



# Connecting for prosperity

How cities are critical for levelling-up

May 2022

LONDON  
HERITAGE  
QUARTER HQ

A WPI Economics Report for South Westminster  
Business Improvement Districts



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## About this report

This report was commissioned by the South Westminster Business Improvement Districts, newly rebranded as "London HQ". Analysis, conclusions and views expressed in this report reflect the views of the authors, not those commissioning the work.

## About WPI Economics

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# Foreword



Cities. I have lived in them, worked in them, had some of the greatest experiences of my life in them. From Manchester, Leeds and Bristol to Birmingham, Brighton and London - my home - no two cities are the same but, they each have a pulse, a character, a way of staying with you long after you have departed. They change, they change you...and that's their beauty. They deserve to be celebrated. To be acknowledged for what they give us as individuals and the nation as a whole.

But having spent the vast majority of my career working in our great capital city, I now find myself searching for new ways to talk positively about London. Not that I don't think London has a good story to tell, but I fear no one is listening at the moment. In the face of significant and multiple challenges, in my view it's folly to not fully unleash the power of our cities, with London being our economic powerhouse exemplar.

This report is not intended to be revelatory, more celebratory. Reminding us of the power of our cities, and of London - our capital city. The evidence is clear - cities offer huge value, and contribute significantly to our shared national prosperity. Commissioned by the four South Westminster Business Improvement Districts, this report launches under the new umbrella of London HQ - the heritage quarter, historic home of Government, the monarchy and home to more FTSE 100 businesses than any other BID area. Collectively, our business communities are working together and proudly championing our part of the city. There is much to be proud of, here in London and across the UK. As we look forward to a post Brexit, post pandemic landscape surely we much focus on what unites us and where the opportunities lie, rather than dwell on what we're told divides us.

Changing the message is part of the challenge. We need a new narrative. We need a new national discourse about the economic opportunities of cities: celebrating success, spreading prosperity and supporting growth. Now there's a capital idea.

**Ruth Duston, OBE, OC,  
CEO London HQ**

# Executive Summary

- England's large cities make a vital contribution to the country. This report is looking at London and the "Core Cities" of Birmingham, Bristol, Leeds, Liverpool, Manchester, Newcastle, Nottingham and Sheffield. They are all unique and collectively have different characteristics, and are home to 13.5m out of England's 59.7m population. Collectively, they are distinct from the rest of England in that they are more:
  - **Young:** 28% of young adults live in our largest cities, compared to 15% of over 65s.
  - **Skilled:** 53% of working-age people in London and 39% of people in large cities have degrees. 31% do in the rest of the country.
  - **Ethnically diverse:** 37% of Londoners are people of colour, as are 23% of people in the other major cities. In the rest of England outside major cities, 92% of people are white.
- The relationship between cities and the rest of the country is an important engine of prosperity. Cities are important because they:
  - Bring **people** (as workers, students and visitors), **businesses** (as suppliers and customers) together from surrounding countryside, towns and other cities and from the rest of the world. These people and organisations have a variety of needs and specialisms and come from a variety of cultures. The largest cities in England bring together:
    - 4m business visitors (62% of the total), 2019.
    - 19.7m tourists, out of 37.3m.
    - 950,000 business (40% of the total).
    - 1.6m commuters.
  - **Using networks:** cities are home to the networks that connect people. This includes:
    - Transport: 41/50 of the busiest railways stations are in the largest cities, and London's airports offer connection to 433 destinations.
    - Anchor institutions and clusters: universities, research institutes and bodies like hospitals act as the heart of world-leading innovation clusters in areas like advanced materials, life sciences and fintech.
  - **These facilitate innovation, high productivity, learning and knowledge exchange and specialist functions.** This means that our cities are at the cutting edge of innovation:
    - Start-ups: the largest cities see more business start ups than elsewhere. There were 88.7 start-ups per 100,000 people in the Core Cities, rising to 107.33 in London. In the rest of England there were only 53.3.
    - Patents: more intellectual capital is generated in the largest cities than elsewhere. There were 19.7 patent applications per 100,000 people in London, compared to a national average of 17.8.

- The role that cities play as connectors and drivers of prosperity is under threat from a number of sources. Brexit has disrupted the migration patterns that many cities rely on. Covid hit cities hard both economically and in terms of public health and they continue to struggle with suppressed visitor numbers and the shift to working from home. There are also significant policy challenges to cities, not least of all, levelling up. There is a real risk that levelling up takes the form of levelling down our most successful cities and that long-term, irreversible harm will be done to the economy. The hit to cities could be as much as £21 billion in lost output a year, but if cities are encouraged to be successful, they could contribute £63 billion a year more to the national economy.
- To ensure the continued success of cities and the contribution they make to the rest of the country, the government must commit to their long-term future. This must be done both in word, by moving away from damaging anti-city and North vs. South rhetoric, as well as in practice. The best practical steps to allowing cities to continue making a strong contribution is meaningful devolution of powers and resources at a local level to equip cities to pursue the opportunities that local people, organisations and business know are in a city's best interests.

# Introduction

We emerge from the Covid-19 pandemic with the country facing major challenges. Most importantly we need to rebuild from the pandemic whilst responding to the weaknesses in our economy and society exposed by it. At the same time, Brexit and the levelling-up agenda pose challenges that must be answered by fundamentally reshaping how we do certain things. All of this must be delivered in a way that adequately responds to the climate emergency and achieves net zero, whilst also embracing the opportunities presented by technological change in the form of increased automation and digitisation.

The Levelling-Up White Paper presented by the government in Spring 2022 gives us an important opportunity to consider the role of England's largest cities, not least because of the ambition articulated in the paper for every English region to contain a globally competitive city.

To make the most of this levelling up, we must leverage the unique skills, features and contributions of people and places right across the UK. We will not succeed by pitting different parts of the country against each other, but rather by allowing everywhere to perform at its best. That means levelling up is as much about how London and UK major cities perform, as it is about supporting the North of England.

This report shows that cities are crucial to ensuring that other parts of the country succeed. Importantly we highlight the deep relationship between cities, the rest of the country and rest of the world and how these connections are vital to prosperity and quality of life across the country. However, there is a risk that policymakers make decisions in response to the challenges we face that will dampen - rather than support - cities' ability to serve as the drivers of prosperity like they need to.

We must also recognise that poverty, inequality and deprivation are not isolated to certain parts of the country. Indeed, London sees the highest poverty rates in the country (at 29% compared to the England-wide average of 22%)<sup>1</sup> and this report shows that in each of England's largest cities outside of London, significantly more neighbourhoods see high levels of deprivation compared to the country as a whole, with 63% of neighbourhoods in Liverpool in the most deprived fifth nationwide. This shows that the answer to improving living standards is not just a focused effort on particular locations, but by allowing every area to fulfil its potential simultaneously.



# What makes cities distinctive?

## England's largest cities

The “Core Cities” of England have been recognised – alongside London – as the most important settlements in the country. This report focuses on these 9 cities to hone in on what it is that makes cities unique, how they have been impacted by Covid and their role in the recovery. It is important to take this opportunity to highlight the strengths and needs of these cities, because they often get lost in a levelling-up conversation which can overly focus on smaller towns and cities in the North of England. Whilst these places do have their own challenges, they cannot be adequately addressed without also making the case for the cities that act as the lynchpins of the broader regions these towns sit in.

