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City views:

How do Britain's cities see London?

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“Centre for Cities is a research and policy institute, dedicated to improving the economic success of UK cities.

We are a charity that works with cities, business and Whitehall to develop and implement policy that supports the performance of urban economies. We do this through impartial research and knowledge exchange.”

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Executive Summary

London's relationship with the rest of the nation – particularly its perceived dominance over other parts of the country – has long been a key feature of the UK economy, politics and cultural life. However, London's growth has become a particular focus following the economic downturn of 2008 and the slow road to recovery that has followed.

During these years, the capital's economy has continued to accelerate away from other UK cities, despite politicians from all major political parties promoting a more balanced UK economy in which everyone shares the burden of reducing the deficit and restoring growth.

Given London's invaluable role in driving national growth, local and national leaders must do much more to understand and articulate the links between city economies, building a greater appreciation of the benefits it brings to their place alongside the potential dangers of holding back the capital's success to preference other parts of the country.

Most Britons cannot see how investing in London's Crossrail project, Tech City or another London airport is going to benefit them. And likewise, most Londoners and London businesses do not think about what the growth in other cities like Birmingham, Manchester and Leeds means for the new opportunities available to them.

Within this context, this report aims to further our understanding of how people and businesses in cities outside London feel about the capital today, including its impact on their place and the future of the country as a whole.

To do so, we commissioned a survey of people living in 16 cities outside of London as well as a national survey and facilitated a series of discussions with local government and business leaders from those places. Taken together, these new insights tell us more about how people living outside of London perceive the capital.

First, there is a strong sense of scepticism amongst respondents as to whether London benefits the economy where they live. While most agree that the London economy benefits the country as a whole, they do not believe that it is particularly good for their place.

Second, there is a clear feeling that our national politics and policymaking does not respond to local needs. A majority also believe that the location of Whitehall and Parliament within London leads to national decisions that are too focused on the needs of the capital, rather than other UK cities.

And third, many believe that London dominates culturally and in terms of national media coverage, at the expense of other cities across the country.

Below we set out 12 key findings from the national and city surveys covering the economy, government and leadership, culture and media, quality of life and connections between London and other cities.

*“This report
aims to
further our
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of how people
and businesses
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London feel
about the
capital today”*



12 key survey findings

Economy

- Nationally, 66 per cent of UK adults outside London think London has a positive impact on the national economy, but only 24 per cent think London has a positive effect on their local economy. In some Northern cities, less than 1 in 10 people thought that London has a positive effect on their local economy (for example Hull 8 per cent, Sheffield 8 per cent and Liverpool 9 per cent).
- Across the UK, most UK workers outside London (59 per cent) never visit London for work purposes.

Government and leadership

- 64 per cent of UK adults outside London said the location of Whitehall and Parliament means that political decisions are too focused on London in comparison to the rest of the UK. This sentiment was most pronounced in Leeds (79 per cent), Sheffield (79 per cent) and Glasgow (78 per cent).
- Only 17 per cent of UK adults outside London think that Whitehall and Parliament are responsive to the issues in the city/ town where they live.
- Nationally, 40 per cent of UK adults outside London think a mayoral position like the Mayor of London would be beneficial for their area. But in Bristol and Leicester where they have mayors, 57 per cent and 52 per cent think it would be beneficial for their city, respectively.

Culture and media

- Over three out of four UK adults outside London (76 per cent) think national coverage of news stories in the UK is very or fairly focused on London.
- Nationally, 36 per cent of UK adults outside London visit the capital at least once a year for holiday or leisure; but that number rose to 80 per cent in Brighton and Hove, 76 per cent in Southend, and 67 per cent in Milton Keynes.

Quality of Life

- UK adults outside London were asked to select five words from a list that best described London. People viewed London as expensive (62 per cent) and crowded (59 per cent) more than any other descriptors they could choose from, followed by cosmopolitan (35 per cent), lively (32 per cent), cultural (32 per cent), diverse (30 per cent) and chaotic (30 per cent).
- Only 32 per cent of UK adults outside London think the capital is a good place to raise a family.
- 57 per cent of UK adults outside London think that the overall quality of public transport is better in London than in their city or town.

