

All over the place

Perspectives on local economic prosperity

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June 2022



Acknowledgements

This report is part of the Economy 2030 Inquiry which is generously funded by the Nuffield Foundation. The authors are particularly grateful to Torsten Bell and Mike Brewer for their support and advice throughout this project; and to Alex Beer and Henry Overman for their insightful comments on an early draft of this report. We thank Kate Ogden and David Philipps from the Institute for Fiscal Studies for sharing data on local authority financing, and Natalie Berg from the British Retail Consortium for sharing data on shop vacancies. Our qualitative research in Yorkshire and the Humber was greatly enriched by the preliminary conversations we had with Mel Booney from CaVCA in Scarborough; Emma Hardy MP in Hull; Tom Forth of Open Innovations in Leeds; and Councillor James Higginbottom in Barnsley. Most of all, however, we thank the 35 participants who took part in our focus groups in April 2022 for their candour and their insight. Any errors, of course, remain the authors' own.

Citation

If you are using this document in your own writing, our preferred citation is:
L Judge & D Tomlinson, *All over the place: Perspectives on local economic prosperity*, The Resolution Foundation, June 2022

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The Economy 2030 Inquiry

The Economy 2030 Inquiry is a collaboration between the Resolution Foundation and the Centre for Economic Performance at the London School of Economics, funded by the Nuffield Foundation. The Inquiry's subject matter is the nature, scale, and context for the economic change facing the UK during the 2020s. Its goal is not just to describe the change that Covid-19, Brexit, the Net Zero transition and technology will bring, but to help the country and its policy makers better understand and navigate it against a backdrop of low productivity and high inequality. To achieve these aims the Inquiry is leading a two-year national conversation on the future of the UK economy, bridging rigorous research, public involvement and concrete proposals. The work of the Inquiry will be brought together in a final report in 2023 that will set out a renewed economic strategy for the UK to enable the country to successfully navigate the decade ahead, with proposals to drive strong, sustainable and equitable growth, and significant improvements to people's living standards and well-being.

The Nuffield Foundation

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Summary

The place where one is born, educated and works can have a profound bearing on one's living standards. But how do people living in different types of places experience their local area and want it to change? In April 2022, we ran four focus groups in Yorkshire and the Humber to explore this question. We listened to people from all walks of life discuss their lives in, and aspirations for, their local economy in a core city (Leeds); a smaller, less centrally located city (Hull); an ex-industrial but well-connected large town (Barnsley); and a more remote and less populous coastal community (Scarborough).

This briefing note brings together the conversations we heard in these groups and reflects on a question that is central to both the Government's 'levelling up' agenda and the Economy 2030 Inquiry: what could a new economic strategy that addresses longstanding spatial disparities look like? So, what did we find? To begin, people cared very much about their local area, taking great pleasure in the beauty, vibrancy or simply sense of 'home' their place provides. But participants in our focus groups also had a strong belief that 'things should be better' and in this they were not alone: data shows that in every region of England, more than three-quarters of the population say that their area has either trodden water or deteriorated in recent years.

Our focus group participants' concerns about their place readily translated into ideas about how things should be improved. For most, the contribution their town or city made to the national economy was a source of pride, but participants were realistic about the role their town or city could play in a modern economy. They recognised that different local areas have different endowments: Hull did not expect to have the same sorts of jobs as Leeds, for example, nor Scarborough to mimic Barnsley. In this, they seemed more open-eyed than many politicians, accepting that there is no 'one size fits all' economic model, and that the opportunities that different places afford their residents can never be entirely levelled.

Critically, our focus groups were alive to the tensions and trade-offs that growth in their area could bring. They were eager for more investment in cities in the North, but they also recognised that accelerated growth could bring challenges. Our Leeds participants feared, for example, that growing affluence in their city would go hand-in-hand with rising inequality (a legitimate concern given international evidence and the experience of London). The most pressing issue they raised was that higher wages in the city could increase housing costs, not least because high prices were already making lives hard. Such fears have a foundation. House prices have grown by an average of 82 per cent in the quarter of local authorities with the highest pay in the last fifteen years, for example, compared to 47 per cent in the quarter with the lowest pay.

Those living outside a city's precincts had a different set of concerns. Our participants recognised that opportunities are highly contingent on proximity and quality of transport locally: participants in our Barnsley focus group, for example, clearly benefited from their proximity to motorways and had public transport links to nearby big cities. But across the board, most of our participants saw a car as essential to access work and leisure alike (no doubt explaining why roadworks were such a bugbear). This is backed by hard evidence. We find that with the exception of the capital, the relative number of jobs reachable in a 30-minute commute by car is far higher than the number by public transport in every type of place. Moreover, the benefit of car usage is larger for those living in smaller places: a 30-minute commute by car from a small town provides, on average, links to 28-times more jobs than the equivalent by public transport, compared to a 7-times multiple in core cities and a 3-times multiple in London.

But although there were concerns about how many jobs were easily accessed, none in our focus groups were worried about unemployment, no doubt reflecting that the labour market in spring 2022 was very strong. Instead, it was the quality of work that loomed large in conversation. In every group, participants expressed concern about conditions in low-paid jobs: casual employment, zero-hours contracts, a lack of training and progression and, in some cases, behaviour on the part of employers that strayed into being unlawful. But minimum wage jobs are more common in some areas than others (9.7 per cent of jobs in Scarborough and 8.3 percent in Barnsley are at the wage floor, for example, compared to 5.8 per cent in Leeds). While such jobs were still welcomed, the need to improve their quality was especially urgent in these places.

Although commentators often view the out-migration of young people from far-flung areas as contributing to local economic decline, our focus group participants were largely positive about this trend: they felt it was natural and healthy for young people to go out and 'see the world'. Instead, they worried far more about young people who did not have the option to leave via higher education, a valid concern given that those growing up in the most deprived quintile of local authorities have the lowest quality secondary schools, and are two-and-a-half times less likely to leave their home area upon reaching adulthood than their peers in the least deprived quintile (17 per cent compared to 42 per cent).

Finally, the issue that most vexed all of our groups was the degradation of their places and public services. Empty shops, unsafe public spaces and weak policing meant that some felt parts of their town or city centre were 'no-go' areas, curtailing economic activity and diminishing pride of place. Our participants in Hull were particularly vocal on this point: action on this front was urgently required, they felt, not just to improve the look and feel of their place but also to ensure that those with higher paid jobs locally could be attracted back into the city, both to live and to spend.

Overall, our focus groups painted a picture of political leadership that was not getting to grips with such problems. Although there was some recognition that swingeing cuts to local authority budgets played a role (core cities saw their revenue per resident fall by one-quarter between 2009 and 2019, for example), failure to address visible issues such as congested roads or empty shops had eroded trust in local government's capabilities. Moreover, the people we spoke to were more realistic than some of Britain's political leaders when it came to routes to growth: they neither thought that everywhere could become a high-skilled tech hub, nor that prettifying places was enough to level up their area. For the people we met in Leeds, Barnsley, Hull and Scarborough, then, 'levelling up' meant economic growth alive to their place's endowments, driving and driven by investment in the public realm, and justifying once again people's deeply-held pride of place.

Our experience of the economy is differentiated by the type of place in which we live

On most metrics, spatial disparities are significant in the UK today.¹ The place where one is born, educated and then works can have a profound bearing on one's living standards. Different places occupy very different roles in our economy: the number and industrial mix of jobs on offer in one area can vary hugely compared to another, for example. Likewise, proximity to (or perhaps more accurately, connectivity with) economic centres provides more opportunity, but clearly differs considerably from place to place. The fact that outcomes vary so much between different parts of the UK is currently of acute political concern, and most obviously take form in the 'levelling up' agenda.² But how do people actually experience place-based differences, and what do they think a new economic strategy that is alive to their local area should look like?

In April 2022, we ran four focus groups in Yorkshire and the Humber to explore these questions.³ We listened to people from all walks of life discuss their experiences of, and aspirations for, their local economy in a core city (Leeds); a smaller, less central city (Hull); an ex-industrial but well-connected large town (Barnsley); and a more remote and less populous coastal community (Scarborough).⁴ Of course, our groups could not possibly capture the full diversity of local areas. However, as Figure 1 shows, paying attention to what happens in towns and cities is justified given that Great Britain is a highly urbanised

¹ See, for example, H Overman & X Xu, [Spatial disparities across labour markets](#), IFS Deaton Review of Inequalities, February 2022.

² Department for Levelling Up, Housing and Communities, [Levelling up the United Kingdom](#), February 2022.

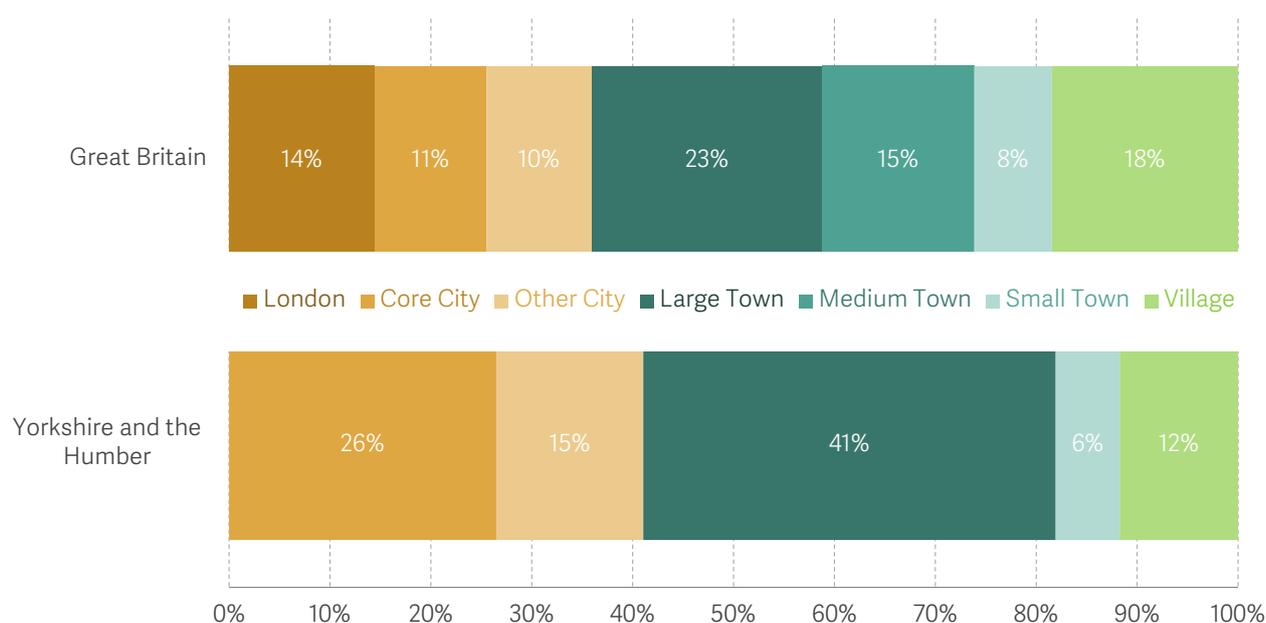
³ See Annex 1 for key statistics about each of the places we visited as part of this project.

