

Where growth happens

The high growth index of places

Place Analytics insight
Autumn 2014





Executive summary

As the UK emerges from the worst economic crisis in many generations, increasing attention is being given to delivering and supporting economic growth. National policy makers are focused on providing the investment and levers to facilitate this growth while, at the local level, decision makers are working hard to ensure that these levers are used to maximum effect. The result is that growth – its stimulation, acceleration and maintenance – is at the forefront of national, sub-regional and local agendas.

But growth is not uniform across the country. The positive announcement in the 2014 Budget that the Office of Budget Responsibility (OBR) had revised its forecast for GDP growth from 2.4% to 2.7% in 2014¹ will not play out evenly across the UK. While London and the south east are experiencing economic growth, some other parts of the country are still awaiting the first shoots of recovery. How that growth manifests itself locally, be it economically, demographically or otherwise, presents very different opportunities and implications for policy makers and local leaders in fostering that growth.

Against such an uneven growth landscape, the debate around growth at a policy and local level takes many different forms. To shed light on the dynamics of local growth, this report and index analyse growth at a local level on a range of measures. It highlights the common characteristics of high growth areas and provides a tool for understanding the nature of growth within specific places. In doing so, it identifies a number of implications and challenges for driving, catalysing and sustaining growth. It also draws upon the views of a range of local leaders and chief executives – particularly in terms of rebalancing growth across England – and our experience of working with dynamic organisations within the public and private sectors.

High growth places, dynamic places and growth corridors

HIGH GROWTH	Our High Growth Index of places, based on economic and demographic measures, shows the pivotal role played by London in driving growth nationally and the role of cities for driving growth regionally. Outside of London, Manchester is the strongest performer, with Birmingham, Milton Keynes, Bristol and Brighton and Hove all ranking in the top five.
DYNAMIC GROWTH	Highlighting past areas of growth, however, may not necessarily be an indicator of future growth or sustainability. A dynamism index, ranked by assessing a basket of productivity drivers, indicates the quality of growth. The emerging picture shows that dynamism clusters around cities and their wider conurbations. Again, London leads, but is followed by Cambridge, then Reading, Manchester, Bristol, Oxford, Brighton and Hove, Milton Keynes, Leeds and Warrington.
GROWTH CORRIDORS	Combining rankings for both growth and dynamism reveals a pattern of growth in England based around nine growth corridors. These are functional, large scale, economic areas which have been at the heart of growth over the last decade and are likely to maintain a pivotal role in shaping that growth in the future. Based around key cities, these corridors extend across district borders and create key strategic linkages with other high growth and dynamic areas.

¹ HM Treasury (March 2014) Budget 2014

What are the characteristics of high growth and dynamic economies?

The characteristics of high growth and dynamic places are segmented into three broad spheres: economic, demographic and environmental. Analysing these three elements reflects the need to consider place with a ‘balanced scorecard’ approach. The linkages between each of them means that none can be tackled independently, neither in terms of research or local strategy. This was clearly reflected in the views of the leaders that we consulted as part of this research.

In the **economic** sphere the key characteristics were large local economies, high business and employment densities, a high percentage of knowledge-driven businesses, especially within the knowledge-driven services sector, high business formation rates and a high level of patents granted. Interestingly, we found little correlation in the data between growth and business survival, indicating that business failure is an inevitable element of an enterprising culture; and that a thriving local economy should be prepared for churn and provide support mechanisms to give entrepreneurs the confidence to try new ideas.

In the **demographic** sphere, high growth places have a highly skilled workforce, a high proportion of knowledge workers, a young and economically active workforce and

diverse communities. Local authority leaders recognised the importance of human capital and the need to foster ‘talent’, from skills and education attainment to creative abilities, entrepreneurial spirit and resilience. Talent retention and resisting the draw on that skilled workforce to other attractive locations – in particular, London – is also key to growth. Alongside this, universities play an important role in attracting and refreshing the talent pool, especially where there are trends towards a locally ageing working population.

In the **environmental** sphere there is strong connectivity with good access to inter-city rail, motorways and airports, good access to local services and amenities and a high level of office floor space as a proportion of the total commercial and industrial floor space. Of these, connectivity and infrastructure are essential components in growth in terms of both driving, as well as sustaining, that growth. Despite a time of austerity, investment in transport, utilities, communication, housing and workplace infrastructure is critical. Leaders also recognised the need to invest in enhancements, rather than develop new infrastructure and that this investment must sit strategically in line with an area’s overall growth vision.

THE LEADERSHIP VIEW

A challenging role for the public sector in managing growth

Alongside its creative role in stimulating growth, the public sector has had to rise to the challenge of seeking to deliver growth in the context of cuts and reductions. This has meant that for many authorities their focus, over the last five years, has been on the twin priorities of growth and reform of public services.

This has been a significant challenge. Not least because of the direct relationship between growth and the requirement for services: as population grows so does the demand for mandatory services, placing increasing demand on a reducing budget. In and of itself this is not sustainable.

The authorities we spoke to were also focused on service reform to ensure that local communities were able to benefit from local growth by, for example,

ensuring the local population has the requisite skills to access employment opportunities, driving through skills programmes and schools reform.

It is a live challenge that many authorities are actively wrestling with, and one which requires innovative approaches that will increase local revenues, shrink dependency and reduce the unit cost of delivering mandatory services.



THE LEADERSHIP VIEW**A creative role for the public sector in stimulating local growth**

While private sector growth is a pre-requisite for sustainable long-term growth, there is clearly an important role for the public sector to play in stimulating growth. Increasingly, this role is about developing creative and innovative solutions to long standing and deep set market failures. It is a creativity that is even more important in an age of austerity.

In part, this creativity is about working with and adapting standard national products, policies and services so that they are genuinely local solutions, tailored to the individual and specific needs of a particular place. But it is also increasingly about using innovative solutions to create new services, deliver major projects and to drive growth. As such, the most innovative local authorities, in particular, are regularly exploring what is possible in terms of prudential borrowing, the creation of different funding vehicles, developing different approaches to asset management and adopting different approaches to service delivery. At the heart of these innovative approaches is the dual desire to bring forward projects and to leverage maximum value from public sector investment.

Analysing the economic, demographic and environmental characteristics reflects the need to consider place with a 'balanced scorecard' approach. The linkages between each of them means that none can be tackled independently, neither in terms of research or local strategy. This was clearly reflected in the views of the leaders that we consulted.

Collaboration around growth corridors is key, particularly in the regions

There is a clear role for both the public and private sector in stimulating sustainable growth, from developing creative solutions to recognising and building on the distinctiveness of individual places where those assets exist. This at a time when the public sector, particularly at the local level, is seeking to deliver significant public service reform. In this challenging context strong local leadership is essential to providing a robust and stable platform for growth.

This leadership will be required to join-up central and local government and local enterprise partnerships across geographies, different services, various stakeholders and to work with the private sector. It will also need to be a strong advocate for an area or sub-region to both central government and internationally. Lastly, it will need to support growth through a singular focus, and through identifying growth drivers and barriers, and working with the relevant partners, to either invest in them or address them.

In this context, the identification of nine growth corridors has important implications for government and policy makers, presenting both opportunities and challenges. The nine growth corridors are functional and large scale, economic areas that have been and continue to be pre-eminent in the UK growth story. At the core of these corridors lie a number of England’s key metropolitan areas and large cities. But growth also extends beyond these traditional administrative boundaries; permeating borders into neighbouring areas and creating strategic linkages with other high growth and dynamic areas.

For those local leaders and stakeholders that sit at the heart of one of the corridors there is a need to work across the traditional administrative boundaries and think more in terms of functional economic areas to manage and deliver growth in a joined up and complementary way; one which will reduce duplication and at times disruptive competition between areas.

For those outside growth corridors there will be the need to understand their economic role and function in relation to the growth corridors most appropriate to them. Then how to engage in these fully, over time, through the creation of physical, governance and operational linkages, or through identifying opportunities and services it could provide, such as the availability of employment land or lower labour costs.

In order to provide this leadership and to respond appropriately, it is vital that places understand the economic and social geography in which they function and are cognisant of where growth happens. We want this work to contribute to that understanding.

The production of the High Growth and Dynamism Indices by our Place Analytics team ties in closely with our related research around the Agents of Growth and the power of mid-sized businesses (www.grant-thornton.co.uk/Agents-of-growth). It is an in-depth analysis that will be repeated on an annual basis to provide further insight into, and monitor how, this interesting story of growth unfolds.

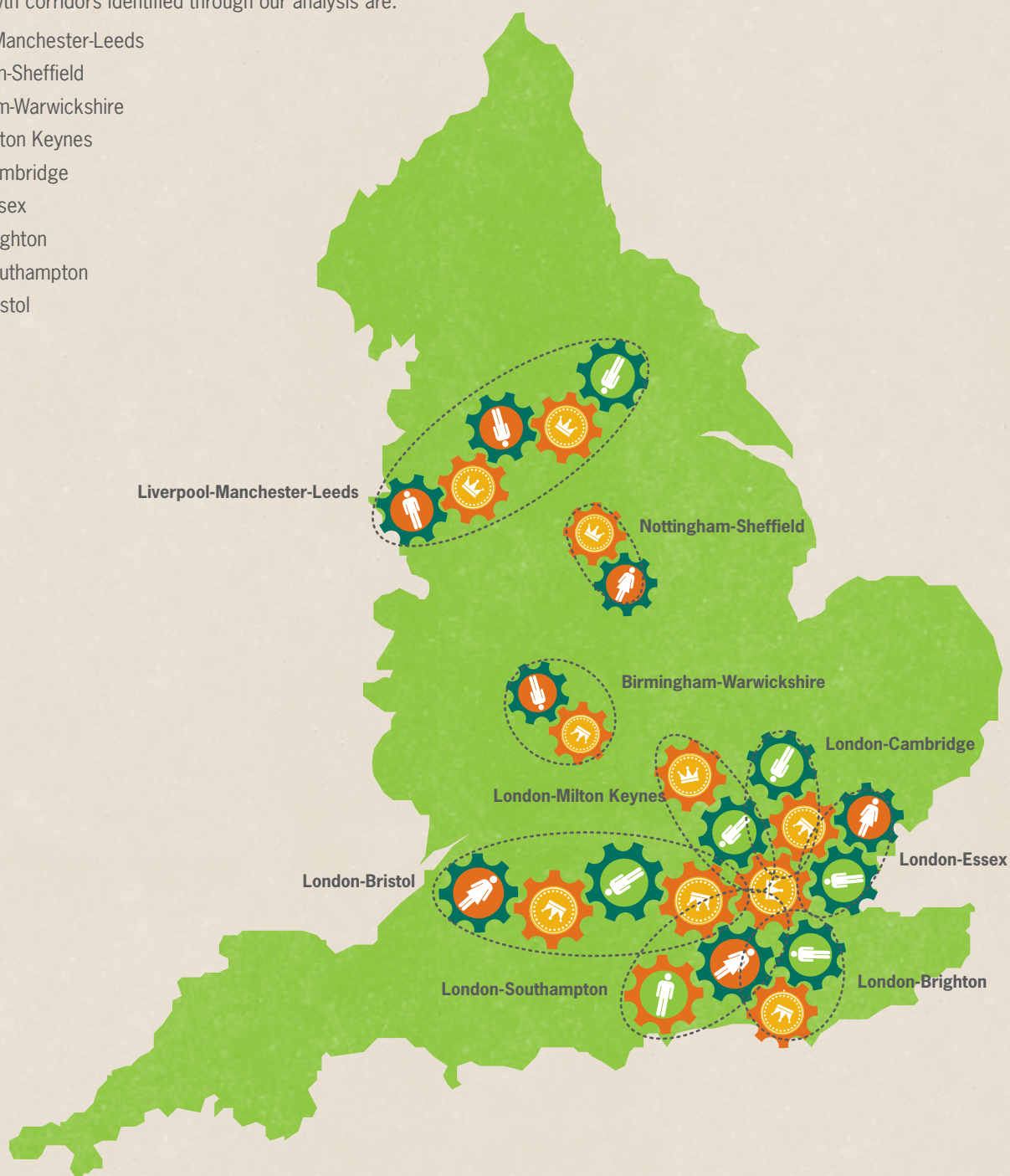


There is a clear role for both the public and private sector in stimulating sustainable growth, from developing creative solutions, to recognising and building on the distinctiveness of individual places where those assets exist.

