021	Change 2018-2021
Major Urban	102.8	103.4	0.7
Large Urban	93.0	93.6	0.6
Other Urban	91.6	91.7	0.1
Significant Rural	96.0	95.8	-0.1
Rural-50	91.2	90.7	-0.5
Rural-80	89.6	89.0	-0.7

[25] Gerli, P. and Whalley, J. (2021) 'Fibre to the countryside: a comparison of public and community initiatives tackling the rural digital divide in the UK', *Telecommunications Policy*. doi: 10.1016/j.telpol.2021.102222

[26] Lindsay, F. (2019) 'The U.K. healthcare and tourism sectors are reliant on foreign workers and threatened by Brexit', Forbes 15 August. https://www.forbes.com/sites/freylindsay/2019/08/15/the-u-k-healthcare-and-tourism-sectors-are-reliant-on-foreign-workers-and-threatened-by-brexit/?sh=31d5ae8553ae

TUC (2017) *How are we doing? The impact of Brexit at industry level*, London: Trade Union Congress.

[27] Rural Services Network (2021) *Tourism Recovery Plan - Rural Lens Review*, Tavistock: Rural Services Network.

5.3. Competitiveness of the UK's largest urban areas in 2021

The pandemic has led to a number of commentators suggesting that the dominance of large cities in terms of economic development may be coming to an end. The advantages for sharing information through face-to-face interaction is now less attractive given the potential for illnesses such as Covid-19 to be transmitted more easily. However, others have suggested that the city, as a coordinating mechanism, is likely to remain and therefore large cities have a key role to play in the future.

This section cannot determine how the pandemic will affect the competitiveness of large cities in the longer run, as the extent of a return to the office is not certain. However, it is likely that some cities will be better positioned to function as the coordinating mechanisms noted above in a more distanced and digital world, and the first signs of any change in the 'winners' and 'losers' may begin to be apparent in the 2021 UKCI figures.

Edinburgh remains the most competitive of the larger UK cities and has effectively maintained its UKCI score between 2018 and 2021. Manchester, although remaining the second most competitive Core city, has seen a slight slip over the period between 2018 and 2021, perhaps a reflection of the additional restrictions faced by the city from the spikes in Covid-19 cases present within the wider Greater Manchester area. This has meant that Bristol, Leeds and Glasgow all closed the gap with Manchester.

Cardiff and Belfast, as the regional centres of Wales and Northern Ireland respectively, have seen relatively little change in their competitiveness. However, this might in future years translate into a fall in their Core City rankings if Liverpool, Nottingham and Newcastle upon Tyne continue to improve their competitiveness.

Of all the larger urban areas, Birmingham has seen the largest Core City ranking fall of three places. However, in the long-run it could be a major beneficiary of changing working patterns, where those whose jobs are based in London may opt for cheaper alternative residences in cities further afield and work remotely more often. The construction of HS2 would allow such workers to more easily commute when required for face to face meetings.

Sheffield remains at the bottom of the Core City rankings. In part, this may reflect its greater reliance on its traditional expertise in manufacturing and engineering rather than other comparator cities.[28] It also lacks the same transportation link advantages as other core cities. Given a further fall in its competitiveness between 2018 and 2021, although modest, this may mean that Sheffield and the wider South Yorkshire area ends up being left behind despite investments to 'level up' as other parts of the North West and Yorkshire and the Humber benefit to a greater extent.

TABLE 5.03: UKCI INDEX AND RANK FOR EXTENDED CORE CITIES

					Change 2018-2021	
Extended Core City Rank 2021	Locality	Extended Core City Rank 2018	2018 Index Score	2021 Index Score	UKCI	Extended Core City Rank
1	City of Edinburgh	1	112.9	112.5	-0.4	0
2	Manchester	2	107.4	105.6	-1.8	0
3	Bristol, City of	3	101.9	103.1	1.2	0
4	Leeds	4	98.2	100.4	2.2	0
5	Glasgow City	6	95.4	98.1	2.7	+1
6	Cardiff	5	96.0	96.1	0.1	-1
7	Belfast	7	94.0	94.5	0.5	0
8	Liverpool	9	91.7	93.1	1.4	+1
9	Nottingham	11	88.4	91.9	3.5	+2
10	Newcastle upon Tyne	10	90.3	91.6	1.3	0
11	Birmingham	8	91.8	91.1	-0.7	-3
12	Sheffield	12	87.6	86.8	-0.8	0

[28] Sheffield City Region (2020) *Renewal Action Plan*, Sheffield: Sheffield City Region.

6. A Regional Perspective

The UKCI focuses on competitiveness measured at the local rather than the regional level. However, as was shown in Section 3 the distribution of competitiveness across Great Britain does highlight a trend for competitiveness to drop the further localities are situated away from London. This means that although less competitive localities can be found in most regions of Great Britain there are still likely to be clear differences in the average level of competitiveness found for localities in different regions.

The results presented below are weighted averages to account for the different sizes of the localities that make up each region. The weighting is based on the localities' populations, so that the overall average reflects the benefits enjoyed by the regional population in terms of greater competitiveness. This follows the argument set out in Section 2 that competitiveness should ultimately benefit the resident population of a locality, rather than being a race to the bottom based on job cuts and wage reductions.

6.1. Regional Competitiveness in 2021

Table 6.01 highlights the average scores and ranks for localities based on their regional location. The top regions are London, South East, and East of England, with the first two being the only ones achieving scores above the national average (UK=100). Although only changing slowly, the change between 2018 and 2021 suggests that the pattern of London and the South East diverging from the rest of the UK has continued, making the Government's 'levelling up' a tricky proposition to achieve.

Whereas Wales has traditionally had the least competitive localities on average, this is now not the case with the latest data indicating that the North East now holds the bottom position. However, both these regions have seen little change between 2018 and 2021. Whereas Yorkshire and the Humber and the East Midlands have seen the average UKCI for their localities rise a little between 2018 and 2021, leaving the North East and Wales further adrift.

However, these results should be considered within the context of those reported in Sections 3, 4 and 5 where, for example, the East Midlands has some of the least competitive localities (Mansfield), whilst having both the largest ranking increases (Chesterfield) and decreases (Gedling) as well as strengthening cities (Derby, Leicester, and Nottingham). Clearly the patterns of competitiveness are not just creating more and less competitive regions as a whole, but also distinct differences within these regions.

TABLE 6.01: AVERAGE UKCI LOCAL SCORE AND RANK BY REGION (UK=100)

	UKCI		Rank		Change 2018-2021	
Region	2018	2021	2018	2021	UKCI	Rank
London	116.4	117.3	64	59	0.9	+4.5
South East	102.4	102.4	114	111	0.0	+2.5
East of England	96.2	95.6	151	155	-0.6	-4.5
Scotland	92.4	92.5	185	183	0.1	+1.5
South West	92.1	91.6	184	189	-0.5	-4.8
North West	91.3	91.2	198	198	-0.1	-0.1
West Midlands	89.8	90.1	212	208	0.3	+4.3
East Midlands	88.8	89.5	215	206	0.8	+9.4
Yorkshire and the Humber	86.7	87.3	239	234	0.5	+4.2
Wales	84.2	84.1	265	269	-0.1	-4.3
North East	82.4	82.4	287	286	0.0	+1.2

7. English Local Enterprise Partnership (LEP) Areas and Scottish and Welsh City Regions

The move from local and regional responsibility for economic development to that centred around Local Enterprise Partnerships (LEP) and City Regions is now a well-established pattern in the UK. This has progressed further in recent years with City Deals being agreed in a growing number of areas. As these larger areas take on more responsibility for economic development, we provide competitiveness figures for all the LEP areas in England and those Scottish and Welsh City Regions that have agreed deals at this point in time.

As well as overall UKCI index, we break down the UKCI into its component sub-indices and report these in sub-sections below. This will provide an indication of the resources available to the LEP and City Region decision makers, and the extent to which they are generating outputs and the benefits enjoyed by the residents.[29]

7.1. Competitiveness of LEP and City Regions in 2021

Table 7.01 below presents the competitiveness of the English LEP areas and Scottish and Welsh City Regions in 2021 along with a pre-pandemic figure for 2018. In 2021 there are 12 LEP and City Regions that have levels of competitiveness above the UK average. These are predominantly English LEPs with the exception of Aberdeen City Region (UKCI = 104.5) ranked 7th in 2021. As noted in Section 5, the competitiveness of the Aberdeen City Region is strongly linked to the success of the dominant oil and gas industry, and structural change has seen this competitiveness fall over time.

The leading LEP areas remain London (UKCI = 128.0) and those located along the main arteries running into the capital city: Thames Valley Berkshire (UKCI = 120.9); Enterprise M3 (UKCI = 113.5); and Hertfordshire (UKCI = 109.1). Currently, there does not appear to be any evidence that the Covid-19 Pandemic has altered the patterns of competitiveness away from London.

Outside of England, after Aberdeen City Region the next most competitive city region is the Edinburgh and South East Scotland City Region (UKCI = 99.0) ranked in 15th place followed by Stirling and Clackmannanshire City Region (UKCI = 93.2) in 22nd place. The highest ranked Welsh City Region is Cardiff City Region (UKCI = 86.3), which is ranked 36th.

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[29] We note that at the time of the publication of this report many of the LEP areas of England have been going through a renaming process based on their new areas of responsibility. However, given such branding is yet to be established for consistency with previous reports (UKCI and others) and data we retain the previously used names, but will update in future editions of the UKCI.

Comparisons with the figures reported in Sections 3 and 5 for the cities themselves show that the competitiveness of the Scottish and Welsh City Regions noted above tends to be concentrated rather than spread throughout the City Region as a whole. For example, Edinburgh has a UKCI score of 112.5, the highest for the Extended Core Cities, compared to only 99.0 for the City Region as a whole. Leeds is another example, where the LEP has a UKCI of 90.2, but the city itself has a UKCI score in 2021 of 100.4. It is unclear whether or not competitiveness within City Regions will become more broadly based due to changes in working patterns brought on by the Covid-19 Pandemic, which will see cities become coordinating mechanisms rather than the point of production. However, it is still likely that connections, particularly of a digital nature, will need upgrading if all parts of LEP areas and City Regions are to benefit fully.

Less competitive LEP and City Regions are a mix of some of the more rural areas (for example, Mid Wales UKCI = 80.9; and Cornwall and the Isles of Scilly UKCI = 81.3) and old industrial areas (Black Country UKCI = 81.3; Swansea Bay City Region UKCI 82.3; and North East UKCI = 82.5). In the case of the former group, the lack of a major urban centre may limit the potential to coordinate activities across the area. Efforts to network and share information will need to be greater to make up for those that more naturally occur in urban areas.[30] For the second group, the success of similar LEP and City Region areas to transform themselves holds promise, but these other cities have a head start with regard to the networks and resources built, which may attract innovative businesses and those skilled individuals wishing to work in them.[31]

Table 7.01: UKCI by English Local Enterprise Partnership Areas and Scottish and Welsh City Regions (UK=100)

Rank 2021	Local Enterprise Partnership Area/City Region	UKCI 2021	UKCI 2018	Rank 2018	Change 2018-2021 UKCI	Change 2018-2021 UKCI Rank
1	London	128.0	127.8	1	0.3	0
2	Thames Valley Berkshire	120.9	122.0	2	-1.1	0
3	Enterprise M3	113.5	113.2	3	0.2	0
4	Hertfordshire	109.1	109.8	4	-0.7	0
5	Buckinghamshire Thames Valley	106.7	108.2	5	-1.6	0
6	Oxfordshire	104.5	104.9	7	-0.4	+1
7	Aberdeen City Region	104.5	105.5	6	-1.0	-1

[30] Li, Y. Westlund, H. and Liu, Y. (2019) 'Why some rural areas decline while some others not: an overview of rural evolution in the World', *Journal of Rural Studies*, 68, 135-143.

[31] Huggins, R. and Thompson, P. (2017) 'Networks and regional economic growth: a spatial analysis of knowledge ties', *Environment and Planning A*, 49 (6), 1247-1265.

Rank 2021	Local Enterprise Partnership Area/City Region	UKCI 2021	UKCI 2018	Rank 2018	Change 2018-2021 UKCI	Change 2018-2021 UKCI Rank
8	Cheshire and Warrington	103.6	103.9	8	-0.3	0
9	Coast to Capital	102.6	103.3	9	-0.6	0
10	West of England	101.5	101.2	11	0.3	+1
11	South East Midlands	100.8	101.4	10	-0.7	-1
12	Greater Cambridge and Greater Peterborough	100.2	101.1	12	-0.9	0
13	Coventry and Warwickshire	99.8	101.1	13	-1.3	0
14	Worcestershire	99.8	95.0	17	4.8	+3
15	Edinburgh and South East Scotland City Region	99.0	99.0	15	0.0	0
16	Gloucestershire	97.9	99.0	14	-1.1	-2
17	Swindon and Wiltshire	96.9	98.0	16	-1.1	-1
18	Greater Birmingham and Solihull	95.5	94.4	18	1.1	0
19	Leicester and Leicestershire	94.4	92.2	24	2.2	+5
20	Solent	94.3	94.0	20	0.3	0
21	Greater Manchester	93.7	94.3	19	-0.6	-2
22	Stirling and Clackmannanshire City Region	93.2	92.8	22	0.3	0
23	South East	93.1	92.9	21	0.1	-2
24	Glasgow and Clyde Valley City Region	91.6	90.6	27	1.0	+3
25	York and North Yorkshire	91.6	92.5	23	-0.9	-2
26	Dorset	90.8	91.9	26	-1.0	0
27	Leeds City Region	90.2	89.1	29	1.1	+2
28	Inverness and Highland City Region	90.1	92.1	25	-1.9	-3
29	Cumbria	89.4	89.3	28	0.0	-1
30	Derby, Derbyshire, Nottingham and Nottinghamshire	88.8	87.8	31	1.0	+1
31	Liverpool City Region	88.1	86.7	34	1.4	+3
32	New Anglia	87.4	87.6	32	-0.2	0
33	The Marches	87.2	86.7	35	0.5	+2
34	Lancashire	87.0	88.0	30	-1.0	-4
35	Stoke-on-Trent and Staffordshire	86.6	86.6	36	0.1	+1
36	Cardiff City Region	86.3	87.0	33	-0.7	-3
37	Heart of the South West	86.3	86.5	37	-0.2	0
38	Hull and East Riding	84.6	84.5	38	0.1	0
39	North Wales	84.4	83.8	40	0.6	+1
40	Tees Valley	84.1	84.1	39	0.0	-1
41	Sheffield City Region	83.7	83.5	41	0.2	0
42	Greater Lincolnshire	83.4	83.2	42	0.2	0
43	North East	82.5	82.6	43	0.0	0
44	Swansea Bay City Region	82.3	82.4	44	-0.1	0
45	Cornwall and Isles of Scilly	81.3	81.8	45	-0.4	0
46	Black Country	81.3	79.8	47	1.5	+1
47	Mid Wales	80.9	79.8	46	1.1	-1

7.2. Resources for LEP and City Regions in 2021 – UKCI Input Index

As outlined in Section 2, the UKCI is made up of three sub-indices: Input, Output and Outcome indices. The first of these captures the resources available within the area and is therefore associated with input or process competitiveness.

Four of the five English LEPs at the top of the UKCI Input rankings in 2021 (Table 7.02) are unsurprisingly London and the neighbouring areas of Thames Valley Berkshire, Enterprise M3 and Hertfordshire. This is consistent with the large amount of the UK's resources being drawn into London.[32] This along with policies focused on ensuring the retention of London's global competitiveness makes the possibility of other areas retaining their competitiveness and 'levelling up' harder to achieve.[33]

The exception in Table 7.02 is Worcestershire LEP, which is now ranked 4th in terms of the UKCI Input Index with a value of 120.6. This is a substantial rise from the UKCI Input Index value of 103.2 achieved in 2018, leading to a climb in the rankings of eight places. The main factor driving this improvement is business registrations. Worcestershire already had a high rate of business registrations per head, above the UK average, but this has increased further in recent years. This entrepreneurial activity provides the competitiveness to absorb shocks and re-direct resources to their most effective use in periods of uncertainty. Areas such as Worcestershire that are responding to shocks such as Brexit and the Covid-19 Pandemic in this manner may be those with greater industrial diversity rather than over-reliance on a particular industrial sectors.[34] However, there can be concerns relating to high business registration rates in particular areas, as they may not represent businesses embedded in the area, particularly with Internet based businesses having limited physical presence and employment in the area they are registered.[35]

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[32] Gardiner, B. Martin, R. Sunley, P. and Tyler, P. (2013) 'Spatially unbalanced growth in the British economy', *Journal of Economic Geography*, 13 (6), 889-928.

McCann, P. (2016) *The UK Regional-National Economic Problem: Geography, Globalisation and Governance*, Abingdon: Routledge.

[33] McCann, P. and Ortega-Arilés, R. (2021) 'The UK 'geography of discontent': narratives, Brexit and inter-regional 'levelling up', *Cambridge Journal of Regions, Economy and Society*. doi: 10.1093/cjres/rsab017

[34] Bishop, P. (2019) 'Knowledge diversity and entrepreneurship following an economic crisis: an empirical study of regional resilience in Great Britain', *Entrepreneurship and Regional Development*, 31 (5/6), 496-515.

Worcestershire Local Enterprise Partnership (2019) *WLEP SEP Refresh and LIS Development Evidence Base*, Worcestershire: Worcestershire Local Enterprise Partnership.

[35] Office for National Statistics (2019) *Multiple business registrations at a single postcode: 2018*, Newport: Office for National Statistics.

Two other English LEP areas improving their rankings in the 2021 UKCI Input Index rankings are Liverpool City Region (6 places to 29th) and Leicester and Leicestershire (5 places to 17th). Both of these LEP areas saw increases in business registrations, although not to the same extent as Worcestershire. They also saw improvements in the skills held by their labour forces helping them to close the gap with the UK average in terms of the proportion of the population holding university level qualifications.

As with the overall UKCI, Aberdeen City Region is the highest ranked Scottish or Welsh City Region on the UKCI Input Index with a ranking of 9th. Edinburgh is the next highest ranked non-English LEP or City Region area, ranked at 19th. This means that the Aberdeen City Region is the only non-English area to have a UKCI Input Index reflecting greater resource availability than the UK average (UKCI Input Index = 107.4).

Two of the bottom five places are taken by the Welsh areas of North Wales (UKCI Input Index 76.1 ranked 43rd) and at the very bottom Swansea Bay City Region (UCKI Input Index 74.2 ranked 47th). Compared to the UK average, Swansea underperforms on all five measures entering the UKCI Input Index: presence of knowledge based businesses, skilled labour (proportion of the population holding university qualifications – NVQ4+), business registrations, active business and economic activity. The presence of two universities, Swansea University and University of Wales Trinity Saint David, in the City Region make the low skills of the labour force a worry, but understandable if retention of skilled labour is hard with a limited presence of knowledge intensive businesses to employ them appropriately.

The largest decline in UKCI Input Index ranking is found for Inverness and Highland City Region (9 places). This city region has seen a decline in the presence of skilled labour and a drop in economic activity rates.

Table 7.02: UKCI Input Scores by English Local Enterprise Partnership Areas and Scottish and Welsh City Regions (UK=100)

Rank 2021	Local Enterprise Partnership Area/City Region	UKCI Inputs 2021	UKCI Inputs 2018	Rank 2018	Change 2018-2021 UKCI Inputs Index	Inputs Index Rank
1	London	140.9	140.0	1	0.9	0
2	Thames Valley Berkshire	122.3	124.8	2	-2.5	0
3	Enterprise M3	121.4	120.7	5	0.7	+2
4	Worcestershire	120.6	103.2	12	17.4	+8
5	Hertfordshire	120.4	122.2	4	-1.7	-1
6	Buckinghamshire Thames Valley	118.1	123.4	3	-5.3	-3
7	Coast to Capital	109.1	112.1	6	-3.0	-1
8	Oxfordshire	108.0	109.9	7	-1.9	-1
9	Aberdeen City Region	107.4	108.0	9	-0.6	0
10	Cheshire and Warrington	105.2	108.6	8	-3.5	-2
11	South East Midlands	104.4	106.9	10	-2.4	-1
12	West of England	103.9	104.0	11	0.0	-1
13	Greater Cambridge and Greater Peterborough	101.8	102.3	13	-0.5	0
14	Gloucestershire	101.4	101.2	14	0.2	0
15	Greater Birmingham and Solihull	100.9	96.4	19	4.5	+4
16	Coventry and Warwickshire	98.4	99.9	15	-1.5	-1
17	Leicester and Leicestershire	96.7	93.5	22	3.2	+5
18	Greater Manchester	96.4	98.7	16	-2.3	-2
19	Edinburgh and South East Scotland City Region	96.3	96.7	18	-0.4	-1
20	South East	95.2	94.2	21	1.1	+1
21	Swindon and Wiltshire	94.3	98.2	17	-3.9	-4
22	Solent	92.1	91.6	25	0.5	+3
23	York and North Yorkshire	91.1	95.0	20	-3.9	-3
24	Dorset	91.0	92.0	24	-1.0	0
25	Stirling and Clackmannanshire City Region	89.8	92.1	23	-2.4	-2
26	Leeds City Region	87.9	85.8	26	2.1	0
27	The Marches	86.9	85.8	27	1.1	0
28	Glasgow and Clyde Valley City Region	86.2	85.4	29	0.8	1
29	Liverpool City Region	84.7	82.6	35	2.1	+6
30	Derby, Derbyshire, Nottingham and Nottinghamshire	84.3	83.6	32	0.7	+2
31	Cumbria	83.5	83.3	33	0.2	+2
32	Lancashire	83.0	84.7	30	-1.7	-2
33	Heart of the South West	82.8	84.0	31	-1.2	-2
34	Stoke-on-Trent and Staffordshire	82.1	82.2	37	-0.2	+3
35	New Anglia	81.9	82.5	36	-0.6	+1
36	Cardiff City Region	81.3	82.9	34	-1.7	-2

Rank 2021	Local Enterprise Partnership Area/City Region	UKCI Inputs 2021	UKCI Inputs 2018	Rank 2018	Change 2018-2021 UKCI Inputs Index	Inputs Index Rank
37	Inverness and Highland City Region	80.9	85.6	28	-4.7	-9
38	Sheffield City Region	79.7	78.4	40	1.2	+2
39	Mid Wales	79.5	77.2	41	2.2	+2
40	Tees Valley	78.2	80.2	38	-2.0	-2
41	Cornwall and Isles of Scilly	78.1	79.2	39	-1.0	-2
42	Hull and East Riding	77.5	76.7	42	0.8	0
43	North Wales	76.1	76.3	44	-0.2	+1
44	Greater Lincolnshire	75.4	76.5	43	-1.1	-1
45	North East	75.2	74.6	46	0.5	+1
46	Black Country	74.3	71.8	47	2.6	+1
47	Swansea Bay City Region	74.2	76.2	45	-2.0	-2

7.3. Production of LEP and City Regions in 2021 – UKCI Output Index

The preceding sub-section indicates the extent to which the resources available to generate competitiveness are unevenly distributed across the English LEP and Scottish and Welsh City Regions. Although this may partly explain differences in the outcomes achieved (discussed in sub-section 7.4 below), the capability to deploy these resources successfully may also differ between areas. Such differences could reflect the networks present, the support from the local public and civil sectors, and the presence of supportive cultures. Table 7.03 below ranks the LEP and City Region areas on the UKCI Output Index, which seeks to capture the outputs produced as outlined in Section 2.

Two English LEP areas stand out from the others in terms of their performance. Interestingly, it is Thames Valley Berkshire LEP, which is ranked 1st with a UKCI Output Index of 131.7, being ahead of London with a UKCI Output Index of 131.1. Although this order may at first appear to be surprising, it should be noted that while central London may be associated with knowledge intensive services, in particular those associated with the financial sector, this is not necessarily the case for other parts of London. Similarly, Thames Valley Berkshire, while being a highly productive area, also has a considerable level of employment in four sectors described as low productivity: retail and wholesale; administration and support services; tourism, hospitality and food services; and entertainment and recreation.[36]

[36] Thames Valley Berkshire (2021) *Recovery and Renewal Plan*, Reading: Thames Valley Berkshire LEP.