⁴ Our participant frame for each focus group was as follows: five men/five women; three/four participants from households with an income (earnings plus benefits/pension income) of £250/week or below, four from households with an income between £250-£500/week, three/four participants from households with an income greater than £500/week; a mix of ages with no more than two participants aged 65-plus; six/seven participants in work, and three/four not in work (inactive or unemployed). All had to have lived in the local area for at least one year. Some drop outs meant that these ratios were not always achieved but all groups contained a broad cross-section of the local population.

country (and Yorkshire and the Humber even more so). More than one-third (35 per cent) of the working age population lives in a local authority that is dominated by a city, for example, and a further 46 per cent live in places dominated by towns.⁵ What, then, did we find?

FIGURE 1: The majority of the British population lives in towns or cities

Proportion of population, by local authority settlement type: Great Britain & Yorkshire and the Humber, 2021



NOTES: 'Core city' relates to eleven major 'population and economic centres' namely: Birmingham, Bristol, Cardiff, Edinburgh, Glasgow, Leeds, Liverpool, Manchester, Newcastle, Nottingham and Sheffield. 'Other city' refers to other settlements with more than 175,000 inhabitants. 'Large town' refers to settlements with a population in excess of 60,000, and 'Medium town' a population of over 7,500, with 'Village' covering all other.

SOURCE: Analysis of ONS Population Estimates; local authority settlement types are from C Baker, *City & Town Classification of Constituencies & Local Authorities*, House of Commons Library, June 2018.

There can be a good, a bad and an ugly side to one's local area

To begin, our focus groups made clear that place matters a great deal to people in sentimental terms. Attachment to the local area was often very strong: our focus group participants spoke eloquently about what they liked about their places and what they meant to them.⁶ Green spaces and natural beauty stood out for many as key attributes, and feeling safe in a place was important too. But perhaps what was most valued by our participants was simply the sense of community and 'home' that their place provided.

⁵ Throughout this briefing note, we use settlement classifications from C Baker, *City and town classification of constituencies and local authorities*, House of Commons Library, June 2018. This categorises each local authority according to the type of settlement in which the largest share of its population resides.

⁶ We deliberately left the term 'your place' undefined in our focus groups to allow participants to put their own boundaries on the concept. In fact, without exception, participants interpreted this term quite narrowly to mean their town or city of residence.

Those who were 'born and bred' in a place felt this particularly acutely, but incomers also spoke readily about how much they cared for, and felt accepted in, their local area.

It's a great place to bring up kids. It's relatively safe. It's a beautiful place, lots of fresh air. (Scarborough)

When I left [a long-term job overseas], I came back to Leeds not just because all my family are here, but it's where I know, it's where I grew up, it's where I feel safe. (Leeds)

I like living here. Although we spoke about, you know, no shops and homelessness, there is this community spirit. People stick up for each other, they talk. It's just a friendly place to live in. (Hull)

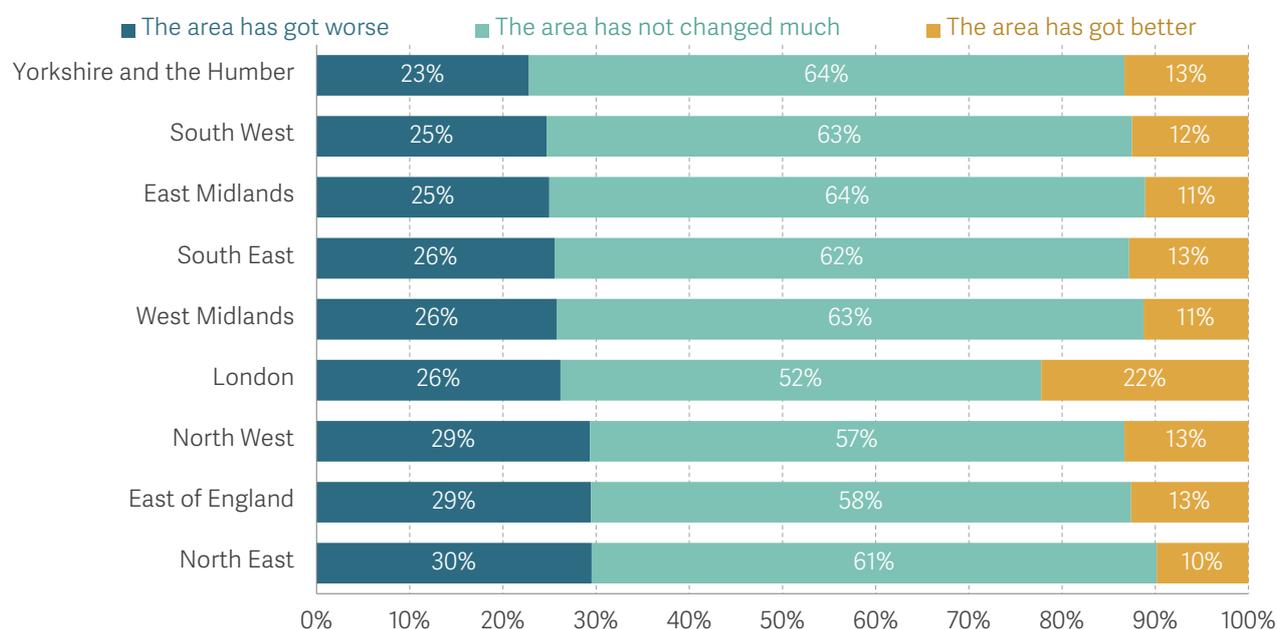
There're things that need doing, but I wouldn't go and live anywhere else. (Barnsley)

As the quotes above already indicate, however, the pleasure people took in their place was rarely unalloyed. Although the local labour market was widely viewed as strong in all four areas (a topic we will return to in detail shortly), many spoke of their place as stagnating or even deteriorating in recent years. In this regard, the people of Yorkshire and the Humber do not appear to be atypical. As Figure 2 shows, more than one-in-five people in all regions of England reported that their area 'got worse' between 2017 and 2019 (with those in Yorkshire and the Humber the least pessimistic of any region).⁷

⁷ We show results for 2019-20 in order to avoid the confounding effect of the pandemic.

FIGURE 2: At least three-quarters of people in every region of England think their area has stagnated or deteriorated over the past two years

Proportion of population reporting 'Has your area got better or worse in the past two years?': England, 2019-20



NOTES: Data available for England only. Base is those who have lived in an area for more than two years.
SOURCE: Analysis of Department for Digital, Culture, Media & Sport and Office for Civil Society, Community Life Survey.

In every part of England, more than three-quarters of people say that their place has either trodden water or deteriorated over time. On the plus side of the ledger, Londoners are the most positive, perhaps explained by London's younger population (younger people in all regions are more likely to say their area has improved) and the reality of a capital city that is benefiting from investment in ways that other parts of the country are currently not.⁸

There were two stand-out issues in our focus groups when it came to discussing the deterioration of their place over time. First, there was a high level of complaint about the quality of public services in each, ranging from the NHS to education to policing and the courts. Participants vividly described what the austerity of the 2010s had meant to them, and how they felt this had degraded their home areas over time. As a result, there was a strong sense of distrust for the government, and questions about its ability to deliver for the local area.

My little girl fell and broke her wrist and they said, don't go to A&E, it will probably be really busy, go to the minor injuries. And they said, we're going to be out 3 hours. She was screaming she was in that much pain. And after about two and a half

⁸ It is also worth noting that the share of people reporting things have 'deteriorated in their area' has been steadily climbing over recent years, with the average share rising from 18 per cent in 2012-13 to 26 per cent in 2019-20. Source: Analysis of Department for Digital, Culture, Media & Sport and Office for Civil Society, Community Life Survey.

hours I said, how long is the wait? They said we've had some emergencies come in, you're going to be another five hours. (Hull)

The police just haven't got the resources to deal with somebody that's dealing drugs...But it's just not the police that don't do things. It's then the courts that don't do anything. (Barnsley)

I just don't see things changing ... all I've seen in last 10 to 15 years is public services getting worse and worse ... a two per cent [pay rise] for the NHS? Well it's just a punch to the guts. (Leeds)

But if our participants were cynical about national government's capabilities, that was nothing compared to how they felt about 'the council'. The most pressing issue for many was the physical fabric of their place, and especially the hollowing out of the city or town centre. This sort of deterioration meant that some of our participants avoided what had once been the key shopping district of their place, either because it simply wasn't alluring enough, or because they felt unsafe visiting their town centres even during daylight hours. Specifically, they were put off by the mixture of a lack of other visitors, meaning the place felt quite empty, alongside a high number of street homeless. The exception was Leeds, where participants spoke positively about the amenities such as shops and restaurants in the city centre.