Map 1 Growth corridors map

The nine growth corridors identified through our analysis are:

- Liverpool-Manchester-Leeds
- Nottingham-Sheffield
- Birmingham-Warwickshire
- London-Milton Keynes
- London-Cambridge
- London-Essex
- London-Brighton
- London-Southampton
- London-Bristol



Building the High Growth and Dynamism Indices

How growth manifests itself locally – be it economically, demographically or physically – matters. Growth, or indeed the lack of it, presents very different opportunities and implications for policy makers and local leaders. As such it is important to understand more about how this place-based story of growth plays out across England.

However, is historic growth a useful predictor of future growth or its sustainability? Will a pattern emerge over the coming decade whereby those areas that have experienced high levels of growth continue to do so, in effect creating a small number of growth centres across England? Or will there be a period of rebalancing, as those areas with lower or indeed negative growth provide the ‘spare capacity’ to accommodate future growth? Or will the reality lie somewhere in between with some areas continuing to experience high economic and demographic growth and new high growth areas emerging?

To take this into account, the detailed analysis behind this report and indices, undertaken by Grant Thornton’s Place Analytics team, explores growth through two complementary lenses:

1. **A high growth index** of places which identifies those places that have experienced the fastest growth over the past eight years, according to three growth criteria, each assessed by scale of growth (in absolute terms) and the rate of growth (in relative terms). This then enables the identification of the common characteristics of high growth and indicates the implications and challenges for driving, catalysing and sustaining it.
2. **A dynamism index** of places which focuses on the quality of growth; places where growth has contributed towards local economic value. The drivers of dynamic growth used to calculate this index were those found to have a high correlation to areas with a high Gross Value Added (GVA) by job² (Appendix 1).

THE LEADERSHIP VIEW

Evidence based understanding



A key factor in creating a stable platform for growth is a robust, evidence-based understanding of their locality. This provides clarity for the leadership so that there is a shared understanding of what the problem or opportunity is, its scale, and what works with regards to possible solutions. This evidence base is essential for underpinning the vision for a locality and the action and activity required.

Significant weight is placed on the importance of knowing their place, its position and performance relative to others, and how they use this evidence base to make decisions around prioritisation and focus.

This analysis has been supplemented by a small number of in-depth, semi-structured interviews with a selection of local leaders and chief executives charged with overseeing the growth of their areas. In particular, this included Sir Howard Bernstein, CEO of Manchester City Council, Ged Fitzgerald, CEO of Liverpool City Council and John Mothersole, CEO of Sheffield City Council, for their insight and response in the context of the re-balancing debate for these major northern cities. We also draw upon the firm’s wider insight around growth, to provide detail and colour to the opportunities and challenges facing sub-regional and local government in delivering and supporting economic growth.

² GVA assesses value of goods and services produced locally, but doesn’t take account of what is driving that scale, which is best represented by GVA by job. We have focused on productivity rather than prosperity (GVA per head) for two main reasons. First, “increasing productivity is generally considered to be the only sustainable way of improving living standards in the long term” (The ONS Productivity Handbook). Second, GVA per head requires a greater degree of caution in its application as it mixes a workplace based (GVA) and residence based (population) calculation.

High Growth Index criteria



- 1 Economic growth** – including business stock and employment levels



- 2 Demographic growth** – including resident population and growth in working age population



- 3 Place growth** – dwelling stock and commercial floor space

Methodology

- For the high growth index, change has been assessed on all measures over the period 2004 to 2012
- The findings refer to the characteristics of each district. For a fuller understanding of the growth dynamics of an area, it may be appropriate also to consider the performance of neighbouring areas
- In creating composite/index scores, equal weighting has been given to the individual measures
- Due to data availability issues, the City of London has been omitted from the analysis
- Reference to regions reflect the statistical geographies used by the Office of National Statistics

Dynamism Index criteria



- 1** The presence and concentration of **knowledge intensive businesses** – the proportion of enterprises in three key knowledge sectors (professional, scientific and technical; business administration and support services; and information & communication)



- 2** The proportion of the **resident workforce in knowledge intensive sectors**



- 3** The proportion of the **resident workforce in knowledge occupations** (eg managers, professional and technical occupations)



- 4** **A highly skilled resident workforce** – the proportion qualified to NVQ level 4 (ie degree level) or above



- 5** **A high business formation rate** – the percentage of businesses that have registered for VAT within the last year



- 6** **The number of patents granted** as a proportion of resident population as a proxy on the relative levels of innovation in a given place



- 7** **The connectivity** of a place in terms of transport both within the area and further afield (road, rail and air)

The High Growth Index of Places

Our **High Growth Index** combines the economic growth indices (in terms of businesses and employment) and people growth indices (in terms of population and working population), equally weighted, to create a composite index that identifies those places that have grown fastest (in terms of both the rate and scale of growth) over the last eight years. This underlying breakdown by economic, people and place growth respectively can be seen in appendices one to three.

London and the cities are the key growth drivers

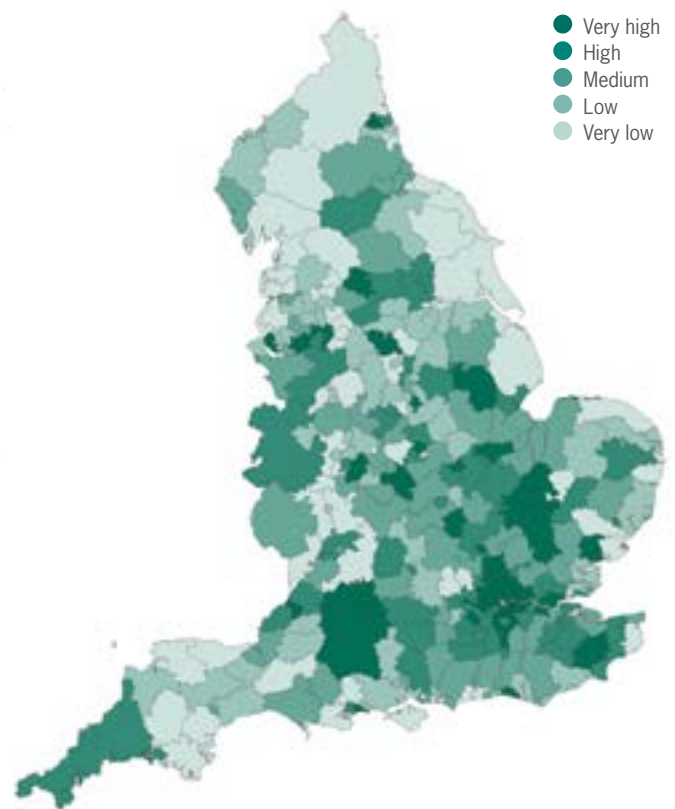
Our index shows the dominant and pivotal role played by London in driving growth. London has nine of the ten top performing districts (and 23 of the top 50), with boroughs in east (Tower Hamlets, Newham, Hackney), central (Southwark, Lambeth, Wandsworth) and west London (Hounslow) heading the index. Only Manchester outside London, makes the top ten.

Outside London, it is cities that are acting as the major drivers of growth, with 18 featuring among the top 50 performers. This includes Manchester, Birmingham, Brighton and Hove and Milton Keynes. Given that London makes up 23 of the top 50 performers, this analysis raises interesting questions for policy and decision makers about how growth can be spread more evenly across England: outside of London how can economic scale be created to really drive economic growth and indeed match London? It is the key question in economic development that many are actively wrestling with.

Regional challenges and disparities endure

However, it is clear that while some places have prospered, other parts of the country have not enjoyed growth over the last eight years and, in some cases, may have experienced decline. The regions with the largest proportion of low performing areas were in the north west, south west and west midlands (where over 30% of districts are ranked in the bottom 50 performers).

Map 2 High growth



Outside London, it is cities that are acting as the major drivers of growth, with 18 featuring among the top 50 performers.