With their rural less knowledge intensive economies, Mid Wales (UKCI Output Index = 70.1) and Cornwall and Isles of Scilly (UKCI Output Index = 76.9) are both in the bottom five rankings. The other LEPs and City Regions ranked at the bottom of the UKCI Output Index are old industrial areas, with Swansea Bay City Region and the Black Country (UKCI Output Indices of 77.3 and 76.2 respectively) also ranked low in terms of the UKCI Input Index. They are joined by the more urbanised Sheffield City Region (UKCI Output Index = 77.0) in the bottom 5 LEP and City Regions. Although Sheffield itself (Table 5.03) is the least competitive of the large cities covered by the UKCI, it compares favourably with the rest of its City Region in terms of UKCI as a whole (Table 7.01). This is also reflected in Sheffield alone having a UKCI Output Index of 80.1 in 2021, which is well below the UK average, but above that of the City Region as reported above and in Table 7.03. This implies that while the city itself is transforming and reallocating skilled labour away from traditional strengths associated with heavy industry to specialist manufacturing and the service sector, this has not happened to the same extent in the surrounding city region which was intrinsically linked to the Sheffield steel industry through coal mining.

TABLE 7.03: UKCI OUTPUT SCORES BY ENGLISH LOCAL ENTERPRISE PARTNERSHIP AREAS AND SCOTTISH AND WELSH CITY REGIONS (UKCI=100)

Rank 2021	Local Enterprise Partnership Area/City Region	UKCI Outputs 2021	UKCI Outputs 2018	Rank 2018	Change 2018-2021 UKCI Outputs Index	Change 2018-2021 Outputs Index Rank
1	Thames Valley Berkshire	131.7	132.3	1	-0.6	0
2	London	131.1	130.4	2	0.7	0
3	Enterprise M3	113.1	113.3	3	-0.2	0
4	Cheshire and Warrington	105.9	105.2	5	0.6	+1
5	Hertfordshire	104.3	104.0	6	0.3	+1
6	Aberdeen City Region	103.6	105.2	4	-1.6	-2
7	Coventry and Warwickshire	99.9	101.4	7	-1.5	0
8	Oxfordshire	99.7	100.1	8	-0.4	0
9	South East Midlands	99.1	98.5	13	0.6	+4
10	West of England	98.6	98.6	12	0.0	+2
11	Coast to Capital	98.6	98.3	14	0.3	+3
12	Edinburgh and South East Scotland City Region	98.5	99.8	9	-1.4	-3
13	Buckinghamshire Thames Valley	98.0	98.7	11	-0.6	-2
14	Greater Cambridge and Greater Peterborough	97.4	99.3	10	-1.9	-4
15	Swindon and Wiltshire	96.8	97.6	15	-0.8	0
16	Gloucestershire	95.2	97.1	16	-1.9	0
17	Inverness and Highland City Region	91.5	92.6	17	-1.2	0
18	Solent	91.3	91.7	18	-0.5	0

Rank 2021	Local Enterprise Partnership Area/City Region	UKCI Outputs 2021	UKCI Outputs 2018	Rank 2018	Change 2018-2021 UKCI Outputs Index	Outputs Index Rank
19	Stirling and Clackmannanshire City Region	89.3	87.8	22	1.5	+3
20	Leicester and Leicestershire	89.2	87.8	23	1.5	+3
21	Greater Birmingham and Solihull	88.8	89.0	19	-0.2	-2
22	Greater Manchester	88.4	88.7	20	-0.4	-2
23	Glasgow and Clyde Valley City Region	88.3	87.7	24	0.6	+1
24	York and North Yorkshire	87.5	87.7	25	-0.2	+1
25	Worcestershire	87.2	88.0	21	-0.8	-4
26	South East	87.1	86.9	26	0.2	0
27	Leeds City Region	86.7	85.5	29	1.2	+2
28	Dorset	85.5	85.9	28	-0.4	0
29	Cumbria	85.1	86.0	27	-0.9	-2
30	New Anglia	85.0	84.8	30	0.2	0
31	Lancashire	84.2	84.5	31	-0.3	0
32	Derby, Derbyshire, Nottingham and Nottinghamshire	83.8	83.3	32	0.5	0
33	Stoke-on-Trent and Staffordshire	83.1	83.1	34	0.0	+1
34	Cardiff City Region	82.6	83.2	33	-0.6	-1
35	Hull and East Riding	82.4	82.6	35	-0.2	0
36	Liverpool City Region	81.6	81.5	38	0.2	+2
37	North Wales	81.3	81.9	36	-0.6	-1
38	Heart of the South West	80.9	81.7	37	-0.8	-1
39	Tees Valley	80.0	79.4	42	0.6	+3
40	Greater Lincolnshire	79.8	81.2	39	-1.4	-1
41	North East	79.5	79.9	41	-0.4	0
42	The Marches	79.2	80.5	40	-1.3	-2
43	Swansea Bay City Region	77.3	77.1	44	0.2	+1
44	Sheffield City Region	77.0	77.3	43	-0.3	-1
45	Cornwall and Isles of Scilly	76.9	76.9	45	0.0	0
46	Black Country	76.2	75.5	46	0.7	0
47	Mid Wales	70.1	70.8	47	-0.6	0

7.4. Outcomes for LEP and City Regions in 2021 – UKCI Outcome Index

As Section 2 outlined, the ultimate objective of local and regional economic development should be to generate rising and sustainable standards of living for the population of the area. Although this can be considered in a broader format, the UKCI follows the approach of measuring unemployment and wages as part of the UKCI Outcome Index.

Table 7.04 indicates that many of the same English LEP areas of London and its surrounding areas (Thames Valley Berkshire; Enterprise M3; and Buckinghamshire Thames Valley) take the top positions in the UKCI Outcome Index. The exception is Oxfordshire, which is further afield but is a noted hub of knowledge intensive businesses and the location of a world leading university. It is ranked 8th in terms of the UKCI Input Index and UKCI Output Index, so has high quality resources, which are employed effectively, and the benefits also appear to flow to the LEP.

The UKCI Outcome Index displays greater variation between 2018 and 2021 than the other sub-indices of the UKCI. This is potentially a reflection of the anomalies created by the government furlough scheme where changes in unemployment level may be hidden in some areas and only become apparent in coming months as the unwinding of the scheme starts to take effect.

Although experiencing a rise in unemployment, Greater Lincolnshire; Leicester and Leicestershire; and North Wales have seen increases in their UKCI Outcome Index due to rises in median wages. It is important that the caveats about the furlough scheme and rapid recovery of some sectors hit hard by the Covid-19 Pandemic restrictions need to be taken into account, as it is possible that the twin shocks of Brexit and Covid-19 may have shifted activity from lower value sectors or increased the wages earned by these sectors, with all three LEP areas showing a decline in employment rate negatively affecting their UKCI Output Index (Table 7.03). In the longer term, the sustainability of this rise in the UKCI Outcome Index is likely to rely on investments and innovations to boost productivity (a component of the UKCI Output Index) to make these higher outcomes affordable.

TABLE 7.04: UKCI OUTCOME SCORES BY ENGLISH LOCAL ENTERPRISE PARTNERSHIP AREAS AND SCOTTISH AND WELSH CITY REGIONS (UK=100)

Rank 2021	Local Enterprise Partnership Area/City Region	UKCI Outcomes 2021	UKCI Outcomes 2018	Rank 2018	Change 2018-2021 UKCI Outcomes Index	Change 2018-2021 Outcomes Index Rank
1	London	113.1	113.8	1	-0.7	0
2	Thames Valley Berkshire	109.4	109.8	2	-0.4	0
3	Enterprise M3	106.2	106.0	3	0.2	0
4	Oxfordshire	105.8	104.8	4	1.0	0
5	Buckinghamshire Thames Valley	104.5	103.6	6	0.8	+1
6	Hertfordshire	103.0	103.8	5	-0.7	-1
7	Aberdeen City Region	102.4	103.2	7	-0.9	0
8	Edinburgh and South East Scotland City Region	102.4	100.5	11	1.9	+3
9	West of England	102.0	101.0	10	1.0	+1
10	Greater Cambridge and Greater Peterborough	101.4	101.7	9	-0.3	-1
11	Coventry and Warwickshire	101.0	102.0	8	-1.0	-3
12	Glasgow and Clyde Valley City Region	100.9	99.2	14	1.7	+2
13	Stirling and Clackmannanshire City Region	100.6	98.8	18	1.8	+5
14	Coast to Capital	100.4	99.7	12	0.7	-2
15	Cumbria	100.1	99.3	13	0.8	-2
16	Cheshire and Warrington	99.8	98.0	21	1.8	+5
17	Solent	99.8	98.9	16	0.9	-1
18	Swindon and Wiltshire	99.7	98.3	19	1.4	+1
19	South East Midlands	98.8	99.1	15	-0.2	-4
20	Derby, Derbyshire, Nottingham and Nottinghamshire	98.7	96.9	25	1.8	+5
21	Inverness and Highland City Region	98.6	98.2	20	0.4	-1
22	Liverpool City Region	98.6	96.7	26	1.9	+4
23	Leicester and Leicestershire	97.4	95.4	31	2.0	+8
24	Gloucestershire	97.1	98.8	17	-1.7	-7
25	South East	97.0	98.0	22	-0.9	-3
26	Greater Birmingham and Solihull	97.0	97.9	24	-1.0	-2
27	North Wales	96.7	93.9	42	2.8	+15
28	Swansea Bay City Region	96.6	94.8	35	1.8	+7
29	Greater Manchester	96.5	95.7	29	0.7	0
30	Dorset	96.3	98.0	23	-1.7	-7
31	York and North Yorkshire	96.2	94.9	33	1.3	+2
32	Leeds City Region	96.2	96.3	27	-0.1	-5
33	Greater Lincolnshire	96.1	92.4	46	3.6	+13

Rank 2021	Local Enterprise Partnership Area/City Region	UKCI Outcomes 2021	UKCI Outcomes 2018	Rank 2018	Change 2018-2021 UKCI Outcomes Index	Outcomes Index Rank
34	The Marches	96.0	94.1	38	1.9	+4
35	Cardiff City Region	95.6	95.3	32	0.4	-3
36	New Anglia	95.6	95.8	28	-0.2	-8
37	Heart of the South West	95.6	93.9	41	1.6	+4
38	Sheffield City Region	95.2	95.7	30	-0.5	-8
39	Stoke-on-Trent and Staffordshire	95.1	94.7	37	0.4	-2
40	Tees Valley	94.7	93.0	44	1.7	+4
41	Hull and East Riding	94.5	94.8	36	-0.3	-5
42	Black Country	94.4	93.2	43	1.2	+1
43	Mid Wales	94.4	92.5	45	1.9	+2
44	Lancashire	93.9	94.9	34	-1.0	-10
45	North East	93.7	94.0	40	-0.3	-5
46	Worcestershire	93.4	94.1	39	-0.7	-7
47	Cornwall and Isles of Scilly	89.4	89.6	47	-0.2	0

7.5. Largest changes in Competitiveness of LEPs and City Regions between 2018 and 2021

Previous UKCI reports have taken a longer-term perspective when comparing the performance of English LEP areas and Scottish and Welsh City Regions over time. However, the recent significant changes in the boundaries of many of the English LEP areas make this comparison inappropriate. Therefore, we reset the comparison year to 2018 rather than 2010 as in previous reports, as in 2010 many LEPs were responsible for larger areas.

In Table 7.06 Leicester and Leicestershire show the best improvement in ranking, rising five places between 2018 and 2021. This indicates how a city that spent some of the longest periods under Covid restrictions can continue to operate.[37] Worcestershire, as another LEP similar in nature to Leicester and Leicestershire in having a single middle size city in a more rural area, has climbed three places between 2018 and 2021. Whereas the increase in Leicester and Leicestershire's ranking mainly appears to be attributable to its improved UKCI Outcome Index, driven by higher wages, the Worcestershire increase is associated with high business creation. It is interesting that both of these LEPs appear to have been hit hard by the twin shocks of Brexit and Covid-19 Pandemic. In the case of Leicester and Leicestershire, lower employment has been offset with higher wages for those in work, which could generate the motivation to invest to achieve productivity improvements rather than relying on labour intensive approaches. Worcestershire on the other hand appears to have seen the shocks release entrepreneurial talent to allow adaptation.

Liverpool City Region and Glasgow and Clyde Valley City Region, with the large investments from their established respective City Deals, have both climbed three places.[38] This is positive with the investments in business, skills and infrastructure bearing fruit, and will hopefully allow these cities to catchup with the leading large cities in their regions Greater Manchester (North West) and Edinburgh (Scotland) over time.

Table 7.05: Best Performing Local Enterprise Partnership Areas and Scottish and Welsh City Regions 2018 to 2021 (UK=100)

Local Enterprise Partnership Area/City Region	2021	Rank 2021	2018	Rank 2018	Change 2018-21 UKCI	UKCI LEP Rank
Leicester and Leicestershire	94.4	19	92.2	24	2.2	+5
Worcestershire	99.8	14	95.0	17	4.8	+3
Liverpool City Region	88.1	31	86.7	34	1.4	+3
Glasgow and Clyde Valley City Region	91.6	24	90.6	27	1.0	+3
Leeds City Region	90.2	27	89.1	29	1.1	+2
The Marches	87.2	33	86.7	35	0.5	+2

[37] ITV (2021) 'Leicester: the city that's suffered the longest'. https://www.itv.com/news/central/2021-02-23/leicester-the-city-thats-suffered-the-longest

[38] Liverpool City Region Local Enterprise Partnership (2012) *Liverpool City Region Deal with Government*, Liverpool: Liverpool City Region LEP.
Glasgow City Region 'City Deal: Over £1 billion investment for Glasgow City Region'. https://glasgowcityregion.co.uk/city-deal/

Table 7.06 indicates that the largest declines in competitiveness have been experienced by more rural LEP areas: Inverness and Highland City Region (UKCI decline of 1.9 points); Gloucestershire (UKCI decline of 1.1 points); and Lancashire (UKCI decline of 1.0 points). This led to a fall of 4 places for Lancashire, 3 places for Inverness and Highland City Region, and 2 places for Gloucestershire in the rankings. Restrictions on tourism and hospitality may have played a role, but other important sectors such as expertise in aerospace, valves and pumps in Gloucestershire may be suffering from downturns in the sectors they supply.[39] In the case of aerospace, the recovery of markets may be slow, but is unlikely to reflect a long-run pattern of decline, while for advanced manufacturing serving customers in the oil and gas industries, a recovery may be quicker, but there may be a requirement to seek alternative customers if the green agenda reduces demand for these goods.

Table 7.06: Worst Performing Local Enterprise Partnership Areas and Scottish and Welsh City Regions 2018 to 2021 (UK=100)

					Change 2018-21	
Local Enterprise Partnership Area/City Region	2021	Rank 2021	2018	Rank 2018	UKCI	UKCI LEP Rank
South East	93.1	23	92.9	21	0.1	-2
Greater Manchester	93.7	21	94.3	19	-0.6	-2
York and North Yorkshire	91.6	25	92.5	23	-0.9	-2
Gloucestershire	97.9	16	99.0	14	-1.1	-2
Cardiff City Region	86.3	36	87.0	33	-0.7	-3
Inverness and Highland City Region	90.1	28	92.1	25	-1.9	-3
Lancashire	87.0	34	88.0	30	-1.0	-4

[39] GFirst LEP (2019) G*loucestershire Local Industrial Strategy 2019: Gloucestershire: Future-Proofed*, Gloucester: GFirst LEP.

8. Forecasting Growth with the UKCI

As outlined in Section 2, input or process competitiveness is intended to consider the potential of a locality to provide a high level of living standards for its residents on an on-going basis. This means that the UKCI will provide an insight into those localities that have the greatest potential to generate high value jobs and production in the future.

This section of the report uses this to forecast the economic growth of localities in Great Britain. As the growth of localities will be bound up with the national and global economic prospects a single forecast would provide a false measure of accuracy. Rather we consider four different scenarios based on previous economic conditions. These are based on the ‘boom’ period prior to the Global Financial Crisis, the ‘bust’ of the Financial Crisis period itself, the ‘recovery’ characterised by limited productivity gains after the Financial Crisis, and the longer run pattern over all these periods.

Appendix 1 provides more detail of the method used, but in simple terms we consider how the UKCI sub-indices at the start of each period affected the subsequent growth of localities during the period. Using this insight, we can estimate how localities will grow if a similar period is experienced given their current UKCI sub-indices. It must be noted that the current economic and social situation is unique, and therefore there will be more uncertainty than normal as the past two years have shown that conditions can change rapidly and also changing working patterns may have a profound impact that is yet to be established.

As we are most interested in changes in living standards, we concentrate on growth in GVA per capita rather than growth in GVA. The first measure better captures the share of income generated within the locality enjoyed by each resident, whereas growth in GVA might be driven by inward migration and might result in little benefit to the existing population. Of course it must be noted that GVA per capita is an average, and even with this measure some residents are likely to benefit to a much greater extent than others. We exclude the City of London and Westminster from the analysis as they are highly atypical, and are first and second in all the forecasts by a large margin.

8.1. GVA per Capita Growth in the Long-run Scenario

The figures covered in this subsection are based on the OECD forecasts of growth for the UK over the next 20 years and how localities have performed over the longer run in the past. It is unsurprising given growth rates in the past 40 years that localities in London dominate the top 10 localities in terms of expected future growth (Table 8.01). Eight of the top ten localities are in the capital city, with Camden and Tower Hamlets leading, with annual growth expected to be over 6.5 percent annually.

The two localities outside London that appear in the top ten are surprisingly not located in the other regions often regarded as part of the core, the South East and East of England, but are from the North West. The more rural locality of Copeland located in the County of Cumbria is first with an annual predicted growth rate for GVA per capita at just under 5 percent. Although this may appear initially surprising, Copeland has one of the largest concentrations of nuclear industry skills in the UK, being the location of Sellafield, and as such it has a highly skilled workforce combined with access to Lake District national park providing high living standards for many residents.[40]

TABLE 8.01: TOP 10 FASTEST PREDICTED GVA PER CAPITA GROWING LOCALITIES (LONG-RUN SCENARIO)

Rank	Locality	Region	Annual Growth Rate
1	Camden	London	6.71
2	Tower Hamlets	London	6.51
3	Islington	London	5.82
4	Southwark	London	5.01
5	Copeland	North West	4.94
6	Hammersmith and Fulham	London	4.92
7	Hackney	London	4.78
8	Kensington and Chelsea	London	4.32
9	Richmond upon Thames	London	4.20
10	Knowsley	North West	4.12

[40] https://www.thecumbrialep.co.uk/copeland/

The second North West locality predicted to experience high growth in GVA per capita under the long-run scenario is Knowsley, which has benefited from its location as part of the Liverpool City Region LEP and with easy access to Manchester City Region LEP. It has an extremely important position within the logistics sector, which benefits from access to two international airports and Motorways providing access to all points of the compass. It also possesses a growing advanced manufacturing sector.[41] These geographical benefits are likely to play an important role, with GVA per capita expected to grow at 4.12 percent per year over the long-run.

In contrast to the top ten localities with the faster predicted growth (Table 8.01), all expected to see growth of over 4 percent per year on average, those in Table 8.02 are expected to see a fall in output per resident in real terms. It is interesting to note that although two localities in the North West were expected to be the fastest growing, there are three localities in the bottom 10 from the same region. These include the seaside resort of Blackpool, which like many of its peers has seen an increase in deprivation and difficulties achieving steady growth capable of generating employment for all living and moving to the area,[42] and being reliant on a seasonal tourist sector and often temporary labour from outside the local area.[43] It is also argued that the weak third sector in such localities plays a role, and the nature of the deprivation present requires carefully targeted interventions, which large public sector schemes are often incapable of providing in the correct integrated manner.[44] Although seaside resorts differ across the UK in terms of the exact type of deprivation experienced, it is notable that Hastings and Thanet (which includes the seaside towns of Margate and Ramsgate) both in the South East region are also in the bottom 10.

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[41] Knowsley Council (2016) *Knowsley: Our Plan for Accelerating Economic Growth 2016-2021*, Huyton: Knowsley Metropolitan Borough Council.

[42] Beatty, C. and Fothergill, S. (2004) 'Economic change and the labour market in Britain's seaside towns', *Regional Studies*, 38 (5), 459-478.

[43] Shaw, G. and Coles, T. (2007) 'The resort economy: changing structures and management issues in British resorts', in S. Agarwal and G. Shaw (eds.0, *Managing Coastal Tourism Resorts: A Global Perspective*, Clevedon: Channel View, pp. 40-70.

[44] Agarwal, S. Jakes, S. Essex, S. Page, S. J. and Mowforth, M. (2018) 'Disadvantage in English seaside resorts: a typology of deprived neighbourhoods', *Tourism Management*, 69, 440-459.

Tameside and Pendle in North West, along with Tamworth in the West Midlands and Mansfield in the East Midlands, are more urbanised areas, but are part of the periphery of larger urban areas or closely located nearby to such areas. These areas had traditions in manufacturing and extraction and have suffered from the decline of these sectors. They have not been able to compete with their larger nearby neighbours that have switched to service based economies. In effect, they are suffering from being near to, but not fully part of, the cities that have experienced a renaissance. One aspect holding them back is a lack of high skilled employees,[45] and difficulties retaining higher ability young people who are drawn to better remunerated jobs in these nearby cities.

TABLE 8.02: 10 SLOWEST PREDICTED GVA PER CAPITA GROWING LOCALITIES (LONG-RUN SCENARIO)

Rank	Locality	Region	Annual Growth Rate
351	Forest of Dean	South West	-0.47
352	Tamworth	West Midlands	-0.48
353	Thanet	South East	-0.57
354	Mansfield	East Midlands	-0.60
355	Torridge	South West	-0.74
356	Blackpool	North West	-0.75
357	Tameside	North West	-0.81
358	Hastings	South East	-0.83
359	Boston	East Midlands	-0.93
360	Pendle	North West	-1.05

Table 8.03 highlights the localities that are predicted to grow at the slowest and fastest rates in each region. The results show that in most regions there are quite large disparities. These are likely to lead to increased inequality between areas in the same region. The largest differences between the top and bottom performers found are in the North West and London where there are 5.99 and 5.53 percentage points between the highest and lowest predicted growth rates for these localities respectively.

The North East (1.45 percentage points) and Yorkshire and the Humber (1.77 percentage points) have the smallest differences in their best and worst predicted local growth rates. This is not good news, however, as rather than this reflecting moderate, but better spread growth across their localities, it tends to reflect low predicted growth in output per resident across all localities.

[45] Tameside Metropolitan Borough Council (2021) *Inclusive Growth Strategy 2021-26,* Ashton under Lyne: Tameside Metropolitan Borough Council.