A lot of people want to buy funky clothes. There isn't really anything...Nothing vintage or nothing cool that's going to make you want to hang out in the town. When I walk through the town I just want to get through it as quickly as possible. (Scarborough)

We haven't got any shops any more, I don't even bother going into the city centre because you're wasting your time...I usually go shopping out of town, Leeds, Manchester or online. (Hull)

Well, it is [scary] when you go in. I'm an older woman on my own and you're looking around all the time, because, well, I don't feel safe. [Question: Was it different in the past?] Absolutely, yes. (Barnsley)

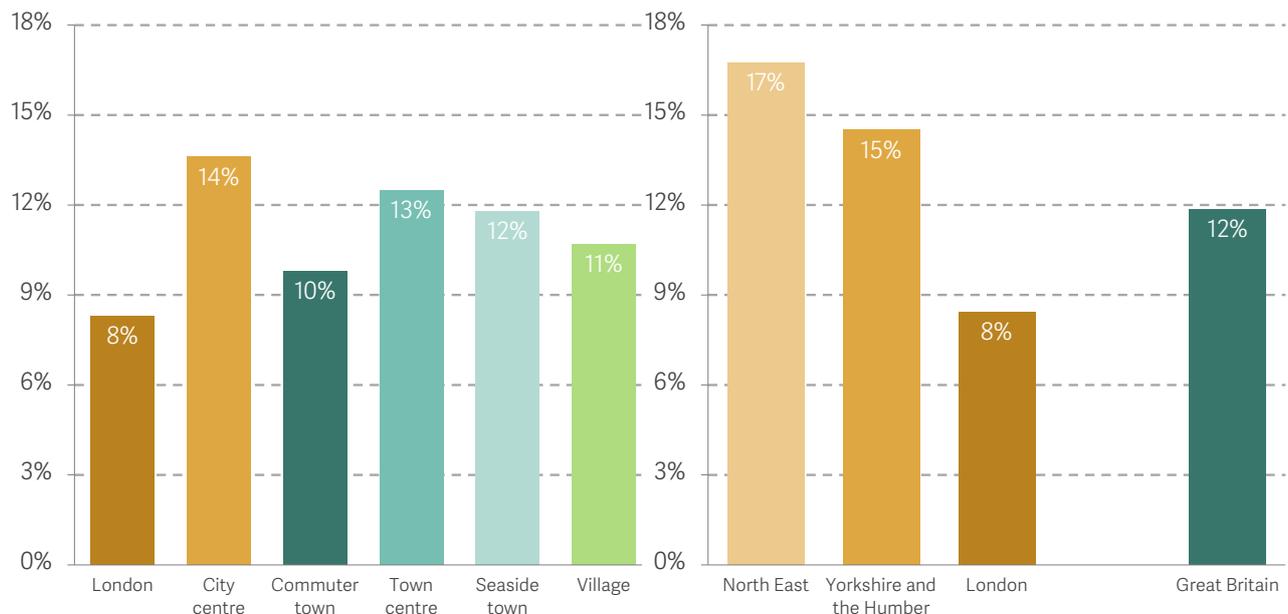
Figure 3 suggests that our focus group participants were right to be concerned about city and town centres in particular.⁹ The left-hand panel shows the retail vacancy rates for different local authority settlement types across Great Britain. The difference between one-in-seven (14 per cent) vacant premises in city centres other than London and one-

⁹ Again, we present results here for 2019 to avoid the pandemic effect. However, the trends we show hold true for 2020 and 2021, albeit at inflated rates.

in-ten (10 per cent) in commuter towns on the outskirts of large conurbations is perhaps the most striking takeaway, and accords with the rise of out-of-town shopping centres.¹⁰

FIGURE 3: City and town centres have the highest share of empty shops

Retail vacancy rates by local authority settlement type (left-hand panel) and for selected regions (right-hand panel): Great Britain, 2019



NOTES: Local authority settlement types are those used by Local Data Company.

SOURCE: Analysis of Local Data Company data provided by British Retail Consortium.

Moreover, as the right-hand panel shows, Yorkshire and the Humber is not an outlier in this respect. Although the region has slightly higher rates of retail vacancies than the national average (15 per cent compared to 12 per cent), it is not the highest (that booby prize goes to the North East at 17 per cent), but it is considerably more 'hollowed out' than London, which has the lowest share of empty shops at 8 per cent.¹¹

People have an economic vision about how things could be better in their place

Our focus group participants' concerns about their place readily translated into ideas about how things could and should be improved. The history of their place and its natural endowments loomed large for many in our conversations. For most people, the contribution their town or city had made to the national economy in the past was a source of pride and identity, and, having been economically productive in the past,

¹⁰ See, for example: M Carmona, [The existential crisis of traditional shopping streets: The sun model and the place attraction paradigm](#), *Journal of Urban Design*, Vol 27(1), 2022.

¹¹ See also: Public First, [Levelling Up Poll](#), November 2021 in which 50 per cent of adults in Great Britain reported that their nearest high street had worsened in the past decade, and the majority of those whose high street has declined cited boarded up shops as the reason why things have deteriorated.

people felt their place could be so again. But despite some nostalgia, participants were realistic about the role their town or city could play in a modern economy. Indeed, there was some concern that the past inhibited vision and was potentially holding places back.

[Participant 1] You know, we are not a big city. We're a small coastal town ... So, you know, we've got to make the best of what we've got. [Participant 2] If we had a massive water sports centre here too – surfing, windsurfing, powerboating, training for the fishermen as well – that would be a massive help...we're near the coast, it's such a great opportunity that not all have. (Scarborough)

I think it's changed a lot, Barnsley. Every family and generations going back were mining, and that's now shut down. Barnsley is now trying to create industrial estates, putting small technology firms, small businesses, that's cropping up all the way and we've got big warehouses because we're near the M1 motorway. Barnsley is diversifying. (Barnsley)

I think maybe historically perhaps, there is still an image that Hull has about docks and fish. (Hull)

Strikingly, our focus group participants understood that investment would generally flow to large conurbations, that similar firms would cluster together, and that the presence of universities could stimulate growth. When we posed the hypothetical question 'if a new tech park was going to be built in Britain, where do you think it would be located?' to our groups, not a single participant suggested it should be located away from the orbit of a large city. Moreover, those in our focus groups were accepting that more investment flowing to larger cities meant that they were the places one needed to go to in order to get the best salaries.

We are lucky in Leeds with our colleges and universities, the diverse range we've got, there's engineering, law, fashion and stuff like that – it's fantastic for the city. (Leeds)

[Question: If investment for a new tech park was available, where would it go?] Oxford or Reading, York or Leeds. Where there's already people and transport. (Scarborough)

It's always been the case: if you wanted the bigger, higher salaries, you go to city centres, it's always been the case to work in a city centre if you want the highest salary. I think that's never going to change. (Barnsley)

However, there were stark differences in opinion about where this fictional tech park would most likely be. Across the board, around half of participants thought it would inevitably be located in the South of England: London, Oxford, Cambridge and Bristol

stood out as the key contenders. But this fatalism was not shared by all in our groups. For others, places such as Manchester and Leeds were seen as equally fit for purpose (even if there were some Lancashire/Yorkshire tensions observed!). Some in our groups, however, thought that investment should be actively directed to a city like Hull which in their view needed a boost far more than already prosperous cities.

No, it'll never happen [significant investment in the North]. It'll just get worse. It'll be London and the South East forever. It'll just get bigger and stronger; the rest of the country will just get weaker and weaker. (Barnsley)

[How would you feel if the investment went to London?] [Participant 1] It's just what's expected – we're used to that. [Participant 2] That's their loss – it's such a shame when there is so much talent up here. (Leeds)

You've got to go for Hull. It's got to start somewhere, regenerating the rest of the country has got to start somewhere. We can't let them keep having it all down there [the South] and it will not work if it just tries to grow out. You know, they've got to start putting things in these outposts. (Barnsley)

Successful cities can have their downsides

Although people recognised that investment was necessary to drive shared prosperity, they noted that there could be some costs associated with accelerated growth of their cities. Our participants understood higher-paid jobs generated work for others, but they feared that growing affluence would go hand-in-hand with growing inequality. Those in Leeds already noted this phenomenon, while our participants in Barnsley worried that more high-paid jobs locally would push up prices too.

I think Leeds has got one of the biggest inequality gaps in the country and every bus stop you go out to Harewood, you lose a year of life expectancy. You've got lots of service jobs, coffee shops and the like, low pay – to serve the people on those higher wages with good jobs in the finance industry. (Leeds)

If you increase wages to say London's wages, things are going to go London's cost of living. So, do you actually want a lower wage and a low cost of living and an easy nice life to live, or do you want higher London wages and it'll cost a fortune to live? I don't know where you draw a line. (Barnsley)

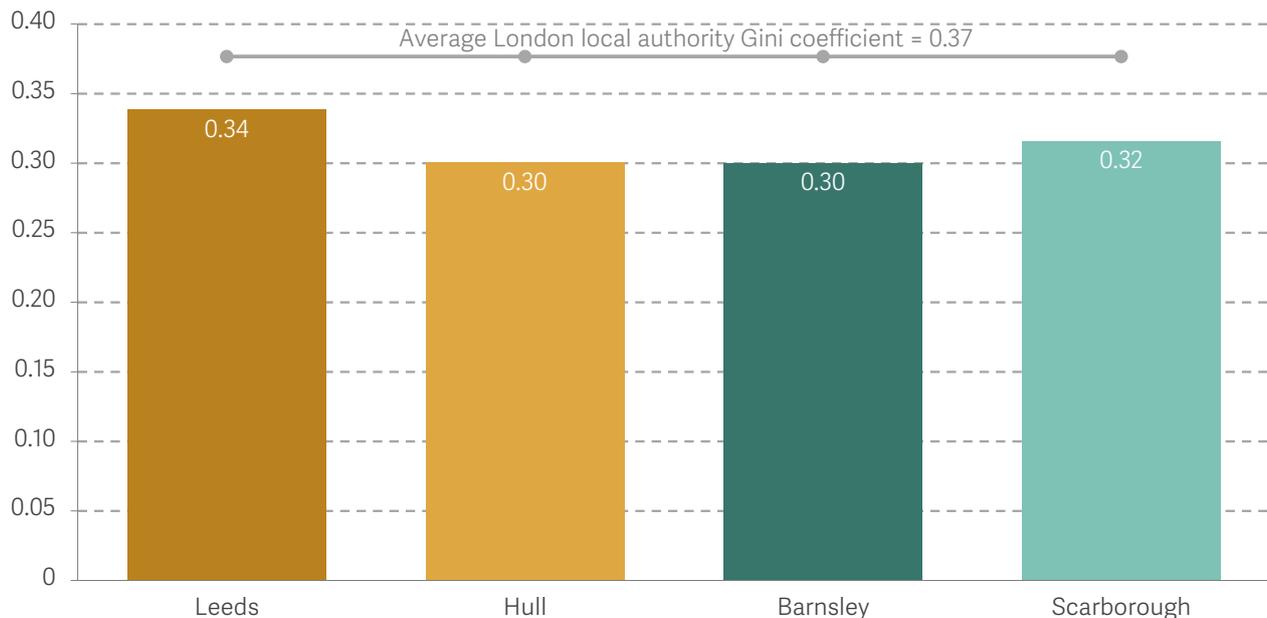
Interestingly, our participants' perception that cities are especially unequal is consistent with academic studies.¹² And Figure 4 drives the point home. Here, we present the income equality (as measured by the Gini coefficient) for the four local authorities that

¹² See, for example, K Behrens & F Robert-Nicoud, [Urbanisation makes the world more unequal](#), Vox-EU/CEPR, July 2014; E Glaeser, M Resseger & K Tobio, [Inequality in cities](#), Journal of Regional Science 49(4), 2009.

we visited for this project. As the chart makes plain, our participants in Leeds were right to think that income inequality is a bigger issue for them than for participants in Hull, Barnsley and Scarborough, and higher still in London.