## England's powerhouses

The cities we are looking at have much in common – they are the largest, best connected and some of the most dynamic places in the country. Between them, with a population of 13.5 million people, they account for 23% of the UK's population. They also have unique histories, strengths, and areas for opportunity. The cities we are looking at are:

- **Birmingham:** the largest city in the West Midlands conurbation, centrally located in the UK. As well as manufacturing specialities, it is growing in high value added sectors such as financial and professional services. Major facilities such as the International Convention Centre attract international attention.
- **Bristol:** this city boasts a vibrant, creative and historic atmosphere. It is best known for its contribution to the arts and sciences and maritime history and is well established in electronic and aerospace engineering.
- **Leeds:** the most prominent sectors in Leeds are finance, business and insurance. It is also home to a major shopping and commercial centre and many upcoming creative and manufacturing industries.
- **Liverpool:** Liverpool has a history as a major trading port. Today, its economy has moved towards services. Tourism has grown in importance and is famous for its music, football, culture and architecture.
- **London:** as the capital of the UK, London is the economic powerhouse of the South and accounts for more than a fifth of the country's economic output. Its reputation for multiculturalism, one of the world's largest financial centres and culture in music, comedy and theatre secures its status as one of a few true world cities, competing with the likes of New York, Paris and Tokyo.



**3.3m**

Inner London population



**5.6m**

Outer London population



**4.6m**

Other major cities population



**59.7m**

Total England population

- **Manchester:** The economy is comprised of knowledge-based industries, creative and media businesses. It also has a growing research and innovation sector as well as hosting large anchor organisations such as the BBC and ITV.
- **Newcastle:** A lively and diverse city with an industrial heritage and a popular nightlife scene. Its urban centre has recently benefited from investments which have stimulated business and job growth, especially in sectors like science, finance, retail and tourism.
- **Nottingham:** Nottingham is an international city with strengths in science and technology. It is home to the Queen’s Medical Centre and the BioCity – the largest teaching hospital and largest bioscience incubator in Europe. It was named the City of Literature in 2015.
- **Sheffield:** this city is constantly evolving, attracting new talent and investment on the basis of its innovation and creativity. It has two world-class universities, independent art galleries and underground music venues and advanced manufacturing capabilities.

These cities are all unique and have very different demographic, social and economic characters, as shown by the key figures in table 1. London stands out in terms of the population, density and economic output. However, the other major cities are each individually significant in terms of their population and production. Additionally, the close proximity of cities in both the North West (especially Liverpool and Manchester) and Yorkshire (especially Leeds and Sheffield) means that there are emerging urban groupings across the country.

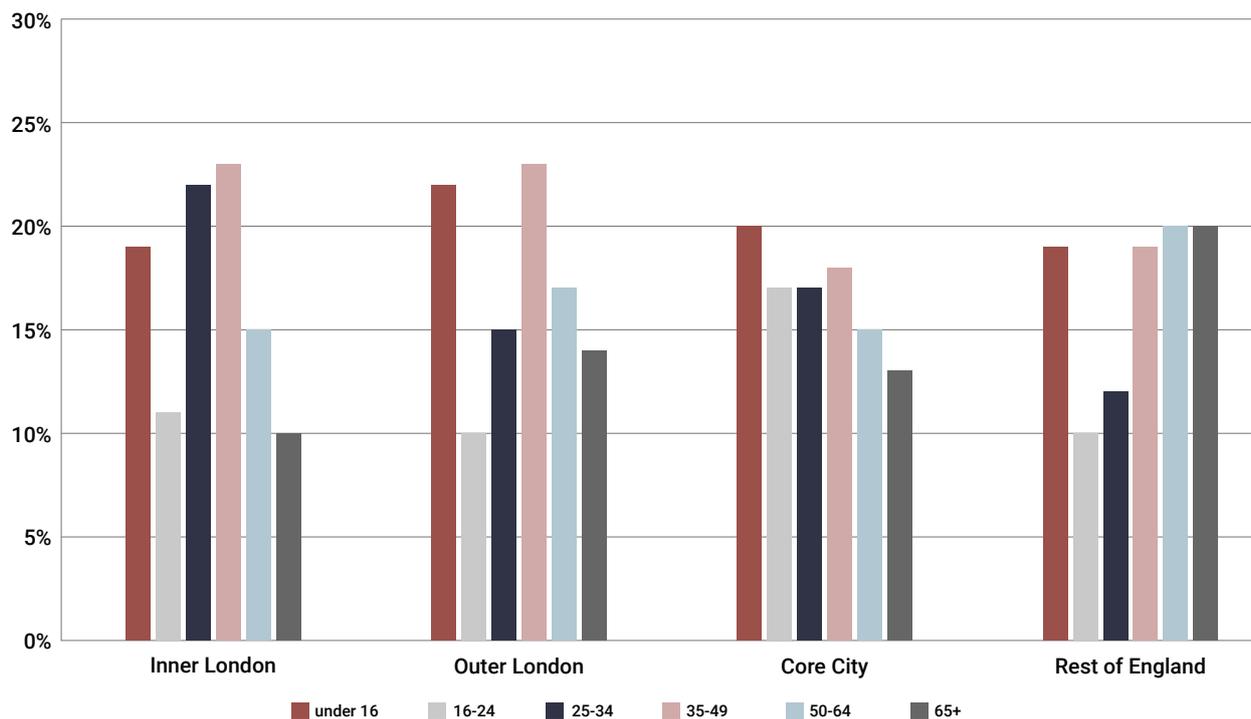
Table 1: Economic and demographic profile of England’s major cities

	 Population	 Land area (km2)	 Population density	 Economic output (GVA, billions)	 Average Annual household income	 Proportion of neighbourhoods in the 20% most deprived nationally
<b>Birmingham</b>	1,150,000	270	4,300	£27.8	£37,500	56%
<b>Bristol</b>	450,000	110	4,300	£15.3	£42,500	30%
<b>Leeds</b>	800,000	550	1,400	£27.4	£40,000	34%
<b>Liverpool</b>	500,000	110	4,500	£13.5	£34,500	63%
<b>London</b>	8,950,000	1530	5,900	£468.2	£53,500	16%
<b>Manchester</b>	550,000	120	4,800	£24.5	£37,000	59%
<b>Newcastle</b>	300,000	110	2,700	£9.4	£35,500	39%
<b>Nottingham</b>	350,000	70	4,500	£10.6	£34,000	57%
<b>Sheffield</b>	600,000	370	1,600	£13.0	£40,500	34%

Source: WPI Economics analysis

An important feature that makes cities different from the rest of the country is their age make-up. Cities are younger on average than the rest of the population. This is even more so the case for Inner London. This makes cities more dynamic than the country as a whole. It also shows how cities play a role in many people’s life cycles: people often move to cities when they are young and acquire skills, knowledge, experience and connections before moving elsewhere. This is a key mechanism by which cities spread high-performing workers throughout the country. 28% of young adults aged between 16 and 34 live in England’s largest cities, compared with just 15% of those aged over 65, so directing resources away from cities is likely to hit young people the hardest – a generation already experiencing historic headwinds to their prosperity.

Figure 1: Age breakdown of major cities in England (2020)



Source: WPI Economic analysis of ONS population estimates

Cities are distinct from other places in other ways as well. People in cities are more:

- **Ethnically diverse:** 37% of Londoners are people of colour, as are 23% of people in the other major cities. In the rest of England outside major cities, 92% of people are white. Birmingham is the most ethnically diverse city where only 58% of people are white.
- **Skilled:** 39% of working-age people in the Core Cities outside of London hold a degree, rising to 53% in London. In the rest of England it is only 31%. Fully 35% of working-age people with degrees in the England live in the 9 largest cities, which hold only 26% of the working-age population.

## Cities in a global context

Large cities are of course not a feature unique to England. Table 2 shows the ten biggest cities in countries that are similar to England in size or culture. It shows that although London compares favourably with the largest cities in other countries, second-tier cities in England are much smaller than their equivalents elsewhere. For example, Liverpool the 6th largest city in England has a population of 0.9 million, ten times smaller than the capital. Ottawa, the 6th largest city in Canada, on the other hand has a population of 1.4m, 4.5 times smaller than the largest city.