Connections

- Nationally, one in five UK adults outside London (20 per cent) would consider living there in the future.
- Nearly one in four UK adults outside London (23 per cent) have lived in the capital. This is highest in Brighton (51 per cent) and Milton Keynes (45 per cent) respectively.

“Only 17 per cent of UK adults outside London think that Whitehall and Parliament are responsive to the issues in the city where they live”



These findings suggest three main implications:

First, cities need to work together. London clearly benefits from its business connections and the skilled workers it draws from other cities, and UK cities benefit from London's economic strength. In turn, all cities need to work together strategically to make the most of their relationships and capitalise on each of their strengths.

Second, cities need to demand more from central government. Cities need to argue more for their place, demonstrate why blanket national policies will not work for them, and show how local flexibility would deliver better outcomes.

Third, cities need to fill the leadership gap people perceive from central government. Local leaders need to engage more with the public in order to explain how national policies translate locally, how more local responses can help the economy grow, and to show what they are already achieving to build trust.

“Cities need to work together strategically to make the most of their relationships and capitalise on each of their strengths”



1. London's role in the UK economy

London and the UK

The UK economy is recovering at two different speeds, and the effects are being felt across the country. Most people feel that, while London and the South East are growing at one pace, most of the rest of the country is growing more slowly. Despite Labour promoting a “one nation economy” and David Cameron stating that “we’re all in this together”, the statistics and people’s opinions do not agree with the rhetoric.

Political parties – both the Coalition parties and Labour – are fighting an uphill battle to get the public to see how growth centred in London benefits everyone. In 1997, London and the South East accounted for 35 per cent of the British economy, and this had increased to 38 per cent by 2012. Even more recently (between 2010 and 2012), London and the South East accounted for more than half of all the growth in the national economy.¹ For people outside London, it is difficult to see how or why they benefit from Government’s big investments there, such as Crossrail or Tech City.

London often takes the spotlight, because the capital plays such a large role in the national economy, is the seat of politics and the civil service, and has a large cultural and tourism draw. But other cities play an important role in the UK economy. Altogether, cities outside London account for 39 per cent of the population,² 39 per cent of the jobs,³ and 37 per cent of the total economy.⁴

But the economies of cities are interconnected. London has complex relationships with other cities, from business links to migration, that mean the success of each city is – to some extent – dependent on its relationship with other cities.

Beyond the facts, perceptions matter too

The relationship between businesses, workers and political leaders in cities shape people’s opinion of those places.

People’s perceptions of the economy influence their work, political or business decisions. This in turn shapes the economy. The public also make many decisions based on their perception of where opportunities are in the economy. For instance:

- University graduates may move to the city where they think the most and best job opportunities lie
- Business owners will decide where to trade or open up branch businesses based on where they think their growth markets are located
- Voters will support political parties that they think will help the country grow the most and in the right way.

Beyond the economic facts and political rhetoric, people’s perceptions shape the economy. Although not all voters know the detail of what is happening in the economy, they often have a good feeling of the state of the ‘real’ economy and of

“Cities outside London account for 39 per cent of the population, 39 per cent of the jobs, and 37 per cent of the total economy”

1 ONS 2013, Regional Gross Value Added (Income Approach) NUTS3 Tables, Centre for Cities calculations.
 2 NOMIS 2013, Mid-year population estimates 2012.
 3 NOMIS 2013, Annual Population Survey, residents analysis, July 2012- June 2013
 4 ONS 2013, Regional Gross Value Added (Income Approach) NUTS3 Tables, Centre for Cities calculations



the direct and indirect effects it has on them.⁵ This makes voters' perceptions of the economy and London's role in it very important as they affect business, job and migration decisions, and influence how politicians and the Government design policies that invest in cities around the country.