FIGURE 4: Income inequality is higher in Leeds than in other places we visited

Gini coefficient for income: selected local authorities and London local authority average, 2016



NOTES: London Gini coefficient is the average across all London local authorities.

SOURCE: Analysis of A Rae & E Nyanzu, *An English Atlas of Inequality*, University of Sheffield, November 2019.

Anxiety about how the cost of living could increase in cities relative to other types of place if productivity improved was most evident in discussions about housing costs. This was particularly acutely felt in Leeds, where our participants talked about how surging rents made it impossible to save for a deposit and how they were priced out of home ownership. Moreover, Figure 5 suggests they are right to be concerned: house prices have grown faster in local authorities with higher rates of median pay over the last 15 years than in those where average earnings are lower.¹³

I'm living at home with parents saving for first house so I'm being able to save quite a fair bit doing that. I absolutely feel for anyone out there now that's renting – and has aspiration to buy a house because they [rents] are going through the roof. (Leeds)

¹³ We acknowledge that house prices are an imperfect measure of ongoing housing costs, but it is reasonable to assume rents and house prices change in local areas relative to each other in a similar way. For further discussion about changing housing costs by local areas over time, see: L Judge, *Moving matters: Housing costs and labour market mobility*, Resolution Foundation, June 2018.

I am splitting up with my partner and I'm worried – what can I afford? I won't be able to get a mortgage on my own...what am I going to get? The girl I work with pays £700 for a studio – I mean that's just ridiculous – it's just not affordable. (Leeds)

FIGURE 5: House prices have risen fastest in places with higher average pay over the last 15 years

Change in nominal average house price (2004=100), by median hourly pay: Great Britain, 2019



NOTES: Hourly pay is residence-based.

SOURCE: Analysis of ONS, UK House Price Index; ONS, Annual Survey of Hours and Earnings.

Finally, although participants in Leeds acknowledged that there was a great deal of house building in the city, many were concerned that the price of new builds was often too high. Crucially, our participants were critical of the lack of truly affordable social housing being built, an issue that was exacerbated by cuts to housing support through the benefits system.

The amount that they are building and you see the prices, and it's like who can afford it – the salaries for the area don't match what they are building. (Leeds)

Ten per cent of all new builds are supposed to be affordable housing, aren't they? Some are supposed to be allocated to local councils for council tenants - but I think what they do is they say it is affordable but it isn't ... and then with the rent caps [restrictions on housing benefit], people can't afford the difference or to bridge the gap. (Leeds)

Good connectivity means more job opportunities and access to culture

Outside of Leeds, our focus groups were less likely to raise the issue of housing affordability, but connectivity between places featured more prominently. In Barnsley, this discussion was broadly a positive one, with the town's location and road and train links to the core cities of Leeds and Sheffield meaning that participants benefited from spill-overs and saw their area's economic success as bound up with that of their larger neighbours. Rather than fearing that Barnsley risked becoming a commuter town, residents were positive about the economic opportunities they could access in nearby cities while also enjoying the lower house prices and the strong community feel of a smaller place.

If more business came in to Sheffield...then if they were good skilled jobs or good paid jobs, that definitely would be a benefit to us. (Barnsley)

Looking for jobs I would have just looked and seen it was Sheffield, that was near me. I'll do that, I'll take that one on, you know it's, it's something that's achievable and doable and it's worth doing and it's worth the commute for the money and the careers you might be able to get out of it. (Barnsley)

We heard a very different story in Scarborough and Hull. Both locations suffered from being 'at the end of the line'. This had three implications: first, it was hard for residents to access work opportunities further afield; second, it made it harder for people to visit and spend their incomes there; and third, it made it an unattractive location for firms. People felt that this was part of the reason for under-investment in their local area. But even those who lived in the far better-connected Leeds and Barnsley complained about links to key hubs, most notably to Manchester and London.

[Participant 1] There's a lack of opportunities, which partly links into lack of transport. [Participant 2] The point about transport links really resonates here. My partner commutes sometimes to Manchester, every time she has the trains have been cancelled. It's just absolutely shocking that those links don't exist given that it's a tourist town as well. (Scarborough)

The thing with Hull is you've got to be coming to Hull. You don't pass through Hull. So, I think that's part of the investment problem ... Because you've got to be coming to Hull. (Hull)

Question: Would people benefit from a new tech park in Manchester? [Participant 1] Well they would if it was easy to commute! [Participant 2] It's the Pennines – because there is literally the M62 and that's your lot. It could be absolutely fine but

as soon as there is an issue on that – then there is no alternative. I do commute to Bury some of the time and it is just a nightmare. (Leeds)

All that said, there was some recognition that transport connections were perhaps less important than in the past. It was clear that the rise of hybrid working as a result of the pandemic had opened up new opportunities for some participants.

One of the very few silver linings to come out of Covid was increased homeworking which has meant that my partner was able to utilise that to relocate here. And so even with like the flip flopping of various lockdowns and restrictions, she's not really had to go back into the office very much at all. So, it's just really fortunate that she's been able to bring a job with her as well from Manchester, that wouldn't have otherwise existed. (Scarborough)

I think with the change of everything that came with the pandemic is that there's a hell of a lot now that are hybrid, you don't have to go to the office, don't have to be in a particular place... I've never seen as many jobs available as there is at the moment where I can apply for them. (Barnsley)

Finally, it is interesting to note that transport links between places were considered important by participants in our focus groups and not just for work and job opportunities. There was also frustration that poor transport connections made it difficult to travel for leisure and entertainment in other places, or for cultural events taking place in people's home towns.

You know, there's times you wish I could just, you know, go to a decent gig. Because you can't, you can't get there. ...You can't afford to go to York or Hull for a night out. Not these days. You can't get a train back in time. If you go you have to stay for a night. (Scarborough)

I remember Elton John came to the stadium when it was new, and I think it was another big name. Rod Stewart three years ago. Everybody came, that's the point... It was an occasion. I thoroughly enjoyed it. (Hull)

Commuting by car opens up many more jobs for people, but has its frustrations

With public transport such a common cause for complaint, it was no surprise that so many participants in our focus groups felt highly reliant on their car. In this, they were not alone: pre-pandemic, 68 per cent of workers usually travelled to work by car, a figure that

rises to 74 per cent for Yorkshire and the Humber.¹⁴ Those who could not access a car clearly felt cut off from both work and leisure opportunities as a result.

Because I'm working out of Hull, I'm down the road that I know buses go down but the nearest bus stop is maybe about a mile away. So, for me personally, yes, I would need a car [to access jobs]. (Hull)

It's the transportation as well. I live out in one of the villages, and I don't drive or I have a licence, I don't have access to a car, so I'm reliant on the bus route and they are few and far between and obviously that limits what you can do in a day, what type of jobs you can do as well. (Scarborough)

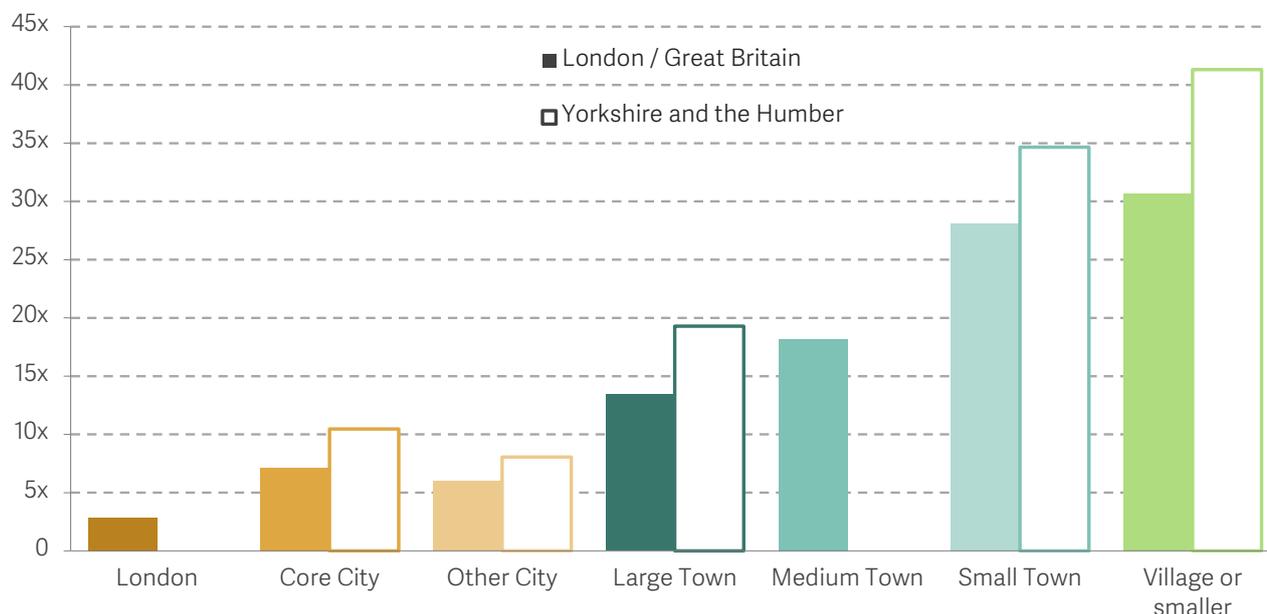
There're some lovely places out of town if you've got a vehicle and you can get out there and do it, but what can you do close by? There's a couple of walks in [town] but I wouldn't want to go and walk them on my own, I'd be a bit frightened. (Barnsley)

The extent to which the lack of a car can make it difficult to access a range of employment opportunities is clearly evidenced in Figure 6. Here, we compare the number of jobs reachable in each place by a 30-minute commute on public transport, to the number reachable by car. Disparities in public transport provision and the way in which our towns and cities are designed predominantly with driving in mind leads to the striking result that in small towns, for example, a car provides links to 28-times more jobs within 30-minutes than a journey on public transport. This compares to a 7-times multiple in core cities, and just a 3-times multiple in London. Across the board, the benefits of car ownership in terms of job-accessibility are higher in Yorkshire and the Humber than in Great Britain as a whole.