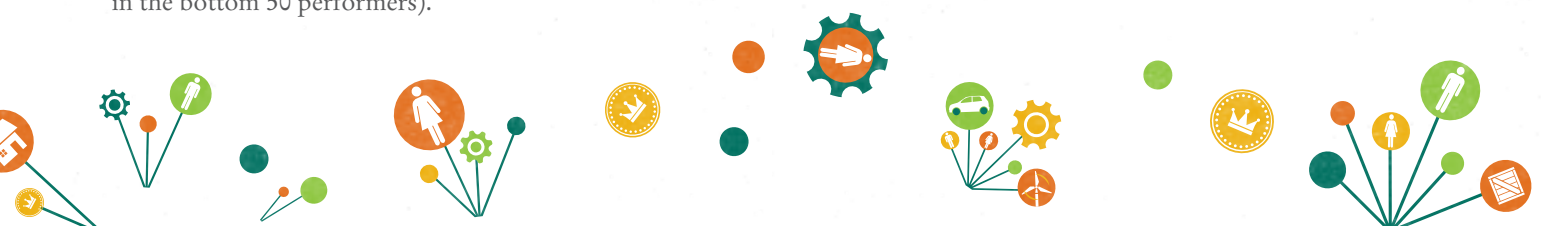


Figure 1 Regional overall growth patterns

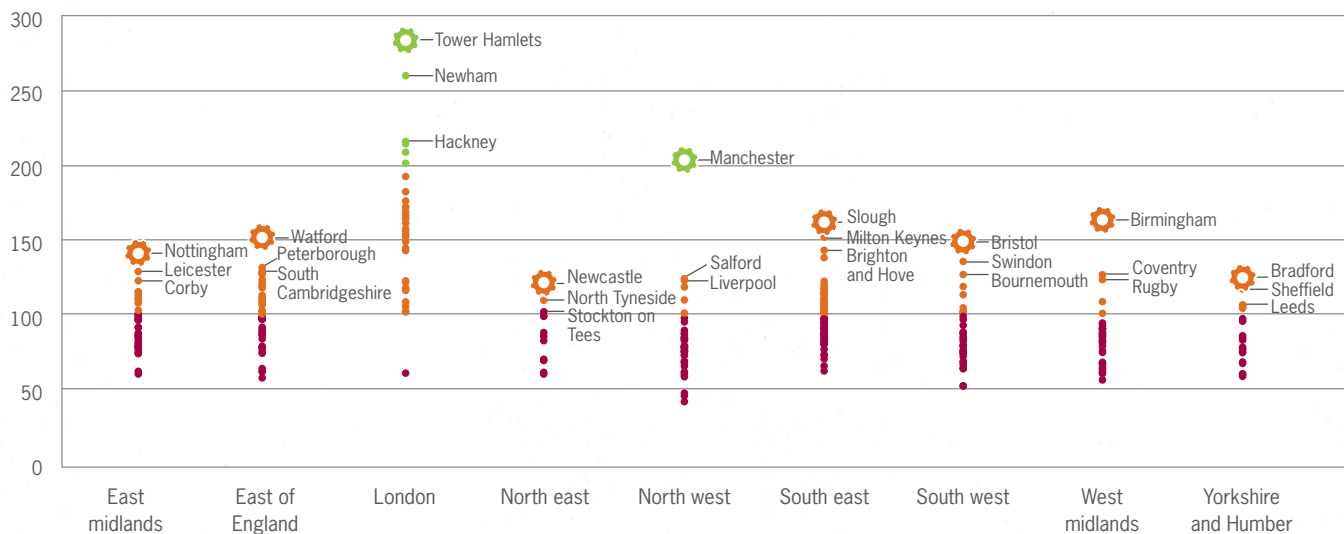


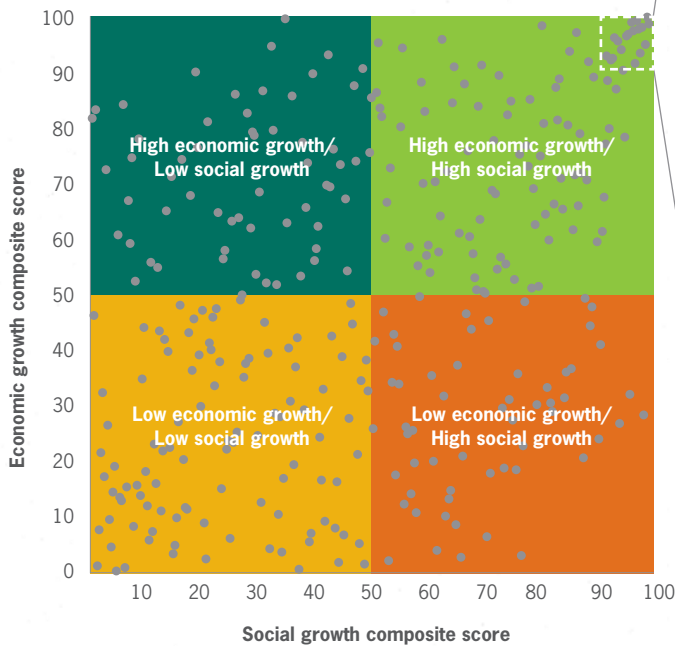
Table 1 High Growth Index

Cities (exc London)	High growth score	Local authority area	Region	High growth score
1 Manchester	205	1 Tower Hamlets	London	285
2 Birmingham	165	2 Newham	London	260
3 Milton Keynes	153	3 Hackney	London	217
4 Bristol	150	4 Southwark	London	216
5 Brighton and Hove	144	5 Lambeth	London	210
6 Nottingham	142	6 Manchester	North west	205
7 Leicester	137	7 Hounslow	London	203
8 Swindon	137	8 Islington	London	194
9 Peterborough	133	9 Brent	London	183
10 Cambridge	128	10 Greenwich	London	177
11 Bournemouth	128	11 Redbridge	London	173
12 Coventry	128	12 Waltham Forest	London	173
13 Bradford	126	13 Westminster	London	170
14 Liverpool	124	14 Camden	London	168
15 Newcastle upon Tyne	123	15 Barking and Dagenham	London	166
16 Sheffield	120	16 Birmingham	West midlands	165
17 Warrington	120	17 Slough	South east	163
18 Leeds	118	18 Hillingdon	London	163
19 Derby	117	19 Barnet	London	159
20 Northampton	111	20 Enfield	London	157

The characteristics of high growth areas

So what are the typical traits of high growth areas? The growth matrix groups the performance of all the English districts according to economic and social growth and produces four groups (Figure 2), each with broadly similar place characteristics (Table 2).

Figure 2 The growth matrix



THE LEADERSHIP VIEW

Maximising the value of place

Growth is predicated on maximising the value of specific local assets. This is about understanding local specialisms and niches – no matter how small – and making the most of them: supporting them; building on them.

In part this relates to the distinctiveness of individual places whether that be a sector specialism, a particular cultural strength, a physical asset or key infrastructure. But it was also an

acknowledgement that across the UK there is both increasing competition and increasing homogeneity between places, particularly cities as they vie with one another to attract investment or lay claim to particular strengths as the UK's capital of, for example, science, technology or culture.

A focus on local strengths was therefore seen as a means of both countering this but, more importantly, driving growth by getting behind and investing in those assets where competitive advantage and opportunity already exist. Importantly,

a number of the leaders emphasised that this was not simply about identifying the jewels and assets that were of a particular scale. In fact, some argued the converse and that investment and support for the larger assets with the anticipation of trickle down effects did not actually work in driving growth, instead emphasising the value of the small.



Table 2 Summary of place characteristics

<p>HIGH ECONOMIC GROWTH LOW SOCIAL GROWTH</p>  <p>(Examples: Barrow, North Warwickshire, South Tyneside, Stockport, Knowsley, St Helens, Castle Point, South Ribble)</p> <p>Economic</p> <ul style="list-style-type: none"> • Smaller economies • Low % knowledge-driven businesses • Lower skills profile <p>Social</p> <ul style="list-style-type: none"> • Fewer knowledge workers • Higher % level 2 occupations • Less diverse communities • Slightly older workforce <p>Place</p> <ul style="list-style-type: none"> • Reasonably well connected • Less office space/more industrial floorspace • Reasonably affordable places to live 	<p>HIGH ECONOMIC GROWTH HIGH SOCIAL GROWTH</p>  <p>(Examples: Tower Hamlets, Southwark, Manchester, Lambeth, Milton Keynes, Hounslow, Slough)</p> <p>Economic</p> <ul style="list-style-type: none"> • Large local economies • High % knowledge-driven businesses • High business formation rates • High employment density <p>Social</p> <ul style="list-style-type: none"> • High % knowledge-driven businesses • Young and economically active workforce • Diverse communities <p>Place</p> <ul style="list-style-type: none"> • Well connected • Good access to services and amenities • High % office floorspace
<p>LOW ECONOMIC GROWTH LOW SOCIAL GROWTH</p>  <p>(Examples: West Somerset, Wyre Forest, South Lakeland, North Norfolk, Ryedale, Staffordshire Moorlands, Eden, Babergh)</p> <p>Economic</p> <ul style="list-style-type: none"> • Small local economies • High self employment rates • Relatively high proportion of NVQ2+4 <p>Social</p> <ul style="list-style-type: none"> • Older population • Less diverse communities • More affordable housing <p>Place</p> <ul style="list-style-type: none"> • Poorly connected • Poor access to services/amenities • High car dependency • Attractive natural environment 	<p>LOW ECONOMIC GROWTH HIGH SOCIAL GROWTH</p>  <p>(Examples: Luton, Ipswich, Norwich, Kirklees, Sandwell, Gloucester, Maidstone)</p> <p>Economic</p> <ul style="list-style-type: none"> • High % public sector employment • Fewer knowledge-driven businesses <p>Social</p> <ul style="list-style-type: none"> • Relatively diverse communities • Relatively young communities • Larger families • Fewer knowledge workers <p>Place</p> <ul style="list-style-type: none"> • Well connected • More affordable • Reasonable access to services and amenities

The Dynamism Index

Is historic growth a useful predictor of future growth or its sustainability?

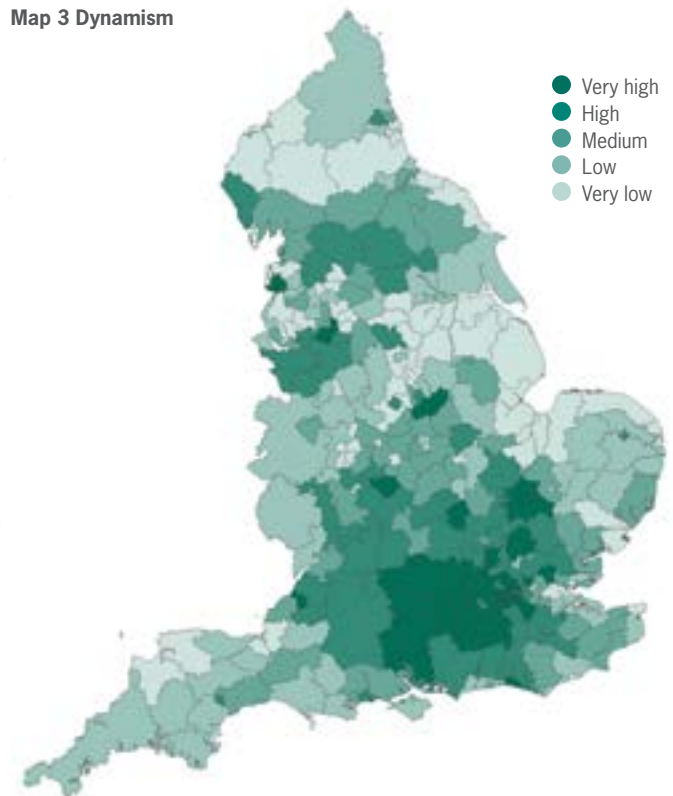
If the recent economic crisis has taught policy makers and commentators anything, it is that predicting the future over the medium to longer-term is extremely difficult. So much can and will happen over the next decade – in terms of infrastructure improvement, technological change, social development, environmental imperatives and of course changing economic and political cycles – that the geography of growth will undoubtedly look different to that presented in this report. What is not known is by how much. Will High Speed 2 drive growth of particular areas at the expense of others? Will technological advances change how and where people work? Will changes in societal norms drive up the demand for new and different types of homes impacting on where people want to live?

For many of these types of question it is simply too early to know. To consider this, the **Dynamism Index** focuses on the quality of growth, to identify areas with a vibrant and dynamic economy, from which to elicit common characteristics which may be the key ingredients for driving value and growth in local economies in the future. This could be used by policy makers to frame future areas of focus for investment and business support interventions.

Our index shows that dynamism clusters around cities and their wider conurbations. This is particularly true for London, but it is also apparent in Birmingham, Manchester, Leeds, Bristol and Brighton although the geographical spread is narrower. There is also an interesting pattern emerging to the west of London with a dynamic corridor developing between the south coast up to St Albans encapsulating Reading and Oxford – two of the most dynamic cities – along with the districts of Wokingham, Windsor and Maidenhead, Winchester, Basingstoke and Deane and Newbury. It is a corridor that currently extends towards Swindon in the west.