About this report

The purpose of this research is to understand how people perceive London and their city's relationship with London. This report is not comparing perceptions against economic data to gauge whether people are 'right'. Rather, the research gives the reader a better understanding of how people across the UK see their relationship with London and proposes implications for the economy, policy and businesses.

This report brings together opinion polls from across the UK, opinions of business and local leaders and economic analysis to paint a picture of how people see London rather than what economists, politicians and the media tell us.

The Centre for Cities and Centre for London commissioned two polls from YouGov. The polls asked the same questions, one to a nationally-representative sample and the other to a representative sample in 16 UK cities across a range of sizes, locations and economic performance (see Figure 1 which also denotes the distance each city is from London).

Box 1: About our city survey

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 1,688 adults. Fieldwork was undertaken between 11th - 19th March 2014. The survey was carried out online. The figures have been weighted and are representative of all adults in each city surveyed (aged 18+). These were Newcastle, Kingston-Upon-Hull, Nottingham, Birmingham, Bristol, Cardiff, Glasgow, Leeds, Liverpool, Manchester, Sheffield, Brighton and Hove, Leicester, Southampton, Southend, and Milton Keynes.

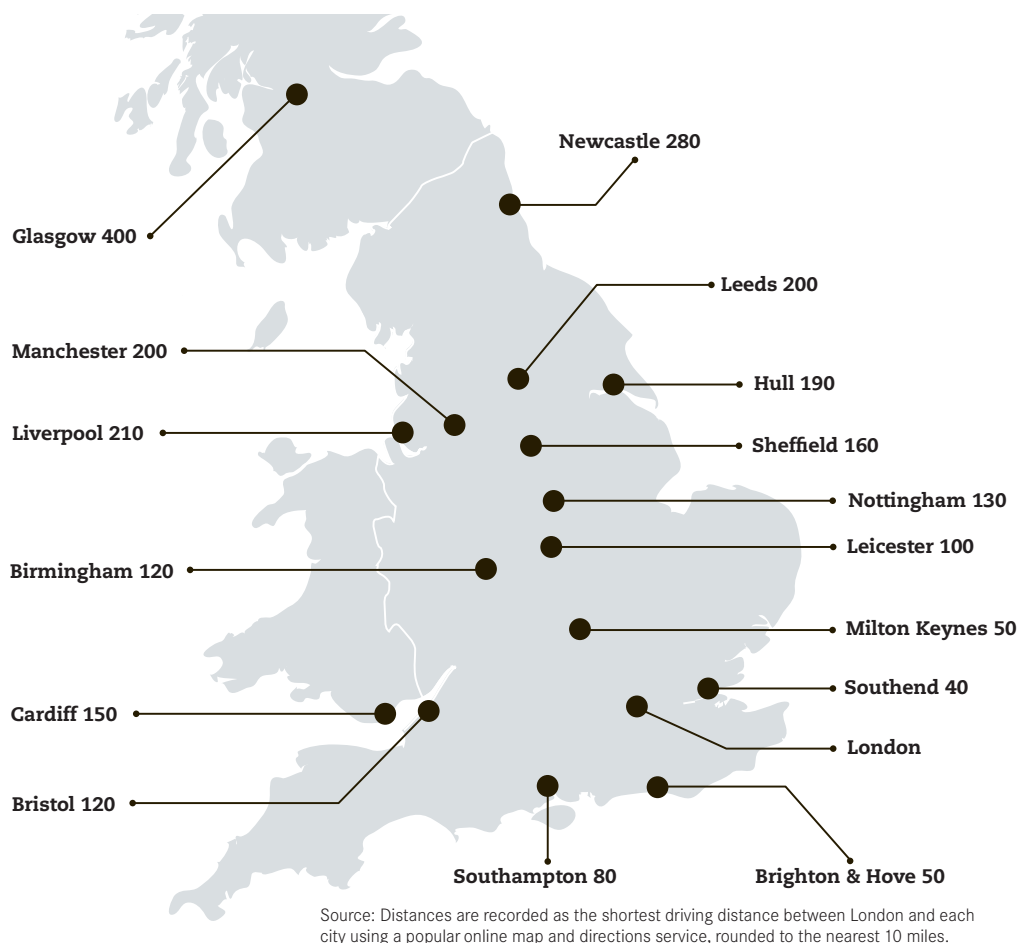
National Survey: All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 2,478 adults, of which 2209 were from outside of London. Fieldwork was undertaken between 11th - 12th March 2014. The survey was carried out online. The figures have been weighted and are representative of all UK adults (aged 18+).