¹⁴ See: Department for Transport, [How workers usually travel to work by car by region of workplace](#) (TSGB0112), December 2020.

FIGURE 6: Driving increases access to jobs everywhere

Ratio of number of jobs reachable in a 30-minute commute by car to number of jobs reachable in a 30-minute commute by public transport, by local authority settlement type: 2019



SOURCE: Analysis of Onward 'Network effects' dataset.

This high level of car dependency in Yorkshire and the Humber might also explain why congestion and roadworks were such a bugbear in all of our focus groups. The problems that our participants outlined were not just annoying for them as individuals, but were also seen as a drag on the potential of local areas.

I dislike the unnecessary roadworks everywhere. There's the big one, which is close to a massive school. Nobody knows the way around it yet. And then all of a sudden, this week in [a nearby village] temporary lights have come up. Nobody knows why. It's just constant. Once they finish a job somewhere the lights appear somewhere else, but nobody knows the reason why they're popping up. (Barnsley)

I'm looking for a new job and I'm limited because I don't want to have to drive through the city centre because I know how bad the traffic is in that area. I'm limited to West Hull where I live because I can't spare two hours sat in traffic each day or pay for extra childcare for that time. (Hull)

[Question: what would improve your place?] More transport links. Yeah, dualise the A64. Just do something to make it easier to get to York and improve the transport links. (Scarborough)

Quality rather than lack of work is the salient issue in many places today

If we had held our focus groups in Leeds, Hull, Barnsley and Scarborough thirty to forty years ago, there is little doubt that a key concern in each local area would have been unemployment. In 2022, a buoyant labour meant that unemployment was not an issue raised in our groups. Rather, in all the places we visited, participants felt that there was work enough for those who wanted it.

There are a lot of job opportunities ... We've been looking for staff for a while. Nobody's applied! (Scarborough)

I think there's a wide range of jobs available for all skill sets. I've been looking, there's a mixture of jobs for non-qualified people and loads [of jobs] out there that suit everybody's skills and qualifications. (Hull)

There might not be these high-wage jobs here, but there are jobs if people want the jobs. I think there'll be enough jobs in Barnsley to go around. (Barnsley)

The more common refrain in our focus groups was the prevalence of low paid work in their area, especially for those who did not have a degree. There was a strong view that those doing minimum wage jobs should be valued more highly, either because the roles involved hard, physical labour or because of their social value (or both).

[Participant 1] I think the minimum wage needs to be seen as the minimum, not the standard wage. And it's very much seen as the standard here. [Participant 2] The most important thing to change about the warehouse jobs is the pay because when it's hard labour, you should be paid for that, the same way if you were doing a dangerous job. (Barnsley)

My sister worked in NHS admin for about ten years and she rather surprisingly admitted to me when we went past Costa coffee and we saw a job advert - they get paid more than me. I said to my sister – it is not worth you being in that environment, being under that much stress to be paid that pittance. (Leeds)

I left my job and I went to [work in a] nursing home ... but the conditions were horrific. I was thinking what an absolute shambles and there's somebody up there making all these profit from this care sector. You know, they can charge what they want for a person living there but they can't pay a decent wage to their workers. And I just don't understand why. (Scarborough)

In addition, our focus group participants in Scarborough and Barnsley expressed concern about how people can easily get 'trapped' in low-pay work given that so many jobs in

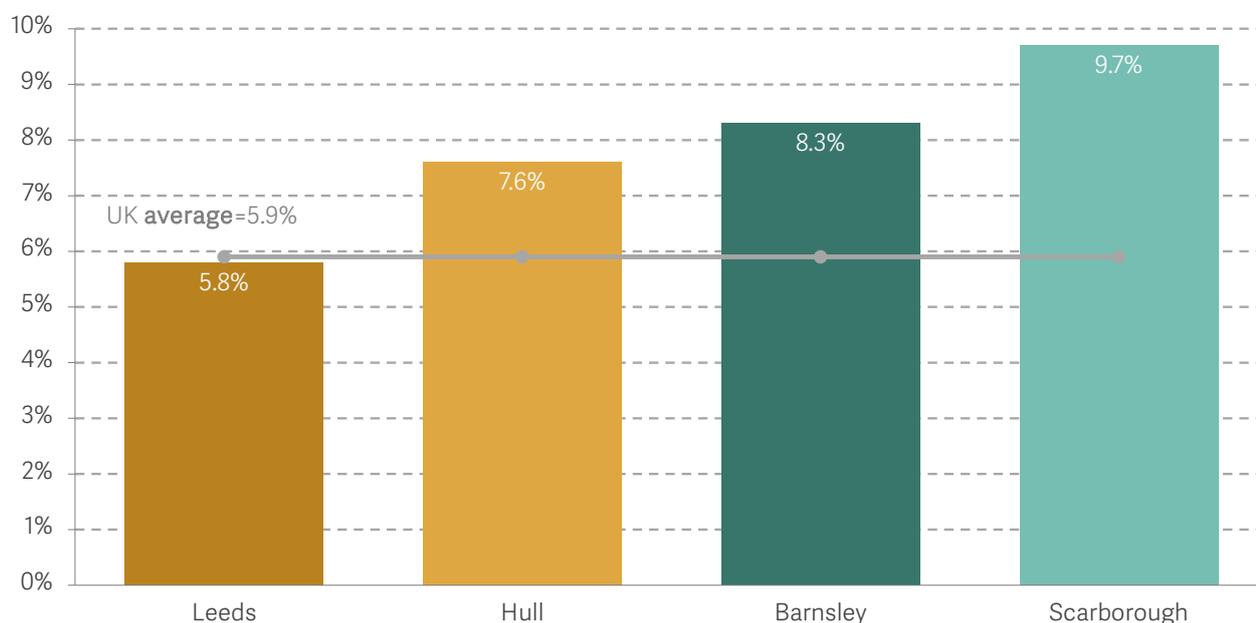
their areas are at the wage floor. Figure 7 supports this perspective, showing that close to one-in-ten (9.7 per cent) of jobs in Scarborough, and one-in-twelve (8.3 per cent) in Barnsley are minimum wage, significantly higher than the national average of 5.9 per cent. But even in Leeds, where the share of the workforce at the wage floor is slightly below the UK average at 5.8 per cent, participants in our focus groups worried about lack of progression opportunities for those working such jobs.

It's a case of, oh, okay, I work in a tourist town, so that means I could be a cleaner and do care, shops or a restaurant and that's my lot. (Scarborough)

A lot of people in Leeds are working on zero-hour contracts, in low-paid crappy jobs. There's loads of work out there but a hell of a lot of it isn't good work. There's lots of talk about Leeds being the financial capital and this, that and the other – but there are people doing [long] shifts in warehouses and you don't have any long-term prospects in those jobs and there's no career path. (Leeds)

FIGURE 7: Minimum wage jobs are more common in Scarborough than in Leeds

Proportion of employees on the National Living Wage/National Minimum Wage: UK and selected local authorities, 2021



NOTES: Includes those paid below or within 5p of the applicable rate.

SOURCE: Analysis of Low Pay Commission, Minimum wage in 2021: Coverage by local authority, region and nation, December 2021.

Our focus group participants also reported that low-paid work often went hand-in-hand with poor terms and conditions. Lack of security of contract (or indeed any contract) was a common complaint, leaving people exposed to shocks and feeling unable to plan (for example, to save to buy a house) due to the risk of job loss. But we also heard about

behaviour by employers that went beyond being poor, to in some cases being seemingly unlawful.

What happened with the big employers, and that's why I got made redundant, is because it was all turned into contractors. The contracts now are zero-hour contracts whereas contracts back then, it wasn't well paid place to be, but you had security. They couldn't say oh, you're finished. (Hull)

Every coffee shop I've worked in has shut down, like about four or five in a row. It's constantly people revolving. I never have a contract, so I'm just told it's over now. (Scarborough)

The minimum wage isn't as good as people make it out to be, especially when you're – so like I used to do security – they put you on minimum wage, but you still have to pay for a licence. (Hull)

My brother worked for [an online retailer in a warehouse] for three months and once his contract was coming up, they sacked him. All his friends got sacked as well and they all had to reapply for their jobs, so they could just keep them on a continuous roll so that they didn't have to give them a permanent contract. They gave them incentives, I think it was £1,000 for signing up. A lot of them never received it as well. (Hull)

Those from smaller places leave home most frequently to find opportunity elsewhere

With opportunities clustering in cities and spill-overs largely determined by transport links, it was unsurprising to hear from many in our focus groups that they did not always expect to benefit substantially from accelerated growth in their region. Our question about the likely location of a hypothetical tech park was very revealing in this regard. Although there were participants who wanted it to be based in the North wherever they lived, others were indifferent because they did not think it would be close enough to their home area to benefit them and their communities.