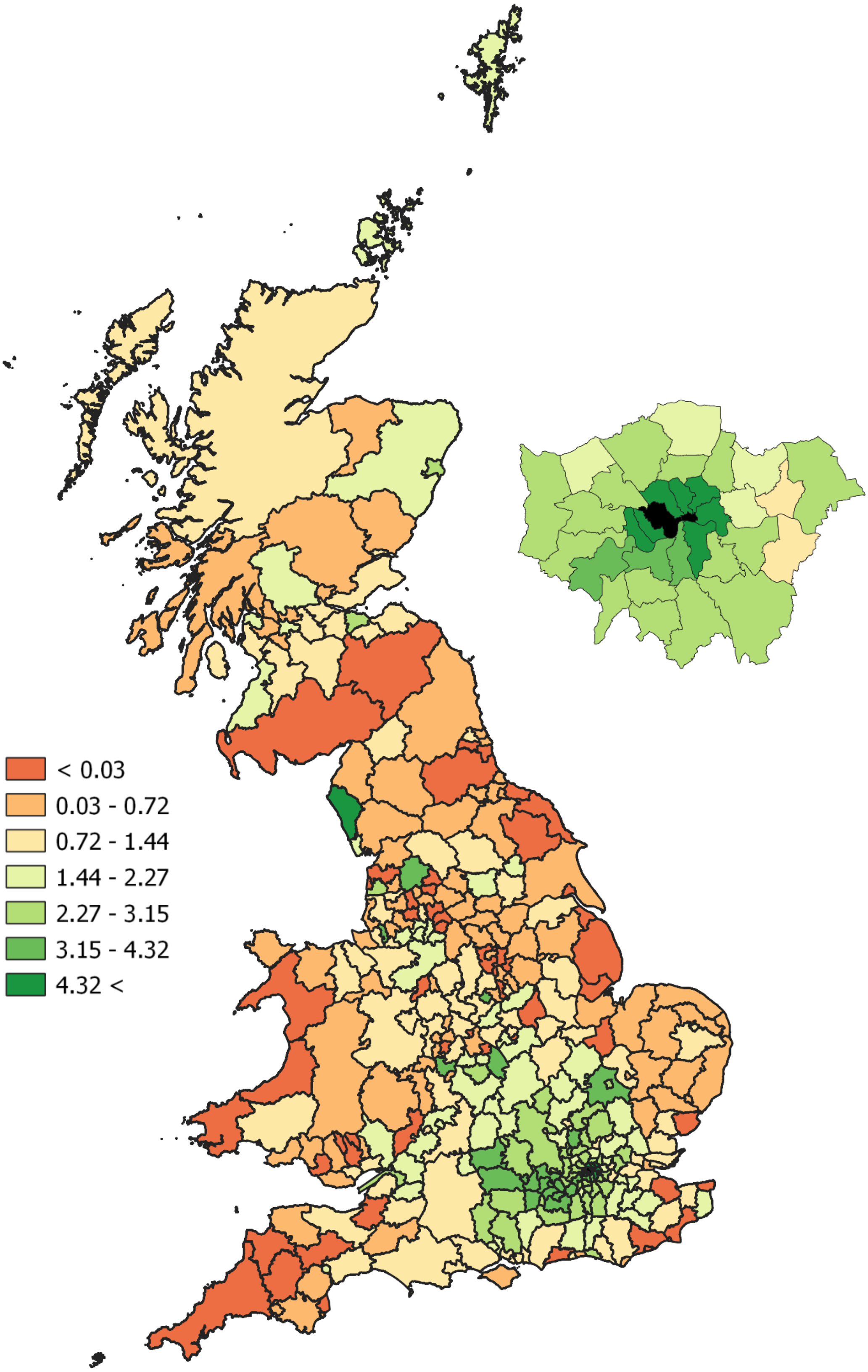
Table 8.03: Fastest and Slowest Predicted GVA per Capita Growing Localities in each Region (Long-run Scenario)

Regions	Growth Rank	Locality	Annual Growth Rate
East Midlands	26	Derby	3.34
	359	Boston	-0.93
East of England	24	South Cambridgeshire	3.41
	339	Fenland	-0.34
London	1	Camden	6.71
	161	Bexley	1.18
North East	173	Newcastle upon Tyne	1.08
	343	County Durham	-0.36
North West	5	Copeland	4.94
	360	Pendle	-1.05
Scotland	43	City of Edinburgh	2.95
	324	Dumfries and Galloway	-0.12
South East	11	Wokingham	4.12
	358	Hastings	-0.83
South West	74	Bristol, City of	2.30
	355	Torridge	-0.74
Wales	114	Monmouthshire	1.68
	349	Ceredigion	-0.45
West Midlands	20	Bromsgrove	3.54
	352	Tamworth	-0.48
Yorkshire and the Humber	121	York	1.59
	329	Kingston upon Hull, City of	-0.19

London is the only region where the predicted per capita growth rate of the worst performing locality is positive (Bexley 1.18% per annum). In fact, it is striking that when comparing the worst performing localities for each region, excluding London, there is only 0.93 percentage points difference between Dumfries in Scotland (-0.12% per annum) and Pendle in the North West (-1.05% per annum).

In other words, slow improvements in GVA per capita, and the associated impact in terms of limited benefits for living standards, are a widespread problem in the UK, not just in particular regions. Some regions may have more lower (or fewer higher) growth localities (North East, Yorkshire and the Humber, and Wales), but all regions have areas that are likely to be left behind. This is apparent in Figure 8.01 below where all regions apart from London have their red localities reflecting near zero or even negative predicted improvements in GVA per capita. However, while some regions tend to have few localities in paler (peach) shades, reflecting low but positive rates of growth (North East and Wales), others are predominately these paler shades (West Midlands) or even green meaning growth rates of GVA per capita of over 2 percent per annum (London and the South East). Growth is not estimated for those areas shaded black.

FIGURE 8.01: LOCAL AUTHORITY GVA PER CAPITA PREDICTED GROWTH (LONG-RUN SCENARIO)



8.2. Bust Scenario

The bust scenario reflects the predicted growth rates per annum if the UK and global economies experience a period of economic downturn similar to the Global Financial Crisis period. The figures calculated do not reflect the years of greatest decline alone but average the rates over the period from the initial shock until the recovery truly starts and might therefore cover a five year period if repeated shocks are experienced (see appendix 1 for details). This scenario might be appropriate if, for example, new Covid-19 variants mean that lockdowns and other policies enforcing business closure continue to be common place.

The fastest predicted GVA per capita growth rates presented in Table 8.04 are much lower than under the long-run scenario (Table 8.01), but many of the same localities are present. The London boroughs of Kensington and Chelsea; and Richmond upon Thames have been replaced by Bracknell Forest and Wokingham in the South East.

TABLE 8.04: TOP 10 FASTEST PREDICTED GVA PER CAPITA GROWING LOCALITIES (BUST SCENARIO)

Rank	Locality	Region	Annual Growth Rate
1	Tower Hamlets	London	0.72
2	Camden	London	0.63
3	Islington	London	0.29
4	Copeland	North West	0.18
5	Southwark	London	0.04
6	Hammersmith and Fulham	London	-0.03
7	Hackney	London	-0.15
8	Knowsley	North West	-0.18
9	Wokingham	South East	-0.33
10	Bracknell Forest	South East	-0.33

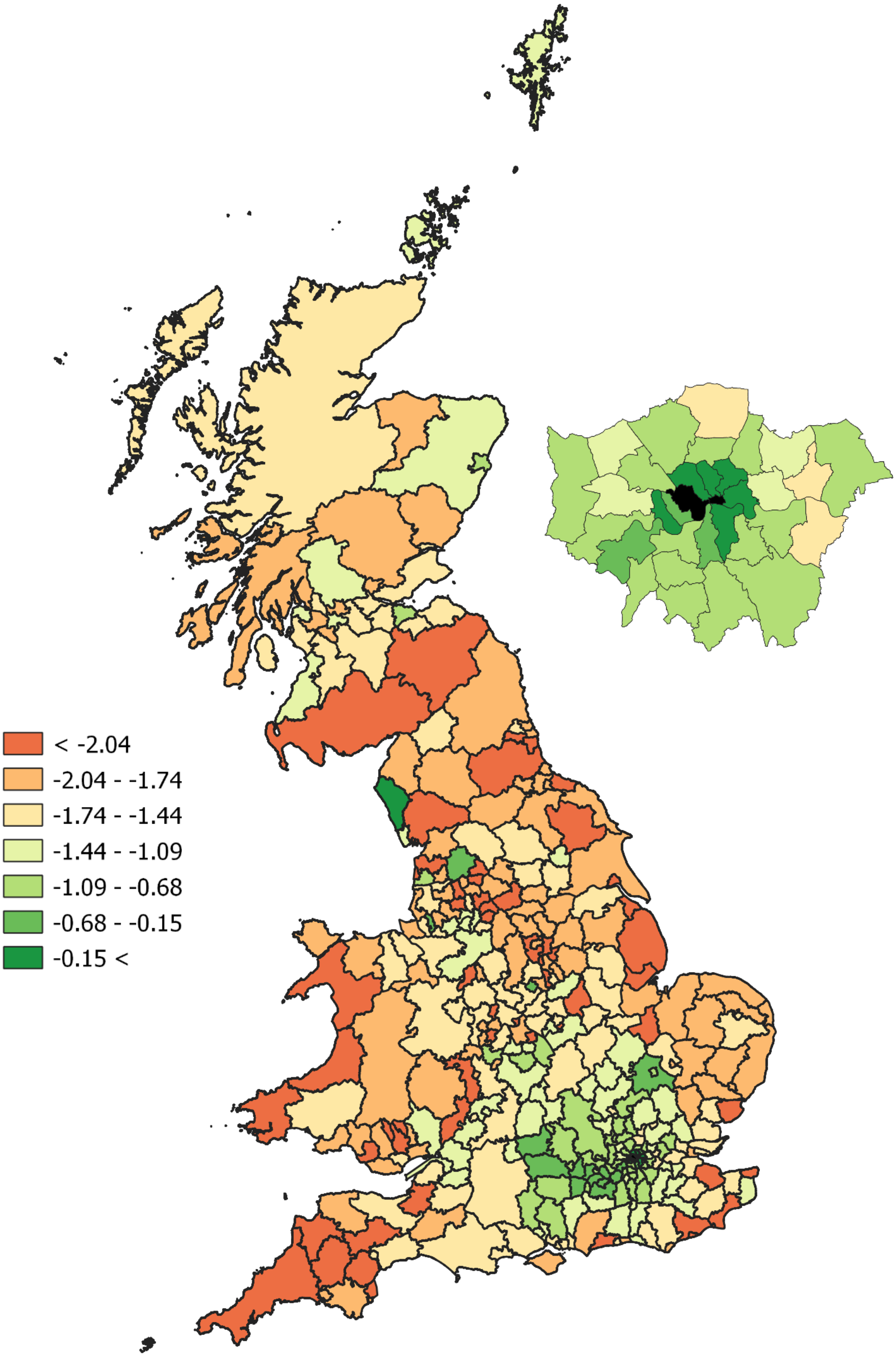
Table 8.05 presents those localities in the bottom ten under the bust scenario and shows that they are exactly the same as in the long-run growth scenario (Table 8.02). This implies that those localities that are most vulnerable to severe shocks are also those that lack the resources and appropriate deployment of those resources to generate growth over the longer term. All of the bottom ten localities are forecast to experience a loss of GVA per capita of more than 2 percent per annum. This means that the longer the Covid-19 and Brexit disruptions persist, the greater the ground these localities will have to make up to return to the same levels of output per resident to support the existing standards of living.

TABLE 8.05: 10 SLOWEST PREDICTED GVA PER CAPITA GROWING LOCALITIES (BUST SCENARIO)

Rank	Locality	Region	Annual Growth Rate
351	Tamworth	West Midlands	-2.28
352	Forest of Dean	South West	-2.29
353	Mansfield	East Midlands	-2.31
354	Thanet	South East	-2.31
355	Blackpool	North West	-2.38
356	Torridge	South West	-2.39
357	Tameside	North West	-2.42
358	Hastings	South East	-2.44
359	Boston	East Midlands	-2.46
360	Pendle	North West	-2.53

Given the consistent pattern of localities in both the top and bottom 10 localities in terms of predicted growth under both the long-run and bust scenario, it is no surprise that the geographical distribution is very similar (Figure 8.02). This means that when discussing issues of recovery and levelling up, policy makers must be aware that although more localities outside the core regions may need investment support to recover, there will be localities being left behind in all regions, both in a relative manner compared to other localities in their region, and also in an absolute manner in the case of those suffering the largest declines in GVA per capita. Growth is not estimated for those areas shaded black.

FIGURE 8.02: LOCAL AUTHORITY GVA PER CAPITA PREDICTED GROWTH (BUST SCENARIO)



8.3. Recovery Scenario

The recovery scenario reflects the predicted growth rates per annum if the UK and Global economies experience a period of economic recovery similar to that after the Global Financial Crisis period, characterised by low productivity gains. Effectively, this might be regarded as a return to the environment present immediately prior to the height of the uncertainty of achieving a Brexit deal. In a similar fashion to the Bust Scenario, this relates to conditions that could prevail for around five years if no further major shocks are experienced.

Table 8.06 shows again that the top 10 localities in terms of GVA per capita growth are dominated by those in London, eight of the ten. All of the localities would be expected to grow by more than 2 percent annually. While this appears promising it should be noted that these are the fast growing localities in this scenario, and that most would be producing growth rates well below the trend rate experienced prior to the Global Financial Crisis.

The London boroughs are joined by Bromsgrove in the West Midlands and St Albans in the East of England. Both of these smaller urban areas tend to have a larger number of businesses present per head and a high level of business registrations, rather than being reliant on a small number of larger employers. As such, these may be the localities best placed to grab the opportunities that present themselves in the recovery period.

TABLE 8.06: TOP 10 FASTEST PREDICTED GVA PER CAPITA GROWING LOCALITIES (RECOVERY SCENARIO)

Rank	Locality	Region	Annual Growth Rate
1	Camden	London	2.75
2	Islington	London	2.55
3	Bromsgrove	West Midlands	2.45
4	Hackney	London	2.40
5	Tower Hamlets	London	2.34
6	Kensington and Chelsea	London	2.32
7	Hammersmith and Fulham	London	2.29
8	Richmond upon Thames	London	2.25
9	Southwark	London	2.23
10	St Albans	East of England	2.18

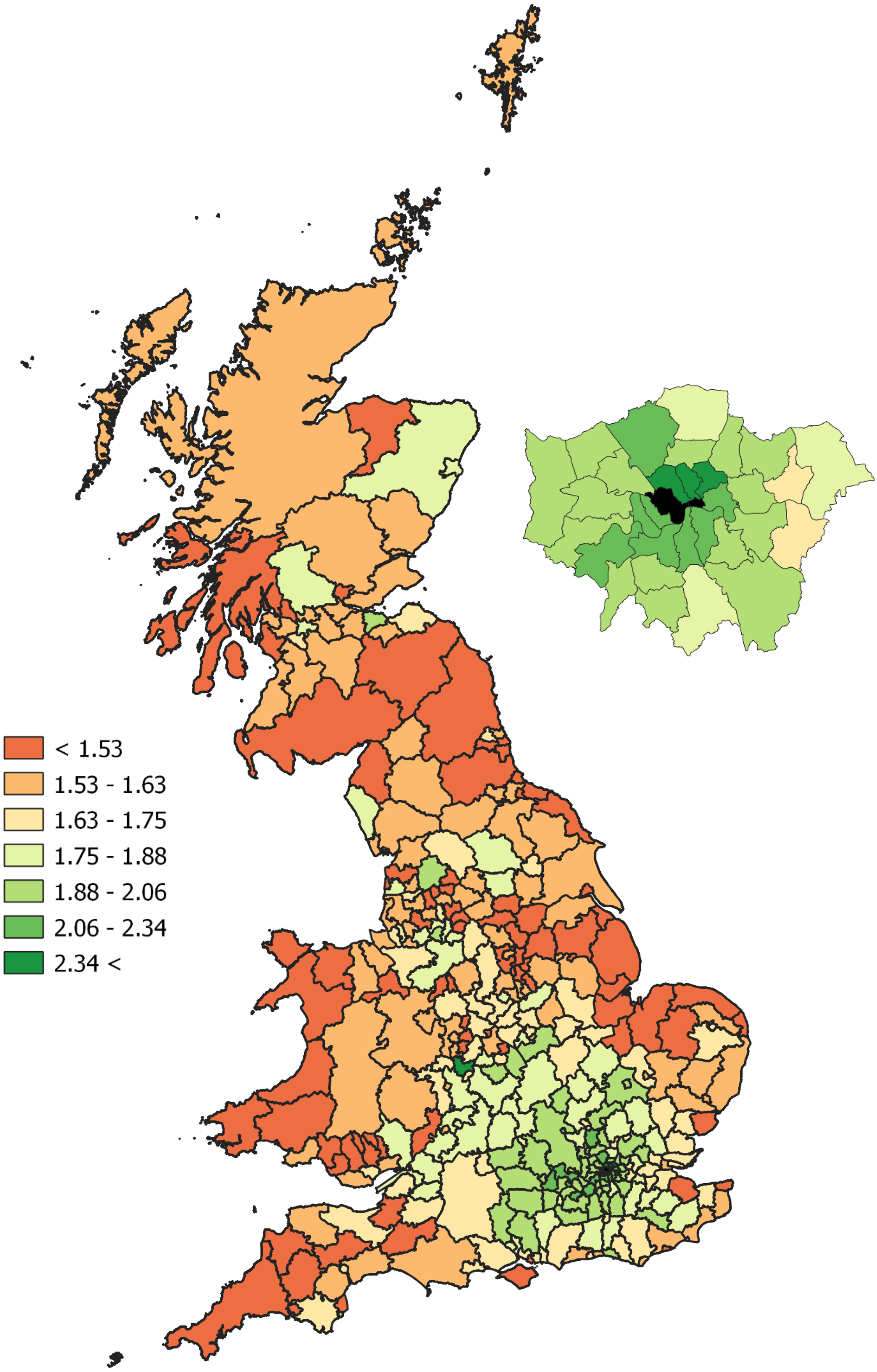
Table 8.07 indicates that many of the slower growing localities in the recovery period have previously appeared in the long-run and bust scenarios slower growing localities (Tables 8.02 and 8.05 respectively). For example, Blackpool, Pendle and Tameside in the North West and Boston and Mansfield in the East Midlands are listed. However, these are joined by a number of Welsh localities: Neath Port Talbot, Merthyr Tydfil, and Blaenau Gwent. All three of these localities are in the bottom 11 of the UKCI rankings. The predictions here suggest that the poorer outcomes achieved for these localities are not just due to large declines in GVA per capita during economic downturns (all are coloured red in Figure 8.02 above), but relatively they are even more likely to lose out through weaker recoveries afterwards.

TABLE 8.07: BOTTOM 10 SLOWEST PREDICTED GVA PER CAPITA GROWING LOCALITIES (RECOVERY SCENARIO)

Rank	Locality	Region	Annual Growth Rate
351	Redcar and Cleveland	North East	1.42
352	Tameside	North West	1.42
353	Neath Port Talbot	Wales	1.42
354	Pendle	North West	1.41
355	Blackpool	North West	1.41
356	Mansfield	East Midlands	1.41
357	East Lindsey	East Midlands	1.40
358	Merthyr Tydfil	Wales	1.40
359	Boston	East Midlands	1.38
360	Blaenau Gwent	Wales	1.34

Comparisons of the geographical distribution of predicted growth in GVA per capita under the recovery scenario in Figure 8.03 with the previously presented situation under the bust scenario (Figure 8.02) appears to show more uniform patterns within regions. More of the localities in the East Midlands, North East and Wales fall into the category of localities with the lowest growth in GVA per capita. The more peripheral parts of the East of England such as Norfolk, and the South West such as Devon and Cornwall are also included in this group. The South East, on the other hand, while not completely avoiding localities with lower growth in GVA per capita - Thanet and Medway remain in this group - has fewer. This means that regional differences appear more likely to develop in periods of recovery rather than recession. Growth is not estimated for those areas shaded black.

FIGURE 8.03: LOCAL AUTHORITY AREA GVA PER CAPITA PREDICTED GROWTH (RECOVERY SCENARIO)



8.4. Boom Scenario

The last scenario, boom, reflects the situation that was present prior to the Global Financial Crisis. It would perhaps seem less likely that the UK economy will transition to this scenario immediately, but given the strong recovery from the Covid-19 restrictions in 2021 it is possible. It would require minimal reintroduction of restrictions and is likely to require firms to quickly invest in technology to reduce the impact of rising labour costs and boost productivity. Although current fiscal and monetary policy has been supportive of this, the winding up of Covid-19 business support and concerns relating to rising costs appear to make it unlikely that business confidence will be sufficient to avoid a slow down after the immediate re-employment of slack within the economy. This means that although the 'Great Moderation' saw high levels of growth from the late 1990s onwards until the Global Financial Crisis, this scenario is likely to refer to a shorter period of two or three years at most.

Table 8.08 is dominated by London boroughs, but also includes the West Midlands town of Bromsgrove and the nuclear specialist location of Copeland, which was previously discussed under the recovery and long-run scenarios. All of the top 10 localities would experience growth of GVA per capita of over 5 percent and approaching 9 percent in the case of Camden.

TABLE 8.08: TOP 10 FASTEST PREDICTED GVA PER CAPITA GROWING LOCALITIES (BOOM SCENARIO)

Rank	Locality	Region	Annual Growth Rate
1	Camden	London	8.69
2	Tower Hamlets	London	7.83
3	Islington	London	7.58
4	Hackney	London	6.42
5	Hammersmith and Fulham	London	6.37
6	Southwark	London	6.34
7	Kensington and Chelsea	London	5.89
8	Richmond upon Thames	London	5.67
9	Copeland	North West	5.63
10	Bromsgrove	West Midlands	5.42

Table 8.09 indicates the worst performers and again includes many of the old industrial towns, and seaside resorts. Torridge in the South West and East Lindsey in the East Midlands as well as being reliant on tourism are also highly agricultural. Such localities are unlikely to have the resources and industries necessary to gain greatly from any boom in demand.

Even though this is a boom scenario, five of the ten bottom localities are predicted to see small declines in their GVA per capita. Given the high growth rates of the more successful localities, it is under this scenario that the largest disparities in outcomes for localities are likely to develop.

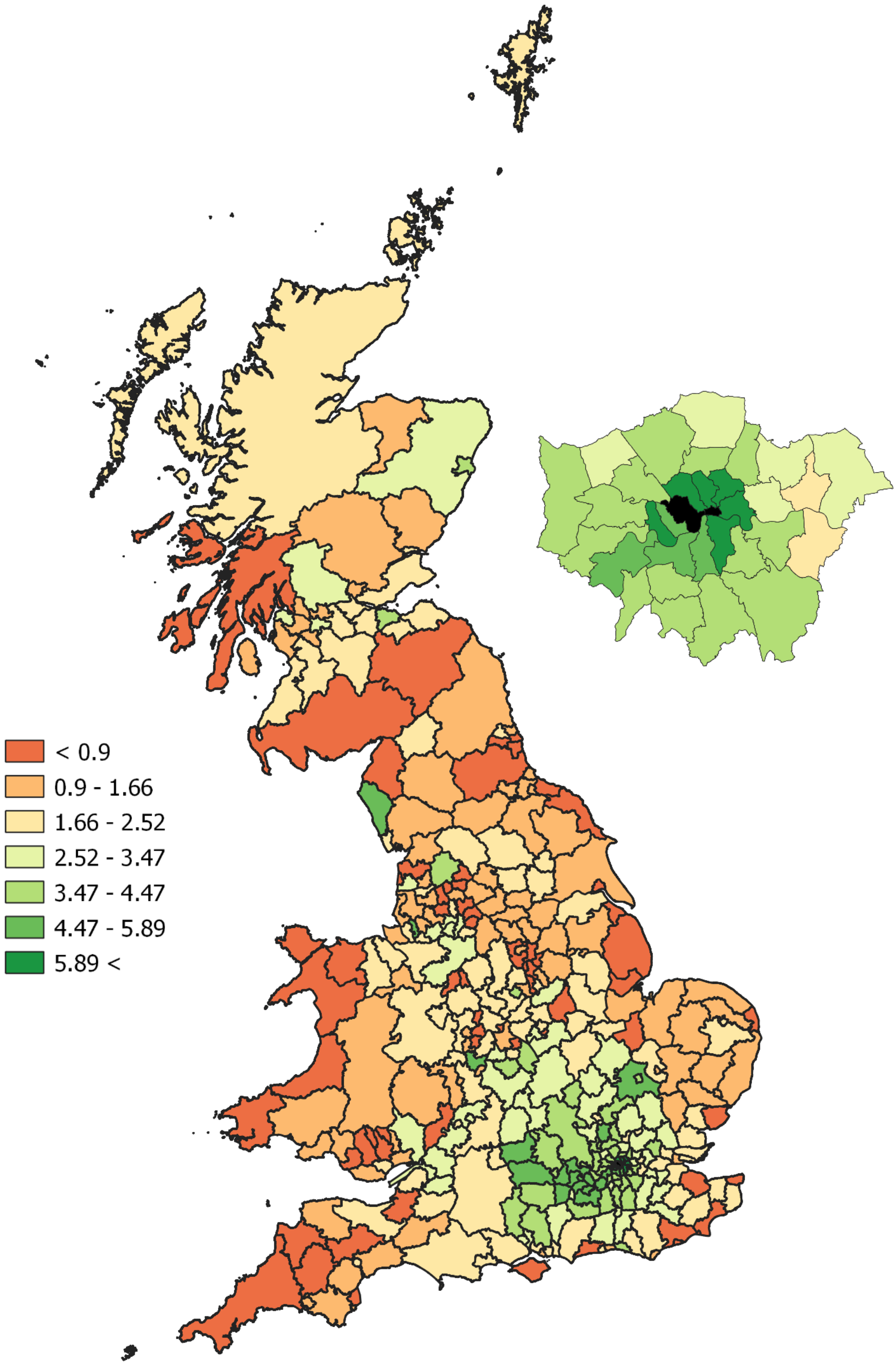
TABLE 8.09: 10 SLOWEST PREDICTED GVA PER CAPITA GROWING LOCALITIES (BOOM SCENARIO)

Rank	Locality	Region	Annual Growth Rate
351	East Lindsey	East Midlands	0.22
352	Thanet	South East	0.21
353	Blaenau Gwent	Wales	0.16
354	Mansfield	East Midlands	0.10
355	Torridge	South West	0.02
356	Blackpool	North West	-0.02
357	Hastings	South East	-0.02
358	Tameside	North West	-0.05
359	Boston	East Midlands	-0.23
360	Pendle	North West	-0.28

Geographically, Figure 8.04 shows that with the odd exception in the North West, West Midlands and Scotland, under the boom scenario localities in London, the South East and to a lesser extent the East of England pull ahead of the rest of the UK in terms of production output per person. In effect, while attention is often drawn to rising unemployment rates in downturns (bust scenario) in the less successful regions, it is during boom periods that the greatest disparities are created. This shows the importance of considering the concepts of competitiveness from a longer run perspective, with resilience not just being the resistance to the shocks aspect, but also the ability to adapt and reorientate after the shock has passed.[46] Growth is not estimated for those areas shaded black.