Table 2: The nine most populous cities in comparison countries

Rank nationally	England	France	Germany	United States	Canada
1	London (9.5 million)	Paris (11.1 million)	Berlin (3.6 million)	New York City (8.2 million)	Toronto (6.3 million)
2	Manchester (2.8 million)	Lyon (1.7 million)	Hamburg (1.8 million)	Los Angeles (4 million)	Montreal (4.3 million)
3	Birmingham (2.6 million)	Marseille (1.6 million)	Munich (1.6 million)	Chicago (2.7 million)	Vancouver (2.6 million)
4	West Yorkshire/ Leeds (1.9 million)	Lille (1.1 million)	Cologne (1.1 million)	Houston (2.3 million)	Calgary (1.6 million)
5	Southampton (0.9 million)	Toulouse (1 million)	Frankfurt (0.8 million)	Phoenix (1.8 million)	Edmonton (1.5 million)
6	Liverpool (0.9 million)	Bordeaux (1 million)	Duesseldorf (0.6 million)	San Antonio (1.6 million)	Ottawa (1.4 million)
7	Newcastle upon Tyne (0.8 million)	Nice (0.9 million)	Stuttgart (0.6 million)	Philadelphia (1.6 million)	Quebec City (0.8 million)
8	Nottingham (0.8 million)	Nantes (0.7 million)	Leipzig (0.6 million)	San Diego (1.4 million)	Winnipeg (0.8 million)
9	Sheffield (0.7 million)	Toulon (0.6 million)	Dortmund (0.6 million)	Dallas (1.3 million)	Hamilton (0.8 million)
10	Bristol (0.7 million)	Grenoble (0.5 million)	Dresden (0.6 million)	Austin (1 million)	Kitchener (0.6 million)

Source: World Population Review. Note: this uses "metropolitan area", a more extensive definition of city than used elsewhere in this report, hence that the larger populations of English cities reported here.

This is the result of how cities have developed in different countries. But different places also have very different municipal cultures, with many other countries giving their cities much more power and autonomy to forge their own course compared to the UK. This can allow them to better spread prosperity throughout the country and allow each city to really play to its strengths. Importantly, doing this is achievable whilst also encouraging a strong and thriving capital.

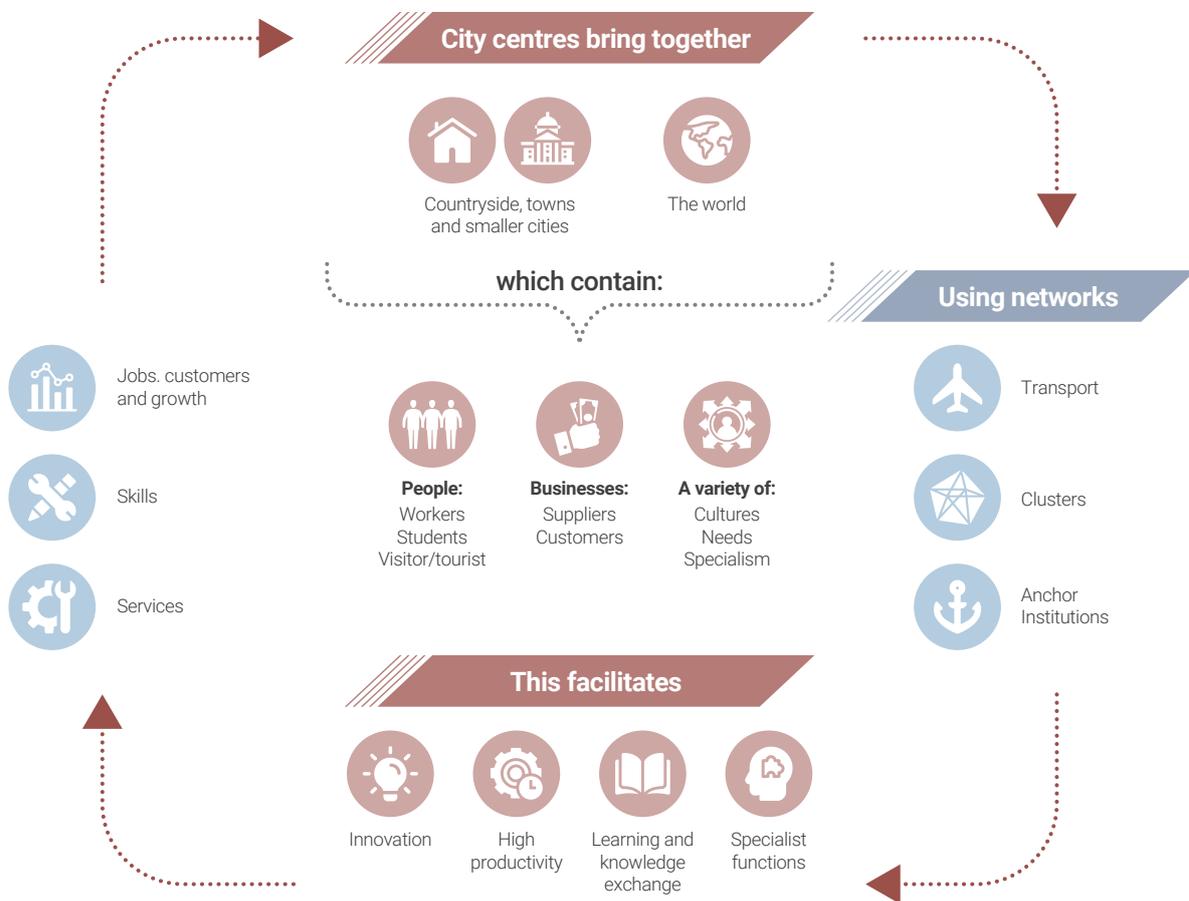
# CHAPTER 3 Cities and the rest of the country

Cities are understood best not as places that sit apart their immediate surrounding and the rest of the country. Instead, cities are deeply connected to the world around them. They exist to bring people together and facilitate connections and, as such, they are of significant benefit to other places, even if they are far away.

## Understanding the role of cities

To explore in more detail why this is the case, it is helpful to understand in more detail what the relationship between cities is, how it works and why it is mutually beneficial.

Figure 2: The circular relationship between cities and other places



As figure 2 illustrates, there are circular links between cities and elsewhere. Cities allow people and groups of people to come together in one place because of their uniquely strong networks. Getting people together allows for activities to take place that could not take place elsewhere (types of businesses and services, innovation, etc). These create benefits in the forms of jobs, services, investment and so on that are then spread back to the areas that cities draw people from. This is a mutually beneficial and self-reinforcing relationship, and it must be protected and nourished if we are to recover from Covid and achieve goals around levelling-up and net zero. The following sections explore each element of this relationship in more detail.

## Cities bring together



The feature that makes cities special is their capacity to bring people and organisations together. This happens in many ways; people commute from the surrounding area to give city centres the largest labour markets. The presence of these workers is part of what attracts businesses to cities, both as places to establish their operations and to meet with other business as clients and suppliers. People will also come to cities to play, with day trippers coming to shop, watch sport and go to the theatre and international tourists coming for the combination of history and leisure facilities you can only get in dense urban areas. The scale of this coming together is easy to see:

- People made **590 million day trips into cities and large towns in 2019 (42% of all day tips), spending £31 billion (56% of spending on day trips).**<sup>3</sup>
- Of the 37.3m tourists who came to the UK from abroad before the pandemic, **19.7m tourists came to England's largest cities, with 16.4m going to London alone.**<sup>4</sup> Tourism has also been hit uniquely hard by Covid. In 2020 it was estimated that Central London was predicted to miss out on £10.9 billion of spending by tourists, far higher than the £1.9 billion lost from commuters.<sup>5</sup> Tourism isn't expected to recover until at least 2025.<sup>6</sup> With 15% of overseas tourists to London visiting other parts of the UK as part of their trip before the pandemic,<sup>7</sup> continued suppressed visitor numbers to London are likely to have a ripple effect across the country.
- **4 million business visitors came to England's largest cities from abroad in 2019**, 62% of all business trips.<sup>8</sup>
- **40% of businesses in England are in the 9 largest cities** – 950,000 firms.<sup>9</sup>
- Over **950,000 students study at universities based in England's 9 largest cities**, over 40% of all enrolled students in the country.<sup>10</sup> Every year, hundreds of thousands of students move to cities to access education they would not be able to access elsewhere.
- **Over 1.6m people work in one of the largest cities despite living elsewhere.** Around half of those (795,000) commute into London.<sup>11</sup> These are jobs provided by cities to people all around the country.