I'm quite indifferent really [between the tech park being based in Hull or Oxford]. I mean, I have to say, it might be selfish like, but it's not really going to affect us in the long run. (Barnsley)

I don't think more jobs [in Leeds] would have a positive effect [on Hull]. I mean, the price of petrol now and public transport, it would just be uneconomical to travel there unless there was an exceptionally high salary. (Hull)

For those in farther-flung places, the option of moving away was instead discussed as a realistic way to expand one's opportunities. Somewhat surprisingly, those in our focus groups generally saw this as a good thing, as it provided a way to access a wider range of jobs and better pay. In particular, most felt it was a natural for young people to move away, especially from smaller places such as Scarborough. But in Hull, there was more ambivalence towards the idea of young people leaving the area and a stronger sense that there should be enough on offer in a place of its size for people not to have to leave in order to achieve a better standard of living. In our other groups, concern focused more on those who were left behind.

I think people should move away. When I was younger I couldn't wait to get down to London ... when I was in my twenties it was great to live in a city and do things. As you get older, you know, things change. But I think you should go and explore. (Scarborough)

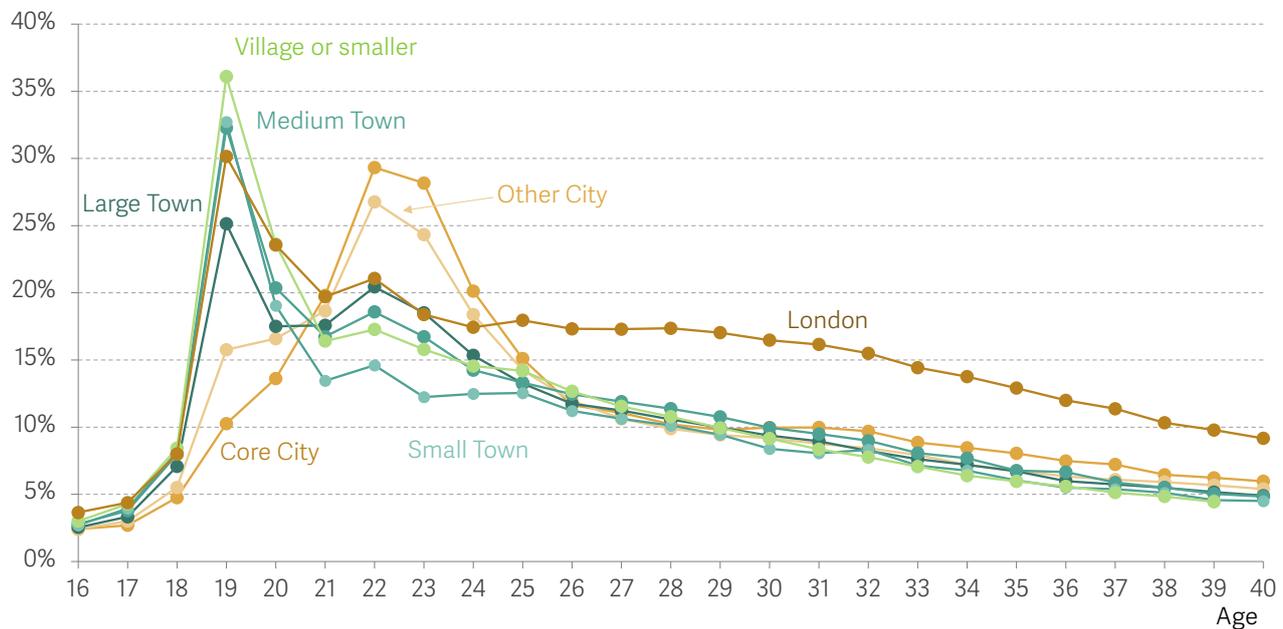
[Participant 1] I think it is great for any young individual to go off and see the world. [Participant 2] If they have no choice [but to leave] it's not so great, and it's not so great for the community you are leaving. [Participant 3] Yeah, I left [my rural home area] and everyone left there is 60-plus. (Leeds)

Figure 8 confirms what we heard. Those living in less-urbanised local authorities are more than twice as likely to leave their home area as they enter adulthood than those living in cities (other than London). More than one-third of 19-year-olds leave local authorities dominated by villages or small towns for example (36 per cent and 33 per cent respectively), three times as many as from core cities (10 per cent) and twice as many as other cities (16 per cent). But after that age, residents of areas dominated by smaller settlements are the least likely to migrate outwards.¹⁵

¹⁵ There is a spike up in out-migration at ages 21 to 23 years concentrated in cities; this seems likely to be driven by graduates leaving their university town or otherwise moving in the early years of their careers.

FIGURE 8: Those living in smaller places are most likely to leave when they reach adulthood

Average outward migration rate from local authorities, by local authority settlement type and single year of age: England, 2019



NOTES: Excludes Buckinghamshire and Northamptonshire.

SOURCE: Analysis of ONS, Estimates of the population for the UK, England and Wales, Scotland and Northern Ireland.

Poorer places produce fewer young adults who go on to higher education

Figure 8 also hints at an issue that came up strongly in our focus groups: the key chance that people have to move away from their local area is through entering higher education by the age of 19. Moreover, they also flagged that young people who leave for university frequently do not return, either because they become attached to their place of study or because they make the most of the wider options that open up to them once they have a degree. This observation is supported by longitudinal analysis: places with high average earnings tend to attract graduates through migration, and graduates who have grown up in places with low average earnings are more likely to stay away.¹⁶

Most of my kids' friends all went to uni and they have not stayed in their hometown. They've gone to uni and made their home there. I would say at least 80 per cent of people who I know from Barnsley who have gone to university have not come back to Barnsley. Yeah. I'm not saying they wouldn't like to, it's because they can earn a better living in a bigger city. (Barnsley)

¹⁶ J Britton et al, *London calling?: Higher education, geographical mobility and early-career earnings*, IFS, September 2021.

I don't want [my children] to end up in the same cycle I had. I worked since I was 14 in various random jobs, but I've worked to get where I am now ... So they have a uni fund already set up - because they are going to uni, they will be leaving, and what they do after that is up to them. But it's sad to say that I don't want them to stay here. (Scarborough)

In all of our focus groups, there was real concern expressed, however, about what the offer was for those who did not go on to university. And our participants in Scarborough gave a further turn to this screw. They pointed out that the quality of schools in less prosperous places can also drive poorer outcomes, limiting the chances of young people from these localities leaving for higher education further still. We heard that the low level of amenities in the town meant it was challenging to attract and retain teachers, and that the lack of opportunities locally made it hard to inspire.

It's a challenge, keeping good teachers in a place like this, and that can really affect the schools. (Scarborough).

If you can't see it, then you can't be it and that's what I'm struggling with at the moment. They [young people] don't see enough people coming back saying, "I've been here, I've been there". So I think on a daily basis, it's quite a challenge to inspire young people that have been hit through a two-, three-year pandemic, never sat an exam, and then say, "Go off to uni". (Scarborough)

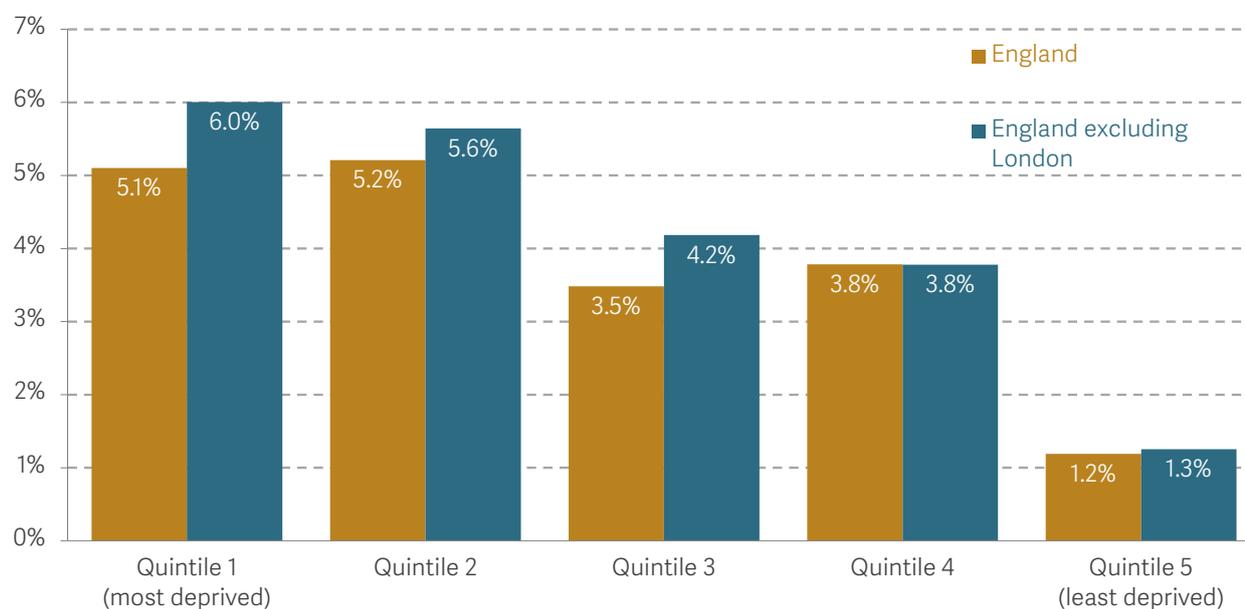
Figure 9 suggests our Scarborough focus group was on to something. Here, we show the share of secondary schools that Ofsted have rated as inadequate, having serious weaknesses or in special measures by the level of deprivation of the local authority in which their school is located. Although it is acknowledged that this metric is a far from a perfect predictor of outcomes, across England there more than one-in-twenty secondary schools rated inadequate or below in the most deprived quintile of local authorities, compared to just over one-in-a hundred in the least deprived (5.1 per cent compared to 1.2 per cent).¹⁷ The gap between school ratings in the most and least deprived places get even bigger when we exclude London, a useful exercise given the recognised high performance of schools in the capital.¹⁸

¹⁷ See, for example: S Von Stumm et al, School quality ratings are weak predictors of students' achievements and wellbeing: Ofsted ratings and student outcomes, Journal of Child Psychology and Psychiatry, 2020.

¹⁸ See, for example: A Ross et al, Examining the London advantage in attainment: evidence from LSYPE, DfE Research report, November 2020.