[46] Martin, R. and Sunley, P. (2017) 'Competitiveness and regional economic resilience', in R. Huggins and P. Thompson (eds.), *Handbook of Regions and Competitiveness: Contemporary Theories and Perspectives on Economic Development*, Cheltenham: Edward Elgar, pp. 287-307.

FIGURE 8.04: LOCAL AUTHORITY GVA PER CAPITA PREDICTED GROWTH (BOOM SCENARIO)



8.5. Comparisons of Growth Predictions Under Different Scenarios

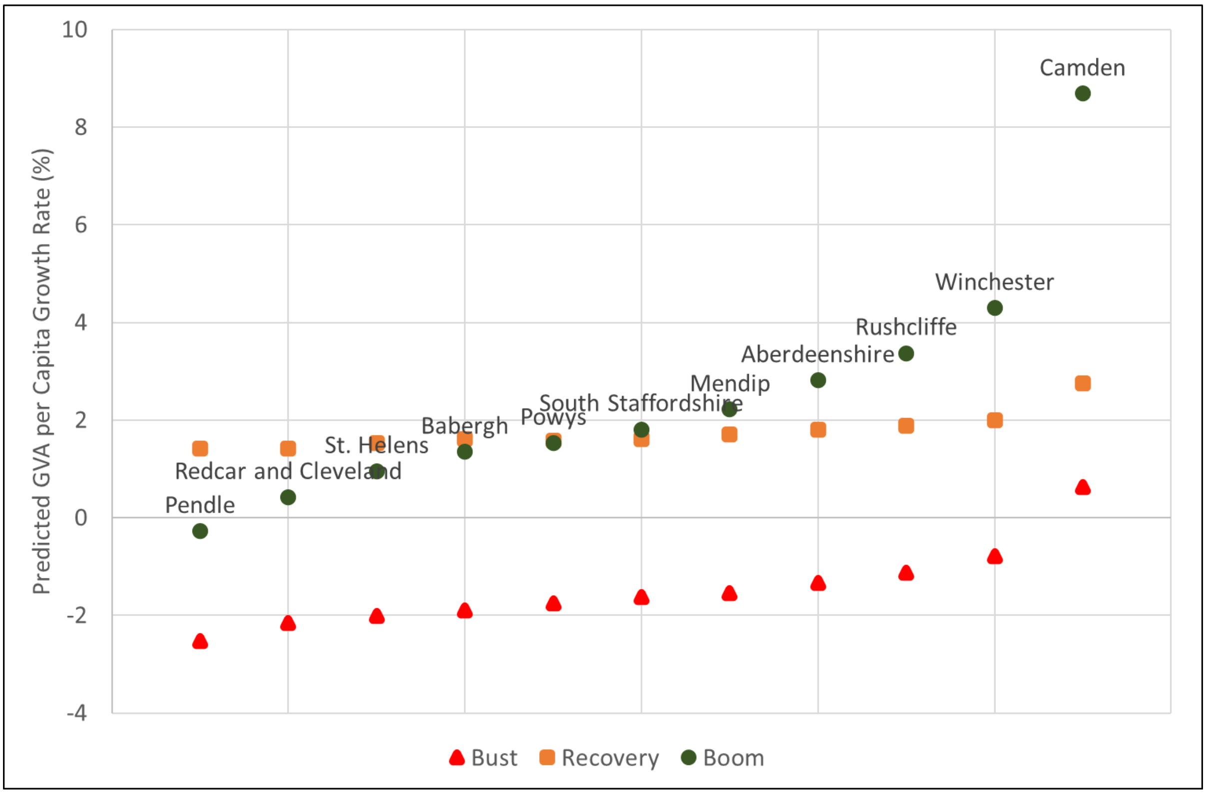
The preceding four sub-sections have outlined four different scenarios and the localities expected to show the best and worst performances in terms of growth of GVA per capita. These sub-sections have touched on when the greatest disparities between localities both within the same and between different regions are likely to exist. This sub-section briefly makes this comparison by looking at the shorter-term forecasts from the bust, recovery and boom scenarios in order to provide further insight into where the differences in the long-run scenario are likely to originate.

Figure 8.05 shows the forecast growth in GVA per capita for a selection of different localities. These localities were chosen to cover the whole range of forecast GVA per capita growth patterns, as well as drawing on localities from as wide a range of regions as possible. The growth rates of GVA per capita estimated for these localities are shown for each of the three short-run scenarios.

While the bust scenario estimates of growth in GVA per capita are always below the recovery and boom scenario estimates for the same locality, the same is not always true when comparing the recovery and boom scenarios. There is much less variance in the recovery GVA per capita growth rates between the best and worst performing localities. Furthermore, the localities with the lowest rates of growth catch up in the recovery phase are actually likely to grow more quickly than in the boom phase.

It is in the boom scenario that the largest disparities exist and the struggling localities fall behind. The localities with the highest forecast GVA per capita pull much further ahead. This comparison confirms that while the Covid-19 and Brexit shocks are likely to have hit the less competitive localities hardest, it will be when the global and national economies pick up that 'levelling up' will be most important. Sadly, this is likely to be when the social and political impetus to achieve this will be weakest as higher absolute employment rates and income growth will distract from relative underperformance.

FIGURE 8.05: COMPARISON OF PREDICTED PER CAPITA GVA GROWTH RATES BY SCENARIO



9. Conclusions

This report has presented the latest UKCI data for 2021. Although it is not possible to fully understand the impact that the twin shocks of Brexit and the Covid-19 Pandemic will have in the long-run, it provides a first insight into those localities which are best positioned to deal with the shocks faced. The most competitive localities in the UK remain those located in London, but there has been much more change in the last few years than has been the case for many of the previous UKCI reports.

It is apparent that while competitiveness remains clustered around London and the South East there are spots of greater competitiveness throughout the UK. In addition, there are many localities with erosions in competitiveness in most regions. London might be regarded as an exception, with its relatively high level of competitiveness compared to other regions. However, it should be recognised that it has localities which have relatively lower levels of competitiveness compared to others elsewhere in the region.

Attempts at 'levelling up' have to take care not to focus on regional differences alone. Within regions there are variations in competitiveness, which are likely to result in greater disparities over time. Any policies taken at too high a level of spatial aggregation may result in less competitive localities in more competitive regions being left further behind.

For those regions receiving investments to help with levelling up, there is a danger that the larger cities will tend to gain as they remain the core coordinating entities in their regions. The gains in competitiveness enjoyed by many of these larger cities may in part reflect the existing City Deals that have been agreed. However, their renaissance also appears to reflect a longer-run pattern and that the more peripheral localities within regions may continue to be left behind.

In conclusion, the trends in competitiveness differences suggest that the economic levelling of the UK economy over the coming years is unlikely and can only be addressed through significant additional investment in the local areas of the UK that have been left behind.

Appendix 1: Forecasting Growth with the UKCI

The overall UK competitiveness index is a composite measure of both outcome competitiveness and process/input competitiveness.[47] Outcome competitiveness reflects the ability of a locality to utilise the inputs available to improve the welfare of residents of the locality.[48] Process or input competitiveness considers the resources that are available to utilise to renew and generate favourable outcomes for businesses and residents of the locality thereby taking a more dynamic perspective.[49]

The inclusion of both process and outcome competitiveness dimensions in the UKCI means that it provides an insight into the future progress of a locality's success in terms of the resources available and its current success in converting these into better welfare outcomes for residents. The report utilises this strength of the UKCI to provide forecasts of the future growth of the UK localities. In recognising that growth is in part dependent on external factors, in particular the growth of the national UK economy, a number of scenarios are generated. The analysis focuses on growth of GVA per capita of the locality in preference to growth of GVA as a stronger measure of changes in average standards of living across localities.[50] This discrepancy in measures has led some to note recovery has been spatially uneven and inconsistent over time.[51] Such a pattern is likely to be the case in the recovery from the current shocks from Brexit and the Covid-19 Pandemic.

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[47] See for example: Aiginger, K. (2006) 'Competitiveness: from a dangerous obsession to a welfare creating ability with positive externalities', *Journal of Industry, Competition and Trade*, 6 (2), 161-177.

[48] See for example: Kitson, M. Martin, R. and Tyler, P. (2004) 'Regional competitiveness: an elusive yet key concept?', *Regional Studies*, 38 (9), 991-999.

And

Porter, M. (2007) 'Competitiveness implications for central Europe and the Czech Republic', Paper presented in Prague, 22 October.

[49] See for example: Aiginger, K. and Firgo, M. (2017) 'Regional competitiveness: connecting an old concept with new goals', in R. Huggins and P. Thompson (eds.), *Handbook of Regions and Competitiveness: Contemporary Theories and Perspectives on Economic Development*, Cheltenham: Edward Elgar, pp. 155-191.

And

Fratesi, U. (2017) 'The dynamics of regional competitiveness', in R. Huggins and P. Thompson (eds.), *Handbook of Regions and Competitiveness: Contemporary Theories and Perspectives on Economic Development*, Cheltenham: Edward Elgar, pp. 207-231.

[50] https://ig.ft.com/sites/numbers/economies/uk/

[51] Corlett, A. and Clarke, S. (2017) *Living Standards 2017: The past, present and possible future of UK incomes*, London: Resolution Foundation.

The process used to generate the forecasts is to utilise previous UKCI figures and examine the relationship between the input and outcome sub-indices (that capture the resources available and the ultimate ability to generate welfare benefits for the population) and growth in GDP per capita in the following years.[52] Recognising that this relationship may not remain constant for different periods of the business cycle, the relationship is estimated using the following UKCI figures and periods of growth:

UKCI 1997 → GDP per capita growth 1997 – 2007 (boom period)

UKCI 2009 → GDP per capita growth 2007 – 2012 (bust period)

UKCI 2013 → GDP per capita growth 2012 – 2016 (recovery period)

UKCI 1997 → GDP per capita growth 1997 – 2013 (long-run estimate)

Each estimate provides a slightly different insight in terms of the period under examination, whether it is pre-Great Recession (boom), Great Recession (bust), or post-Great Recession (recovery), or alternatively a longer run analysis that covers all three periods to some degree, but excluding the most recent data where uneven patterns of the recovery and concerns about Brexit may have led to short-run fluctuations.

We retain the same periods used to estimate the relationships for the scenarios as those used in the 2019 report because of the large fluctuations and uncertainty present in more recent data as the Brexit decision affected business decisions. The relationships take the following form:

$$AnnualGrowth_{Y1-YN,i} = \beta_0 + \beta_1 Inputs_{UKCI,i} + \beta_2 Outcomes_{UKCI,i} + \varepsilon_i$$

Where $AnnualGrowth_{Y1\text{-}YN,i}$ is the average GDP per capita growth for the period *Y*1 to *YN* (i.e. 1997 to 2007; 2007 to 2012; 2012 to 2016; or 1997 to 2013) in locality *i*. This is firstly determined by β_0 which is a base level of growth in per capita GDP that would be experienced by a theoretical locality with a UKCI of 0. $Inputs_{UKCI,i}$ and $Outcomes_{UKCI,i}$ are the UKCI Input and Outcome sub-indices for locality *i* at the beginning of the period. The coefficients β_1 and β_2 are estimated and reflect the relationship between GDP per capita growth and the UKCI sub-indices for Inputs and Outcomes respectively. The final term ε is an error term reflecting the fact that other factors beyond the UKCI will influence annual growth during the period that will lead to deviations from the predictions.

The relationships between the UKCI sub-indices and GDP per capita for each period are as summarised below:

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[52] The relationship between UKCI figures and GDP per capita growth is established using regression analysis.

Table 10.1: Relationship between UKCI Input and Outcome sub-indices with GDP per capita growth

Scenario	Period	Input Sub-Index	Outcome Sub-Index
Boom	1997-2007	0.000397	0.001322
Bust	2007-2012	0.000106	0.000611
Recovery	2012-2016	0.000084	0.0000886
Long-run	1997-2013	0.000296	0.001345

The full equations estimated are as follows:

Boom

$$AnnualGrowth_{97-07,i} = 0.879 + 0.000397 Inputs_{97,i} + 0.001322 Outcomes_{97,i} + \varepsilon_i$$

Bust

$$AnnualGrowth_{07-12,i} = 0.931 + 0.000106 Inputs_{09,i} + 0.000611 Outcomes_{09,i} + \varepsilon_i$$

Recovery

$$AnnualGrowth_{12-16,i} = 1.027 + 0.000084 Inputs_{13,i} + 0.0000886 Outcomes_{13,i} + \varepsilon_i$$

Long-Term

$$AnnualGrowth_{97-13,i} = 0.870 + 0.000296 Inputs_{97,i} + 0.00135 Outcomes_{97,i} + \varepsilon_i$$

To produce forecasts from these relationships, current data is taken from the UKCI for 2021 and using the relationships outlined above estimates of GVA per capita growth are produced. The estimates are then adjusted to account for the UK growth in GVA per capita expected in each scenario[53]. This generates four different growth estimates for each locality, one for each scenario.

[53]The initial estimate assumes that conditions are those nationally and internationally currently in place, but local growth will respond to their UKCI Inputs and Outcomes as in the particular scenario. This is then scaled by the figure generated for the UKCI as a whole (Input Index = 100, Outcome Index = 100), to produce a ratio of local growth to that of the UK. This ratio is then multiplied by the estimated UK GDP per capita growth for the relevant scenario to adjust for the growth that would be expected in such a scenario. In most cases this figure is taken from the UK growth over the period used to produce the original estimates, so that the Boom scenario assumes that UK growth will be that experienced on average for the 1997-2007 period. The exception is for the long-run estimate where this is taken from the OECD estimates of growth for the period 2021 to 2041.

This means the overall equations used to estimate each of the scenarios are as follows:

Boom

$$AnnualGrowth_{97-07,i} = \left[\left(\frac{(0.879 + 0.000397 Inputs_{21,i} + 0.001322 Outcomes_{21,i})}{1.051} \times 1.027\right) - 1\right] \times 100$$

Bust

$$AnnualGrowth_{07-12,i} = \left[\left(\frac{(0.931 + 0.000106 Inputs_{21,i} + 0.000611 Outcomes_{21,i})}{1.003} \times 0.986\right) - 1\right] \times 100$$

Recovery

$$AnnualGrowth_{12-16,i} = \left[\left(\frac{(1.027 + 0.000084 Inputs_{21,i} + 0.0000884 Outcomes_{21,i})}{1.044} \times 1.018\right) - 1\right] \times 100$$

Long-Term

$$AnnualGrowth_{97-13,i} = \left[\left(\frac{(0.870 + 0.000296 Inputs_{21,i} + 0.00135 Outcomes_{21,i})}{1.034} \times 1.017\right) - 1\right] \times 100$$

Appendix 2: UKCI in Rank Order

In the table below localities are presented in rank order

Locality	Region	2018	Rank 2018	2021	Rank 2021
City of London	London	991.9	1	928.3	1
Westminster	London	207.1	2	205.7	2
Camden	London	172.4	3	167.7	3
Tower Hamlets	London	153.5	4	151.7	4
Islington	London	149.7	5	148.2	5
Hammersmith and Fulham	London	135.2	6	134.0	6
Kensington and Chelsea	London	129.2	9	132.4	7
Southwark	London	130.2	8	131.7	8
Runnymede	South East	126.9	12	130.0	9
Hounslow	London	130.2	7	128.0	10
Richmond upon Thames	London	124.7	13	125.7	11
Elmbridge	South East	127.5	11	125.1	12
Windsor and Maidenhead	South East	128.5	10	125.0	13
Hackney	London	119.0	20	122.9	14
Wokingham	South East	123.4	14	121.6	15
Bromsgrove	West Midlands	109.4	52	121.6	16
Reading	South East	121.1	18	121.5	17
West Berkshire	South East	120.0	19	120.4	18
Lambeth	London	118.5	23	119.6	19
Three Rivers	East of England	122.3	15	119.5	20
Mole Valley	South East	121.6	16	119.2	21
Slough	South East	121.3	17	118.5	22
Watford	East of England	115.9	26	118.5	23
Hillingdon	London	114.6	30	117.3	24
Milton Keynes	South East	118.0	24	117.2	25
Warwick	West Midlands	118.7	22	116.6	26
Hertsmere	East of England	119.0	21	116.5	27
Bracknell Forest	South East	115.6	27	115.5	28
Woking	South East	116.4	25	115.5	29

Locality	Region	2018	Rank 2018	2021	Rank 2021
St Albans	East of England	111.6	37	114.5	30
Brentwood	East of England	114.0	33	113.9	31
Hart	South East	111.5	39	113.6	32
Surrey Heath	South East	110.0	46	113.3	33
Reigate and Banstead	South East	114.0	34	113.2	34
Rushmoor	South East	114.2	31	113.2	35
Winchester	South East	115.3	28	113.1	36
City of Edinburgh	Scotland	112.9	35	112.5	37
Basingstoke and Deane	South East	112.6	36	112.2	38
Cambridge	East of England	111.6	38	112.1	39
Wandsworth	London	114.8	29	111.8	40
Guildford	South East	108.1	58	111.6	41
Spelthorne	South East	110.2	44	110.6	42
Kingston upon Thames	London	109.9	48	110.2	43
Merton	London	110.8	41	110.2	44
South Cambridgeshire	East of England	114.2	32	109.7	45
Vale of White Horse	South East	104.3	75	109.4	46
Cotswold	South West	110.1	45	108.8	47
Stratford-on-Avon	West Midlands	110.2	43	108.7	48
Barnet	London	106.7	63	108.7	49
Solihull	West Midlands	109.9	49	108.3	50
Ealing	London	108.8	54	108.3	51
Welwyn Hatfield	East of England	106.2	66	108.2	52
Waverley	South East	108.2	57	108.1	53
Trafford	North West	109.7	50	107.9	54
Aberdeen City	Scotland	109.4	51	107.8	55
South Oxfordshire	South East	106.3	65	107.6	56
Epping Forest	East of England	109.9	47	107.3	57
South Gloucestershire	South West	106.9	62	107.0	58
Sevenoaks	South East	107.0	61	106.7	59
Buckinghamshire	South East	108.2	56	106.7	60
Harrow	London	109.0	53	106.6	61

Locality	Region	2018	Rank 2018	2021	Rank 2021
Cheshire East	North West	107.9	59	106.4	62
North Hertfordshire	East of England	101.4	92	106.3	63
Tunbridge Wells	South East	105.2	69	106.2	64
Brighton and Hove	South East	104.8	73	106.0	65
Dartford	South East	108.5	55	106.0	66
Stevenage	East of England	101.8	90	105.7	67
Manchester	North West	107.4	60	105.6	68
Eastleigh	South East	110.7	42	105.6	69
Bromley	London	106.0	67	105.5	70
Crawley	South East	106.4	64	105.2	71
Brent	London	103.1	82	105.0	72
Warrington	North West	103.6	78	104.8	73
Swindon	South West	104.9	72	104.8	74
Test Valley	South East	102.8	84	104.6	75
Rugby	West Midlands	103.8	77	104.2	76
Tonbridge and Malling	South East	103.8	76	103.9	77
Tewkesbury	South West	105.0	71	103.8	78
Oxford	South East	105.9	68	103.7	79
Croydon	London	103.3	80	103.7	80
Ribble Valley	North West	99.4	103	103.5	81
Salford	North West	101.4	93	103.2	82
Bristol, City of	South West	101.9	88	103.1	83
Epsom and Ewell	South East	103.3	79	102.4	84
Blaby	East Midlands	103.0	83	102.4	85
Fylde	North West	101.8	89	102.3	86
Cherwell	South East	104.8	74	102.3	87
Dacorum	East of England	105.1	70	101.9	88
Cheltenham	South West	102.4	85	101.9	89
Sutton	London	99.7	100	101.6	90
Greenwich	London	99.4	104	101.3	91
East Hertfordshire	East of England	110.8	40	101.1	92
Aberdeenshire	Scotland	101.7	91	101.0	93

Locality	Region	2018	Rank 2018	2021	Rank 2021
Worthing	South East	100.4	97	100.9	94
Exeter	South West	98.5	111	100.9	95
Rushcliffe	East Midlands	103.3	81	100.9	96
Harborough	East Midlands	98.1	117	100.8	97
Haringey	London	99.1	106	100.8	98
Southampton	South East	96.0	133	100.6	99
Leeds	Yorkshire and the Humber	98.2	116	100.4	100
Redbridge	London	98.7	110	100.3	101
Bexley	London	102.1	86	100.2	102
Tandridge	South East	98.4	112	100.2	103
Mid Sussex	South East	102.0	87	100.0	104
Havering	London	96.4	127	99.9	105
Horsham	South East	98.9	109	99.7	106
Chelmsford	East of England	100.8	95	99.6	107
West Northamptonshire	East Midlands	99.8	98	99.5	108
Waltham Forest	London	97.3	121	99.3	109
Cheshire West and Chester	North West	99.5	102	99.3	110
Newham	London	96.3	129	99.0	111
Bedford	East of England	96.3	131	98.8	112
North West Leicestershire	East Midlands	96.8	124	98.7	113
Huntingdonshire	East of England	100.6	96	98.5	114
Enfield	London	98.3	115	98.5	115
South Ribble	North West	96.6	125	98.3	116
Derby	East Midlands	95.1	141	98.1	117
Glasgow City	Scotland	95.4	138	98.1	118
Basildon	East of England	97.0	122	98.0	119
South Derbyshire	East Midlands	97.5	118	97.7	120
Lewisham	London	94.8	143	97.5	121
Maidstone	South East	94.8	142	97.3	122
East Hampshire	South East	99.7	99	97.1	123
Harrogate	Yorkshire and the Humber	99.1	105	96.9	124
Uttlesford	East of England	98.9	108	96.8	125