Beyond these city hinterlands there are, however, large clusters across the country that score poorly with regard to dynamism. Apart from a few isolated pockets, the far north of England scores poorly, as does a band south of Cheshire and north of Birmingham that stretches through the east midlands across the breadth of the country. The south west, beyond Bristol, also scores low.

Map 3 Dynamism



Despite the clear relationship emerging between dynamism and cities, it is not an even picture across all cities as Figure 3 shows. Rather, cities appear to broadly fall into three bands. Cambridge scores particularly highly – significantly outperforming all of the other cities, while of the seven top performing cities outside of London, four are in the south east. Of the eight English core cities³, all bar Manchester and Bristol are in the middle scoring group. Manchester and Bristol have similar high scores (within two points of each other), while the remaining six also have broadly similar scores (within 14 points of each other). There is also clearly a similar set of challenges facing a number of England's key cities⁴ as they seek to deliver growth in the context of generally mid-sized economies, which from our analysis appear less dynamic with regard to the different drivers of productivity.

³ Birmingham, Bristol, Leeds, Liverpool, Manchester, Newcastle, Nottingham and Sheffield.

⁴ Bath, Blackpool, Bournemouth, Brighton, Cambridge, Coventry, Derby, Doncaster, Hull, Kirklees, Milton Keynes, Norwich, Peterborough, Plymouth, Portsmouth, Preston, Southampton, Southend, Stoke, Sunderland, Wakefield, Wolverhampton and York.

Figure 3 City ranking by region

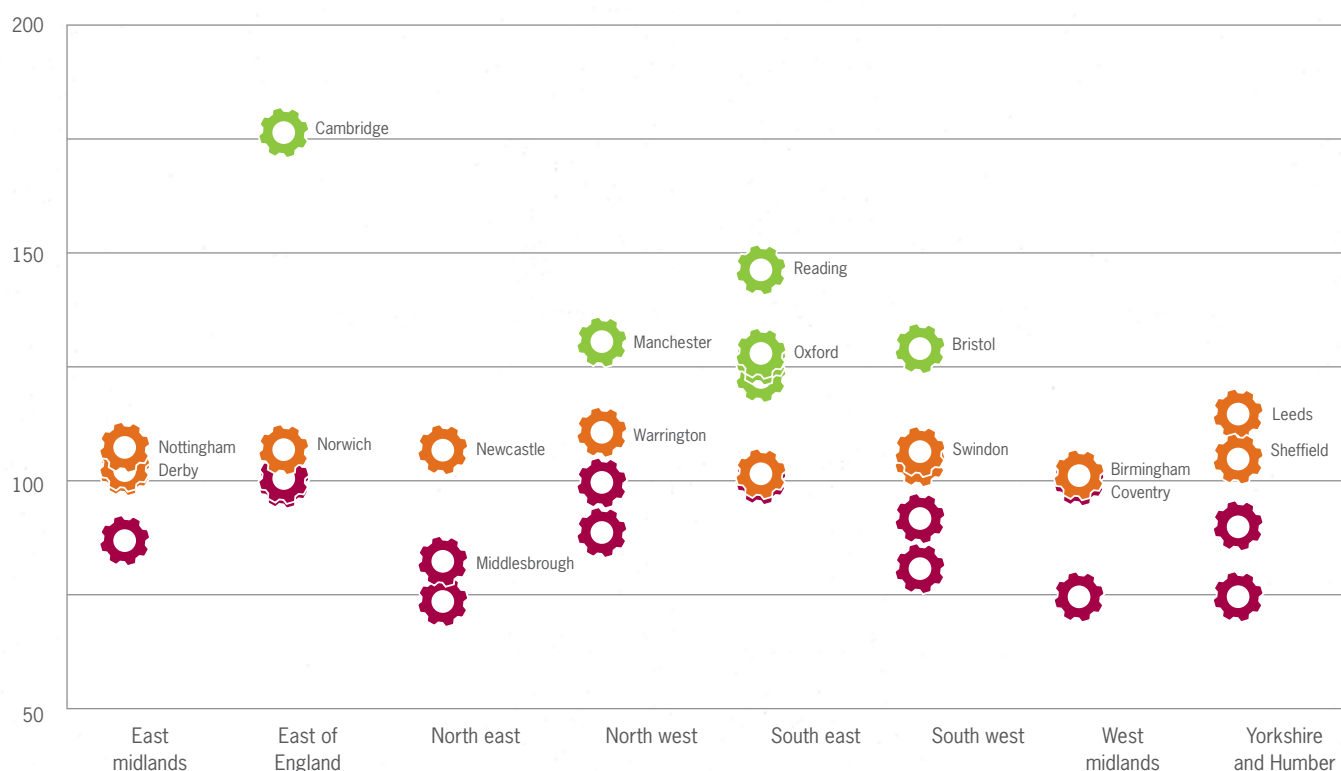


Table 3 Dynamism Index

Cities (exc London)	Dynamism score	Local authority area	Region	Dynamism score
1 Cambridge	176	1 Westminster	London	293
2 Reading	146	2 Camden	London	211
3 Manchester	131	3 Islington	London	198
4 Bristol	129	4 Tower Hamlets	London	195
5 Oxford	128	5 Cambridge	East of England	176
6 Brighton and Hove	127	6 Lambeth	London	174
7 Milton Keynes	123	7 Hammersmith and Fulham	London	174
8 Leeds	114	8 Southwark	London	172
9 Warrington	111	9 Richmond-upon-Thames	London	169
10 Nottingham	107	10 Kensington and Chelsea	London	168
11 Norwich	107	11 Wandsworth	London	159
12 Newcastle-upon-Tyne	107	12 South Cambridgeshire	East of England	157
13 Swindon	107	13 Mole Valley	South East	150
14 Bournemouth	105	14 Woking	South East	148
15 Sheffield	104	15 Hackney	London	147
16 York	104	16 Reading	South East	146
17 Derby	103	17 Wokingham	South East	145
18 Northampton	102	18 Windsor and Maidenhead	South East	144
19 Portsmouth	102	19 Elmbridge	South East	144
20 Birmingham	101	20 Watford	East of England	144

Apart from a few isolated pockets, the far north of England scores poorly, as does a band south of Cheshire and north of Birmingham that stretches through the east midlands across the breadth of the country. The south west, beyond Bristol, also scores low.

Growth and dynamism

If a place needs to be both growing and dynamic, is driving these characteristics the holy grail for achieving sustainable, long-term growth? Understanding the characteristics of these high performing places will be crucial to framing policy and action in support of this.

The dynamic growth matrix

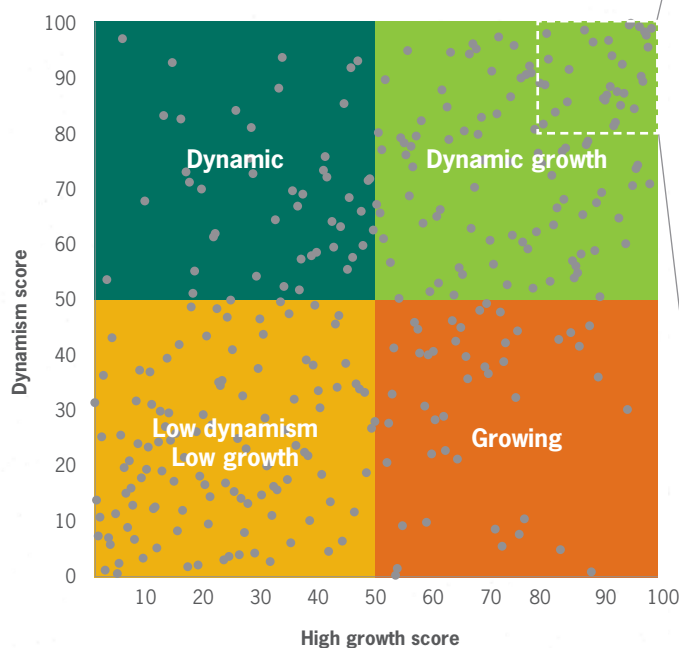
Combining the rankings for the high growth and dynamism indices provides a dynamic growth matrix and four different typologies (Figure 4).

Those categorised as **low dynamism/low growth** tend to be more rural or peripheral places, or declining former industrial areas. Places in the **dynamic quadrant** are generally higher value, more dynamic local economies that are slow growing. They tend to be places on the fringes of cities which have attracted more specialised high value/high tech businesses. The opportunity for these places will be to build

on their dynamic enterprises and business stock successes by encouraging further growth. In the **growing quadrant** there are fast growing places where local economies are less dynamic. Many of these places are in coastal or semi-rural locations. Here, improving the quality and value of the local business base will be key to long-term success and sustainability. The places in the **dynamic growth quadrant** are the key drivers of growth and dynamism in the UK. They include London boroughs and a number of cities, together with large parts of the south east and east of England. Building on, creating linkages to and perhaps spreading their success will be key to future UK economic success.

The number of local authority areas that appear in the **dynamic growth quadrant** in each English region is shown in Figure 5. The importance of London and neighbouring south east/east of England is clear, with local authority areas in these regions accounting for almost 70% of the

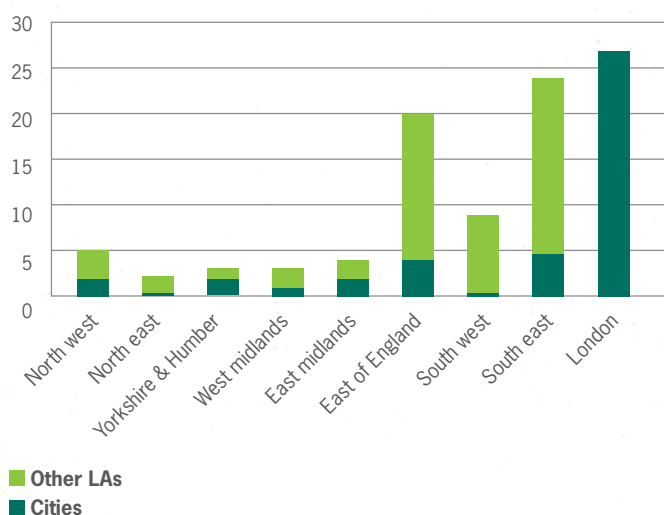
Figure 4 Dynamic growth matrix



total. While there are several high performing towns and cities in the south east (eg Milton Keynes, Reading, Brighton and Hove, Slough) other successful places are found across Surrey, Sussex and Hampshire. The same pattern is found in the east of England, with parts of Hertfordshire, Essex and Cambridgeshire performing well, along with cities such as Cambridge, Peterborough and Norwich.

In other regions, it is generally the major cities that are the key drivers of growth and dynamism. Here, Manchester, Liverpool and Warrington emerge as strong players in the 'North West Atlantic Gateway'. Birmingham and Coventry, Leeds and Sheffield, Nottingham and Derby, and Newcastle upon Tyne emerge as the main drivers of growth and dynamism within their respective regions. The only slight exception is the south west; while Bristol plays a key role, it is accompanied by a number of other high performing non-city areas, for example in Gloucestershire and the west of England.