## Case Study: The Northbank

The Northbank Business Improvement District (BID) is a small-scale example of the strengths, challenges and evolution of cities. The area's rich history demonstrates how the role of cities in bringing business and customers together has a long tradition. The BID covers a pivotal area of central London - a historic royal processional route connecting the City of London to the West End, today the area is predominantly a business district with several major corporate occupiers but also attracts other diverse business sectors. It's home to two world-leading academic institutions and a number of tourist attractions including Trafalgar Square and The National Gallery.

The arrival of several major luxury hotels and theatres has seen the area further evolve into a tourist, retail, hospitality and entertainment destination, and illustrates both how cities can successfully adapt and the importance of respecting and making the most of our heritage.

The Northbank brings people from all around the country and the world – as both workers and visitors – to enjoy things they wouldn't be able to do elsewhere, from specialist shops and restaurants to world-class theatres and hotels. Like cities across the country, the Northbank was hit hard by the pandemic; as many businesses were closed for the duration of the lockdowns. Emerging from the pandemic has revealed both challenges and opportunities. A change in working patterns and the slow return of office workers has affected how businesses operate and many struggled with the reduced number of customers. Fewer staff from the EU made it harder for businesses to fill roles, whilst the lack of foreign visitors to London meant that the district had to cater more to domestic day trippers. This was supported by innovations by businesses such as enhanced signage and setting up quality alfresco dining which both enhanced the visitor experience and gave people more confidence in the safety of visiting a central location.

The evolution of the area is ongoing with the development of the ambitious Strand Aldwych programme, which will create a new cultural hub and showcase opportunities for the future of the city in the recovery from COVID. The project is a good example of public / private partnership transforming a key part of central London, with benefits shared by all.

This, and the ongoing response to COVID and other challenges, demonstrates both the importance of adaptability to cities' revival, but also the fundamental power of bringing people together around a shared vision of the future.

## Using networks



Transport



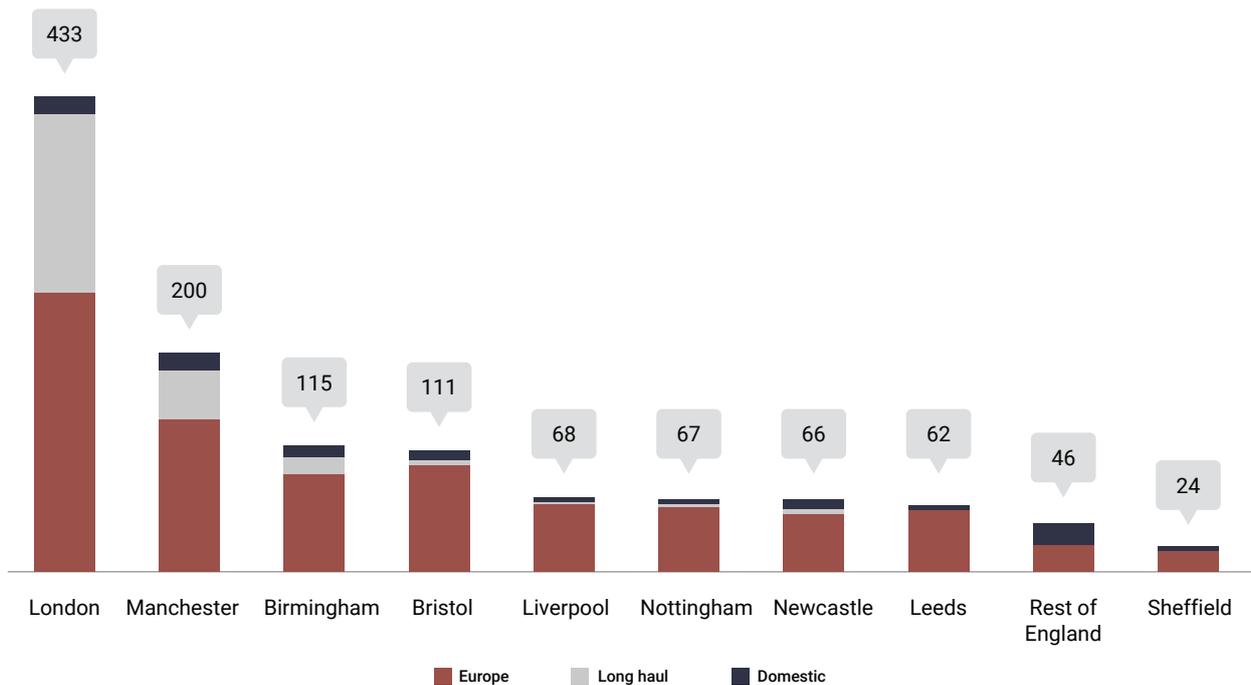
Clusters



Anchor Institutions

This bringing together of people and organisations from places outside cities requires both physical and virtual networks. Railways are important in connecting the largest cities to towns and rural areas around the country. There are nearly 2,000 railway stations in England which facilitate connections right into the heart of our most important cities. That is why 41 out of the 50 busiest railway stations in England are in the nine largest cities. 32 of these are in London.<sup>12</sup> The super-connectedness of London’s railways will be significantly enhanced by the imminent opening of the Elizabeth Line, which will increase rail capacity in the capital by 10% and bring 1.5 million more people within a 45 minute journey of central London.<sup>13</sup> Air travel also serves a vital role, partly in connecting more remote places domestically (such as the routes between Newquay and the Tees Valley and London). Most air passengers, however, fly internationally. Airports require large numbers of people to operate, so it is our largest cities that act as the gateway between the rest of the country and the world, attracting people from overseas to their world-class facilities at the same time. Figure 3 shows how airports in our large cities offer many more destinations than other airports – especially London with its global hub at Heathrow – because they can pool passengers together from around the country and around the world. This means that the tens of millions of people who are within an hour or two from Heathrow or Manchester airports can access many long-haul destinations that they otherwise would not be able to.

Figure 3: Scheduled routes out of city airports in England by destination (2019)



Source: WPI analysis of CAA. London includes Heathrow, Gatwick, Luton, Stansted, Southend and City. Destinations served by more than one London airport are counted once. \*Nottingham = East Midlands Airport

“For cities to be places people want to live, set up business and invest you need to look at the whole picture including skills, business support and health. Good transport infrastructure is necessary but not sufficient” – John Wrathmell GMCA

Interpersonal connections are as important as transport infrastructure. Personal and professional networks between individuals are vital for allowing innovation to flourish, for people to gain knowledge and skills and for different types of business and organisations to collaborate. A core part of these networks are often anchor institutions. These can be public bodies like universities, research institutes, government departments or private organisations like large employers, but all can act as keystones that ecosystems of individuals and businesses can cluster around. Table 3 shows the sorts of hubs that have formed around leading universities in the major cities of England. These hubs have attracted hundreds of millions of pounds of investment, tens of thousands of jobs and collaborations with leading UK firms like Unilever and GlaxoSmithKline.<sup>14</sup> This activity leads jobs and investment in the surrounding regions. Vitality for the UK's future competitiveness, they will also develop domestic capabilities in the technologies of tomorrow, like AI and advanced materials.