Locality	Region	2018	Rank 2018	2021	Rank 2021
York	Yorkshire and the Humber	95.9	136	96.7	126
North Warwickshire	West Midlands	99.6	101	96.7	127
Bath and North East Somerset	South West	96.2	132	96.7	128
Central Bedfordshire	East of England	101.2	94	96.6	129
Fareham	South East	98.3	114	96.5	130
Wychavon	West Midlands	95.2	140	96.5	131
West Oxfordshire	South East	98.3	113	96.2	132
Cardiff	Wales	96.0	134	96.1	133
Luton	East of England	97.5	119	96.1	134
Stirling	Scotland	95.8	137	96.0	135
Peterborough	East of England	94.1	149	95.4	136
Stroud	South West	97.0	123	95.2	137
Stockport	North West	96.0	135	95.2	138
Ashford	South East	94.7	145	94.9	139
East Staffordshire	West Midlands	96.3	128	94.8	140
Thurrock	East of England	93.5	153	94.6	141
Redditch	West Midlands	91.5	179	94.6	142
Broxbourne	East of England	97.4	120	94.6	143
New Forest	South East	96.3	130	94.5	144
Hinckley and Bosworth	East Midlands	91.5	181	94.2	145
Knowsley	North West	85.6	247	94.2	146
Monmouthshire	Wales	93.2	158	94.1	147
Chichester	South East	99.1	107	93.8	148
Flintshire	Wales	93.3	156	93.7	149
Craven	Yorkshire and the Humber	92.7	162	93.7	150
Bournemouth, Christchurch and Poole	South West	95.2	139	93.4	151
Braintree	East of England	93.2	157	93.3	152
Copeland	North West	92.7	163	93.2	153
Liverpool	North West	91.7	177	93.1	154
Halton	North West	92.9	160	93.0	155
West Suffolk	East of England	93.3	155	93.0	156

Locality	Region	2018	Rank 2018	2021	Rank 2021
Harlow	East of England	94.0	150	92.9	157
Portsmouth	South East	91.5	180	92.9	158
Coventry	West Midlands	94.3	147	92.8	159
Norwich	East of England	90.7	190	92.5	160
West Lothian	Scotland	93.6	152	92.2	161
North Somerset	South West	92.7	164	92.2	162
Leicester	East Midlands	87.6	225	92.2	163
Perth and Kinross	Scotland	94.7	146	92.1	164
North Northamptonshire	East Midlands	91.0	188	92.0	165
Worcester	West Midlands	92.9	159	92.0	166
East Cambridgeshire	East of England	92.6	166	92.0	167
Wiltshire	South West	93.9	151	91.9	168
Nottingham	East Midlands	88.4	215	91.9	169
Hambleton	Yorkshire and the Humber	94.2	148	91.7	170
Shetland Islands	Scotland	94.8	144	91.7	171
Newcastle upon Tyne	North East	90.3	194	91.6	172
Stafford	West Midlands	92.3	170	91.6	173
Havant	South East	89.7	200	91.5	174
Lichfield	West Midlands	92.3	169	91.5	175
Preston	North West	96.5	126	91.3	176
Stockton-on-Tees	North East	89.5	202	91.2	177
Selby	Yorkshire and the Humber	92.3	172	91.1	178
Carlisle	North West	88.9	209	91.1	179
Dover	South East	89.6	201	91.1	180
Birmingham	West Midlands	91.8	176	91.1	181
Eden	North West	89.5	203	91.1	182
Derbyshire Dales	East Midlands	92.6	165	90.8	183
Medway	South East	88.6	213	90.8	184
Gravesham	South East	87.4	228	90.7	185
Somerset West and Taunton	South West	86.8	235	90.7	186
Falkirk	Scotland	90.7	189	90.7	187
Malvern Hills	West Midlands	92.0	175	90.5	188

Locality	Region	2018	Rank 2018	2021	Rank 2021
Barrow-in-Furness	North West	91.3	185	90.5	189
Ipswich	East of England	92.5	167	90.4	190
Barking and Dagenham	London	90.4	193	90.3	191
Colchester	East of England	92.8	161	90.1	192
Highland	Scotland	92.0	174	90.1	193
Charnwood	East Midlands	90.0	197	90.0	194
South Hams	South West	93.4	154	90.0	195
Mendip	South West	86.6	238	90.0	196
Telford and Wrekin	West Midlands	86.9	234	90.0	197
Newport	Wales	90.7	191	89.9	198
Rutland	East Midlands	90.2	195	89.9	199
Maldon	East of England	88.0	219	89.9	200
Broadland	East of England	91.3	184	89.8	201
South Lakeland	North West	92.3	171	89.8	202
Renfrewshire	Scotland	88.8	210	89.7	203
South Lanarkshire	Scotland	89.9	198	89.3	204
South Norfolk	East of England	90.2	196	89.1	205
Amber Valley	East Midlands	89.0	208	89.1	206
Wealden	South East	89.4	205	89.1	207
Lewes	South East	92.1	173	88.8	208
Gloucester	South West	88.7	211	88.7	209
Melton	East Midlands	92.4	168	88.7	210
Bury	North West	91.6	178	88.5	211
East Lothian	Scotland	88.5	214	88.4	212
Adur	South East	87.5	226	88.3	213
Calderdale	Yorkshire and the Humber	91.4	182	88.2	214
South Ayrshire	Scotland	87.0	233	88.2	215
Canterbury	South East	84.2	259	88.2	216
Babergh	East of England	87.8	220	88.2	217
Southend-on-Sea	East of England	87.4	229	88.1	218
Ryedale	Yorkshire and the Humber	91.0	187	88.0	219
Dorset	South West	88.2	218	88.0	220

Locality	Region	2018	Rank 2018	2021	Rank 2021
Fife	Scotland	87.1	231	87.8	221
Orkney Islands	Scotland	91.2	186	87.8	222
North Lincolnshire	Yorkshire and the Humber	85.4	248	87.8	223
Mid Suffolk	East of England	91.4	183	87.7	224
East Riding of Yorkshire	Yorkshire and the Humber	87.4	227	87.6	225
South Kesteven	East Midlands	88.6	212	87.5	226
Clackmannanshire	Scotland	86.3	242	87.2	227
Darlington	North East	90.4	192	87.2	228
North Lanarkshire	Scotland	86.4	241	87.0	229
East Devon	South West	85.9	245	87.0	230
North Tyneside	North East	86.7	236	86.9	231
Rochford	East of England	89.4	204	86.9	232
Chorley	North West	89.2	207	86.8	233
Sheffield	Yorkshire and the Humber	87.6	223	86.8	234
West Lancashire	North West	89.3	206	86.8	235
Swansea	Wales	85.0	252	86.7	236
Wyre Forest	West Midlands	80.2	313	86.6	237
Dundee City	Scotland	84.6	254	86.6	238
Midlothian	Scotland	86.1	243	86.6	239
East Suffolk	East of England	87.6	224	86.4	240
Folkestone and Hythe	South East	83.8	271	86.3	241
Shropshire	West Midlands	87.3	230	86.1	242
Forest of Dean	South West	88.4	217	86.0	243
North Kesteven	East Midlands	84.1	261	85.9	244
Broxtowe	East Midlands	87.0	232	85.7	245
Na h-Eileanan Siar	Scotland	82.7	283	85.7	246
Staffordshire Moorlands	West Midlands	82.7	284	85.4	247
Bolton	North West	87.8	221	85.4	248
Herefordshire, County of	West Midlands	85.1	251	85.4	249
South Staffordshire	West Midlands	88.4	216	85.3	250
Chesterfield	East Midlands	82.1	291	85.2	251
North Devon	South West	84.6	255	85.2	252

Locality	Region	2018	Rank 2018	2021	Rank 2021
High Peak	East Midlands	85.9	246	85.1	253
Newark and Sherwood	East Midlands	83.5	275	84.8	254
Wrexham	Wales	85.9	244	84.8	255
Moray	Scotland	85.3	250	84.7	256
Denbighshire	Wales	80.9	304	84.7	257
Cannock Chase	West Midlands	83.7	272	84.6	258
Lincoln	East Midlands	82.8	280	84.6	259
Teignbridge	South West	86.7	237	84.6	260
West Dunbartonshire	Scotland	82.8	278	84.6	261
Angus	Scotland	84.1	265	84.5	262
South Somerset	South West	89.7	199	84.5	263
East Dunbartonshire	Scotland	87.7	222	84.4	264
Scottish Borders	Scotland	84.1	266	84.3	265
Lancaster	North West	84.5	256	84.3	266
Tamworth	West Midlands	84.1	268	84.3	267
East Renfrewshire	Scotland	85.3	249	84.1	268
South Holland	East Midlands	84.2	260	84.1	269
Wakefield	Yorkshire and the Humber	83.4	277	84.1	270
Argyll and Bute	Scotland	86.5	240	83.9	271
Vale of Glamorgan	Wales	84.3	257	83.6	272
Wolverhampton	West Midlands	80.4	310	83.6	273
Sedgemoor	South West	84.0	269	83.6	274
Eastbourne	South East	84.1	267	83.5	275
Rossendale	North West	81.9	293	83.5	276
Bradford	Yorkshire and the Humber	80.5	307	83.2	277
Bolsover	East Midlands	86.6	239	83.1	278
Oadby and Wigston	East Midlands	84.2	258	83.0	279
Rotherham	Yorkshire and the Humber	80.0	316	83.0	280
Wyre	North West	81.4	298	82.9	281
King's Lynn and West Norfolk	East of England	80.7	306	82.9	282
Burnley	North West	84.9	253	82.8	283
Plymouth	South West	82.1	292	82.8	284

Locality	Region	2018	Rank 2018	2021	Rank 2021
Breckland	East of England	80.1	314	82.8	285
Middlesbrough	North East	80.9	303	82.7	286
Inverclyde	Scotland	83.7	273	82.7	287
Sunderland	North East	82.6	285	82.6	288
Bridgend	Wales	84.0	270	82.6	289
Swale	South East	84.1	262	82.5	290
Pembrokeshire	Wales	84.1	263	82.5	291
Erewash	East Midlands	82.3	289	82.4	292
Kirklees	Yorkshire and the Humber	82.8	281	82.2	293
Sefton	North West	81.3	301	82.2	294
Arun	South East	82.5	287	82.1	295
Doncaster	Yorkshire and the Humber	81.3	300	81.9	296
Wirral	North West	82.6	286	81.9	297
Gateshead	North East	81.4	299	81.9	298
Stoke-on-Trent	West Midlands	79.2	330	81.7	299
Powys	Wales	80.7	305	81.6	300
Blackburn with Darwen	North West	81.8	295	81.5	301
Dudley	West Midlands	79.7	321	81.5	302
North Ayrshire	Scotland	80.2	312	81.5	303
Bassetlaw	East Midlands	78.7	337	81.3	304
Nuneaton and Bedworth	West Midlands	82.8	279	81.3	305
Cornwall	South West	81.7	296	81.3	306
St. Helens	North West	79.2	328	81.1	307
Sandwell	West Midlands	79.9	318	81.1	308
Wigan	North West	79.4	323	81.0	309
East Ayrshire	Scotland	79.3	326	81.0	310
Allerdale	North West	82.3	290	80.9	311
Mid Devon	South West	84.1	264	80.9	312
West Lindsey	East Midlands	83.5	276	80.9	313
Dumfries and Galloway	Scotland	81.6	297	80.7	314
Pendle	North West	81.9	294	80.7	315
Oldham	North West	78.7	338	80.6	316

Locality	Region	2018	Rank 2018	2021	Rank 2021
Ashfield	East Midlands	79.3	325	80.5	317
Isle of Wight	South East	80.0	315	80.4	318
Gedling	East Midlands	83.6	274	80.3	319
Kingston upon Hull, City of	Yorkshire and the Humber	80.2	311	80.2	320
Rother	South East	76.8	351	80.2	321
Carmarthenshire	Wales	79.8	320	80.0	322
Rhondda Cynon Taff	Wales	82.8	282	79.9	323
Fenland	East of England	79.3	327	79.8	324
North East Derbyshire	East Midlands	80.4	308	79.8	325
Castle Point	East of England	79.8	319	79.5	326
Northumberland	North East	79.4	324	79.5	327
Hyndburn	North West	77.1	350	79.5	328
Newcastle-under-Lyme	West Midlands	80.9	302	79.2	329
Ceredigion	Wales	78.3	340	79.2	330
Caerphilly	Wales	80.4	309	79.2	331
Rochdale	North West	79.2	331	79.1	332
North East Lincolnshire	Yorkshire and the Humber	78.1	344	79.1	333
Walsall	West Midlands	78.9	335	79.1	334
Conwy	Wales	77.9	346	79.0	335
Hartlepool	North East	76.6	353	78.7	336
Scarborough	Yorkshire and the Humber	79.2	329	78.7	337
North Norfolk	East of England	79.9	317	78.6	338
Isle of Anglesey	Wales	76.8	352	78.5	339
Richmondshire	Yorkshire and the Humber	78.1	343	78.4	340
Hastings	South East	79.0	333	78.4	341
Torfaen	Wales	78.3	341	78.3	342
West Devon	South West	82.4	288	78.1	343
Barnsley	Yorkshire and the Humber	78.2	342	78.1	344
County Durham	North East	79.0	332	77.8	345
Gwynedd	Wales	78.4	339	77.4	346
Tameside	North West	79.7	322	77.3	347
Blackpool	North West	78.9	334	77.3	348

Locality	Region	2018	Rank 2018	2021	Rank 2021
Great Yarmouth	East of England	73.8	361	77.1	349
Thanet	South East	77.1	349	77.0	350
Boston	East Midlands	77.8	347	77.0	351
Neath Port Talbot	Wales	78.9	336	76.9	352
Tendring	East of England	74.8	358	76.1	353
South Tyneside	North East	74.9	357	75.7	354
Gosport	South East	75.2	355	75.6	355
Torbay	South West	75.5	354	75.2	356
Torridge	South West	78.0	345	75.2	357
Merthyr Tydfil	Wales	74.3	359	75.2	358
Mansfield	East Midlands	74.1	360	74.6	359
East Lindsey	East Midlands	75.1	356	74.4	360
Redcar and Cleveland	North East	77.3	348	74.3	361
Blaenau Gwent	Wales	69.3	362	70.8	362

Appendix 3: UKCI in Regional Rank Order

In the table below localities are grouped by region and then placed in rank order.

Locality	Region	2018	Rank 2018	2021	Rank 2021
Localities in the East Midlands					
Blaby	East Midlands	103.0	83	102.4	85
Rushcliffe	East Midlands	103.3	81	100.9	96
Harborough	East Midlands	98.1	117	100.8	97
West Northamptonshire	East Midlands	99.8	98	99.5	108
North West Leicestershire	East Midlands	96.8	124	98.7	113
Derby	East Midlands	95.1	141	98.1	117
South Derbyshire	East Midlands	97.5	118	97.7	120
Hinckley and Bosworth	East Midlands	91.5	181	94.2	145
Leicester	East Midlands	87.6	225	92.2	163
North Northamptonshire	East Midlands	91.0	188	92.0	165
Nottingham	East Midlands	88.4	215	91.9	169
Derbyshire Dales	East Midlands	92.6	165	90.8	183
Charnwood	East Midlands	90.0	197	90.0	194
Rutland	East Midlands	90.2	195	89.9	199
Amber Valley	East Midlands	89.0	208	89.1	206
Melton	East Midlands	92.4	168	88.7	210
South Kesteven	East Midlands	88.6	212	87.5	226
North Kesteven	East Midlands	84.1	261	85.9	244
Broxtowe	East Midlands	87.0	232	85.7	245
Chesterfield	East Midlands	82.1	291	85.2	251
High Peak	East Midlands	85.9	246	85.1	253
Newark and Sherwood	East Midlands	83.5	275	84.8	254
Lincoln	East Midlands	82.8	280	84.6	259
South Holland	East Midlands	84.2	260	84.1	269
Bolsover	East Midlands	86.6	239	83.1	278
Oadby and Wigston	East Midlands	84.2	258	83.0	279
Erewash	East Midlands	82.3	289	82.4	292
Bassetlaw	East Midlands	78.7	337	81.3	304

Locality	Region	2018	Rank 2018	2021	Rank 2021
West Lindsey	East Midlands	83.5	276	80.9	313
Ashfield	East Midlands	79.3	325	80.5	317
Gedling	East Midlands	83.6	274	80.3	319
North East Derbyshire	East Midlands	80.4	308	79.8	325
Boston	East Midlands	77.8	347	77.0	351
Mansfield	East Midlands	74.1	360	74.6	359
East Lindsey	East Midlands	75.1	356	74.4	360
Localities in the East of England					
Three Rivers	East of England	122.3	15	119.5	20
Watford	East of England	115.9	26	118.5	23
Hertsmere	East of England	119.0	21	116.5	27
St Albans	East of England	111.6	37	114.5	30
Brentwood	East of England	114.0	33	113.9	31
Cambridge	East of England	111.6	38	112.1	39
South Cambridgeshire	East of England	114.2	32	109.7	45
Welwyn Hatfield	East of England	106.2	66	108.2	52
Epping Forest	East of England	109.9	47	107.3	57
North Hertfordshire	East of England	101.4	92	106.3	63
Stevenage	East of England	101.8	90	105.7	67
Dacorum	East of England	105.1	70	101.9	88
East Hertfordshire	East of England	110.8	40	101.1	92
Chelmsford	East of England	100.8	95	99.6	107
Bedford	East of England	96.3	131	98.8	112
Huntingdonshire	East of England	100.6	96	98.5	114
Basildon	East of England	97.0	122	98.0	119
Uttlesford	East of England	98.9	108	96.8	125
Central Bedfordshire	East of England	101.2	94	96.6	129
Luton	East of England	97.5	119	96.1	134
Peterborough	East of England	94.1	149	95.4	136
Thurrock	East of England	93.5	153	94.6	141
Broxbourne	East of England	97.4	120	94.6	143
Braintree	East of England	93.2	157	93.3	152

Locality	Region	2018	Rank 2018	2021	Rank 2021
West Suffolk	East of England	93.3	155	93.0	156
Harlow	East of England	94.0	150	92.9	157
Norwich	East of England	90.7	190	92.5	160
East Cambridgeshire	East of England	92.6	166	92.0	167
Ipswich	East of England	92.5	167	90.4	190
Colchester	East of England	92.8	161	90.1	192
Maldon	East of England	88.0	219	89.9	200
Broadland	East of England	91.3	184	89.8	201
South Norfolk	East of England	90.2	196	89.1	205
Babergh	East of England	87.8	220	88.2	217
Southend-on-Sea	East of England	87.4	229	88.1	218
Mid Suffolk	East of England	91.4	183	87.7	224
Rochford	East of England	89.4	204	86.9	232
East Suffolk	East of England	87.6	224	86.4	240
King's Lynn and West Norfolk	East of England	80.7	306	82.9	282
Breckland	East of England	80.1	314	82.8	285
Fenland	East of England	79.3	327	79.8	324
Castle Point	East of England	79.8	319	79.5	326
North Norfolk	East of England	79.9	317	78.6	338
Great Yarmouth	East of England	73.8	361	77.1	349
Tendring	East of England	74.8	358	76.1	353
Localities in London					
City of London	London	991.9	1	928.3	1
Westminster	London	207.1	2	205.7	2
Camden	London	172.4	3	167.7	3
Tower Hamlets	London	153.5	4	151.7	4
Islington	London	149.7	5	148.2	5
Hammersmith and Fulham	London	135.2	6	134.0	6
Kensington and Chelsea	London	129.2	9	132.4	7
Southwark	London	130.2	8	131.7	8
Hounslow	London	130.2	7	128.0	10
Richmond upon Thames	London	124.7	13	125.7	11

Locality	Region	2018	Rank 2018	2021	Rank 2021
Hackney	London	119.0	20	122.9	14
Lambeth	London	118.5	23	119.6	19
Hillingdon	London	114.6	30	117.3	24
Wandsworth	London	114.8	29	111.8	40
Kingston upon Thames	London	109.9	48	110.2	43
Merton	London	110.8	41	110.2	44
Barnet	London	106.7	63	108.7	49
Ealing	London	108.8	54	108.3	51
Harrow	London	109.0	53	106.6	61
Bromley	London	106.0	67	105.5	70
Brent	London	103.1	82	105.0	72
Croydon	London	103.3	80	103.7	80
Sutton	London	99.7	100	101.6	90
Greenwich	London	99.4	104	101.3	91
Haringey	London	99.1	106	100.8	98
Redbridge	London	98.7	110	100.3	101
Bexley	London	102.1	86	100.2	102
Havering	London	96.4	127	99.9	105
Waltham Forest	London	97.3	121	99.3	109
Newham	London	96.3	129	99.0	111
Enfield	London	98.3	115	98.5	115
Lewisham	London	94.8	143	97.5	121
Barking and Dagenham	London	90.4	193	90.3	191
Localities in the North East					
Newcastle upon Tyne	North East	90.3	194	91.6	172
Stockton-on-Tees	North East	89.5	202	91.2	177
Darlington	North East	90.4	192	87.2	228
North Tyneside	North East	86.7	236	86.9	231
Middlesbrough	North East	80.9	303	82.7	286
Sunderland	North East	82.6	285	82.6	288
Gateshead	North East	81.4	299	81.9	298
Northumberland	North East	79.4	324	79.5	327

Locality	Region	2018	Rank 2018	2021	Rank 2021
Hartlepool	North East	76.6	353	78.7	336
County Durham	North East	79.0	332	77.8	345
South Tyneside	North East	74.9	357	75.7	354
Redcar and Cleveland	North East	77.3	348	74.3	361
Localities in the North West					
Trafford	North West	109.7	50	107.9	54
Cheshire East	North West	107.9	59	106.4	62
Manchester	North West	107.4	60	105.6	68
Warrington	North West	103.6	78	104.8	73
Ribble Valley	North West	99.4	103	103.5	81
Salford	North West	101.4	93	103.2	82
Fylde	North West	101.8	89	102.3	86
Cheshire West and Chester	North West	99.5	102	99.3	110
South Ribble	North West	96.6	125	98.3	116
Stockport	North West	96.0	135	95.2	138
Knowsley	North West	85.6	247	94.2	146
Copeland	North West	92.7	163	93.2	153
Liverpool	North West	91.7	177	93.1	154
Halton	North West	92.9	160	93.0	155
Preston	North West	96.5	126	91.3	176
Carlisle	North West	88.9	209	91.1	179
Eden	North West	89.5	203	91.1	182
Barrow-in-Furness	North West	91.3	185	90.5	189
South Lakeland	North West	92.3	171	89.8	202
Bury	North West	91.6	178	88.5	211
Chorley	North West	89.2	207	86.8	233
West Lancashire	North West	89.3	206	86.8	235
Bolton	North West	87.8	221	85.4	248
Lancaster	North West	84.5	256	84.3	266
Rossendale	North West	81.9	293	83.5	276
Wyre	North West	81.4	298	82.9	281
Burnley	North West	84.9	253	82.8	283

Locality	Region	2018	Rank 2018	2021	Rank 2021
Sefton	North West	81.3	301	82.2	294
Wirral	North West	82.6	286	81.9	297
Blackburn with Darwen	North West	81.8	295	81.5	301
St. Helens	North West	79.2	328	81.1	307
Wigan	North West	79.4	323	81.0	309
Allerdale	North West	82.3	290	80.9	311
Pendle	North West	81.9	294	80.7	315
Oldham	North West	78.7	338	80.6	316
Hyndburn	North West	77.1	350	79.5	328
Rochdale	North West	79.2	331	79.1	332
Tameside	North West	79.7	322	77.3	347
Blackpool	North West	78.9	334	77.3	348
Localities in Scotland					
City of Edinburgh	Scotland	112.9	35	112.5	37
Aberdeen City	Scotland	109.4	51	107.8	55
Aberdeenshire	Scotland	101.7	91	101.0	93
Glasgow City	Scotland	95.4	138	98.1	118
Stirling	Scotland	95.8	137	96.0	135
West Lothian	Scotland	93.6	152	92.2	161
Perth and Kinross	Scotland	94.7	146	92.1	164
Shetland Islands	Scotland	94.8	144	91.7	171
Falkirk	Scotland	90.7	189	90.7	187
Highland	Scotland	92.0	174	90.1	193
Renfrewshire	Scotland	88.8	210	89.7	203
South Lanarkshire	Scotland	89.9	198	89.3	204
East Lothian	Scotland	88.5	214	88.4	212
South Ayrshire	Scotland	87.0	233	88.2	215
Fife	Scotland	87.1	231	87.8	221
Orkney Islands	Scotland	91.2	186	87.8	222
Clackmannanshire	Scotland	86.3	242	87.2	227
North Lanarkshire	Scotland	86.4	241	87.0	229
Dundee City	Scotland	84.6	254	86.6	238