FIGURE 9: Children in the poorest areas are four times more likely to attend a secondary school rated inadequate or below than those in the least deprived places

Proportion of state secondary schools ranked as inadequate or below by Ofsted, by local authority deprivation quintile: England, 2021



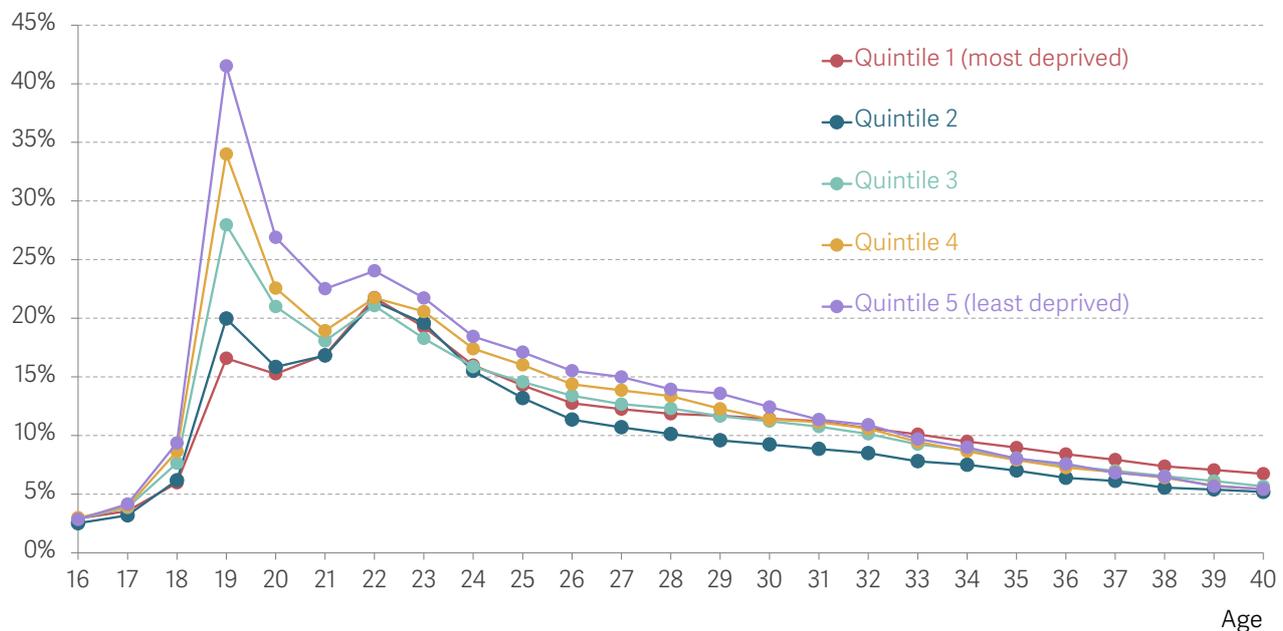
NOTES: Excludes Buckinghamshire and Northamptonshire.

SOURCE: Analysis of Ofsted, State-funded school inspections and outcomes as at 31 December 2021; Ministry of Housing, Communities and Local Government, English Indices of Deprivation 2019.

As a result, many in our focus groups were more worried about those who do not get the grades to go to university and end up 'trapped' in their home town, than those who have the chance to leave. Again, Figure 10 which repeats the exercise in Figure 8 but instead looks at outward migration rates for places by deprivation suggests they are right to be concerned. As this makes very clear, those living in areas with the highest levels of deprivation are significantly less likely to leave in early adulthood than those in the least deprived places (17 per cent compared to 42 per cent).

FIGURE 10: Young people from the least deprived places are significantly more likely to leave home in early adulthood than those from the most deprived areas

Average outward migration rate from local authorities, by deprivation quintile and single year of age: England, 2019



NOTES: Excludes Buckinghamshire and Northamptonshire.

SOURCE: ONS, Estimates of the population for the UK, England and Wales, Scotland and Northern Ireland.

Finally, participants identified a dynamic that is very much chicken-and-egg: if young people do not know people locally doing higher-skilled jobs, then they may not have the role models that inspire them to study and leave. But without a skilled local workforce, firms find it hard to establish themselves in these areas. Likewise, a lack of skilled jobs locally also limits the chances of progression for those that stay but wish to move up and out in the future.

I'm aware of a really successful start-up, that started out the university. They had five employees as a web company and they've ended up going to York, they're now employing over 40 to 50 people, and these are all jobs paying £30k, £40k, £50k but they couldn't stay in Scarborough because they couldn't attract enough people. That's such a good success story for this town that's now gone 40 miles away. Such a shame. They just could not recruit enough [skilled] people. (Scarborough)

At the minute, if you want to progress and you want to make it to management or bigger money, whatever it may be, and you look to relocate to Manchester, Newcastle or Leeds where there are these big-name firms – because we don't have those companies here – you'll never have the experience to work there. Whereas if

you have people able to get experience [here], it would give them the opportunity to go all over the country. We want the opportunities to be able to get out there and see other places. (Hull)

People are clear-sighted about the tensions inherent in their location

Across the whole range of topics discussed in our focus groups, participants combined insight with realism when discussing the trade-offs involved in bringing greater prosperity to their local area. People in our Leeds group understood, for example, that rising prosperity was likely to be coupled with rising inequality and higher house prices. But they also had thoughts on possible policy answers to this challenge, as our next quote illustrates:

[Rising housing costs] doesn't have to happen does it? There just needs to be a massive programme of affordable housing and social housing – selling off the council housing was classic ... we just need to build more houses! (Leeds)

So what other tensions – and potential solutions - did our other groups identify? Our Barnsley group had a clear understanding of what their geography means. Barnsley's connections to major cities provides the potential for people to access a large range of jobs, which can be better than ones that are available close to home, albeit with the car as the dominant mode of transport. But its proximity to motorways and lower land prices also meant the area was a prime location for warehousing. Our participants readily welcomed this as a big part of their economic future, but recognised that jobs in such places needed to have better conditions and more progression prospects.

Yeah, I mean, we're seeing Amazon Prime popping up all over ... because I think the land is cheap and they know that - that's why they're building these massive out-of-town sheds all over the place... We've got great transport links because we're quite central to going north and south and east and west. I wouldn't be surprised if things don't start popping up further down this way. So, I'm quite optimistic that there will be more opportunity come in this way in the next few years. (Barnsley)

[Working in a warehouse], it's a rubbish job, a minimum wage job, it's hard. on average, turnover's like every couple of weeks, somebody will leave and we will get somebody new in. And so I think it's hard finding these jobs that can pay the bills and that you're not leaving feeling exhausted and underappreciated...there's plenty of jobs there, but not careers. (Barnsley)

In contrast, Hull is relatively isolated, presenting its residents with a completely different set of challenges. Our focus group participants recognised that this meant the city could not rely on connectivity to other places in the same way that occurred in Leeds

or Barnsley, and that it needed its own 'offer' as a result. Our groups had some sense of what success could look like (a greater integration of the university into the city life, for example, or an expansion of new industries, such as those supporting wind farms at Hornsea). But our focus group was also clear that the city centre had to be improved if prosperity was to flow into the city, rather than out to surrounding, more affluent, areas. Here, they were keen to get tough.

[Participant 1] It's the rental prices [that are hollowing out the city centre], I know somebody that was renting a shop and she had to give it up because she can't afford the rent. Everything has gone up that much. [Participant 2] I think if they [landlords] were made to reduce the rent [of premises in the city centre] they might get people in. Well, I'm sure they would and then they win because while they're empty, there is no win situation. (Hull)

Finally, participants in Scarborough understood that the natural beauty of their place would mean tourism continued to be their number one industry. Although they aspired to exploit their endowments more lucratively (through a sailing school, for example, or a marine biology department of a university relocating to Scarborough), they were open-eyed in recognising that most who wanted higher-paid jobs would need to leave. However, they were strongly of the view that amenities needed to be better for those left behind who were often limited to low-paid and poor quality work.

It's the backwateriness. That's the fact that it's like as a result, you know, everything is just a bit not quite as good as everywhere else. (Scarborough)

It's the same with the Alpamare [the recently built leisure centre]. It was funded by the council and they just weren't making the money back on it so the prices just skyrocketed, and now local people like myself can't even afford to go. That's a shame because it was marketed as this great swimming pool and attraction for the local community to use and you can't afford to go there. It's kind of pointless. (Scarborough)

Economic leadership needs to be matched with adequate funding

While our focus groups were surprisingly realistic about the economics of their place, they were perhaps overly idealistic about what they could expect of their local leaders. There was a strong sense in all of our groups that 'the council' was responsible for solving the multiplicity of problems our participants encountered every day. Participants wanted those in power to make sure that roadworks should be quick and efficient, for example; empty shops were repossessed and re-let; schools improved; and town centres beautified and better policed. But our participants expectations were frequently disappointed.

They [local politicians] are all very good at talking the talk, but not at getting things done. (Leeds)

I think council should be more responsible for all the things...The council are allowing these horrible places ... and these buildings and these shops they don't belong to a council they belong to private people and council should make them shop owners and building owners keep them tidy, keep them nice. (Barnsley)

I think they'd be able to do it [fix the high street]. I mean, let's be honest, the price of everything has just gone up. Council tax is going to go up again. But I think with the money they get that they could do something. (Hull)

But participants' complaints went beyond just the day-to-day. Overall, there was a strong view that local leaders were unable to bring about sustained positive change for their place. We often heard about councils flip-flopping on decisions, for example, and failing to follow through on promises. But it was clear that if local areas were to 'take off', investment had to be sustained and at scale. In Hull, for example, residents were clear that, despite being City of Culture in 2017, some upgrading to its shops, and the arrival of new high-end employers like Siemens, this had not been sufficient to create the critical mass needed to effect the change to the local economy they wanted to see.

It gets half done, doesn't it? You know, somebody said, "Oh, we'll do this, we do that", and then, "Oh, and we got a better idea", you know, put the money somewhere else. (Scarborough)

[Participant 1] You know when we got the Hilton hotel built, it was a big thing around here that we finally had a name and the council was saying, "The Hilton's here, now so these are going to come, these are going to come". But all that came after that was House of Fraser, other shops left. There's nothing going on in the town centre anymore. [Participant 2] House of Fraser looks nice but ... I think they were hoping it would bring people from out of town and it hasn't because there isn't anything else to go with it. (Hull)

All that said, expectations were sometimes tempered with realism. This came in two forms. First, in that people described the link between the broader economic prosperity (or its lack) and the quality and vibrancy of their local town centre. There was a sense from our participants that even if the nitty-gritty of town centres could be sorted out by local leaders, the real long-term shift would only come about if incomes were higher locally.