Figure 5 Dynamic growth local authority districts by region



THE LEADERSHIP VIEW

The importance of infrastructure



Infrastructure is essential to the competitiveness of individual places and as such it is a vital component in growth, both in terms of driving it but also sustaining it. Investment in transport, utilities, communication, housing and workplace infrastructure is critical for areas as they adapt to growing populations (be they workplace or resident). Throughout our interviews with chief executives and leaders three common strands emerged as they spoke about the importance of infrastructure in driving growth.

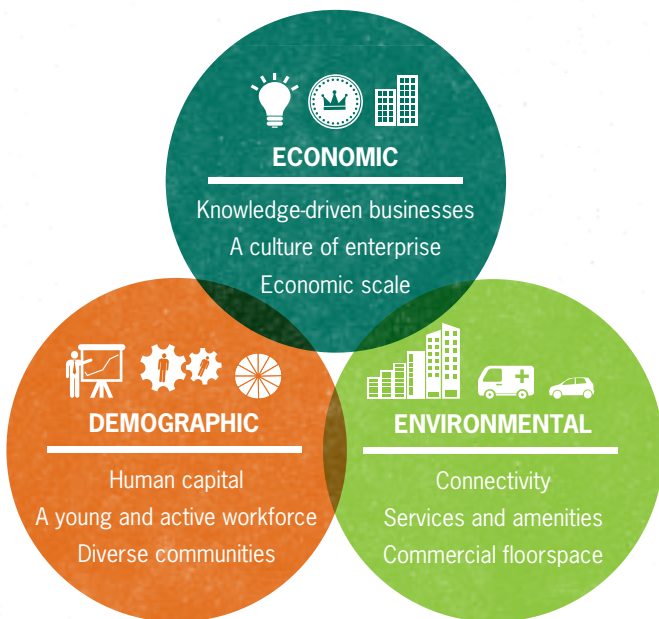
- 1 The centrality and importance of transport infrastructure** – particularly rail and air. Effective rail infrastructure – and the ability both to travel to outside of the locality as well as within it – was regularly held up as a barrier or driver of growth depending on the individual's area. For some this focus was related to wider national debates around High Speed 2, but for others it was simply about improvements to existing infrastructure. For the cities we spoke with, airports were naturally seen as an essential component in driving growth through internationalisation, enabling the area to compete in global markets.
- 2 The requirement was for improved infrastructure and not necessarily new infrastructure** – this will of course vary depending on the individual place, but for the majority of the areas we consulted directly, the overriding view was that the base level infrastructure was in place and that it was now about strategic investment to deliver enhancements and facilitate growth.
- 3 Investment in infrastructure required a clear purpose that aligned to the overall growth vision for that place** – consultees highlighted the danger of the assumption that any infrastructure is good. Rather, investment in infrastructure needs to be evaluated using growth metrics and assessing the extent to which it will either facilitate and catalyse growth or help sustain it. In an age where public money and resources are restricted, if not reducing, this will be particularly important: making the right investment is essential.

The characteristics of high growth and dynamic areas

Are growing and dynamic places all alike; while the places that are not growing all unique?

From our analysis it is possible to distil the key characteristics of high growth and dynamic places which represent the mix of ingredients necessary for driving value and growth in local economies. Some interesting implications emerge for policy makers and those interested in, or responsible for, fostering and sustaining growth as well as managing its consequences across the public – both central and local government – and the private sector.

Figure 6 Balanced scorecard



THE LEADERSHIP VIEW

A 'balanced' economy



Throughout our consultations with leaders and chief executives, the theme of 'balance' regularly emerged, albeit in slightly different contexts in different places although all relevant to thinking about growth. There were four main dimensions to this balance.

- 1 The need to balance success across multiple themes** – there is a need to be good at everything. Given the interlinkages and relationships between different services, activities and themes, growing places need to be making positive steps forward in all areas. An area that has grown its cultural strengths but not addressed its high levels of crime will struggle to maximise the growth potential of this strength. Likewise, an area that is unable to provide high quality schools will struggle to attract and retain management and executive level talent.
- 2 The need to balance – or indeed rebalance – an over reliance on the public sector** – for these areas the challenge was around strengthening and growing the private sector so that it was the majority employer in the area.
- 3 The need to balance population, employment and physical growth** – in confined geographies with limited land availability there is a need to balance the requirement to provide sufficient housing (of a certain size and tenure) with the provision of sufficient employment land.
- 4 A need to balance the dependent and independent population in an area** – with many areas experiencing growth in either, or indeed both, its ageing population and young population there is ever increasing dependency on local services be they adult social care, education or health. This dependency needs to be balanced by growth in the economically active, independent population.

ECONOMIC CHARACTERISTICS

1 Knowledge-driven businesses

Growing and dynamic places invariably have a significant presence of high value, knowledge-intensive businesses, especially within the knowledge-driven services sector (eg telecommunications, computer related services, financial and business services, recreation and cultural services). These businesses are often at the forefront of innovation and new development and frequently cluster within city and town centres.

Targeting these sectors for inward investment and developing strategies to support the growth and development of these businesses are already an important component of many local growth strategies.

Supporting knowledge-driven businesses also requires a significant investment in skills; a policy area that requires multiple interventions at a range of different levels and stages. This includes investment in STEM (science, technology, engineering and mathematics) at school, further and higher education levels. Universities also have a particularly important role to play in supporting knowledge-driven businesses through their work on innovation, research and development as well as working with local authorities and other parts of the public sector to ensure that graduates remain in the area and provide the necessary resource to the knowledge-driven businesses.

2 Economic scale

Many of the fastest growing places already have critical mass. The most successful areas are existing large economies with high business and employment densities. Here, the interplay between large and small employers, from a range of different sectors, can play a vital role in stimulating innovation and new development.

City and town centres often provide a focal point for knowledge economy enterprises and provide a place where businesses can meet and network – stimulating and supporting this has to be a key role for the local enterprise partnership. Yet the role of town centres as a focus for innovation and economic development is not always recognised in town centre strategies. Since they have some of the highest business densities, the role of town centres as economic drivers of change should be increasingly recognised in local plans and town centre strategies, which have traditionally focused on retail. This is particularly important for places with smaller economies.

3 A culture of enterprise

The top performing areas invariably have high business formation rates and provide an environment that is supportive to small and new enterprises. Yet a culture of enterprise is not commonplace across the country, especially within local economies that historically have had a high dependence on large organisations or branch plants, or the public sector.

While support for new and small businesses is a common component of most local economic development strategies, much more could be done to encourage a wider culture of enterprise. This will include: work around entrepreneurship in schools; the provision of creative and flexible space for entrepreneurs to work and network; and the provision of key entrepreneurial skills training. Many would associate entrepreneurship with technology start-ups and Silicon Roundabout in east London, but this is simply not the case with growth being experienced by SMEs in all sectors across the country.

While high business formation rates were a common feature of the most successful local economies, they do not guarantee long-term survival. Here more could be done to support the growth of SMEs with targeted support.

SOCIAL CHARACTERISTICS

4 Human capital

Human capital is a key requirement for growth and dynamism, with all of our top performing areas having good access to a highly skilled workforce. A resident workforce with a high proportion of knowledge workers (professional, managerial and technical workers) also appears to be a common characteristic of many of the most successful and dynamic local economies.

Attracting and retaining these key workers has two complementary economic benefits. Not only are their skills important for driving growth and dynamism within local businesses, but the wealth they create provides an important consumption driver for the local economy, creating jobs in restaurants, shops and other service industries. As noted above, the retention of graduates and close alignment with local universities is a pre-requisite. But so too are schools and further education, not least in the role that good schools can play in attracting and retaining management and executive level talent.

5 A young and economically active workforce

Fast growing places often have high levels of economic activity, with a high proportion of the local population being working age. Universities play a vital role in attracting young people to a place and helping to enrich the pool of local talent. Having attracted them, again the challenge is to retain these key workers, both through career opportunities, and also importantly, by ensuring a strong quality of life offer with access to amenities and cultural pursuits.

6 Diverse communities

Many of the top performing places have relatively diverse communities, comprising a range of different ethnic minority groups and nationalities. This is especially the case in towns and cities which can often offer a wider range of employment opportunities across business sectors and service industries. In a more globalised economy, a rich mix of people and cultures can have a positive impact on economic development, for example in creative industries and businesses operating internationally.

THE LEADERSHIP VIEW

People matter



What is clear in all our discussions around growth – whether it be the turnover growth of an individual small business or the economic growth of a sub-region – is that people matter. For individual places people are one of the key competitive advantages. The chief executives and leaders we spoke to regularly returned to the value of individuals.

There was of course a particular focus on those with higher skills, the knowledge workers, the more economically productive. But it was not limited to this group. What was apparent was that ‘talent’ was often seen as a primary driver for growth. Talent went beyond skills and educational attainment, encapsulating a broad spectrum from creative abilities, to entrepreneurial spirit, to resilience.

The value of this human capital is that it: provides a ‘critical input for growth’ by creating and growing businesses; drives new ideas and innovation; makes products and delivers services; and creates places that people want to live and work in. As such, there is an imperative to foster human capital. This view is supported by the London School of Economics’ Growth Commission which notes that “the growth dividend from upgrading human capital is potentially enormous”, not least as it offers the “double dividend” of driving growth and reducing inequality⁵.

The challenge for many places as they attempt to foster human capital is to counter the pull of opportunities offered by the main cities; and for the main cities it is invariably the pull of London. To do this, places need to provide the support and opportunities to retain talent locally.

⁵ LSE Growth Commission (No date) Investing for Prosperity.

PLACE CHARACTERISTICS

7 Connectivity

The top performing places are well connected both to other high performing places and internationally, with good access to inter-city rail, motorways and airports. Connectivity is important, not only for ensuring businesses have good access to customers and markets, but also for providing access to a wider pool of workers. The most successful places also have sound IT connectivity, with all of our top performers having good broadband access.

8 Access to services and amenities

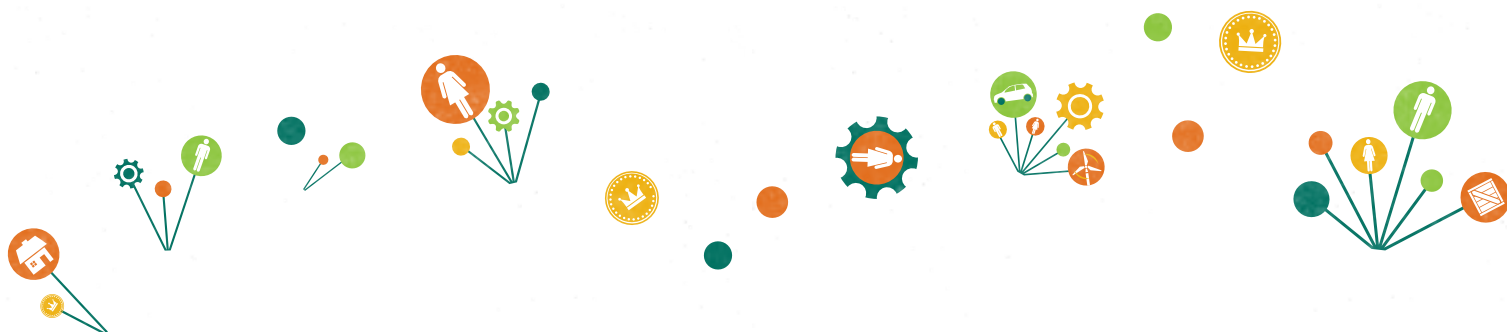
The most successful places (and especially cities) generally offer good access to services and amenities. With human capital key to developing a modern, knowledge-based economy, it is hardly surprising that a place's quality of life offer is increasingly being recognised as an important factor in encouraging growth and dynamism. Not only does it make a place more attractive to highly skilled knowledge workers, but through the services provided, creates a range of additional employment opportunities for the local workforce.