Locality	Region	2018	Rank 2018	2021	Rank 2021
Midlothian	Scotland	86.1	243	86.6	239
Na h-Eileanan Siar	Scotland	82.7	283	85.7	246
Moray	Scotland	85.3	250	84.7	256
West Dunbartonshire	Scotland	82.8	278	84.6	261
Angus	Scotland	84.1	265	84.5	262
East Dunbartonshire	Scotland	87.7	222	84.4	264
Scottish Borders	Scotland	84.1	266	84.3	265
East Renfrewshire	Scotland	85.3	249	84.1	268
Argyll and Bute	Scotland	86.5	240	83.9	271
Inverclyde	Scotland	83.7	273	82.7	287
North Ayrshire	Scotland	80.2	312	81.5	303
East Ayrshire	Scotland	79.3	326	81.0	310
Dumfries and Galloway	Scotland	81.6	297	80.7	314
Localities in the South East					
Runnymede	South East	126.9	12	130.0	9
Elmbridge	South East	127.5	11	125.1	12
Windsor and Maidenhead	South East	128.5	10	125.0	13
Wokingham	South East	123.4	14	121.6	15
Reading	South East	121.1	18	121.5	17
West Berkshire	South East	120.0	19	120.4	18
Mole Valley	South East	121.6	16	119.2	21
Slough	South East	121.3	17	118.5	22
Milton Keynes	South East	118.0	24	117.2	25
Bracknell Forest	South East	115.6	27	115.5	28
Woking	South East	116.4	25	115.5	29
Hart	South East	111.5	39	113.6	32
Surrey Heath	South East	110.0	46	113.3	33
Reigate and Banstead	South East	114.0	34	113.2	34
Rushmoor	South East	114.2	31	113.2	35
Winchester	South East	115.3	28	113.1	36
Basingstoke and Deane	South East	112.6	36	112.2	38
Guildford	South East	108.1	58	111.6	41

Locality	Region	2018	Rank 2018	2021	Rank 2021
Spelthorne	South East	110.2	44	110.6	42
Vale of White Horse	South East	104.3	75	109.4	46
Waverley	South East	108.2	57	108.1	53
South Oxfordshire	South East	106.3	65	107.6	56
Sevenoaks	South East	107.0	61	106.7	59
Buckinghamshire	South East	108.2	56	106.7	60
Tunbridge Wells	South East	105.2	69	106.2	64
Brighton and Hove	South East	104.8	73	106.0	65
Dartford	South East	108.5	55	106.0	66
Eastleigh	South East	110.7	42	105.6	69
Crawley	South East	106.4	64	105.2	71
Test Valley	South East	102.8	84	104.6	75
Tonbridge and Malling	South East	103.8	76	103.9	77
Oxford	South East	105.9	68	103.7	79
Epsom and Ewell	South East	103.3	79	102.4	84
Cherwell	South East	104.8	74	102.3	87
Worthing	South East	100.4	97	100.9	94
Southampton	South East	96.0	133	100.6	99
Tandridge	South East	98.4	112	100.2	103
Mid Sussex	South East	102.0	87	100.0	104
Horsham	South East	98.9	109	99.7	106
Maidstone	South East	94.8	142	97.3	122
East Hampshire	South East	99.7	99	97.1	123
Fareham	South East	98.3	114	96.5	130
West Oxfordshire	South East	98.3	113	96.2	132
Ashford	South East	94.7	145	94.9	139
New Forest	South East	96.3	130	94.5	144
Chichester	South East	99.1	107	93.8	148
Portsmouth	South East	91.5	180	92.9	158
Havant	South East	89.7	200	91.5	174
Dover	South East	89.6	201	91.1	180
Medway	South East	88.6	213	90.8	184

Locality	Region	2018	Rank 2018	2021	Rank 2021
Gravesham	South East	87.4	228	90.7	185
Wealden	South East	89.4	205	89.1	207
Lewes	South East	92.1	173	88.8	208
Adur	South East	87.5	226	88.3	213
Canterbury	South East	84.2	259	88.2	216
Folkestone and Hythe	South East	83.8	271	86.3	241
Eastbourne	South East	84.1	267	83.5	275
Swale	South East	84.1	262	82.5	290
Arun	South East	82.5	287	82.1	295
Isle of Wight	South East	80.0	315	80.4	318
Rother	South East	76.8	351	80.2	321
Hastings	South East	79.0	333	78.4	341
Thanet	South East	77.1	349	77.0	350
Gosport	South East	75.2	355	75.6	355
Localities in the South West					
Cotswold	South West	110.1	45	108.8	47
South Gloucestershire	South West	106.9	62	107.0	58
Swindon	South West	104.9	72	104.8	74
Tewkesbury	South West	105.0	71	103.8	78
Bristol, City of	South West	101.9	88	103.1	83
Cheltenham	South West	102.4	85	101.9	89
Exeter	South West	98.5	111	100.9	95
Bath and North East Somerset	South West	96.2	132	96.7	128
Stroud	South West	97.0	123	95.2	137
Bournemouth, Christchurch and Poole	South West	95.2	139	93.4	151
North Somerset	South West	92.7	164	92.2	162
Wiltshire	South West	93.9	151	91.9	168
Somerset West and Taunton	South West	86.8	235	90.7	186
South Hams	South West	93.4	154	90.0	195
Mendip	South West	86.6	238	90.0	196
Gloucester	South West	88.7	211	88.7	209

Locality	Region	2018	Rank 2018	2021	Rank 2021
Dorset	South West	88.2	218	88.0	220
East Devon	South West	85.9	245	87.0	230
Forest of Dean	South West	88.4	217	86.0	243
North Devon	South West	84.6	255	85.2	252
Teignbridge	South West	86.7	237	84.6	260
South Somerset	South West	89.7	199	84.5	263
Sedgemoor	South West	84.0	269	83.6	274
Plymouth	South West	82.1	292	82.8	284
Cornwall	South West	81.7	296	81.3	306
Mid Devon	South West	84.1	264	80.9	312
West Devon	South West	82.4	288	78.1	343
Torbay	South West	75.5	354	75.2	356
Torridge	South West	78.0	345	75.2	357
Localities in Wales					
Cardiff	Wales	96.0	134	96.1	133
Monmouthshire	Wales	93.2	158	94.1	147
Flintshire	Wales	93.3	156	93.7	149
Newport	Wales	90.7	191	89.9	198
Swansea	Wales	85.0	252	86.7	236
Wrexham	Wales	85.9	244	84.8	255
Denbighshire	Wales	80.9	304	84.7	257
Vale of Glamorgan	Wales	84.3	257	83.6	272
Bridgend	Wales	84.0	270	82.6	289
Pembrokeshire	Wales	84.1	263	82.5	291
Powys	Wales	80.7	305	81.6	300
Carmarthenshire	Wales	79.8	320	80.0	322
Rhondda Cynon Taff	Wales	82.8	282	79.9	323
Ceredigion	Wales	78.3	340	79.2	330
Caerphilly	Wales	80.4	309	79.2	331
Conwy	Wales	77.9	346	79.0	335
Isle of Anglesey	Wales	76.8	352	78.5	339
Torfaen	Wales	78.3	341	78.3	342

Locality	Region	2018	Rank 2018	2021	Rank 2021
Gwynedd	Wales	78.4	339	77.4	346
Neath Port Talbot	Wales	78.9	336	76.9	352
Merthyr Tydfil	Wales	74.3	359	75.2	358
Blaenau Gwent	Wales	69.3	362	70.8	362
Localities in the West Midlands					
Bromsgrove	West Midlands	109.4	52	121.6	16
Warwick	West Midlands	118.7	22	116.6	26
Stratford-on-Avon	West Midlands	110.2	43	108.7	48
Solihull	West Midlands	109.9	49	108.3	50
Rugby	West Midlands	103.8	77	104.2	76
North Warwickshire	West Midlands	99.6	101	96.7	127
Wychavon	West Midlands	95.2	140	96.5	131
East Staffordshire	West Midlands	96.3	128	94.8	140
Redditch	West Midlands	91.5	179	94.6	142
Coventry	West Midlands	94.3	147	92.8	159
Worcester	West Midlands	92.9	159	92.0	166
Stafford	West Midlands	92.3	170	91.6	173
Lichfield	West Midlands	92.3	169	91.5	175
Birmingham	West Midlands	91.8	176	91.1	181
Malvern Hills	West Midlands	92.0	175	90.5	188
Telford and Wrekin	West Midlands	86.9	234	90.0	197
Wyre Forest	West Midlands	80.2	313	86.6	237
Shropshire	West Midlands	87.3	230	86.1	242
Staffordshire Moorlands	West Midlands	82.7	284	85.4	247
Herefordshire, County of	West Midlands	85.1	251	85.4	249
South Staffordshire	West Midlands	88.4	216	85.3	250
Cannock Chase	West Midlands	83.7	272	84.6	258
Tamworth	West Midlands	84.1	268	84.3	267
Wolverhampton	West Midlands	80.4	310	83.6	273
Stoke-on-Trent	West Midlands	79.2	330	81.7	299
Dudley	West Midlands	79.7	321	81.5	302
Nuneaton and Bedworth	West Midlands	82.8	279	81.3	305

Locality	Region	2018	Rank 2018	2021	Rank 2021
Sandwell	West Midlands	79.9	318	81.1	308
Newcastle-under-Lyme	West Midlands	80.9	302	79.2	329
Walsall	West Midlands	78.9	335	79.1	334
Localities in Yorkshire and the Humber					
Leeds	Yorkshire and the Humber	98.2	116	100.4	100
Harrogate	Yorkshire and the Humber	99.1	105	96.9	124
York	Yorkshire and the Humber	95.9	136	96.7	126
Craven	Yorkshire and the Humber	92.7	162	93.7	150
Hambleton	Yorkshire and the Humber	94.2	148	91.7	170
Selby	Yorkshire and the Humber	92.3	172	91.1	178
Calderdale	Yorkshire and the Humber	91.4	182	88.2	214
Ryedale	Yorkshire and the Humber	91.0	187	88.0	219
North Lincolnshire	Yorkshire and the Humber	85.4	248	87.8	223
East Riding of Yorkshire	Yorkshire and the Humber	87.4	227	87.6	225
Sheffield	Yorkshire and the Humber	87.6	223	86.8	234
Wakefield	Yorkshire and the Humber	83.4	277	84.1	270
Bradford	Yorkshire and the Humber	80.5	307	83.2	277
Rotherham	Yorkshire and the Humber	80.0	316	83.0	280
Kirklees	Yorkshire and the Humber	82.8	281	82.2	293
Doncaster	Yorkshire and the Humber	81.3	300	81.9	296
Kingston upon Hull, City of	Yorkshire and the Humber	80.2	311	80.2	320
North East Lincolnshire	Yorkshire and the Humber	78.1	344	79.1	333
Scarborough	Yorkshire and the Humber	79.2	329	78.7	337
Richmondshire	Yorkshire and the Humber	78.1	343	78.4	340
Barnsley	Yorkshire and the Humber	78.2	342	78.1	344

Appendix 4: GVA Growth Forecasts

	Long-Run Annual Growth Rate	Rank	Bust Annual Growth Rate	Rank	Recovery Annual Growth Rate	Rank	Boom Annual Growth Rate	Rank
Camden	7.05	1	1.40	2	3.53	1	9.23	1
Tower Hamlets	6.86	2	1.49	1	3.12	5	8.37	2
Islington	6.16	3	1.06	3	3.33	2	8.12	3
Southwark	5.35	4	0.81	5	3.01	9	6.88	6
Copeland	5.28	5	0.95	4	2.61	90	6.16	9
Hammersmith and Fulham	5.26	6	0.73	6	3.07	7	6.90	5
Hackney	5.12	7	0.62	7	3.18	4	6.96	4
Kensington and Chelsea	4.66	8	0.43	11	3.10	6	6.42	7
Richmond upon Thames	4.53	9	0.40	12	3.03	8	6.20	8
Knowsley	4.46	10	0.59	8	2.53	119	5.31	21
Wokingham	4.46	11	0.44	9	2.86	17	5.86	11
Bracknell Forest	4.33	12	0.44	10	2.72	43	5.52	14
Lambeth	4.22	13	0.32	15	2.87	16	5.66	13
Woking	4.20	14	0.30	16	2.89	13	5.67	12
Surrey Heath	4.18	15	0.34	13	2.78	31	5.48	16
Hart	4.17	16	0.33	14	2.80	26	5.50	15
Runnymede	3.98	17	0.24	17	2.79	29	5.33	18
West Berkshire	3.96	18	0.23	18	2.80	27	5.32	20
Elmbridge	3.89	19	0.14	23	2.93	11	5.48	17
Bromsgrove	3.87	20	-0.01	32	3.22	3	5.95	10
Guildford	3.82	21	0.16	22	2.80	25	5.20	23
Vale of White Horse	3.80	22	0.17	21	2.74	42	5.08	26
Ribble Valley	3.79	23	0.20	19	2.67	69	4.97	28
South Cambridgeshire	3.74	24	0.13	24	2.77	33	5.09	25
Windsor and Maidenhead	3.73	25	0.08	25	2.88	14	5.26	22
Derby	3.67	26	0.19	20	2.58	100	4.71	36
St Albans	3.66	27	0.01	30	2.96	10	5.32	19
Wandsworth	3.60	28	0.00	31	2.91	12	5.20	24

	Long-Run Annual Growth Rate	Rank	Bust Annual Growth Rate	Rank	Recovery Annual Growth Rate	Rank	Boom Annual Growth Rate	Rank
Reading	3.59	29	0.05	27	2.79	28	4.99	27
Rugby	3.54	30	0.08	26	2.68	66	4.76	35
Hounslow	3.48	31	-0.01	33	2.80	24	4.91	29
Kingston upon Thames	3.46	32	-0.02	36	2.81	21	4.91	30
Hillingdon	3.46	33	0.01	28	2.75	39	4.80	34
Mole Valley	3.44	34	-0.01	34	2.76	36	4.81	33
Winchester	3.43	35	-0.02	37	2.77	32	4.82	31
Welwyn Hatfield	3.41	36	0.01	29	2.69	61	4.67	40
Cambridge	3.38	37	-0.02	35	2.72	49	4.68	39
Brentwood	3.36	38	-0.04	39	2.74	41	4.70	37
Waltham Forest	3.35	39	-0.04	40	2.74	40	4.70	38
Stevenage	3.32	40	-0.03	38	2.68	65	4.58	45
Reigate and Banstead	3.32	41	-0.05	41	2.72	50	4.62	42
Hertsmere	3.31	42	-0.11	48	2.83	18	4.81	32
City of Edinburgh	3.28	43	-0.06	44	2.71	52	4.58	44
Slough	3.28	44	-0.06	43	2.70	58	4.57	46
Basingstoke and Deane	3.27	45	-0.06	42	2.68	67	4.52	50
Lewisham	3.21	46	-0.11	47	2.72	46	4.54	49
South Oxfordshire	3.20	47	-0.11	49	2.72	45	4.54	48
North Hertfordshire	3.20	48	-0.10	46	2.70	57	4.50	52
Oxford	3.16	49	-0.08	45	2.61	87	4.32	57
Buckinghamshire	3.13	50	-0.15	50	2.72	44	4.48	53
Watford	3.12	51	-0.19	53	2.80	23	4.59	43
Brent	3.11	52	-0.15	51	2.71	51	4.44	54
Warwick	3.10	53	-0.19	54	2.78	30	4.54	47
Spelthorne	3.09	54	-0.16	52	2.70	55	4.40	55
Barnet	3.07	55	-0.24	56	2.87	15	4.67	41
Merton	2.98	56	-0.26	63	2.82	19	4.50	51
Haringey	2.95	57	-0.25	60	2.77	34	4.40	56
Tandridge	2.90	58	-0.25	57	2.70	54	4.24	60

	Long-Run Annual Growth Rate	Rank	Bust Annual Growth Rate	Rank	Recovery Annual Growth Rate	Rank	Boom Annual Growth Rate	Rank
Greenwich	2.88	59	-0.25	58	2.69	62	4.20	62
Sutton	2.88	60	-0.25	61	2.69	60	4.20	64
Bromley	2.86	61	-0.27	64	2.70	53	4.21	61
Three Rivers	2.85	62	-0.30	68	2.76	35	4.30	59
Croydon	2.83	63	-0.26	62	2.65	76	4.09	68
Test Valley	2.83	64	-0.29	67	2.72	48	4.20	63
Rushmoor	2.83	65	-0.23	55	2.59	97	3.99	70
Aberdeen City	2.80	66	-0.27	66	2.65	72	4.07	69
Waverley	2.79	67	-0.34	73	2.81	22	4.32	58
Havering	2.76	68	-0.27	65	2.60	94	3.94	73
Fylde	2.75	69	-0.25	59	2.55	109	3.86	79
Ealing	2.75	70	-0.34	74	2.76	37	4.19	65
Brighton and Hove	2.75	71	-0.34	71	2.75	38	4.19	66
Milton Keynes	2.74	72	-0.33	69	2.70	56	4.10	67
East Hertfordshire	2.67	73	-0.33	70	2.64	79	3.94	74
Bristol, City of	2.63	74	-0.35	75	2.64	77	3.91	75
Rushcliffe	2.60	75	-0.37	76	2.65	73	3.89	77
Harborough	2.56	76	-0.40	78	2.68	68	3.90	76
South Gloucestershire	2.56	77	-0.34	72	2.55	114	3.68	90
Newham	2.54	78	-0.41	79	2.67	70	3.88	78
Tewkesbury	2.54	79	-0.38	77	2.61	91	3.77	83
Redbridge	2.53	80	-0.44	86	2.72	47	3.94	72
Salford	2.49	81	-0.42	82	2.64	80	3.78	82
Epping Forest	2.47	82	-0.45	89	2.69	64	3.83	80
Tunbridge Wells	2.44	83	-0.46	92	2.69	63	3.82	81
Horsham	2.44	84	-0.43	84	2.62	86	3.71	88
Sevenoaks	2.44	85	-0.45	88	2.65	74	3.76	84
Eastleigh	2.44	86	-0.43	85	2.63	83	3.72	86
Warrington	2.44	87	-0.44	87	2.62	85	3.71	89
Mid Sussex	2.42	88	-0.45	90	2.64	81	3.71	87

	Long-Run Annual Growth Rate	Rank	Bust Annual Growth Rate	Rank	Recovery Annual Growth Rate	Rank	Boom Annual Growth Rate	Rank
Southampton	2.40	89	-0.42	81	2.54	116	3.54	95
Gravesham	2.38	90	-0.41	80	2.50	131	3.45	98
Harrow	2.36	91	-0.56	108	2.82	20	3.96	71
Dartford	2.35	92	-0.47	93	2.61	88	3.61	92
Bath and North East Somerset	2.33	93	-0.48	94	2.60	93	3.57	93
Epsom and Ewell	2.33	94	-0.52	98	2.69	59	3.73	85
Manchester	2.32	95	-0.50	95	2.63	82	3.62	91
Crawley	2.26	96	-0.46	91	2.48	144	3.31	110
Uttlesford	2.24	97	-0.52	99	2.60	92	3.50	97
Inverclyde	2.23	98	-0.43	83	2.37	224	3.11	118
Glasgow City	2.22	99	-0.50	96	2.53	124	3.36	103
Stratford-on-Avon	2.22	100	-0.55	103	2.64	78	3.55	94
Cheshire East	2.20	101	-0.54	101	2.59	96	3.45	99
Stirling	2.19	102	-0.52	97	2.53	122	3.33	106
Cherwell	2.15	103	-0.55	104	2.57	102	3.37	102
Chelmsford	2.15	104	-0.56	107	2.58	99	3.38	101
Solihull	2.14	105	-0.55	102	2.56	105	3.35	104
West Oxfordshire	2.13	106	-0.56	106	2.56	106	3.34	105
Trafford	2.13	107	-0.60	112	2.66	71	3.51	96
Blaby	2.13	108	-0.55	105	2.55	110	3.31	108
Aberdeenshire	2.09	109	-0.58	110	2.58	98	3.33	107
Cheltenham	2.06	110	-0.63	121	2.65	75	3.42	100
Bedford	2.03	111	-0.61	116	2.57	101	3.27	112
Central Bedfordshire	2.03	112	-0.60	111	2.54	117	3.21	113
Shetland Islands	2.03	113	-0.52	100	2.37	225	2.94	127
Monmouthshire	2.00	114	-0.60	113	2.53	123	3.17	115
East Hampshire	2.00	115	-0.64	123	2.61	89	3.30	111
Tonbridge and Malling	1.98	116	-0.62	118	2.55	112	3.19	114
Dacorum	1.97	117	-0.66	126	2.63	84	3.31	109
Stroud	1.96	118	-0.63	120	2.54	118	3.15	117

	Long-Run Annual Growth Rate	Rank	Bust Annual Growth Rate	Rank	Recovery Annual Growth Rate	Rank	Boom Annual Growth Rate	Rank
Huntingdonshire	1.94	119	-0.64	124	2.55	108	3.16	116
Barrow-in-Furness	1.94	120	-0.57	109	2.38	213	2.88	134
York	1.91	121	-0.63	122	2.49	133	3.04	122
Swindon	1.91	122	-0.63	119	2.48	142	3.00	125
South Ayrshire	1.87	123	-0.61	115	2.40	195	2.85	138
Enfield	1.86	124	-0.69	131	2.57	103	3.11	119
Dover	1.85	125	-0.62	117	2.40	196	2.82	141
Orkney Islands	1.85	126	-0.60	114	2.36	237	2.76	145
West Northamptonshire	1.85	127	-0.69	133	2.56	107	3.08	120
Leeds	1.84	128	-0.69	128	2.53	120	3.03	124
Coventry	1.82	129	-0.65	125	2.43	177	2.85	136
Stockport	1.81	130	-0.71	137	2.55	113	3.03	123
Maidstone	1.81	131	-0.71	138	2.55	111	3.04	121
Exeter	1.79	132	-0.69	132	2.49	134	2.93	130
North West Leicestershire	1.79	133	-0.69	130	2.49	135	2.92	131
Maldon	1.77	134	-0.70	134	2.48	140	2.88	133
South Norfolk	1.76	135	-0.69	129	2.45	164	2.83	139
Medway	1.76	136	-0.68	127	2.43	174	2.80	143
New Forest	1.76	137	-0.70	135	2.47	152	2.85	135
Cheshire West and Chester	1.75	138	-0.73	141	2.52	125	2.94	128
Portsmouth	1.72	139	-0.71	136	2.45	166	2.79	144
Hinckley and Bosworth	1.72	140	-0.73	143	2.51	129	2.89	132
Harrogate	1.71	141	-0.75	145	2.54	115	2.94	129
Liverpool	1.70	142	-0.73	140	2.47	149	2.82	142
Wychavon	1.67	143	-0.78	153	2.56	104	2.94	126
Fareham	1.67	144	-0.76	149	2.51	128	2.85	137
South Derbyshire	1.66	145	-0.73	142	2.44	172	2.72	152
Worthing	1.64	146	-0.74	144	2.45	165	2.73	150
Basildon	1.64	147	-0.75	147	2.47	155	2.75	146
Birmingham	1.63	148	-0.76	148	2.47	153	2.75	147