Table 3: clusters that exist around universities in England's major cities

	Digital (including AI, FinTech, Quantum and FinTech)	Advance materials, industry and manufacturing	Health and life sciences	Environmental and Energy Technologies
Birmingham	✓			✓
Bristol	✓			✓
Leeds	✓			
Liverpool	✓	✓	✓	
London	✓		✓	
Manchester	✓	✓	✓	
Newcastle	✓			✓
Nottingham		✓	✓	
Sheffield		✓		

Source: Russell Group<sup>15</sup>

## This facilitates



Innovation



High productivity



Learning and knowledge exchange

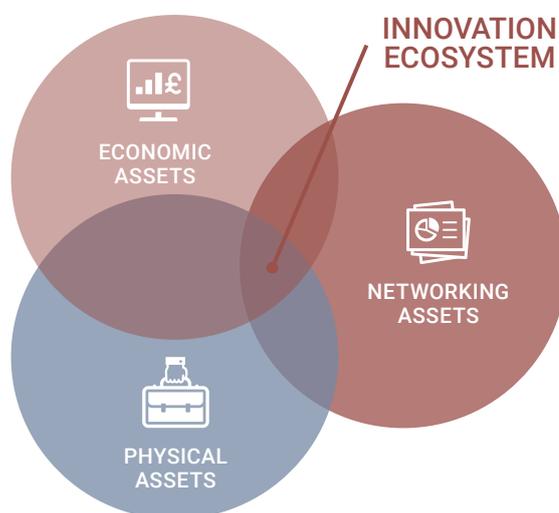


Specialist functions

By bringing people together using networks, cities enable things to happen that would not otherwise be possible. These include:

- Innovation:** when different people come together, they are able to approach challenges from new viewpoints, combine diverse experiences and pool their knowledge to come up with new ways of doing things, creating better products, processes and services in doing so. As figure 4 shows, innovations ecosystems thrive where economics, physical and networking assets coincide; this happens most frequently in large cities.
- Learning and knowledge exchange:** both formally through training and universities, and informally through networks and on-the-job learning, people learn and share their knowledge when they are brought together in large numbers by cities.
- Specialist functions:** by having large pools of customers, suppliers and workers, cities can offer niche services and functions that would not be able to be supported elsewhere. Examples include the Lloyd’s insurance market in London, MediaCityUK in Salford and the National Exhibition Centre in Birmingham.
- High productivity:** all of the above contribute to cities being highly productive places, enabling workers to produce more for every hour they work. This is indeed the case for London, which has the highest levels of productivity in the country. England’s other large cities lag behind, however. Given that the fundamentals are there in terms of connecting large numbers of people, it means these cities have the ingredients in place for a productivity revolution.

Figure 4: elements of innovation ecosystems



We can see evidence of the innovation and ingenuity enabled by England’s cities in many respects:

- Start-ups:** the largest cities see more business start-ups than elsewhere. There were 88.7 start-ups per 100,000 people in the Core Cities, rising to 107.33 in London. In the rest of England there were only 53.3.<sup>16</sup>
- Patents:** more intellectual capital is generated in the largest cities than elsewhere. There were 19.7 patent applications per 100,000 people in London, compared to a national average of 17.8.<sup>17</sup>

The great things that are facilitated by the scale of cities are important to everyone, no matter where they live. The innovation and productivity enabled by cities leads to a stronger national economy, with better businesses, more jobs and investment and higher tax revenues to improve everyone’s living standards. The knowledge that is shared in cities spreads far and wide. Specialist facilities are established in cities not just to serve the residents of those cities, but because they need to access groups of millions or tens of millions of people to be viable. As figure 5 shows, the largest stadiums are overwhelmingly in the largest cities, because to get 90,000 to somewhere like Wembley for a concert or cup final, you need a location that people from towns, villages and small cities from a large part of the country can reach easily.

Figure 5: Specialist facilities in London, other major cities and the rest of England



The advanced materials sector in Manchester and the North West is a prime example of the excellence and specialisation that is created by the density of people, businesses and organisations in large cities. World-leading universities in the North West complement established industries in the nuclear, aerospace and automotive sectors to enable cutting edge academic research and industrial innovation. The results of this can be seen in the Nobel-prize winning discovery of graphene at the University of Manchester. The Graphene Engineering Innovation Centre at the Manchester is encouraging businesses to find ways to commercialise the disruptive material and scale up. This combination of discovery and entrepreneurship in advanced materials will be a core part of the £1.5 billion ID Manchester innovation district. It is clear that bringing together brilliant people working on special projects leads to enhanced productivity, high skilled jobs and the technologies of the future.

## Which provide



An underappreciated element of cities is what they give out to the rest of the country. Because cities draw people in from all around, it is easy to see them as black holes, sucking everything in and consuming it. In reality, cities are more like trampolines: people jump on, grab what they need and jump back off again. We can see this happening in many ways:

- **Services:** Cities provide services that cannot exist elsewhere because the markets are too small. This includes various types of professional services to business – such as those facilitating investment – and specialist public services (such as universities) and leisure facilities (like West End theatres).
- **Customers:** Business in major cities have supply chains stretching across the country. Money spent in a city often ultimately ends up somewhere else in the UK. London, for example, bought over £405 billion worth of goods from the rest of the UK in 2014.<sup>18</sup>

### Jobs

Cities create a 'borrowed agglomeration' effect where surrounding regions benefit from their success whilst carving out their own niche in their economic network.<sup>19</sup> For example, **businesses based in London are responsible for 1.9 million UK jobs outside of the capital and 29.5% of all jobs in Britain.**<sup>20</sup>

The large concentrations of jobs found in cities attract commuters, typically high-skilled ones, who live outside of the central activity zone. Commuting increases the number of jobs workers can access and the number of workers employers can hire, leading to better job matching and higher productivity. There is a symbiotic relationship whereby towns supply high-skilled workers and cities supply high-skilled jobs.

As importantly, large companies based in one city often create jobs elsewhere where in the country. Citi Group, for example bases their Europe, Middle East and Africa headquarters in London and employ an additional 8,000 people across London, Belfast, Derby and Edinburgh.<sup>21</sup> Global businesses recognise that different areas have different specialisms, and want to be based in a country where they can have, for example, a London HQ to be globally connected, a Birmingham or Leeds office to access better value back-office support with call centres in the North East. This process leads to specialisms in cities spreading jobs throughout the country.

### Skills

The skills fostered in cities are also important for circulating the acquired knowledge around the country. Cities take people in, give them skills and experience in turn, which then benefits surrounding regions through the accumulation of disposable income.<sup>22</sup> For example, over half of finance and related professional services jobs in cities were high skilled, suggesting overall that London finance and professional firms play an important role in providing high-skilled employment in other cities.<sup>23</sup>

The expansion of higher education has increased the number of students in the city with large amounts of young professionals staying in the city centre after education.<sup>24</sup> There are 44 universities in London and the core cities, all of which improve and spread skills and employment opportunities across the country. The economic benefits of this includes living in the city, consuming local services and entering the local labour market after graduation or alternatively, upskilling students to work in higher skilled sectors in other core cities in the UK.<sup>25</sup> Alternatively, graduates can return to their home towns after finishing their education, taking their new knowledge and contacts with them.

Furthermore, the universities themselves are important to a city's success. Universities are seen as anchor institutions in their local economies who act as major employers for academics, suppliers and staff, as well as being big purchasers of local goods and services.<sup>26</sup> In this way they produce a multiplier effect – even if the university isn't actively supporting regional development, the infrastructure of a university supports local social and economic progression.<sup>27</sup> Not only are they important for domestic students, but they also draw in a lot of international students. Before the pandemic, approximately 190,000 students came to the UK to study for at least 12 months.<sup>28</sup> International students that enter the local labour market after graduating and bring other benefits such as tourism and innovation, generating wider returns.<sup>29</sup>



# The challenge facing UK cities

The previous section highlighted the distinctive nature of Britain's cities and the contribution they make directly and indirectly to people and places right across the UK. This makes UK cities vital for the future of the UK economy, as we look to the recovery from the pandemic and face into the headwinds from global instability and the need to decarbonise the economy. However, the challenge is that cities right across the UK are facing significant challenges, which will need to be addressed if they are to play the vital role they need to in driving growth and living standards in other places.