⁵ Sanders D. (1999), The Real Economy and the Perceived Economy in Popularity Function: How Much Do Voters Need to Know? A Study of British Data, 1974-1997, Barcelona: Institut de Ciències Polítiques i Socials. Accessed 25 April, 2014, http://new.icps.cat/archivos/WorkingPapers/WP_I_170.pdf

“Beyond the economic facts and political rhetoric, people’s perceptions shape the economy”



Figure 1: UK cities surveyed and their distance from London (miles)



City leader roundtables

The Centre for Cities held roundtables with local government, business, community and university leaders in Bristol, Birmingham, Leeds and Manchester to understand perceptions of London by the people working to improve economic and business links within their city and how those perceptions affect behaviour when it comes to business, leisure and local politics.

Format of the report

The survey and roundtable findings complement each other, with the roundtable providing specific insights that support the findings of the opinion poll. They are integrated together to enrich the understanding of each. Survey findings are highlighted and presented in **green**, and key findings from the roundtables are highlighted and coloured **blue**.

“Voters often have a good feeling of the state of the ‘real’ economy and of the direct and indirect effects it has on them”



2. Does London have an image problem?

Contrasting views of politicians and the media

Media and politicians are asking, “Is London doing ‘too well’?”

- Evan Davis’ BBC2 programme “Mind the Gap: London v the rest” demonstrated just how different London is from the rest of the country.
- Stephanie Flanders, former Economics Editor at the BBC, asked “Should Britain let go of London?”.
- Business Secretary Vince Cable told the Today programme on BBC Radio 4: “One of the big problems that we have at the moment ... is that London is becoming a kind of giant suction machine, draining the life out of the rest of the country...”

And politicians from all major parties are trying to square the growth in London and the South East with a more collective view of national growth. Politicians have ambitions about the need to drive a more balanced economy alongside concerns in the press about London’s perceived dominance. Together, politicians and the media provide a backdrop for how people see London’s position within the economy.

“We’re all in this together” is “not a cry for help, but a call to arms.”

“Come on: let’s pull together. Let’s come together. Let’s work together in the national interest.” – David Cameron⁶

“That is what I mean by One Nation. A country where everyone plays their part... That is how we will make Britain One Nation again.” – Ed Miliband⁷

“London will always be at the heart of the UK’s economy...but we have other strengths too, in other industries, in other places. There can and must be more than one jewel in our crown.” – Nick Clegg⁸

“It [London] is not so much a giant suction machine as it is a gigantic undersea coelenterate that takes in, and then expels.” – Boris Johnson on BBC’s *Mind the Gap*⁹

‘David Cameron says we are all in it together but his actions tell a different story’ – Mirror¹⁰

‘Booming London is becoming a separate country’ – Telegraph¹¹

‘No, Boris – spending more on London won’t fix the country’s economic woes’ – Guardian¹²

‘Boris Johnson clashes with Vince Cable over London ‘draining life’ out of rest of UK comments’ – Independent¹³

⁶ Sky news. 6 October 2010. Cameron Speech: ‘We’re All In This Together’

⁷ Labour.org. 9 July 2013. One Nation politics – speech by Ed Miliband. <https://www.labour.org.uk/one-nation-politics-speech>