While place marketing for inward investment has traditionally targeted businesses, some places (eg Cornwall) are increasingly seeing the benefits of promoting their quality of life offer to attract the highly skilled knowledge workers that they see as key to longer-term success. Places need to consider their distinctive assets and play to these.

9 Commercial floorspace

Fast growing businesses, especially those in the knowledge-driven services sector, generally occupy offices. Unsurprisingly, therefore, many high growth and dynamic places have a healthy stock of office floorspace, often located in city and town centres. While this may be the result of new office development, in London and some other cities it has resulted also from a re-use of former industrial floorspace and from a more intensive and creative use of space within town centres. This, coupled with changing working patterns – whether that be hot-desking, shared workspaces or coffee shops with wifi – has facilitated employment growth without significantly increasing the overall footprint of commercial floorspace within an area.

The creative use and conversion of existing floorspace can therefore provide a win-win strategy for those areas concerned about the physical impact of growth on their place. The success of east London is one that needs to be looked at and understood, even if it is not to be replicated.



Growth corridors

Through our analysis an interesting landscape of UK growth emerges. It is one that has important implications for government and policy makers, presenting both opportunities and challenges. It is a geography that is based around a limited number of growth corridors – functional and large scale local economic areas in the UK – which would appear to be pre-eminent in the UK growth story. This analysis supports much of the current thinking with regard to economic development and growth, as it suggests these growth corridors that have been at the heart of growth over the last decade are likely to remain at the centre of England's growth for the next decade, playing a pivotal role in both driving and shaping growth.

At the core of these corridors lie a number of England's key metropolitan areas and large cities. However, growth invariably extends beyond traditional administrative boundaries as it permeates across borders into neighbouring areas as well as creating key strategic linkages with other high growth and dynamic areas. These linkages appear to follow traditional radial routes – such as the M4 corridor.

These places generally score well on the balanced score-card discussed above.

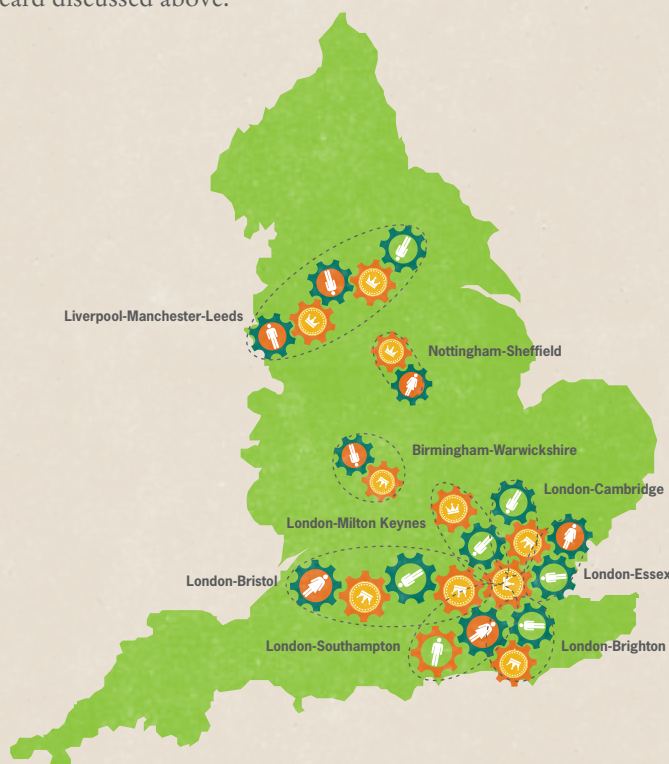
Not all places in the UK want to grow and a number will be content with their position in a benign part of our growth matrix, but what of those aspirant places that sit outside our dynamic growth corridors currently? How do they move up the growth matrix? Will the current shape of infrastructure investment in the UK spread growth or entrench the position further?

For those places wishing and needing to grow, the principle of growth corridors raises a number of important implications for local places, both those that sit at the heart of a corridor and those operating outside of them. As such, it is essential that individual areas understand their place, its unique economic characteristics and assets, and ultimately its role and future function in England's growth story.

Implications for those localities within a growth corridor

- A need for local leaders, across the functional economic areas and traditional administrative boundaries, to manage and deliver growth in a joined up and complementary way that maximises growth benefits throughout the growth corridor. For example, joined up investment strategies that are fully aligned to meet demand and support growth opportunities within the corridor.
- A need to consider local strengths and assets in a broader context, be that human capital or local amenities. Individuals will travel to work and therefore consideration needs to be given to the flow of people within a growth corridor: where do people tend to live and work? Where are the key leisure destinations? Understanding these patterns is essential to ensuring the adequate provision of services (eg homes and schools) as well as the appropriate allocation of employment land. In turn, this should also reduce duplication and unnecessary competition between services.

We are seeing some of these needs and implications being met through the development and emergence of combined authorities or the development of a strong, effectively functioning local enterprise partnership.



Implications for those localities outside growth corridor

- A need to identify appropriate (in market, sector and geographical terms) growth corridors and understand their economic role and function in relation to it. For some this will be about becoming part of the corridor over time through the creation of physical, governance and operational linkages. For others it will be about identifying opportunities and services it could provide in relation to the strengths and assets of the growth corridor through competitive advantages such as the availability of employment land or lower labour costs.
- For those areas that have experienced relatively high economic and social growth, but are isolated from other similar areas (for example Newcastle), there is an important question as to whether it simply remains a hot spot in an area of low or no growth, or maximises existing growth to the benefit of surrounding areas, in effect creating its own regional corridor. If the aspiration is to forge its own growth corridor, then there must be a real emphasis on maximising local strengths and assets and creating linkages with other areas.
- A need to be creative and frame local solutions. Areas have unique challenges and characteristics that require imaginative solutions. This may mean maximising the advantages of diversity be that ethnicity, skills, sub-culture or indeed individual and community mindsets. It is not necessarily about inward investment, but rather identifying, fostering and supporting local assets be they individual, sectoral or physical.

THE LEADERSHIP VIEW

Local leadership



Effective leadership provides a robust and stable platform for growth. How this local leadership manifests itself locally obviously differs between individual places, but regardless of whether it is driven by a combined authority, an individual authority, the local enterprise partnership or a combination, the role is one of:

- **joining up** – central and local government; between different geographic areas and services locally; different stakeholders; and with the private sector
- **advocacy** – speaking on behalf of the area; making the case to central government; and promoting the area nationally and internationally
- **support** – identifying growth drivers and barriers and working with the relevant partners to either invest in them or address them.

These roles were seen by the leaders consulted to translate across the political, executive and organisational spheres. Alongside this, the leaders also highlighted the importance of actively engaging the private sector and working with them to directly shape and influence the area's economic strategy. They also talked up the value of collective power and the ability of multiple authorities and organisations to speak with one voice on particular issues. However, this carries the caveat that it is important to get these structures and their governance right if they are to work effectively; something that was felt to be true for both local enterprise partnerships and combined authorities.

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Grant Thornton has a well established market in the public sector, and has been working with local authorities for over 30 years. We are the largest employer of CIPFA members and students in the UK and our national team of experienced local government specialists, including those who have held senior positions within the sector, provide the growing range of assurance, tax and advisory services that our clients require.

We are the leading firm in the local government audit market, and are the largest supplier of audit and related services to the Audit Commission, counting 40% of local authorities in England as external audit clients. We also audit local authorities in Wales and Scotland via framework contracts with Audit Scotland and the Wales Audit

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Through proactive, client-focused relationships, our teams deliver solutions in a distinctive and personal way, not pre-packaged products and services.

Our approach combines a deep knowledge of local government, supported by an understanding of wider public sector issues, drawn from working with associated delivery bodies, relevant central government departments and with private sector organisations working in the sector.

We take an active role in influencing and interpreting policy developments affecting local government and responding to government consultation documents and their agencies. We regularly produce sector-related thought leadership reports, typically based on national studies, and client briefings on key issues. We also run seminars and events to share our thinking on local government and, more importantly, understand the challenges and issues facing our clients.



Place Analytics

Our Place Analytics team provides a market leading analytical online platform and advisory service. The team helps clients across the public and private sectors to understand better the places, economies and markets in which they operate, and the people that they serve.

Through a combination of sophisticated business intelligence tools and over 4,000 data sets Place Analytics enables:

- comparison between different areas and places across a range of spatial scales
- data sets to be tracked over time and an assessment of the impact of policies
- the correlation of data to undertake multivariate analysis and unpack the drivers of particular patterns
- place optimisation through the identification of particular locations based on a range of criteria
- analysis of people by where they live, to identify common characteristics and behaviours within catchment areas, communities and neighbourhoods.

We provide analytics services to some of the largest local authorities in the UK, as well as leading developers, local enterprise partnerships, central government departments, dynamic high growth businesses and not for profit organisations.

To find out more about your local growth story, understand where your place ranked on our index or to obtain a copy of your local high growth and dynamism profile; or to find out more about how Place Analytics can best support and add value to your organisation, please visit our website (gt-placeanalytics.com) or contact one of our team.

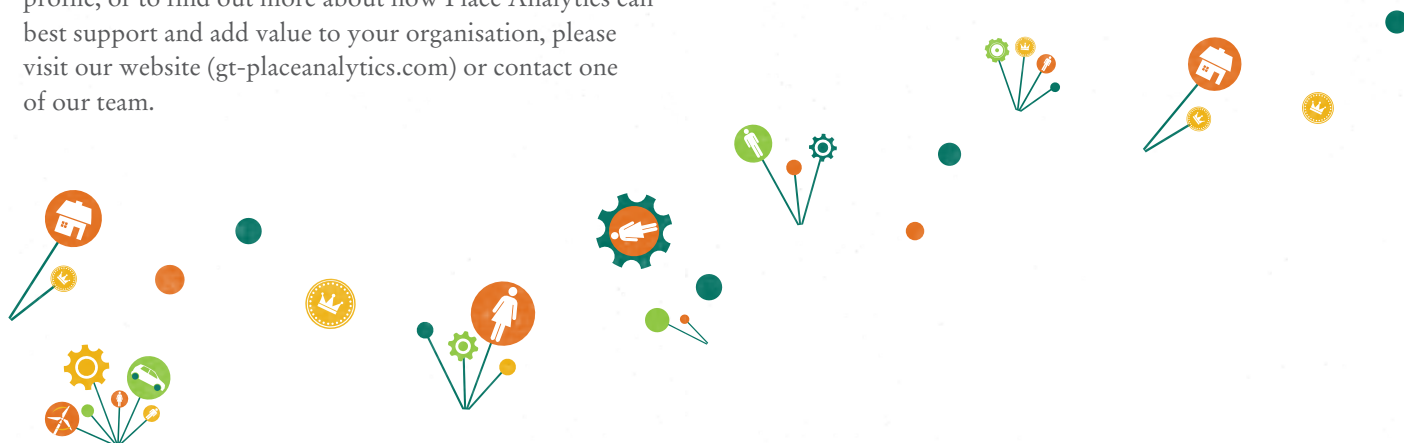
Business intelligence tools to help you understand places, people, economies and markets

Place Insight – achieve a better understanding of places in terms of the economy, society and environment. Based on the latest data, at different spatial levels and linked to an easy-to-use toolkit, it provides a powerful online research & intelligence tool.