"To keep providing for the people they serve, cities need to continuously adapt and change" – Bill Addy, Liverpool BID

## Policy context

Cities sit at a moment of change we have not seen in at least a generation. The decisions that policy makers take over the next few years will determine the role of cities and their contribution to the prosperity of the nation for decades to come. There are a range of pressures, challenges and opportunities facing England's largest cities. Some of the most prominent include:

- **Levelling-up:** the commitment to level-up the country by reducing geographic inequalities is a chance for cities in several ways. Not only do cities include significant inequalities and large portions of their populations who themselves could benefit from levelling-up, they also – as shown throughout this report – have a role in supporting the levelling up of elsewhere. There is, however, an inherent threat to cities as part of the levelling up agenda, which is that the easiest way of closing geographic inequalities may well be to level down the most prosperous areas, harming everyone in the process. Indeed, the Mayor of London, Sadiq Khan has made the case that "levelling up the UK must not be about levelling down London", in part because "London has some of the most deprived communities in the country".<sup>30</sup> A strong theme that came across in the interviews conducted for this report – from people across the country – is that rhetoric around "North versus South" was poisoning debate and making it harder to come up with the solutions that are needed.
- **Covid:** because of their density, interconnectedness and focus on services, cities have faced a greater hit in terms of the health impact and economic shock of Covid than anywhere else. Their recovery is both vital for the good of the country, but also fragile, as cities are to changing public health restrictions, people's tolerance and perception of risk and the ability of visitors to come from abroad.
- **Brexit:** Britain's withdrawal from the European Union has led to a change in migration patterns. England's largest cities attracted more European citizens than anywhere else, and so can be expected to experience a greater shock in the transition towards a new immigration regime. Coupled with this, cities have had to cope with a suppressed investment environment due to the uncertainty since 2016. In the future, cities and the British economy more generally will need to adapt to changing patterns of trade and migration and to embrace whatever opportunities and obstacles emerge. In particular, cities are likely to struggle with fewer workers from the EU.
- **Cost of living crisis:** the emerging cost of living crisis is likely to have a significant impact on cities. This is both because of the higher housing costs and poverty rates experienced by people living in cities, and because a reduction in disposable income is likely to impact the visitor economy.
- **Transition to net zero:** the whole country must work together to address the climate emergency by achieving net zero by 2050. Cities are in a strong position to contribute to net zero. They are able to set local visions and ambitions and help shape the behaviours of both individuals and business.<sup>31</sup> Cities also have lower emissions per head and an easier environment to encourage things like sustainable travel.

It is clear from all of this that cities are going to need to adapt and make the most of the opportunities that these inflection points present. Although cities are strong and resilient, the right decisions need to be made in the coming months and years to support them through this tumultuous period. This is not only for their own sake, but for the good of people living up and down the country – as we have shown, no one benefits from their local metropolis withering.

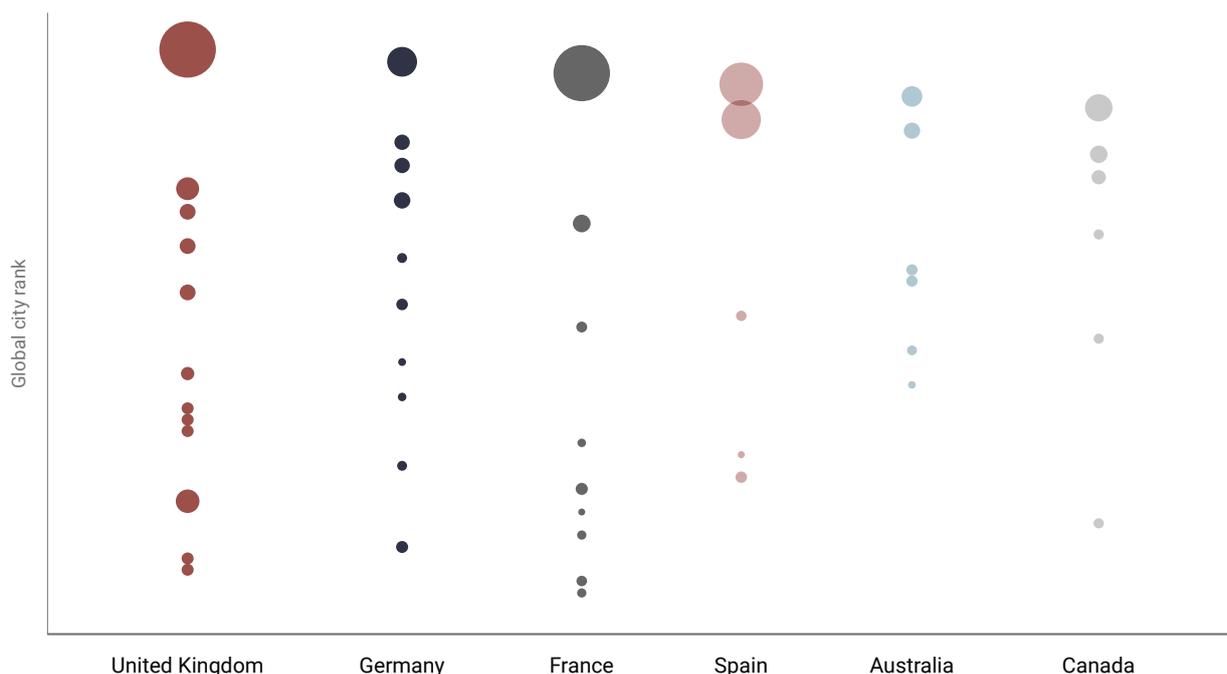
### Globally competitive cities

The recent Levelling-Up White Paper has as one of its central ambitions for levelling-up the aim that every region of England should have a globally competitive city. The need to support cities becomes even more apparent when we consider the UK’s major cities in a global context. When we do this, we see that they are at the centre of a global competition for skills, business, investment and culture – the cities (and therefore countries) that win will reap the benefits of a global success, and those who are left behind will suffer.

For example, a specialised automotive manufacture might weigh up suppliers in both the West Midlands and Bavaria. For some of the most specialised services – certain types of insurance say, or tourism – the competition might be truly global, with London and Liverpool up against the likes of Singapore or New York. In each case, people and businesses are looking for things that only cities can provide: innovation ecosystems, the bringing together of a rich tapestry of cultures and density that makes agglomeration and productivity growth possible. In turn, supply chains benefit, productivity spreads and more cultural variety and opportunities are created; benefiting the whole country.

With this in mind, it is obvious why one of the core objectives from the Levelling Up White Paper is to increase the UK’s global competitiveness by making sure every region in the UK has a globally competitive city. Figure 6 shows why this is the case. Each dot represents a city – the higher it is, the more globally competitive it is according to a synthesis of respected indices on the topic. London tops this global ranking, beating the likes of New York and Tokyo. The size of the dots show how much each city is talked about online, a measure of its brand value and awareness. Compared to similar-sized European countries (Germany, France and Spain) and other English-speaking countries (Australia and Canada), the UK’s cities are reasonably competitive and more spoken about than their competitiveness would suggest. However, it is also clear that we cannot rest on our laurels – our second and third ranked cities sit below those of Germany, Australia and Canada. Britain needs its cities to be more competitive to keep up. A failure to do so will impact on the whole country.