⁸ BBC. 18 February 2013. Clegg extends city deal to 20 more English zones. <http://www.bbc.co.uk/news/uk-politics-21495688>

⁹ BBC2. 13 March 2014. Mind the Gap: London v the rest. Boris Johnson interview. <http://www.bbc.co.uk/programmes/p01tx4ps>

¹⁰ Watson, Tom. 30 January 2014. “David Cameron says we are all in it together but his actions tell a different story.” Mirror. <http://www.mirror.co.uk/news/uk-news/tom-watson-david-cameron-says-3093079#ixzz312pMy6is>

¹¹ Martin, Iain. 19 December 2013. “Booming London is becoming a separate country.” The Telegraph. <http://blogs.telegraph.co.uk/news/ianmartin1/100251330/booming-london-is-becoming-a-separate-country/>

¹² Chakraborty, Aditya. 30 April 2012. “No, Boris – spending more on London won’t fix the country’s economic woes.” The Guardian. <http://www.theguardian.com/commentisfree/2012/apr/30/boris-spending-london-economic-woes>

¹³ Brown, Jonathan. 19 December 2013. “Boris Johnson clashes with Vince Cable over London ‘draining life’ out of rest of UK comments.” The Independent. <http://www.independent.co.uk/news/uk/politics/boris-johnson-clashes-with-vince-cable-over-london-draining-life-out-of-rest-of-uk-comments-9016398.html>

**“Politicians
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London's prominence has been a decades-long issue for the UK

London has been the UK's biggest economy for over a century. Findings from *Cities Outlook 1901* illustrate the long-term importance of London in the UK economic, political and cultural structures.

Even in 1901 there was a North-South divide. In 1901:

- London had long been an economic powerhouse. The capital's population steadily increased over the 19th century. By 1901, 17 percent of the national population lived in the capital.
- A quarter of London's population (1.3 million) had migrated from elsewhere in the country.
- Workers living in London and Oxford were more likely to be employed in higher paid professions.
- Cities with the highest property values tended to be clustered around London and the South East.
- Cities and towns in the South East – such as Reading, Oxford and Cambridge – had greater economic potential due to their proximity to London.¹⁴

Recently, London's role nationally has become even more important

London and the South East are leading the UK economic recovery today.

- Since 2010, 79 per cent of private sector jobs growth has occurred in London.¹⁵
- The capital has created almost ten times more jobs than any other city since 2010.¹⁶
- 28 per cent of the high-skilled population is found in the Greater South East (London, South East and East England).¹⁷
- London has 17 per cent of the UK's 4.9 million private sector businesses, more than any other region. Put together with the South East, that rises to 33 per cent.¹⁸
- There are exactly twice as many businesses per 10,000 adults in London (1,266) as there are in the entire North East region (633).¹⁹

This has prompted warnings that the UK “runs the risk of falling behind by relying too much on London for economic growth”.²⁰

14 Clayton, N. and Mandair, R. (2013). *Cities Outlook 1901*. Centre for Cities: London.

15 Centre for Cities (2014) *Cities Outlook 2014*, Centre for Cities: London.

16 Centre for Cities (2014) *Cities Outlook 2014*, Centre for Cities: London.

17 Centre for Cities (2014) *Cities Outlook 2014*, Centre for Cities: London.

18 Rhodes C. (2013), *Business statistics*, Standard Note: SN/EP/6152, London: House of Commons, accessed 28 April, 2014, www.parliament.uk/briefing-papers/sn06152.pdf

19 Rhodes C. (2013), *Business statistics*, Standard Note: SN/EP/6152, London: House of Commons, accessed 28 April, 2014, www.parliament.uk/briefing-papers/sn06152.pdf

20 Centre for Cities (2014) *Cities Outlook 2014*, London: Centre for Cities

**“Since 2010,
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“London’s growth is often seen to be at the cost of the economy in other cities”

But the UK faces challenges associated with London’s success.