[Participant 1] I think better paid wages creates better areas. It solves a lot of problems and the only has to be slightly better than what it is to make a big difference. [Participant 2] No matter how much of this new stuff you put in like

bowling alleys and stuff to do, it's not going to happen if people don't have the money to do it. (Barnsley)

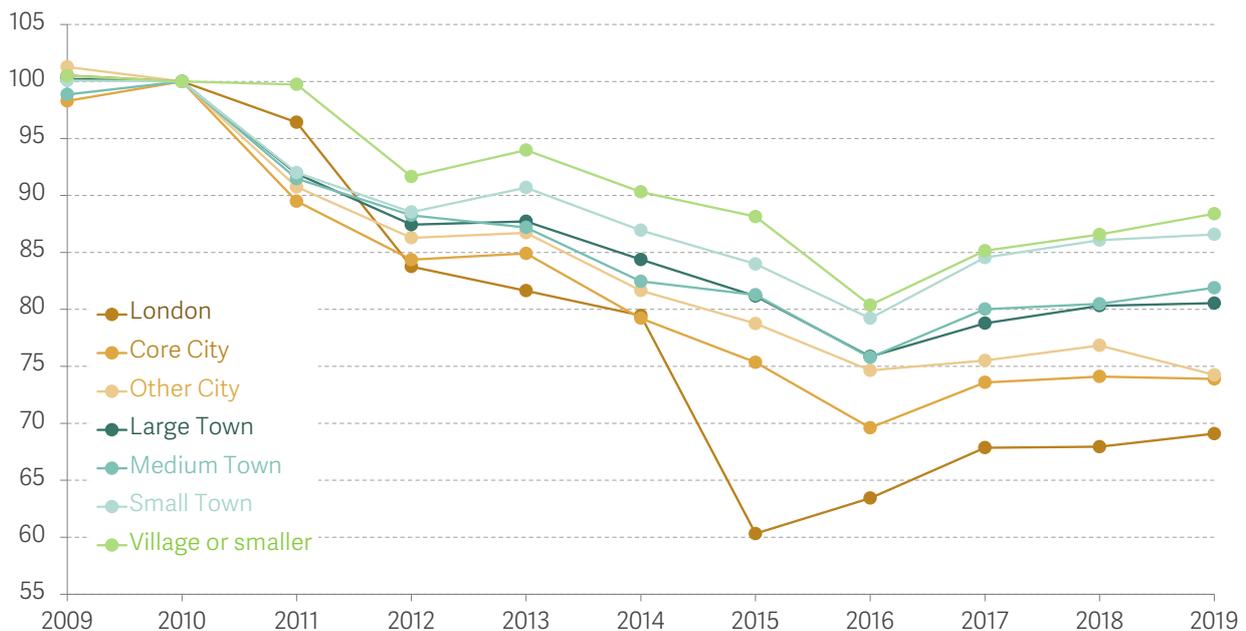
I think [new well-paid jobs] would give the city more of a vibrancy because you go into the town and into the city centre and there's just...at times almost despair, you know, with the people who are there. And while there are few jobs...people won't be spending money, because they have the money to spend. If you got professional people moving in and more fluid with their spending that would probably create jobs with their incomes. (Hull)

Second, realism was also evident in the recognition that local government finances have been hard hit in recent years and this constrained the ability of councils to deliver sometimes even the most basic of services. Figure 11 brings home the point: across local authorities in England, core cities have lost around one-quarter of their real revenue per person since 2009-10, on average; medium towns one-fifth; and even the better-protected local authorities dominated by villages and small towns have lost around one-tenth.

There have been massive cuts so the council is just focusing on basic social care and things. The bins are not being collected, potholes are not being fixed, all the classic signs - but I am not putting the blame on the council. (Leeds)

FIGURE 11: Local authorities of all sizes have experience budget cuts since 2010, with the largest per capita declines in cities

Index of real (GDP deflator-adjusted) local authority revenue per person, by local authority settlement type (2010-11=100): England



NOTES: Year shown is first year in fiscal year e.g. 2009=2009-10.

SOURCE: Analysis of IFS, Measures of local authority revenue and spending 2009-2019.

Conclusion

Let us end, however, with a positive story from Barnsley. There, the council has attracted investment to regenerate a large part of the city centre, creating a shopping and business hub called the Glassworks (a neat reference back to town's old industrial base). In one fell swoop, the development had created new jobs, brought people back into the city centre to spend money, and instilled pride of place once again.

Everybody I spoke to seems to be very proud of it [the Glassworks] at the minute. It's all new, it's all shiny. I must admit I didn't go to Barnsley very often - the whole town centre went completely downhill for me and we stopped going in altogether. But I recently went to meet somebody and it was nice to actually be there and I thought, 'Wow, yeah', I was really took back with how much they have done to it, I thought, 'Well, this looks great!'. (Barnsley)

For the people we met in Leeds, Barnsley, Hull and Scarborough, then, levelling up did not look like a tech hub in every place, nor putting a pretty veneer on their place. People are proud of their local areas, and have a strong, but realistic, sense of its possibilities. What they wanted was sustained economic growth – providing good quality jobs that are accessible by public transport as well as by car – that is truly alive to their place's endowments, driven by and driving improvements to the public realm.

Annex 1: Selected economic statistics at the national and local level

| | Great Britain | Scarborough | Hull | Barnsley | Leeds |
|--|---------------|-------------|----------|----------|----------|
| Population (2020) | - | 109,000 | 259,000 | 248,000 | 799,000 |
| Change in population between 2001 & 2020 | 14% | 2% | 4% | 14% | 12% |
| Internal inward migration rate (2019) | - | 4.4% | 4.2% | 3.6% | 5.9% |
| Internal outward migration rate (2019) | - | 4.2% | 4.8% | 3.1% | 6.0% |
| Median hourly pay of residents (2021) | £15.65 | £13.79 | £12.48 | £13.74 | £15.33 |
| Median weekly pay of residents (2021) | £613 | £547 | £510 | £536 | £597 |
| Employment rate (2021) | 74.8% | 78.2% | 71.1% | 71.0% | 72.7% |
| Unemployment rate (2021) | 4.4% | 3.6% | 4.9% | 4.1% | 5.2% |
| GVA per hour worked (2019) | £35.15 | £25.15 | £28.90 | £26.38 | £33.39 |
| Proportion of employees on the National Living Wage (2021) | 5.9% | 9.7% | 7.6% | 8.3% | 5.8% |
| Proportion of employment in managerial/professional occupations (2021) | 50% | 43% | 35% | 33% | 55% |
| Proportion of employment in care and 'elementary' occupations (2021) | 19% | 30% | 25% | 28% | 17% |
| Proportion of employees in manufacturing (2020) | 8% | 12% | 17% | 16% | 6% |
| Proportion of employees in the public sector (2020) | 27% | 29% | 28% | 27% | 26% |
| Gross disposable household income per person (2019) | £21,400 | £19,100 | £14,900 | £17,100 | £18,600 |
| Average house price (February 2022) | £280,000 | £213,000 | £128,000 | £153,000 | £227,000 |
| Proportion of dwelling stock in private rented sector (2020) | 19% | 22% | 23% | 16% | 21% |
| Proportion of dwelling stock in social rented sector (2020) | 17% | 12% | 27% | 20% | 20% |
| Proportion of dwelling stock that is owner occupied (2020) | 64% | 66% | 49% | 64% | 58% |
| Local authority deprivation rank (1=most deprived, 317=least deprived) | - | 185 | 10 | 264 | 282 |

NOTES: Managerial/professional occupations classified as SOC 2010 Major Group 1-3. Care and 'elementary' occupations classified as SOC 2010 Major Group 6 & 9. Industry statistics are workplace based. National average is United Kingdom for GVA, National Living Wage and household income statistics. National average is England for housing tenure statistics.

SOURCE: Population and migration statistics: ONS, Population estimates and components of population change: Detailed time series 2001 to 2020, June 2021; Median hourly pay: Hourly pay for full-time workers, excluding overtime. ONS, Annual Survey of Hours and Earnings; Median weekly pay: Gross weekly pay for full-time workers. ONS, Annual Survey of Hours and Earnings; Employment rate, unemployment rate and occupation statistics: ONS, Annual Population Survey; GVA, ONS, Sub regional productivity in the UK, July 2021; National Living Wage, Low Pay Commission, Minimum wage in 2021 coverage by local authority, region and nation, December 2021; Industry statistics: ONS, Business Register and Employment Survey; ONS, Regional gross disposable household income (GDHI): local authority by ITL1 region, October 2021; Housing tenure: HM Land Registry, UK House Price Index; ONS, Subnational estimates of dwellings and households by tenure, England: 2020, January 2022; Ministry of Housing, Communities & Local Government, English Indices of Deprivation 2019.

Reports published as part of The Economy 2030 Inquiry to date

All publications are available on the [Inquiry's website](#).

1. [The UK's decisive decade](#): The launch report of The Economy 2030 Inquiry
2. [Levelling up and down Britain](#): How the labour market recovery varies across the country
3. [Work experiences](#): Changes in the subjective experience of work
4. [The Carbon Crunch](#): Turning targets into delivery
5. [Trading places](#): Brexit and the path to longer-term improvements in living standards
6. [Home is where the heat \(pump\) is](#): The Government's Heat and Buildings Strategy is a welcome step forward but lower-income households will need more support
7. [Business time](#): How ready are UK firms for the decisive decade?
8. [Begin again?](#): Assessing the permanent implications of Covid-19 for the UK's labour market
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The UK is on the brink of a decade of huge economic change – from the Covid-19 recovery, to exiting the EU and transitioning towards a Net Zero future. The Economy 2030 Inquiry will examine this decisive decade for Britain, and set out a plan for how we can successfully navigate it.

The Inquiry is a collaboration between the Resolution Foundation and the Centre for Economic Performance at the London School of Economics. It is funded by the Nuffield Foundation.

For more information on The Economy 2030 Inquiry, visit
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