Figure 6: Global city rank (y axis) and share of online mentions (size of bubble)



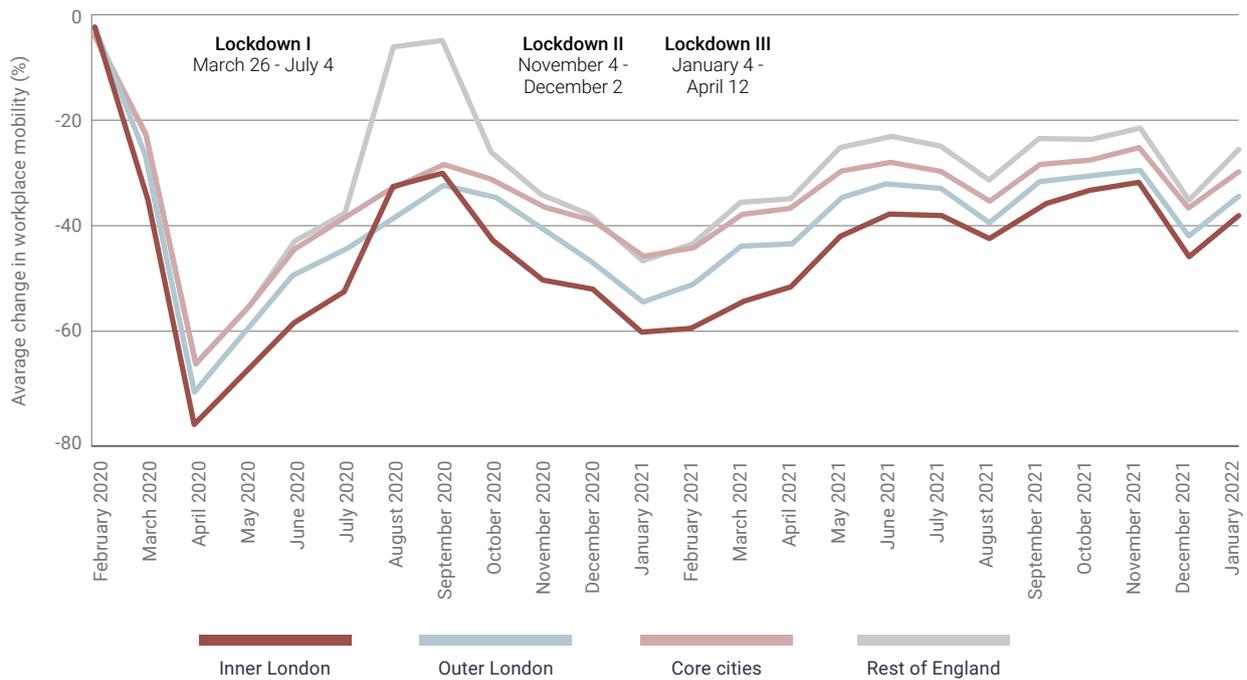
Source: WPI Economics analysis of The World’s Most Talked About Cities (ING Media)

## Covid

The connected nature of cities meant that Covid hit cities the hardest, but they also seem to be bouncing back well. We need to make sure that bounce back is complete or we will break the virtuous circle enabled by cities. Of course, the greatest and most tragic impact that Covid had on cities is the personal cost to individuals and families from illness, death and isolation, but it is also important to recognise the broader economic shocks and how these impacted cities.

### Workplaces

Figure 7: Average change in workplace mobility compared to pre-pandemic baseline



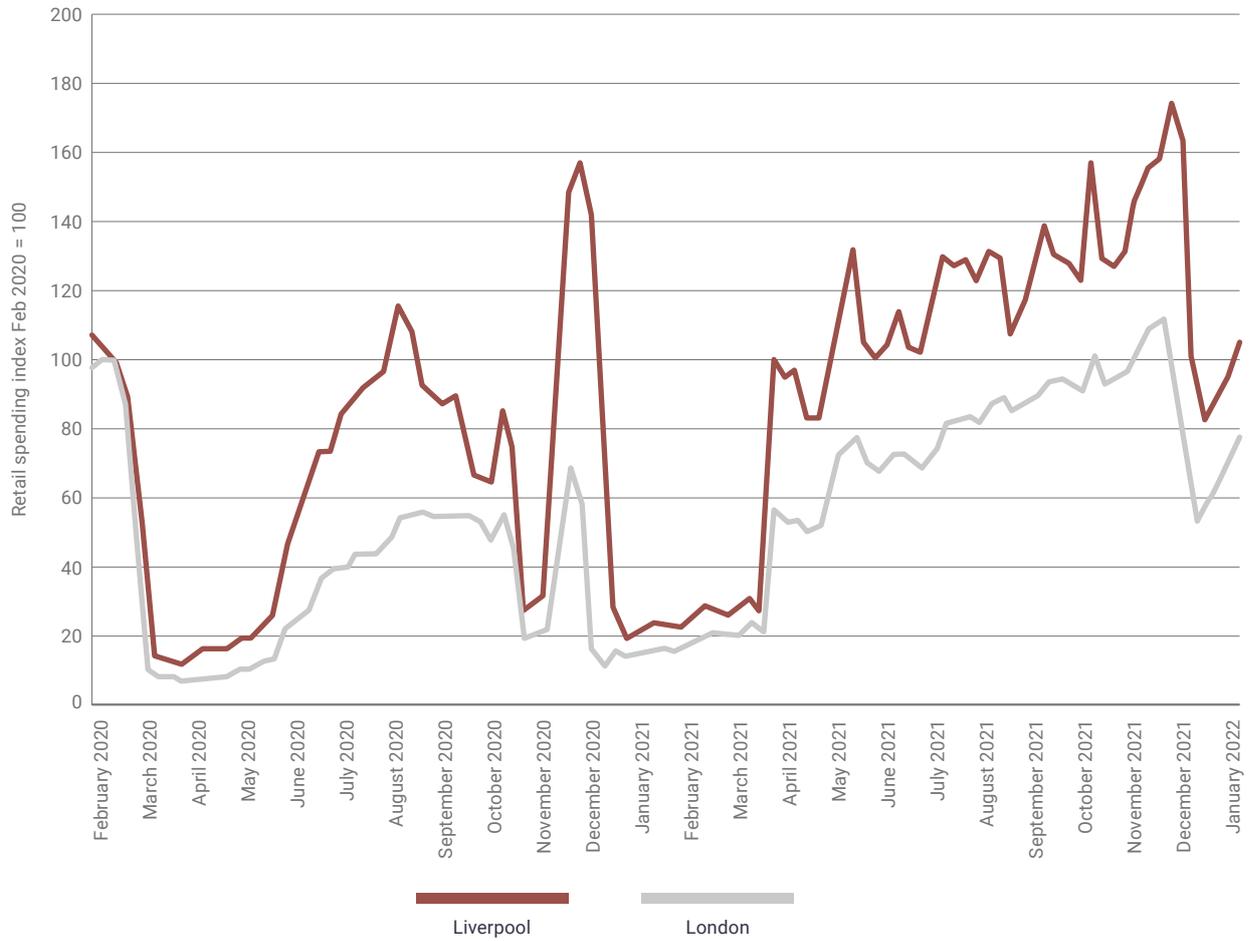
Source: WPI Economics analysis of Google COVID-19 Community Mobility Reports

One of the most obvious impacts of Covid was that people chose and were compelled to stay at home, and not to go out to work if possible. Figure 7 shows data from Google mobile phone data tracing the number of people in workplaces compared to before the pandemic. It shows that, unsurprisingly, each of the formal lockdowns dramatically curtailed the number of people spending time in workplaces – with over three quarters of people staying away at the height of the first lockdown in 2020. The recovery has been different in different types of places. Outside of the largest cities, the number of people going to work has recovered the strongest, returning to round 80% of the pre-Covid level before the Omicron variant hit. The return to the workplace has been much slower in the largest cities, London in particular which dipped back down below 60% of normal levels in December.