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Appendix 1:

The High Growth Index – economic growth

Analysing growth in business stock and employment levels identifies those places that have created the most jobs and businesses. The top rankings are dominated by London boroughs. However, business and employment growth has also been strong in the south east (Slough, Runnymede, Dartford), the east of England (Watford, Hertsmere, Three Rivers, St Albans) and in parts of the north west (Manchester, Warrington, Cheshire East).

Outside London, growth rates have been highest in cities and urban areas across the country, with Manchester, Warrington, Bristol and Milton Keynes all ranking among the top 20 performers on our overall High Growth Index.

In contrast, areas experiencing decline in employment levels and/or business stock are most pronounced in the north and midlands, with the north west, Yorkshire and Humber and west midlands most affected.

Analysis by region as set out in (Figure 7) clearly illustrates the pivotal role played by local economies in London in driving growth nationally, with the majority of London boroughs scoring highly on our index.

In the regions, the growth story is characterised by a significant spread in performance between places, and the key role of cities in driving regional growth, which when aggregated across a region is constrained by the slow or negative growth of the peripheral or rural areas.

In all places, the economic growth rates over the eight year period were impacted by the recession, with a pattern of strong growth between 2004-2008, which then falls between 2008 and 2009, followed by a modest recovery.

Map 4 Economic growth

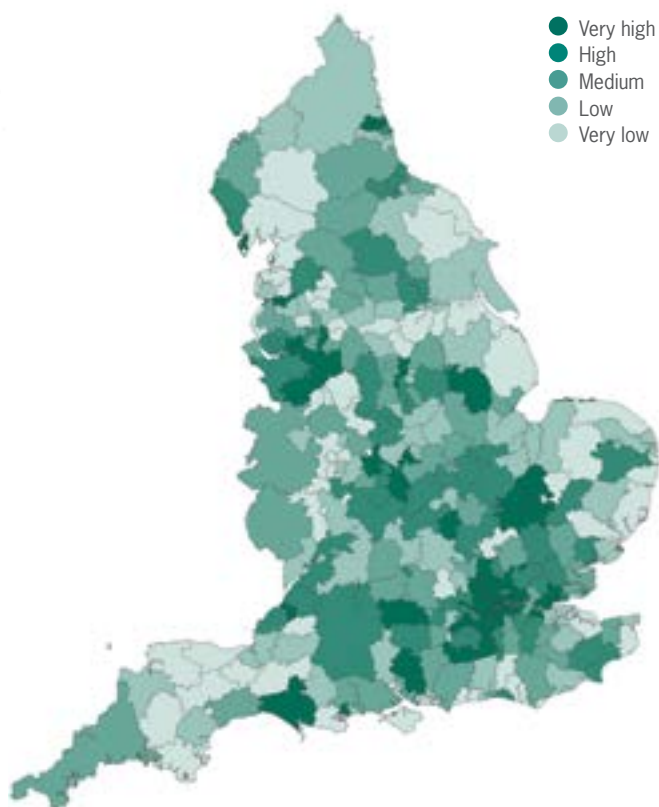


Figure 7 Regional economic growth patterns

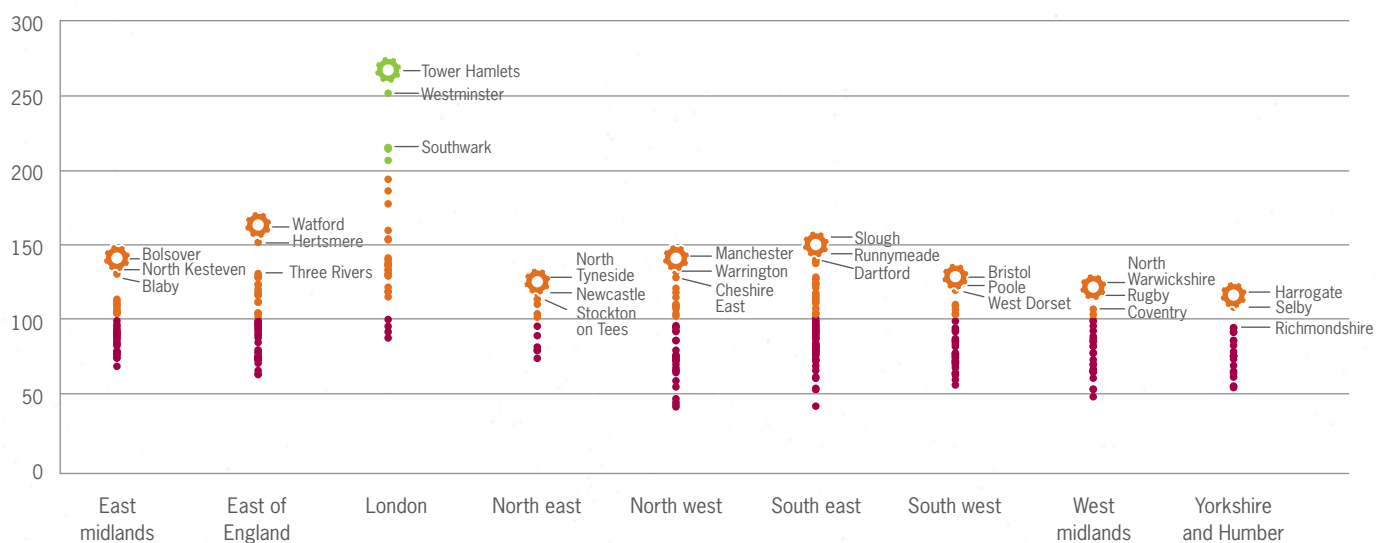


Table 4 Economic growth index

Cities (exc London)	Economic growth score	Local authority area	Region	Economic growth score
1 Manchester	145	1 Tower Hamlets	London	272
2 Warrington	136	2 Westminster	London	256
3 Bristol	132	3 Southwark	London	219
4 Milton Keynes	131	4 Lambeth	London	219
5 Newcastle upon Tyne	121	5 Newham	London	218
6 Cambridge	121	6 Camden	London	211
7 Brighton and Hove	120	7 Hackney	London	198
8 Nottingham	117	8 Hounslow	London	190
9 Oxford	115	9 Islington	London	181
10 Derby	115	10 Watford	East of England	167
11 Liverpool	111	11 Greenwich	London	163
12 Coventry	110	12 Redbridge	London	158
13 Swindon	107	13 Barking and Dagenham	London	157
14 Peterborough	102	14 Hertsmere	East of England	155
15 York	98	15 Slough	South east	150
16 Plymouth	96	16 Hammersmith and Fulham	London	145
17 Reading	96	17 Manchester	North west	145
18 Leeds	95	18 Bolsover	East midlands	145
19 Bradford	89	19 Runnymede	South east	144
20 Northampton	86	20 Hillingdon	London	144

Appendix 2:

The High Growth Index – people growth

An increase in total population in a place directly impacts the demand for goods and services locally, while growth in working age population is crucial for sustaining economic growth. Assessing these measures shows that London boroughs have grown most in terms of people, but demographic growth has been high in cities and urban areas across the country.

There are high growth areas in most regions, and especially in the east midlands (Leicester, Nottingham, Corby), the south east (Slough, Milton Keynes, Brighton) and south west (Bournemouth, Bristol, Swindon).

With the exception of the London boroughs of Newham and Tower Hamlets, by far the highest growth has taken place in Manchester and Birmingham.

However, some regions experiencing economic growth have experienced a population decline, particularly in the north west (Barrow-in-Furness, Sefton, South Lakeland, Knowsley) and north east (South Tyneside, Sunderland, Redcar and Cleveland). Interestingly, the place experiencing the highest rate of population decline over the period was the London Borough of Kensington and Chelsea.

A summary of the findings for the nine English regions (Figure 8) again demonstrates the higher rates of growth of London boroughs, as well as the key role played by Manchester and Birmingham in driving demographic growth within their region.

Map 5 People growth

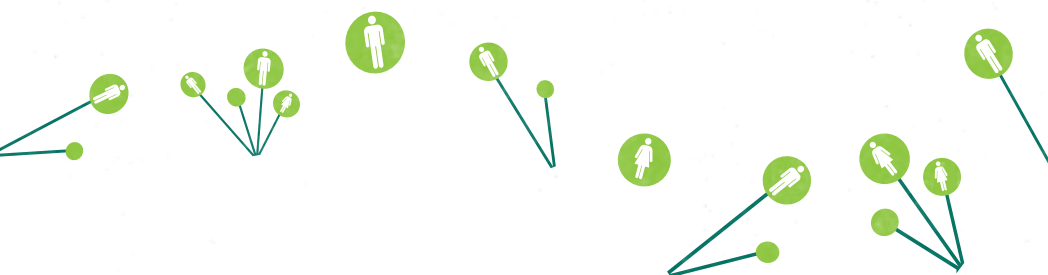
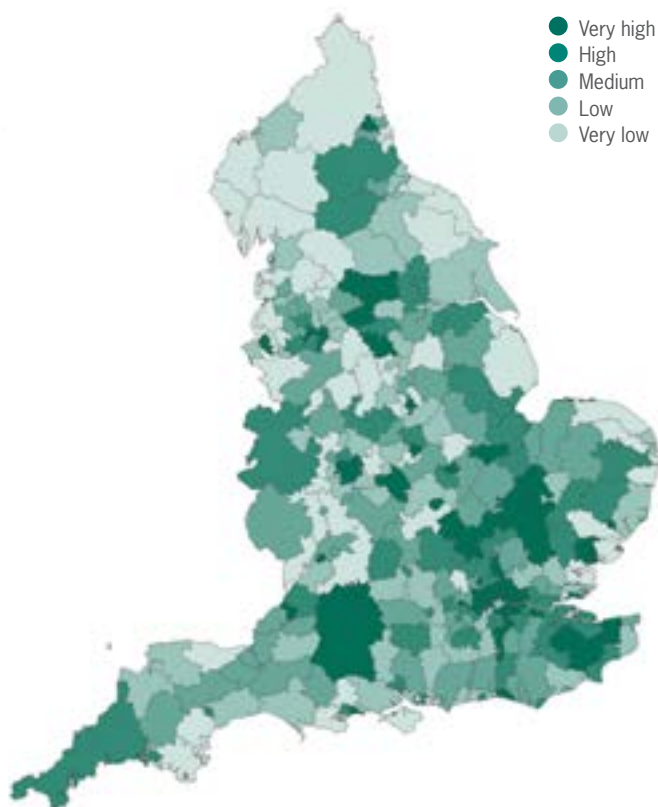