	Long-Run Annual Growth Rate	Rank	Bust Annual Growth Rate	Rank	Recovery Annual Growth Rate	Rank	Boom Annual Growth Rate	Rank
Rutland	1.62	149	-0.79	156	2.52	126	2.83	140
Falkirk	1.62	150	-0.72	139	2.38	222	2.59	167
East Lothian	1.60	151	-0.75	146	2.42	181	2.65	161
Mendip	1.59	152	-0.78	154	2.48	141	2.73	149
Luton	1.59	153	-0.78	151	2.46	157	2.70	154
Barking and Dagenham	1.58	154	-0.79	158	2.48	138	2.73	151
Harlow	1.58	155	-0.77	150	2.44	169	2.66	159
Thurrock	1.56	156	-0.79	157	2.46	159	2.67	157
North Somerset	1.56	157	-0.80	160	2.48	137	2.71	153
Broxbourne	1.55	158	-0.78	155	2.43	176	2.62	165
Stafford	1.53	159	-0.81	162	2.47	154	2.66	158
Somerset West and Taunton	1.52	160	-0.82	165	2.47	148	2.66	160
Bexley	1.51	161	-0.83	169	2.50	132	2.69	155
South Ribble	1.50	162	-0.80	161	2.42	183	2.56	168
Wiltshire	1.50	163	-0.83	168	2.47	147	2.64	163
Cardiff	1.49	164	-0.83	170	2.48	139	2.64	162
Wealden	1.47	165	-0.86	175	2.51	127	2.68	156
Flintshire	1.46	166	-0.81	163	2.39	201	2.48	173
East Ayrshire	1.46	167	-0.78	152	2.32	263	2.36	187
Craven	1.46	168	-0.85	174	2.48	143	2.61	166
Havant	1.45	169	-0.83	172	2.44	171	2.54	169
North Lanarkshire	1.43	170	-0.79	159	2.33	260	2.34	192
West Lothian	1.42	171	-0.82	167	2.39	207	2.43	178
Dundee City	1.42	172	-0.82	164	2.36	234	2.39	182
Newcastle upon Tyne	1.41	173	-0.84	173	2.41	188	2.46	174
South Lanarkshire	1.40	174	-0.83	171	2.38	212	2.41	181
Colchester	1.40	175	-0.86	177	2.45	161	2.52	170
North Kesteven	1.40	176	-0.82	166	2.35	244	2.35	188
Ashford	1.38	177	-0.91	192	2.53	121	2.64	164
Cotswold	1.38	178	-0.94	203	2.59	95	2.74	148

	Long-Run Annual Growth Rate	Rank	Bust Annual Growth Rate	Rank	Recovery Annual Growth Rate	Rank	Boom Annual Growth Rate	Rank
Southend-on-Sea	1.34	179	-0.90	188	2.46	156	2.49	172
South Kesteven	1.34	180	-0.88	180	2.42	182	2.42	180
Rochford	1.33	181	-0.89	187	2.45	168	2.45	176
Carlisle	1.33	182	-0.88	179	2.41	190	2.38	183
South Staffordshire	1.31	183	-0.87	178	2.38	218	2.32	196
North Northamptonshire	1.30	184	-0.93	200	2.49	136	2.50	171
Lewes	1.30	185	-0.91	195	2.45	163	2.44	177
Telford and Wrekin	1.30	186	-0.89	183	2.39	199	2.34	193
North Lincolnshire	1.29	187	-0.86	176	2.32	264	2.21	211
Bournemouth, Christchurch and Poole	1.29	188	-0.92	197	2.45	162	2.43	179
Denbighshire	1.29	189	-0.89	184	2.39	203	2.32	197
Amber Valley	1.28	190	-0.89	186	2.39	206	2.31	199
Fife	1.28	191	-0.90	189	2.40	198	2.32	195
Lichfield	1.27	192	-0.94	202	2.47	146	2.45	175
Charnwood	1.27	193	-0.91	193	2.41	187	2.34	191
Highland	1.27	194	-0.89	185	2.37	233	2.26	204
Halton	1.26	195	-0.89	181	2.35	242	2.24	207
Selby	1.25	196	-0.90	191	2.38	210	2.28	201
Na h-Eileanan Siar	1.25	197	-0.89	182	2.34	247	2.22	210
Gloucester	1.25	198	-0.90	190	2.38	217	2.27	203
East Staffordshire	1.25	199	-0.93	199	2.43	178	2.35	189
Peterborough	1.23	200	-0.94	204	2.43	175	2.34	190
Leicester	1.23	201	-0.95	207	2.46	158	2.38	184
Midlothian	1.22	202	-0.92	198	2.38	215	2.24	206
Dorset	1.22	203	-0.93	201	2.40	191	2.28	200
Bury	1.21	204	-0.96	210	2.46	160	2.37	186
Staffordshire Moorlands	1.21	205	-0.92	196	2.37	228	2.22	209
Norwich	1.21	206	-0.95	208	2.44	170	2.33	194
Canterbury	1.18	207	-0.95	209	2.42	186	2.27	202
North Ayrshire	1.16	208	-0.91	194	2.30	281	2.06	222

	Long-Run Annual Growth Rate	Rank	Bust Annual Growth Rate	Rank	Recovery Annual Growth Rate	Rank	Boom Annual Growth Rate	Rank
West Lancashire	1.16	209	-0.94	206	2.37	230	2.17	214
Nottingham	1.16	210	-0.96	211	2.40	194	2.23	208
East Cambridgeshire	1.15	211	-0.97	215	2.42	180	2.26	205
Derbyshire Dales	1.15	212	-1.01	223	2.50	130	2.38	185
Shropshire	1.13	213	-0.97	213	2.39	200	2.19	213
Chichester	1.12	214	-1.01	224	2.48	145	2.32	198
East Devon	1.09	215	-0.98	216	2.38	214	2.13	217
Gosport	1.07	216	-0.94	205	2.26	312	1.93	241
Newport	1.07	217	-0.99	220	2.38	216	2.11	218
Carmarthenshire	1.06	218	-0.96	212	2.29	285	1.96	234
Sheffield	1.05	219	-1.00	221	2.38	223	2.09	221
Powys	1.04	220	-0.99	219	2.35	245	2.04	224
Braintree	1.04	221	-1.02	227	2.42	185	2.16	215
Lancaster	1.03	222	-0.99	217	2.33	257	2.00	229
Stockton-on-Tees	1.03	223	-1.02	225	2.39	205	2.09	219
West Dunbartonshire	1.03	224	-0.97	214	2.29	290	1.93	240
Wyre Forest	1.01	225	-1.06	239	2.47	150	2.21	212
Angus	1.01	226	-1.01	222	2.34	248	2.00	230
Renfrewshire	1.00	227	-1.03	228	2.38	221	2.04	223
Wrexham	0.99	228	-0.99	218	2.29	287	1.90	244
East Riding of Yorkshire	0.99	229	-1.03	230	2.38	220	2.04	225
Rossendale	0.98	230	-1.03	229	2.36	235	2.01	228
Eden	0.97	231	-1.04	231	2.37	226	2.02	227
West Suffolk	0.97	232	-1.04	235	2.38	219	2.02	226
High Peak	0.95	233	-1.07	241	2.43	179	2.09	220
Swansea	0.95	234	-1.04	236	2.36	236	1.97	233
East Suffolk	0.94	235	-1.04	233	2.35	246	1.95	237
Redditch	0.93	236	-1.10	247	2.47	151	2.14	216
Wolverhampton	0.92	237	-1.04	234	2.32	268	1.88	245
King's Lynn and West Norfolk	0.92	238	-1.02	226	2.28	298	1.82	250

	Long-Run Annual Growth Rate	Rank	Bust Annual Growth Rate	Rank	Recovery Annual Growth Rate	Rank	Boom Annual Growth Rate	Rank
Moray	0.90	239	-1.04	232	2.30	283	1.83	249
Calderdale	0.89	240	-1.09	243	2.40	197	1.99	231
North Warwickshire	0.89	241	-1.07	240	2.36	240	1.92	242
Mid Suffolk	0.89	242	-1.07	242	2.37	229	1.94	239
Plymouth	0.86	243	-1.05	238	2.28	303	1.77	253
Worcester	0.86	244	-1.10	246	2.38	209	1.94	238
Chorley	0.85	245	-1.11	252	2.40	193	1.95	236
East Renfrewshire	0.84	246	-1.12	259	2.42	184	1.98	232
Torfaen	0.82	247	-1.05	237	2.23	334	1.65	268
Broadland	0.82	248	-1.09	245	2.33	254	1.82	251
Hambleton	0.80	249	-1.14	263	2.40	192	1.92	243
South Hams	0.79	250	-1.15	268	2.43	173	1.96	235
Perth and Kinross	0.79	251	-1.12	257	2.36	238	1.84	248
Lincoln	0.78	252	-1.09	244	2.28	300	1.70	261
Bradford	0.77	253	-1.12	255	2.33	255	1.77	252
Newark and Sherwood	0.77	254	-1.11	253	2.32	266	1.76	255
Gedling	0.77	255	-1.10	249	2.30	277	1.72	258
Vale of Glamorgan	0.77	256	-1.14	265	2.39	204	1.86	246
Babergh	0.76	257	-1.14	267	2.39	208	1.86	247
Bassetlaw	0.76	258	-1.10	248	2.29	292	1.69	263
Clackmannanshire	0.74	259	-1.11	251	2.29	288	1.68	265
Erewash	0.74	260	-1.13	261	2.33	256	1.75	256
North Norfolk	0.72	261	-1.11	254	2.27	307	1.63	272
Middlesbrough	0.72	262	-1.13	260	2.30	278	1.68	264
Eastbourne	0.72	263	-1.14	266	2.34	250	1.74	257
Hartlepool	0.71	264	-1.12	256	2.28	306	1.63	274
West Lindsey	0.70	265	-1.13	262	2.28	294	1.63	273
Barnsley	0.69	266	-1.12	258	2.25	321	1.57	281
Wakefield	0.68	267	-1.14	264	2.28	301	1.61	277
Castle Point	0.68	268	-1.16	270	2.33	251	1.70	262

	Long-Run Annual Growth Rate	Rank	Bust Annual Growth Rate	Rank	Recovery Annual Growth Rate	Rank	Boom Annual Growth Rate	Rank
Neath Port Talbot	0.66	269	-1.11	250	2.19	353	1.45	292
Adur	0.66	270	-1.19	277	2.38	211	1.76	254
Dudley	0.65	271	-1.16	269	2.31	274	1.63	275
Darlington	0.64	272	-1.18	271	2.33	259	1.65	267
North Devon	0.64	273	-1.18	272	2.33	261	1.65	269
Sefton	0.61	274	-1.20	279	2.33	252	1.64	271
Wirral	0.60	275	-1.20	278	2.32	265	1.61	276
Doncaster	0.59	276	-1.19	275	2.30	282	1.56	282
Chesterfield	0.58	277	-1.20	281	2.32	262	1.60	278
Wigan	0.58	278	-1.19	274	2.29	291	1.54	283
Herefordshire, County of	0.57	279	-1.23	286	2.37	232	1.66	266
Preston	0.57	280	-1.24	290	2.39	202	1.70	260
South Somerset	0.56	281	-1.20	280	2.29	286	1.53	284
South Holland	0.55	282	-1.19	276	2.27	310	1.48	288
North Tyneside	0.55	283	-1.23	285	2.33	253	1.58	279
Breckland	0.53	284	-1.22	283	2.30	284	1.51	286
Rotherham	0.53	285	-1.22	284	2.30	276	1.52	285
Ashfield	0.51	286	-1.19	273	2.21	344	1.34	305
Isle of Anglesey	0.51	287	-1.20	282	2.24	327	1.40	297
Malvern Hills	0.48	288	-1.31	310	2.45	167	1.71	259
East Dunbartonshire	0.48	289	-1.27	300	2.37	231	1.58	280
South Lakeland	0.48	290	-1.29	306	2.41	189	1.65	270
Ipswich	0.48	291	-1.25	296	2.32	267	1.50	287
Northumberland	0.47	292	-1.24	288	2.28	304	1.43	294
Walsall	0.46	293	-1.23	287	2.25	319	1.38	301
St. Helens	0.46	294	-1.26	297	2.31	275	1.46	291
Allerdale	0.46	295	-1.24	291	2.26	314	1.39	299
South Tyneside	0.44	296	-1.24	289	2.25	323	1.35	302
Isle of Wight	0.43	297	-1.25	292	2.26	317	1.35	303
Richmondshire	0.42	298	-1.28	301	2.31	273	1.44	293

	Long-Run Annual Growth Rate	Rank	Bust Annual Growth Rate	Rank	Recovery Annual Growth Rate	Rank	Boom Annual Growth Rate	Rank
Teignbridge	0.42	299	-1.29	304	2.34	249	1.47	289
Hyndburn	0.41	300	-1.25	293	2.24	331	1.31	310
Rhondda Cynon Taff	0.41	301	-1.25	294	2.24	328	1.31	309
Argyll and Bute	0.40	302	-1.28	302	2.30	280	1.40	296
Conwy	0.39	303	-1.27	299	2.26	311	1.33	307
Kirklees	0.39	304	-1.30	307	2.32	269	1.42	295
Stoke-on-Trent	0.38	305	-1.26	298	2.22	337	1.26	314
Great Yarmouth	0.38	306	-1.25	295	2.21	341	1.24	318
Cannock Chase	0.37	307	-1.29	305	2.28	296	1.34	306
Folkestone and Hythe	0.35	308	-1.31	311	2.31	271	1.38	300
Scarborough	0.34	309	-1.28	303	2.24	333	1.24	317
Ryedale	0.33	310	-1.35	318	2.37	227	1.46	290
Tendring	0.31	311	-1.30	309	2.24	329	1.22	320
Pembrokeshire	0.29	312	-1.32	312	2.28	305	1.27	312
Bolton	0.28	313	-1.36	322	2.35	241	1.39	298
Oldham	0.28	314	-1.33	315	2.28	302	1.26	313
Sedgemoor	0.25	315	-1.35	317	2.28	297	1.24	316
Merthyr Tydfil	0.25	316	-1.30	308	2.17	358	1.05	329
Scottish Borders	0.25	317	-1.35	320	2.29	289	1.25	315
Oadby and Wigston	0.23	318	-1.39	327	2.36	239	1.35	304
North East Lincolnshire	0.22	319	-1.33	314	2.21	342	1.10	323
Broxtowe	0.22	320	-1.38	326	2.33	258	1.30	311
Sunderland	0.22	321	-1.33	313	2.20	346	1.08	326
Melton	0.20	322	-1.40	330	2.35	243	1.32	308
West Devon	0.20	323	-1.37	324	2.28	295	1.20	321
Dumfries and Galloway	0.20	324	-1.34	316	2.20	348	1.07	328
Caerphilly	0.19	325	-1.35	319	2.23	336	1.10	324
Mid Devon	0.19	326	-1.37	325	2.27	309	1.17	322
Arun	0.18	327	-1.40	329	2.32	270	1.23	319
Sandwell	0.18	328	-1.36	321	2.23	335	1.09	325

	Long-Run Annual Growth Rate	Rank	Bust Annual Growth Rate	Rank	Recovery Annual Growth Rate	Rank	Boom Annual Growth Rate	Rank
Kingston upon Hull, City of	0.13	329	-1.37	323	2.20	350	1.00	333
Bolsover	0.08	330	-1.39	328	2.20	349	0.95	340
Swale	0.05	331	-1.43	332	2.25	320	1.02	332
Redcar and Cleveland	0.05	332	-1.40	331	2.20	351	0.92	342
Blackburn with Darwen	0.05	333	-1.44	333	2.27	308	1.05	330
Wyre	0.03	334	-1.46	341	2.30	279	1.08	327
Burnley	0.02	335	-1.45	337	2.26	318	0.99	334
Rochdale	0.01	336	-1.45	336	2.24	326	0.97	336
North East Derbyshire	0.00	337	-1.46	340	2.26	315	0.99	335
Torbay	-0.01	338	-1.44	335	2.22	340	0.91	344
Fenland	-0.01	339	-1.46	339	2.24	330	0.94	341
Gateshead	-0.02	340	-1.47	343	2.26	316	0.97	337
Rother	-0.03	341	-1.50	347	2.31	272	1.04	331
Cornwall	-0.03	342	-1.48	344	2.26	313	0.96	339
County Durham	-0.04	343	-1.46	338	2.21	343	0.86	346
Newcastle-under-Lyme	-0.05	344	-1.48	345	2.25	324	0.92	343
Nuneaton and Bedworth	-0.06	345	-1.50	348	2.28	299	0.97	338
Gwynedd	-0.07	346	-1.47	342	2.20	347	0.83	349
Blaenau Gwent	-0.10	347	-1.44	334	2.11	360	0.66	353
Bridgend	-0.11	348	-1.50	349	2.24	332	0.85	348
Ceredigion	-0.13	349	-1.52	350	2.25	322	0.86	347
East Lindsey	-0.14	350	-1.49	346	2.17	357	0.72	351
Forest of Dean	-0.14	351	-1.54	352	2.29	293	0.90	345
Tamworth	-0.16	352	-1.53	351	2.24	325	0.82	350
Thanet	-0.24	353	-1.56	354	2.22	338	0.71	352
Mansfield	-0.28	354	-1.56	353	2.18	356	0.61	354
Torridge	-0.42	355	-1.64	356	2.21	345	0.53	355
Blackpool	-0.43	356	-1.63	355	2.18	355	0.48	356
Tameside	-0.49	357	-1.67	357	2.19	352	0.45	358
Hastings	-0.51	358	-1.69	358	2.22	339	0.48	357

	Long-Run Annual Growth Rate	Rank	Bust Annual Growth Rate	Rank	Recovery Annual Growth Rate	Rank	Boom Annual Growth Rate	Rank
Boston	-0.61	359	-1.71	359	2.15	359	0.28	359
Pendle	-0.73	360	-1.78	360	2.19	354	0.23	360

Appendix 5: GVA per Capita Growth Forecasts

	Long-Run Annual p.c. Growth	Rank	Bust Annual p.c. Growth	Rank	Recovery Annual p.c. Growth	Rank	Boom Annual p.c. Growth	Rank
Camden	6.71	1	0.63	2	2.75	1	8.69	1
Tower Hamlets	6.51	2	0.72	1	2.34	5	7.83	2
Islington	5.82	3	0.29	3	2.55	2	7.58	3
Southwark	5.01	4	0.04	5	2.23	9	6.34	6
Copeland	4.94	5	0.18	4	1.83	90	5.63	9
Hammersmith and Fulham	4.92	6	-0.03	6	2.29	7	6.37	5
Hackney	4.78	7	-0.15	7	2.40	4	6.42	4
Kensington and Chelsea	4.32	8	-0.33	11	2.32	6	5.89	7
Richmond upon Thames	4.20	9	-0.36	12	2.25	8	5.67	8
Knowsley	4.12	10	-0.18	8	1.76	119	4.79	21
Wokingham	4.12	11	-0.33	9	2.09	17	5.33	11
Bracknell Forest	3.99	12	-0.33	10	1.95	43	4.99	14
Lambeth	3.88	13	-0.44	15	2.09	16	5.13	13
Woking	3.86	14	-0.46	16	2.11	13	5.14	12
Surrey Heath	3.85	15	-0.42	13	2.00	31	4.95	16
Hart	3.83	16	-0.44	14	2.02	26	4.97	15
Runnymede	3.65	17	-0.52	17	2.01	29	4.80	18
West Berkshire	3.62	18	-0.54	18	2.02	27	4.79	20
Elmbridge	3.56	19	-0.63	23	2.15	11	4.95	17
Bromsgrove	3.54	20	-0.77	32	2.45	3	5.42	10
Guildford	3.49	21	-0.61	22	2.02	25	4.68	23
Vale of White Horse	3.46	22	-0.59	21	1.96	42	4.55	26
Ribble Valley	3.46	23	-0.56	19	1.90	69	4.44	28
South Cambridgeshire	3.41	24	-0.63	24	2.00	33	4.56	25
Windsor and Maidenhead	3.40	25	-0.68	25	2.10	14	4.73	22
Derby	3.34	26	-0.58	20	1.80	100	4.18	36
St Albans	3.32	27	-0.76	30	2.18	10	4.79	19
Wandsworth	3.27	28	-0.76	31	2.13	12	4.67	24

	Long-Run Annual p.c. Growth	Rank	Bust Annual p.c. Growth	Rank	Recovery Annual p.c. Growth	Rank	Boom Annual p.c. Growth	Rank
Reading	3.26	29	-0.71	27	2.02	28	4.47	27
Rugby	3.21	30	-0.69	26	1.90	66	4.24	35
Hounslow	3.15	31	-0.77	33	2.03	24	4.39	29
Kingston upon Thames	3.13	32	-0.78	36	2.03	21	4.39	30
Hillingdon	3.13	33	-0.75	28	1.97	39	4.28	34
Mole Valley	3.11	34	-0.77	34	1.98	36	4.28	33
Winchester	3.10	35	-0.78	37	2.00	32	4.29	31
Welwyn Hatfield	3.08	36	-0.75	29	1.92	61	4.14	40
Cambridge	3.05	37	-0.78	35	1.94	49	4.16	39
Brentwood	3.03	38	-0.80	39	1.96	41	4.18	37
Waltham Forest	3.02	39	-0.80	40	1.96	40	4.17	38
Stevenage	2.99	40	-0.80	38	1.91	65	4.05	45
Reigate and Banstead	2.98	41	-0.81	41	1.94	50	4.10	42
Hertsmere	2.97	42	-0.87	48	2.06	18	4.28	32
City of Edinburgh	2.95	43	-0.82	44	1.93	52	4.06	44
Slough	2.95	44	-0.82	43	1.93	58	4.04	46
Basingstoke and Deane	2.93	45	-0.82	42	1.90	67	4.00	50
Lewisham	2.87	46	-0.87	47	1.95	46	4.02	49
South Oxfordshire	2.87	47	-0.87	49	1.95	45	4.02	48
North Hertfordshire	2.86	48	-0.86	46	1.93	57	3.97	52
Oxford	2.83	49	-0.84	45	1.84	87	3.80	57
Buckinghamshire	2.80	50	-0.91	50	1.95	44	3.95	53
Watford	2.78	51	-0.95	53	2.03	23	4.07	43
Brent	2.78	52	-0.91	51	1.94	51	3.92	54
Warwick	2.77	53	-0.95	54	2.01	30	4.02	47
Spelthorne	2.75	54	-0.92	52	1.93	55	3.88	55
Barnet	2.74	55	-1.00	56	2.09	15	4.14	41
Merton	2.65	56	-1.02	63	2.04	19	3.98	51
Haringey	2.62	57	-1.01	60	1.99	34	3.88	56
Tandridge	2.57	58	-1.01	57	1.93	54	3.72	60

	Long-Run Annual p.c. Growth	Rank	Bust Annual p.c. Growth	Rank	Recovery Annual p.c. Growth	Rank	Boom Annual p.c. Growth	Rank
Greenwich	2.55	59	-1.01	58	1.91	62	3.68	62
Sutton	2.55	60	-1.01	61	1.92	60	3.68	64
Bromley	2.53	61	-1.03	64	1.93	53	3.68	61
Three Rivers	2.52	62	-1.06	68	1.99	35	3.78	59
Croydon	2.50	63	-1.02	62	1.87	76	3.57	68
Test Valley	2.50	64	-1.05	67	1.94	48	3.68	63
Rushmoor	2.49	65	-0.99	55	1.82	97	3.47	70
Aberdeen City	2.47	66	-1.03	66	1.88	72	3.55	69
Waverley	2.46	67	-1.10	73	2.03	22	3.80	58
Havering	2.43	68	-1.03	65	1.82	94	3.42	73
Fylde	2.42	69	-1.01	59	1.78	109	3.34	79
Ealing	2.42	70	-1.10	74	1.98	37	3.67	65
Brighton and Hove	2.42	71	-1.10	71	1.98	38	3.67	66
Milton Keynes	2.40	72	-1.09	69	1.93	56	3.58	67
East Hertfordshire	2.34	73	-1.09	70	1.87	79	3.42	74
Bristol, City of	2.30	74	-1.11	75	1.87	77	3.39	75
Rushcliffe	2.27	75	-1.13	76	1.88	73	3.37	77
Harborough	2.23	76	-1.16	78	1.90	68	3.38	76
South Gloucestershire	2.23	77	-1.10	72	1.77	114	3.16	90
Newham	2.21	78	-1.17	79	1.90	70	3.36	78
Tewkesbury	2.21	79	-1.14	77	1.83	91	3.25	83
Redbridge	2.20	80	-1.19	86	1.94	47	3.42	72
Salford	2.16	81	-1.18	82	1.87	80	3.26	82
Epping Forest	2.14	82	-1.21	89	1.91	64	3.31	80
Tunbridge Wells	2.11	83	-1.22	92	1.91	63	3.30	81
Horsham	2.11	84	-1.19	84	1.85	86	3.19	88
Sevenoaks	2.11	85	-1.20	88	1.88	74	3.24	84
Eastleigh	2.11	86	-1.19	85	1.85	83	3.20	86
Warrington	2.11	87	-1.20	87	1.85	85	3.19	89
Mid Sussex	2.09	88	-1.21	90	1.86	81	3.20	87