### Retail

Thriving high streets and shopping centres are an essential part of cities’ offering. Figure 8 shows how the best performing large city (Liverpool) compares to the worst performing large city (London) in terms of how well spending in their shops has recovered over the course of the pandemic. It is clear that retail spending over the course of the pandemic was highly volatile and sensitive to changes in restrictions. Equally, London – which serves as a shopping destination for a more national and global audience – has been slower in its recovery than the more regional hub at Liverpool.

Figure 8: Retail spending recovery index



Source: Centre for Cities

CHAPTER 5

# So what's the scale of the risk?

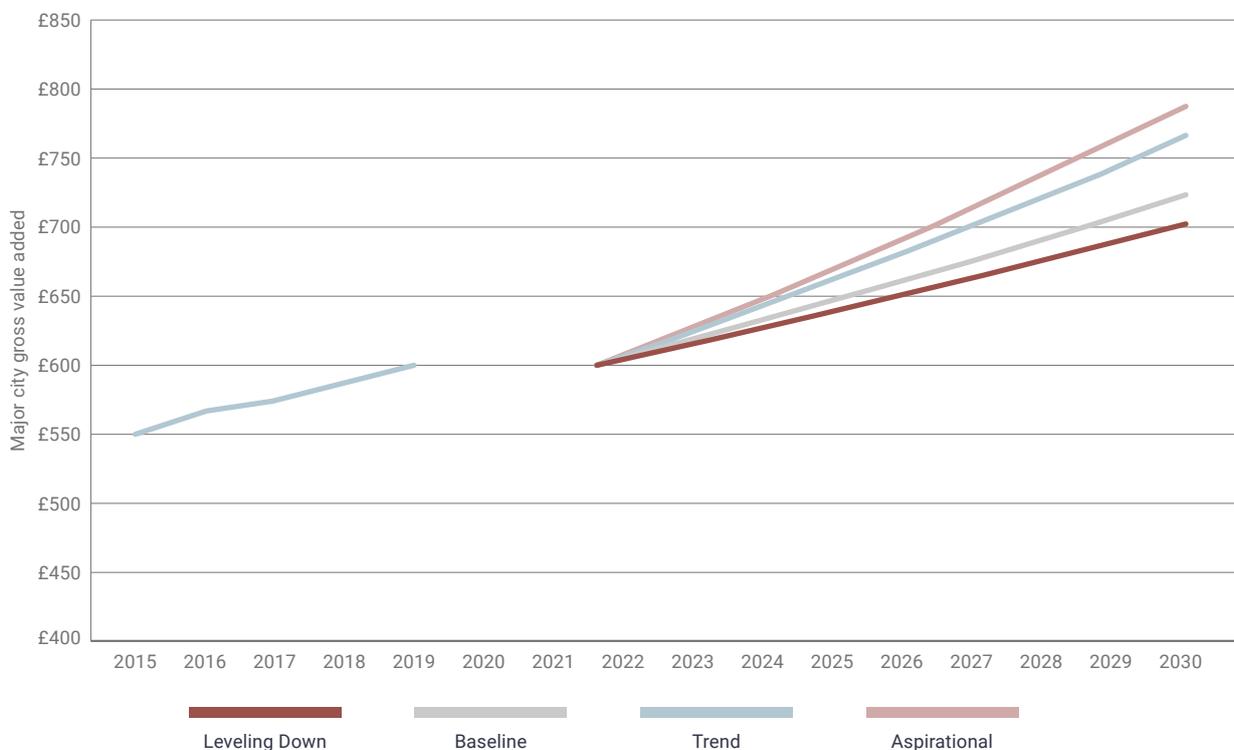
With these significant challenges in mind, it is clear that there is nothing inevitable about the success of England's cities and the contribution they can therefore make to the rest of the country. However, what is clear is that the success of the Covid recovery and levelling up agenda will rest on ensuring that contribution continues. As such, the decisions made by policymakers in the next few years will determine how well this trend will continue. This is a high-stake question, with a potentially a great deal to lose.

## National prosperity

One way of looking at the potential scale of the risk is to assess what might happen to the contribution of England's largest cities to the national economy under range of scenarios. Figure 9 does that and shows that:

- If cities followed the trend of their economic growth before Covid (the "Trend" scenario in the chart below), they can be expected to contribute an extra £42 billion a year by 2030 compared to the scenario where they grow at the same rate as the national average (the "Baseline" scenario).
- Cities would contribute an extra £21 billion a year further (to make a total of £63 billion) if all cities were equipped to grow at the same rate as London (the "Aspirational" scenario in the chart below). This is the ambition policymakers should be aiming towards to make the most of cities' potential.
- However, if the growth of cities slows so that their economies only expand at the same rate as areas outside of the largest cities, there could be up to £21 billion in lost output a year (the "Levelling down" scenario).

Figure 9: real and projected economic output (GVA) from England's largest cities



Source: WPI Economics analysis of ONS UK small area GVA estimates

In addition to these potential losses, there are concerns about what would happen if cities do not return to their role as regional, national and international hubs after the recovery from the pandemic:

- Before the pandemic, London contributed £36.2 billion more to the Exchequer in tax than it received in public spending, making it one of only three regions to make a net contribute to public finances.<sup>32</sup> If the capital's economy grows more slowly in future, it will make less of a contribution to central government compared to scenarios where its historic growth rate continues.
- Rail delivers social benefits of £1 billion a year to cities, in addition to an average spend of a leisure travel of £114 per journey.<sup>33</sup> There will be a significant cost if journeys do not start to return to their pre-pandemic level.
- International students – who are particularly drawn to the elite institutions in our largest cities – contributed £25.9 billion to the UK economy before the pandemic.<sup>34</sup> If there continue to be jitters about the number of students coming to the UK,<sup>35</sup> this will have a long term economic impact.

## CHAPTER 6

# What can we do about it?

This report has shown that Britain's biggest cities are key parts of spreading prosperity around the country and making our economy strong and globally competitive. At the same time, they face significant emerging headwinds from Brexit, the recovery from Covid and more. Cities approach these challenges already harbouring significant amounts of deprivation and inequality, with some of the poorest people in the country living in some of the most prosperous places. It is clear that for the country as a whole to thrive and achieve its goals, our cities must be encouraged to grow and do more, rather than be held back in the false belief that other places must be allowed to catch up.

To do this, the government must support the UK's major cities. This must be done as much through rhetoric as through legislation and resources. The government must recognise the importance of our largest cities, and not shy away from the vital role played by London as our capital, largest city and the face we show to the world. It's not just about London though; there must be a commitment to a target of growth in cities across Britain that at least matches that seen in London prior to the pandemic. This would allow cities to act as the catalyst they need to, in order to secure the success of levelling up.

The best way we can achieve these ambitions is through a programme of ambitious, meaningful devolution. Cities will allow be able to fulfil their potential when we empower the local leaders who best know and understand their city's strengths, weakness and opportunities to make the right decisions for long-term prosperity. To do this, the government should realise the devolution ambitions set out in the Levelling Up White Paper. Specific principles are more likely to led to devolution to succeed:

- **Strong local bodies:** there should be clear lines of accountability, with single local bodies given the power they need and the visibility to be held accountable.
- **Funding:** city governments need sufficient and sustainable funding, including enhanced revenue-raising powers.

Devolution must not, however, be seen as giving to other cities what London has enjoyed for a long time. London has not reached some natural endpoint in either the level of devolution, the quality of public services or the strength of the economy in the capital. Rather, devolution should be seen as a matter of equipping local leaders and communities with the tools and resources they need to realise their ambitions. These ambitions will of course vary across the country depending on the local character, strengths and context. But if we are to make a success of levelling up and come through the crises of Covid and the cost of living emergency, London must be allowed to grow in the most London-like way possible, just as Manchester must be equipped to grow in a way that suits Manchester and so on. That would be real levelling up.

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