Figure 8 Regional social growth patterns



Table 5 People growth index

Cities (exc London)	People growth score	Local authority area	Region	People growth score
1 Manchester	267	1 Newham	London	304
2 Birmingham	251	2 Tower Hamlets	London	298
3 Leicester	195	3 Manchester	North west	267
4 Bournemouth	178	4 Birmingham	West midlands	251
5 Milton Keynes	176	5 Hackney	London	237
6 Brighton and Hove	169	6 Brent	London	227
7 Bristol	169	7 Hounslow	London	215
8 Nottingham	168	8 Southwark	London	212
9 Swindon	167	9 Waltham Forest	London	210
10 Peterborough	164	10 Islington	London	206
11 Bradford	164	11 Lambeth	London	200
12 Sheffield	162	12 Leicester	East midlands	195
13 Coventry	146	13 Greenwich	London	192
14 Leeds	143	14 Redbridge	London	189
15 Ipswich	141	15 Haringey	London	189
16 Liverpool	138	16 Barnet	London	184
17 Northampton	137	17 Hillingdon	London	182
18 Cambridge	135	18 Bournemouth	South west	178
19 Gloucester	126	19 Slough	South east	177
20 Newcastle-upon-Tyne	124	20 Milton Keynes	South east	176

Appendix 3:

The High Growth Index – place growth

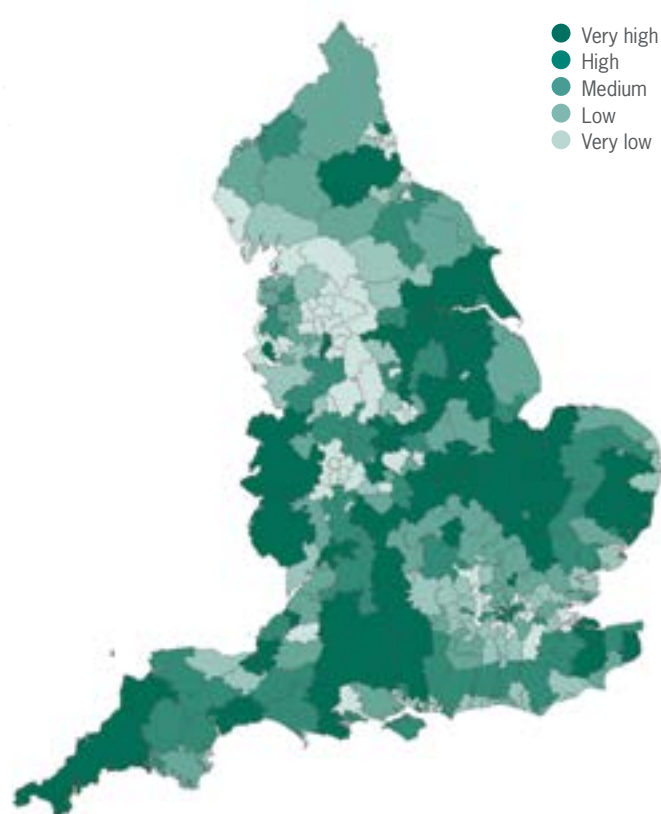
While it may be anticipated that economic growth in terms of numbers of jobs and businesses would correlate to growth in terms of commercial and residential stock, a far more indeterminate picture emerges. Indeed, there is a negative correlation overall between ‘place growth’ in terms of commercial floor space and economic growth in terms of jobs and businesses.

In an area’s physical environment an increase of housing and dwelling stock partly reflects the growth in the resident population, while for the stock of commercial and industrial floorspace it indicates the impact of economic growth. Map 6 shows the geographical patterns emerging.

As would be expected, there is a close relationship between population growth and growth in dwelling stock, with house building an important consequence of population growth in many parts of the country. However, the same does not apply to commercial floorspace. Here, London boroughs and cities such as Manchester and Birmingham appear to have grown in economic terms without increasing their overall stock of commercial floorspace. Meanwhile, places such as Doncaster, the East Riding of Yorkshire and Rotherham have experienced large increases in commercial floorspace, without experiencing significant rates of economic growth. This is largely explained by the nature of the floorspace that has been developed in these areas, where an increase in industrial and warehousing floorspace has not necessarily resulted in high levels of job creation and employment density, posing interesting questions on investment priorities for policy makers.

Whereas the London boroughs occupied most of the top spots for economic and demographic growth measures, only Tower Hamlets appears in the place growth top 10 ranking, recording the highest rate of growth of any English district. Other areas that have experienced rapid physical growth are found in the east midlands (South Derbyshire, Kettering, Corby), the east of England (South Norfolk, Broxbourne, South Cambridgeshire) and Yorkshire and the Humber (East Riding, Doncaster, Rotherham) – often neighbouring areas of towns and cities.

Map 6 Place growth



Of the cities outside London only Milton Keynes, Bristol, Liverpool, Peterborough and Manchester record place growth rates among the top 50 English districts. Areas experiencing very little growth and, in some areas, a decline in commercial floorspace, were parts of the west midlands (Staffordshire Moorlands, Stoke-on-Trent), the north west (Bury, Oldham, Burnley) and London (Hackney, Harrow, Lewisham) with a decline of up to 20%.

Regional analysis (Figure 9) demonstrates a high rate of place growth in areas outside London, especially in the east of England, Yorkshire and Humber and the east midlands.

Figure 9 Regional place growth patterns

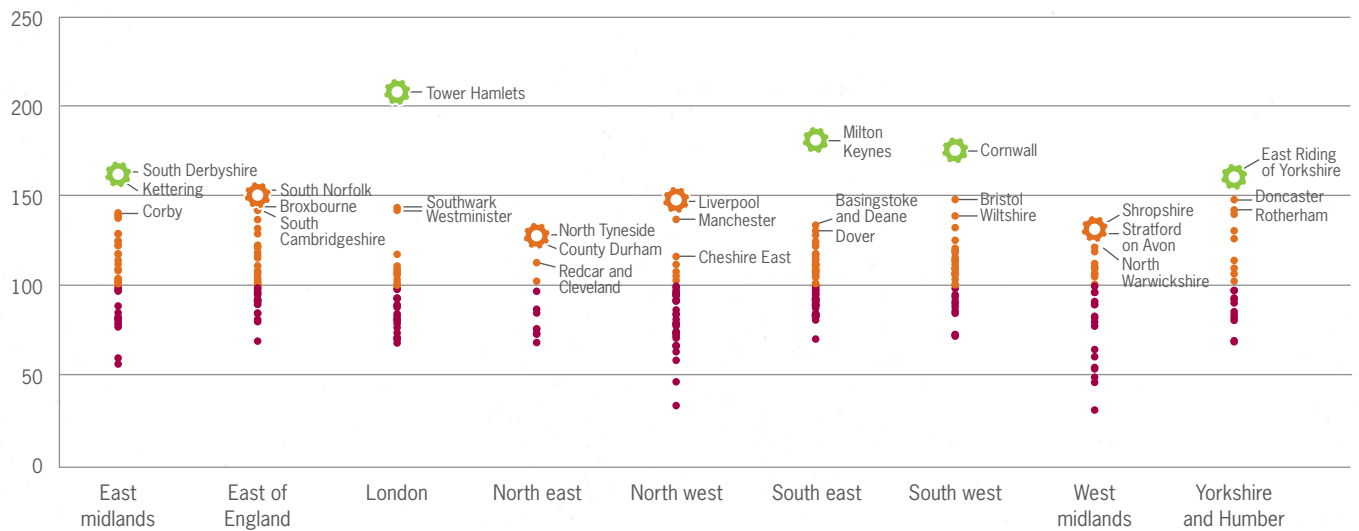


Table 6 Place growth index

Cities (exc London)	Place growth score	Local authority area	Region	Place growth score
1 Milton Keynes	181	1 Tower Hamlets	London	208
2 Bristol	148	2 Milton Keynes	South east	181
3 Liverpool	148	3 Cornwall	South west	175
4 Peterborough	142	4 South Derbyshire	East midlands	162
5 Manchester	137	5 Kettering	East midlands	161
6 Ipswich	115	6 East Riding of Yorkshire	Yorkshire and Humber	160
7 Swindon	114	7 South Norfolk	East of England	150
8 Preston	112	8 Broxbourne	East of England	148
9 Plymouth	109	9 Bristol	South west	148
10 Derby	108	10 Doncaster	Yorkshire and Humber	148
11 Kingston upon Hull	106	11 Liverpool	North west	148
12 Cambridge	106	12 South Cambridgeshire	East of England	147
13 Bournemouth	106	13 King's Lynn and West Norfolk	East of England	145
14 Reading	100	14 Southwark	London	143
15 Norwich	99	15 Westminster	London	142
16 Gloucester	98	16 Rotherham	Yorkshire and Humber	142
17 Brighton and Hove	97	17 Peterborough	East of England	142
18 Portsmouth	97	18 Corby	East midlands	140
19 Northampton	97	19 Selby	Yorkshire and Humber	140
20 Oxford	92	20 Bolsover	East midlands	139

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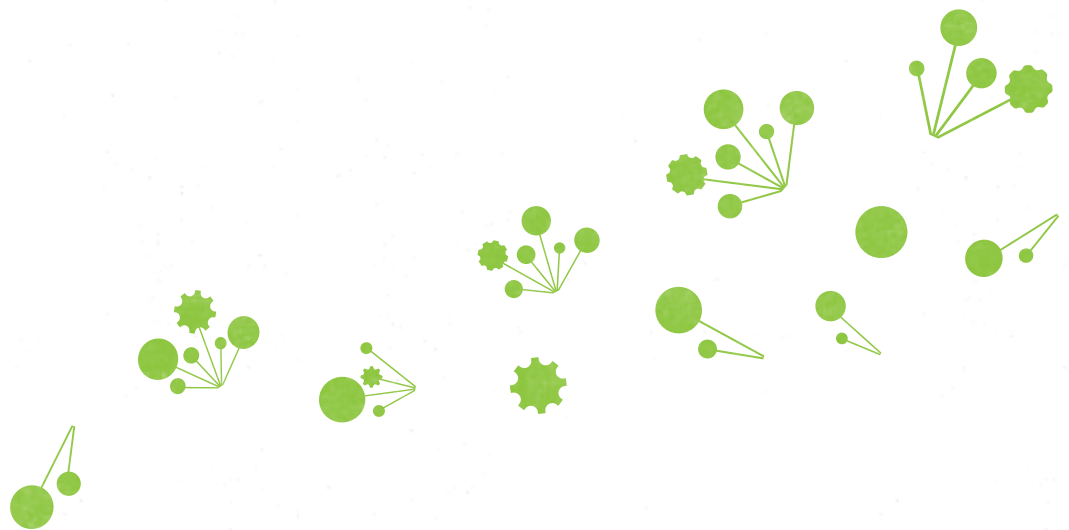
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