	Long-Run Annual p.c. Growth	Rank	Bust Annual p.c. Growth	Rank	Recovery Annual p.c. Growth	Rank	Boom Annual p.c. Growth	Rank
Southampton	2.07	89	-1.17	81	1.76	116	3.02	95
Gravesham	2.05	90	-1.17	80	1.72	131	2.93	98
Harrow	2.03	91	-1.32	108	2.04	20	3.44	71
Dartford	2.02	92	-1.23	93	1.84	88	3.09	92
Bath and North East Somerset	2.00	93	-1.24	94	1.82	93	3.05	93
Epsom and Ewell	2.00	94	-1.28	98	1.92	59	3.21	85
Manchester	1.99	95	-1.26	95	1.86	82	3.10	91
Crawley	1.93	96	-1.22	91	1.70	144	2.79	110
Uttlesford	1.91	97	-1.28	99	1.82	92	2.98	97
Inverclyde	1.90	98	-1.19	83	1.60	224	2.60	118
Glasgow City	1.89	99	-1.26	96	1.75	124	2.84	103
Stratford-on-Avon	1.89	100	-1.31	103	1.87	78	3.03	94
Cheshire East	1.87	101	-1.30	101	1.82	96	2.93	99
Stirling	1.86	102	-1.27	97	1.75	122	2.82	106
Cherwell	1.82	103	-1.31	104	1.80	102	2.85	102
Chelmsford	1.82	104	-1.31	107	1.80	99	2.86	101
Solihull	1.81	105	-1.31	102	1.79	105	2.83	104
West Oxfordshire	1.80	106	-1.31	106	1.78	106	2.82	105
Trafford	1.80	107	-1.36	112	1.89	71	2.99	96
Blaby	1.80	108	-1.31	105	1.77	110	2.80	108
Aberdeenshire	1.76	109	-1.34	110	1.80	98	2.81	107
Cheltenham	1.73	110	-1.39	121	1.87	75	2.90	100
Bedford	1.70	111	-1.37	116	1.80	101	2.75	112
Central Bedfordshire	1.70	112	-1.35	111	1.76	117	2.69	113
Shetland Islands	1.70	113	-1.28	100	1.60	225	2.42	127
Monmouthshire	1.68	114	-1.36	113	1.75	123	2.65	115
East Hampshire	1.67	115	-1.40	123	1.83	89	2.79	111
Tonbridge and Malling	1.65	116	-1.38	118	1.77	112	2.67	114
Dacorum	1.64	117	-1.42	126	1.85	84	2.79	109
Stroud	1.63	118	-1.39	120	1.76	118	2.63	117

	Long-Run Annual p.c. Growth	Rank	Bust Annual p.c. Growth	Rank	Recovery Annual p.c. Growth	Rank	Boom Annual p.c. Growth	Rank
Huntingdonshire	1.62	119	-1.40	124	1.78	108	2.64	116
Barrow-in-Furness	1.61	120	-1.33	109	1.61	213	2.36	134
York	1.59	121	-1.39	122	1.72	133	2.52	122
Swindon	1.58	122	-1.38	119	1.70	142	2.49	125
South Ayrshire	1.55	123	-1.37	115	1.63	195	2.33	138
Enfield	1.53	124	-1.45	131	1.79	103	2.59	119
Dover	1.52	125	-1.38	117	1.63	196	2.31	141
Orkney Islands	1.52	126	-1.36	114	1.59	237	2.25	145
West Northamptonshire	1.52	127	-1.45	133	1.78	107	2.57	120
Leeds	1.51	128	-1.44	128	1.76	120	2.52	124
Coventry	1.50	129	-1.40	125	1.66	177	2.34	136
Stockport	1.48	130	-1.46	137	1.77	113	2.52	123
Maidstone	1.48	131	-1.46	138	1.77	111	2.52	121
Exeter	1.46	132	-1.45	132	1.72	134	2.41	130
North West Leicestershire	1.46	133	-1.45	130	1.71	135	2.41	131
Maldon	1.44	134	-1.45	134	1.70	140	2.37	133
South Norfolk	1.43	135	-1.45	129	1.68	164	2.32	139
Medway	1.43	136	-1.44	127	1.66	174	2.29	143
New Forest	1.43	137	-1.46	135	1.69	152	2.34	135
Cheshire West and Chester	1.42	138	-1.48	141	1.75	125	2.42	128
Portsmouth	1.39	139	-1.46	136	1.67	166	2.28	144
Hinckley and Bosworth	1.39	140	-1.49	143	1.73	129	2.37	132
Harrogate	1.39	141	-1.51	145	1.76	115	2.42	129
Liverpool	1.38	142	-1.48	140	1.70	149	2.31	142
Wychavon	1.34	143	-1.54	153	1.79	104	2.42	126
Fareham	1.34	144	-1.52	149	1.74	128	2.34	137
South Derbyshire	1.34	145	-1.49	142	1.66	172	2.21	152
Worthing	1.32	146	-1.50	144	1.68	165	2.22	150
Basildon	1.31	147	-1.51	147	1.69	155	2.24	146
Birmingham	1.31	148	-1.51	148	1.69	153	2.24	147

	Long-Run Annual p.c. Growth	Rank	Bust Annual p.c. Growth	Rank	Recovery Annual p.c. Growth	Rank	Boom Annual p.c. Growth	Rank
Rutland	1.30	149	-1.54	156	1.75	126	2.31	140
Falkirk	1.29	150	-1.48	139	1.60	222	2.07	167
East Lothian	1.27	151	-1.51	146	1.65	181	2.14	161
Mendip	1.27	152	-1.54	154	1.70	141	2.22	149
Luton	1.26	153	-1.53	151	1.69	157	2.18	154
Barking and Dagenham	1.25	154	-1.55	158	1.71	138	2.21	151
Harlow	1.25	155	-1.53	150	1.67	169	2.14	159
Thurrock	1.24	156	-1.54	157	1.68	159	2.16	157
North Somerset	1.23	157	-1.56	160	1.71	137	2.20	153
Broxbourne	1.22	158	-1.54	155	1.66	176	2.10	165
Stafford	1.20	159	-1.56	162	1.69	154	2.15	158
Somerset West and Taunton	1.19	160	-1.57	165	1.70	148	2.14	160
Bexley	1.18	161	-1.59	169	1.72	132	2.18	155
South Ribble	1.17	162	-1.56	161	1.65	183	2.04	168
Wiltshire	1.17	163	-1.58	168	1.70	147	2.13	163
Cardiff	1.16	164	-1.59	170	1.70	139	2.13	162
Wealden	1.14	165	-1.61	175	1.74	127	2.16	156
Flintshire	1.14	166	-1.56	163	1.62	201	1.96	173
East Ayrshire	1.13	167	-1.53	152	1.55	263	1.85	187
Craven	1.13	168	-1.60	174	1.70	143	2.10	166
Havant	1.12	169	-1.59	172	1.66	171	2.03	169
North Lanarkshire	1.10	170	-1.55	159	1.55	260	1.83	192
West Lothian	1.09	171	-1.58	167	1.61	207	1.92	178
Dundee City	1.09	172	-1.57	164	1.59	234	1.88	182
Newcastle upon Tyne	1.08	173	-1.60	173	1.64	188	1.95	174
South Lanarkshire	1.08	174	-1.59	171	1.61	212	1.90	181
Colchester	1.07	175	-1.62	177	1.68	161	2.01	170
North Kesteven	1.07	176	-1.58	166	1.58	244	1.84	188
Ashford	1.06	177	-1.66	192	1.76	121	2.12	164
Cotswold	1.05	178	-1.69	203	1.82	95	2.22	148

	Long-Run Annual p.c. Growth	Rank	Bust Annual p.c. Growth	Rank	Recovery Annual p.c. Growth	Rank	Boom Annual p.c. Growth	Rank
Southend-on-Sea	1.01	179	-1.65	188	1.69	156	1.98	172
South Kesteven	1.01	180	-1.64	180	1.65	182	1.90	180
Rochford	1.00	181	-1.65	187	1.67	168	1.94	176
Carlisle	1.00	182	-1.64	179	1.63	190	1.87	183
South Staffordshire	0.99	183	-1.63	178	1.60	218	1.81	196
North Northamptonshire	0.98	184	-1.68	200	1.71	136	1.98	171
Lewes	0.97	185	-1.67	195	1.68	163	1.92	177
Telford and Wrekin	0.97	186	-1.64	183	1.62	199	1.83	193
North Lincolnshire	0.96	187	-1.62	176	1.55	264	1.70	211
Bournemouth, Christchurch and Poole	0.96	188	-1.67	197	1.68	162	1.91	179
Denbighshire	0.96	189	-1.65	184	1.62	203	1.81	197
Amber Valley	0.95	190	-1.65	186	1.61	206	1.80	199
Fife	0.95	191	-1.65	189	1.62	198	1.81	195
Lichfield	0.95	192	-1.69	202	1.70	146	1.94	175
Charnwood	0.94	193	-1.67	193	1.64	187	1.83	191
Highland	0.94	194	-1.65	185	1.59	233	1.75	204
Halton	0.94	195	-1.64	181	1.58	242	1.73	207
Selby	0.93	196	-1.66	191	1.61	210	1.77	201
Na h-Eileanan Siar	0.93	197	-1.64	182	1.57	247	1.70	210
Gloucester	0.93	198	-1.66	190	1.60	217	1.76	203
East Staffordshire	0.92	199	-1.68	199	1.65	178	1.83	189
Peterborough	0.91	200	-1.69	204	1.66	175	1.83	190
Leicester	0.90	201	-1.70	207	1.68	158	1.87	184
Midlothian	0.89	202	-1.67	198	1.61	215	1.73	206
Dorset	0.89	203	-1.69	201	1.63	191	1.77	200
Bury	0.89	204	-1.71	210	1.68	160	1.85	186
Staffordshire Moorlands	0.89	205	-1.67	196	1.60	228	1.71	209
Norwich	0.88	206	-1.71	208	1.66	170	1.82	194
Canterbury	0.86	207	-1.71	209	1.64	186	1.76	202
North Ayrshire	0.84	208	-1.67	194	1.53	281	1.55	222

	Long-Run Annual p.c. Growth	Rank	Bust Annual p.c. Growth	Rank	Recovery Annual p.c. Growth	Rank	Boom Annual p.c. Growth	Rank
West Lancashire	0.83	209	-1.70	206	1.60	230	1.66	214
Nottingham	0.83	210	-1.71	211	1.63	194	1.71	208
East Cambridgeshire	0.83	211	-1.73	215	1.65	180	1.75	205
Derbyshire Dales	0.82	212	-1.76	223	1.73	130	1.87	185
Shropshire	0.80	213	-1.72	213	1.62	200	1.68	213
Chichester	0.79	214	-1.77	224	1.70	145	1.80	198
East Devon	0.77	215	-1.74	216	1.61	214	1.62	217
Gosport	0.75	216	-1.70	205	1.49	312	1.42	241
Newport	0.74	217	-1.75	220	1.61	216	1.60	218
Carmarthenshire	0.73	218	-1.71	212	1.52	285	1.45	234
Sheffield	0.72	219	-1.76	221	1.60	223	1.58	221
Powys	0.72	220	-1.75	219	1.58	245	1.53	224
Braintree	0.71	221	-1.78	227	1.65	185	1.64	215
Lancaster	0.71	222	-1.74	217	1.56	257	1.49	229
Stockton-on-Tees	0.70	223	-1.77	225	1.61	205	1.58	219
West Dunbartonshire	0.70	224	-1.73	214	1.52	290	1.42	240
Wyre Forest	0.69	225	-1.81	239	1.69	150	1.70	212
Angus	0.68	226	-1.76	222	1.57	248	1.49	230
Renfrewshire	0.67	227	-1.78	228	1.60	221	1.53	223
Wrexham	0.67	228	-1.74	218	1.52	287	1.39	244
East Riding of Yorkshire	0.66	229	-1.79	230	1.60	220	1.53	225
Rossendale	0.65	230	-1.78	229	1.59	235	1.50	228
Eden	0.65	231	-1.79	231	1.60	226	1.51	227
West Suffolk	0.64	232	-1.80	235	1.60	219	1.51	226
High Peak	0.63	233	-1.82	241	1.65	179	1.58	220
Swansea	0.62	234	-1.80	236	1.59	236	1.46	233
East Suffolk	0.62	235	-1.79	233	1.57	246	1.44	237
Redditch	0.61	236	-1.85	247	1.69	151	1.63	216
Wolverhampton	0.59	237	-1.79	234	1.55	268	1.37	245
King's Lynn and West Norfolk	0.59	238	-1.78	226	1.51	298	1.31	250

	Long-Run Annual p.c. Growth	Rank	Bust Annual p.c. Growth	Rank	Recovery Annual p.c. Growth	Rank	Boom Annual p.c. Growth	Rank
Moray	0.57	239	-1.79	232	1.52	283	1.32	249
Calderdale	0.57	240	-1.84	243	1.62	197	1.48	231
North Warwickshire	0.57	241	-1.82	240	1.58	240	1.41	242
Mid Suffolk	0.57	242	-1.83	242	1.60	229	1.43	239
Plymouth	0.54	243	-1.80	238	1.51	303	1.26	253
Worcester	0.54	244	-1.85	246	1.61	209	1.43	238
Chorley	0.52	245	-1.87	252	1.63	193	1.44	236
East Renfrewshire	0.51	246	-1.88	259	1.65	184	1.47	232
Torfaen	0.50	247	-1.80	237	1.46	334	1.14	268
Broadland	0.49	248	-1.85	245	1.56	254	1.31	251
Hambleton	0.47	249	-1.89	263	1.63	192	1.41	243
South Hams	0.47	250	-1.91	268	1.66	173	1.45	235
Perth and Kinross	0.46	251	-1.87	257	1.59	238	1.33	248
Lincoln	0.46	252	-1.84	244	1.51	300	1.19	261
Bradford	0.45	253	-1.87	255	1.56	255	1.26	252
Newark and Sherwood	0.45	254	-1.87	253	1.55	266	1.25	255
Gedling	0.44	255	-1.86	249	1.53	277	1.22	258
Vale of Glamorgan	0.44	256	-1.90	265	1.62	204	1.35	246
Babergh	0.44	257	-1.90	267	1.61	208	1.35	247
Bassetlaw	0.43	258	-1.86	248	1.51	292	1.18	263
Clackmannanshire	0.42	259	-1.86	251	1.52	288	1.17	265
Erewash	0.42	260	-1.88	261	1.56	256	1.24	256
North Norfolk	0.40	261	-1.87	254	1.50	307	1.12	272
Middlesbrough	0.40	262	-1.88	260	1.53	278	1.17	264
Eastbourne	0.39	263	-1.90	266	1.56	250	1.23	257
Hartlepool	0.39	264	-1.87	256	1.50	306	1.12	274
West Lindsey	0.37	265	-1.88	262	1.51	294	1.12	273
Barnsley	0.36	266	-1.88	258	1.48	321	1.06	281
Wakefield	0.36	267	-1.89	264	1.51	301	1.10	277
Castle Point	0.35	268	-1.92	270	1.56	251	1.19	262

	Long-Run Annual p.c. Growth	Rank	Bust Annual p.c. Growth	Rank	Recovery Annual p.c. Growth	Rank	Boom Annual p.c. Growth	Rank
Neath Port Talbot	0.34	269	-1.86	250	1.42	353	0.94	292
Adur	0.33	270	-1.95	277	1.61	211	1.25	254
Dudley	0.33	271	-1.92	269	1.53	274	1.12	275
Darlington	0.31	272	-1.93	271	1.55	259	1.14	267
North Devon	0.31	273	-1.93	272	1.55	261	1.14	269
Sefton	0.28	274	-1.95	279	1.56	252	1.13	271
Wirral	0.27	275	-1.95	278	1.55	265	1.10	276
Doncaster	0.26	276	-1.94	275	1.52	282	1.05	282
Chesterfield	0.26	277	-1.96	281	1.55	262	1.09	278
Wigan	0.26	278	-1.94	274	1.52	291	1.03	283
Herefordshire, County of	0.25	279	-1.98	286	1.59	232	1.15	266
Preston	0.25	280	-1.99	290	1.62	202	1.19	260
South Somerset	0.24	281	-1.95	280	1.52	286	1.02	284
South Holland	0.23	282	-1.95	276	1.50	310	0.97	288
North Tyneside	0.22	283	-1.98	285	1.56	253	1.08	279
Breckland	0.21	284	-1.97	283	1.52	284	1.00	286
Rotherham	0.21	285	-1.97	284	1.53	276	1.01	285
Ashfield	0.19	286	-1.94	273	1.43	344	0.83	305
Isle of Anglesey	0.18	287	-1.96	282	1.47	327	0.89	297
Malvern Hills	0.16	288	-2.06	310	1.67	167	1.20	259
East Dunbartonshire	0.16	289	-2.03	300	1.60	231	1.07	280
South Lakeland	0.16	290	-2.04	306	1.63	189	1.14	270
Ipswich	0.15	291	-2.01	296	1.55	267	1.00	287
Northumberland	0.15	292	-1.99	288	1.51	304	0.92	294
Walsall	0.14	293	-1.98	287	1.48	319	0.87	301
St. Helens	0.13	294	-2.01	297	1.53	275	0.95	291
Allerdale	0.13	295	-1.99	291	1.49	314	0.88	299
South Tyneside	0.12	296	-1.99	289	1.48	323	0.85	302
Isle of Wight	0.11	297	-2.00	292	1.48	317	0.85	303
Richmondshire	0.10	298	-2.03	301	1.54	273	0.93	293

	Long-Run Annual p.c. Growth	Rank	Bust Annual p.c. Growth	Rank	Recovery Annual p.c. Growth	Rank	Boom Annual p.c. Growth	Rank
Teignbridge	0.09	299	-2.04	304	1.56	249	0.97	289
Hyndburn	0.09	300	-2.00	293	1.47	331	0.80	310
Rhondda Cynon Taff	0.09	301	-2.00	294	1.47	328	0.81	309
Argyll and Bute	0.08	302	-2.03	302	1.53	280	0.90	296
Conwy	0.07	303	-2.02	299	1.49	311	0.83	307
Kirklees	0.06	304	-2.05	307	1.54	269	0.91	295
Stoke-on-Trent	0.06	305	-2.01	298	1.45	337	0.75	314
Great Yarmouth	0.06	306	-2.01	295	1.44	341	0.73	318
Cannock Chase	0.04	307	-2.04	305	1.51	296	0.83	306
Folkestone and Hythe	0.03	308	-2.06	311	1.54	271	0.87	300
Scarborough	0.02	309	-2.04	303	1.46	333	0.73	317
Ryedale	0.01	310	-2.10	318	1.60	227	0.95	290
Tendring	-0.02	311	-2.05	309	1.47	329	0.71	320
Pembrokeshire	-0.03	312	-2.08	312	1.50	305	0.76	312
Bolton	-0.04	313	-2.12	322	1.58	241	0.88	298
Oldham	-0.04	314	-2.08	315	1.51	302	0.75	313
Sedgemoor	-0.07	315	-2.10	317	1.51	297	0.74	316
Merthyr Tydfil	-0.07	316	-2.05	308	1.40	358	0.55	329
Scottish Borders	-0.07	317	-2.10	320	1.52	289	0.74	315
Oadby and Wigston	-0.09	318	-2.14	327	1.59	239	0.84	304
North East Lincolnshire	-0.10	319	-2.08	314	1.44	342	0.60	323
Broxtowe	-0.10	320	-2.13	326	1.56	258	0.79	311
Sunderland	-0.10	321	-2.08	313	1.43	346	0.58	326
Melton	-0.12	322	-2.15	330	1.58	243	0.81	308
West Devon	-0.12	323	-2.12	324	1.51	295	0.70	321
Dumfries and Galloway	-0.12	324	-2.09	316	1.43	348	0.56	328
Caerphilly	-0.13	325	-2.10	319	1.45	336	0.59	324
Mid Devon	-0.14	326	-2.12	325	1.50	309	0.66	322
Arun	-0.14	327	-2.15	329	1.54	270	0.73	319
Sandwell	-0.14	328	-2.11	321	1.46	335	0.58	325

	Long-Run Annual p.c. Growth	Rank	Bust Annual p.c. Growth	Rank	Recovery Annual p.c. Growth	Rank	Boom Annual p.c. Growth	Rank
Kingston upon Hull, City of	-0.19	329	-2.12	323	1.43	350	0.50	333
Bolsover	-0.24	330	-2.15	328	1.43	349	0.45	340
Swale	-0.27	331	-2.18	332	1.48	320	0.51	332
Redcar and Cleveland	-0.27	332	-2.16	331	1.42	351	0.42	342
Blackburn with Darwen	-0.27	333	-2.19	333	1.50	308	0.54	330
Wyre	-0.30	334	-2.22	341	1.53	279	0.57	327
Burnley	-0.30	335	-2.20	337	1.48	318	0.49	334
Rochdale	-0.31	336	-2.20	336	1.47	326	0.46	336
North East Derbyshire	-0.33	337	-2.21	340	1.49	315	0.48	335
Torbay	-0.33	338	-2.20	335	1.45	340	0.41	344
Fenland	-0.34	339	-2.21	339	1.47	330	0.44	341
Gateshead	-0.34	340	-2.22	343	1.49	316	0.46	337
Rother	-0.36	341	-2.25	347	1.54	272	0.54	331
Cornwall	-0.36	342	-2.23	344	1.49	313	0.46	339
County Durham	-0.36	343	-2.21	338	1.44	343	0.36	346
Newcastle-under-Lyme	-0.37	344	-2.23	345	1.48	324	0.42	343
Nuneaton and Bedworth	-0.39	345	-2.25	348	1.51	299	0.46	338
Gwynedd	-0.39	346	-2.22	342	1.43	347	0.33	349
Blaenau Gwent	-0.42	347	-2.19	334	1.34	360	0.16	353
Bridgend	-0.43	348	-2.25	349	1.46	332	0.35	348
Ceredigion	-0.45	349	-2.27	350	1.48	322	0.35	347
East Lindsey	-0.46	350	-2.24	346	1.40	357	0.22	351
Forest of Dean	-0.47	351	-2.29	352	1.51	293	0.40	345
Tamworth	-0.48	352	-2.28	351	1.47	325	0.31	350
Thanet	-0.57	353	-2.31	354	1.45	338	0.21	352
Mansfield	-0.60	354	-2.31	353	1.41	356	0.10	354
Torridge	-0.74	355	-2.39	356	1.43	345	0.02	355
Blackpool	-0.75	356	-2.38	355	1.41	355	-0.02	356
Tameside	-0.81	357	-2.42	357	1.42	352	-0.05	358
Hastings	-0.83	358	-2.44	358	1.45	339	-0.02	357

	Long-Run Annual p.c. Growth	Rank	Bust Annual p.c. Growth	Rank	Recovery Annual p.c. Growth	Rank	Boom Annual p.c. Growth	Rank
Boston	-0.93	359	-2.46	359	1.38	359	-0.23	359
Pendle	-1.05	360	-2.53	360	1.41	354	-0.28	360