First, London’s growth is often seen to be at the cost of the economy in other cities:

- **London is perceived to take talent from the rest of the country,** even though London had a net loss of 158,000 people to the rest of the country between 2009 and 2012. While the capital gained almost one-third of twentysomethings who moved over that period, many workers tend to move out again in later life to other areas in the Greater South East.²¹
- **London’s businesses dominate the economy in other cities.** London-based firms are the largest group of employers in every UK city, accounting for between 6 and 22 per cent of employment.²²
- **London taxes are redistributed for public spending around the country, which some think leads to overdependence on London.** In 2010, for example, Greater London raised £99 billion in taxes, while only receiving £94 billion in public spending in return, making London a net contributor. Before the recession began in 2008, London provided a net contribution of £10-20 billion per year to the rest of the country.²³
- **London dominates in a country where other cities in the UK are punching below their weight.** Many of the UK’s other cities, including some of the largest UK cities such as Birmingham and Manchester, are underperforming.²⁴ This is in the sense that they underperform the national average and contribute less than would be expected to the national economy, for example when compared to equivalent cities in other countries in Europe.

Second, London’s economic success poses many challenges for keeping the city growing:

- **High cost of living.** Cost of living is far higher in London which is reflected by separate Living Wages for the UK (£7.65) and London (£8.80). This suggests that cost of living is at least 15 per cent higher in the capital.²⁵
- **Families moving to the South East or other large cities:** London now loses more migrants to other parts of the country – particularly to the South East – than any other region in England and Wales, according to the ONS.²⁶ But London does tend to retain many of the workers through commuting.
- **High property costs:** Housing is increasingly unaffordable in London. In November 2013, house prices rose 11.6 per cent in London on the year before, compared to 5.6 per cent in England or 3.1 per cent in the UK with London and the South East removed.²⁷
- **High labour costs and labour crowding out:** London has high labour costs, which the London Chamber of Commerce and Industry has noted could

21 Centre for Cities (2014) *Cities Outlook 2014*, Centre for Cities: London.

22 Centre for Cities (2014) *Cities Outlook 2014*, London: Centre for Cities

23 Centre for Cities (2014) *Cities Outlook 2014*, London: Centre for Cities

24 Centre for Cities (2014) *Cities Outlook 2014*, London: Centre for Cities

25 Living Wage Foundation. (2013), ‘New UK Living Wage £7.65 New London rate £8.80’, 4 November 2013, accessed 28 April, 2014, <http://www.livingwage.org.uk/blog/new-uk-living-wage-per-centC2-per-centA3765-new-london-rate-per-centC2-per-centA3880>

26 Allen K. (2013) ‘Londoners move out ... to the south-east’, *The Guardian*, 26 June 2013. Accessed 28 April, 2014, <http://www.theguardian.com/business/economics-blog/2013/jun/26/london-population-migration>

27 Office of National Statistics. (2014), ‘House Price Index, November 2013’, 14 January 2014, accessed 28 April, 2014, <http://www.ons.gov.uk/ons/rel/hpi/house-price-index/november-2013/stb-november-2013.html>



threaten or reduce the city's international competitiveness, along with the need to maintain skill levels.²⁸

- **Areas of high deprivation:** Despite its overall wealth, London is home to some of the most deprived communities in the UK, including Hackney and Tower Hamlets.²⁹

London is an unparalleled success story, but the challenge lies in the long shadow it casts. In turn, understanding how the public view London, its challenges and its successes is essential for figuring out how to build better, mutually-beneficial relationships between the fast-growing capital and the UK's other cities.

Until now, beyond anecdotes, there has been no detailed picture of what the public in other cities think about London and the national and local effects of its growth. Section 3 takes a detailed look at how the nation and cities view London and its impact on where they live.

“London’s economic success poses many challenges for keeping the city growing”

²⁸ Europe Economics & London Chamber of Commerce and Industry, ‘The Competitiveness of London – Future Challenges from Emerging Cities’, accessed 28 April, 2014, <http://www.londonchamber.co.uk/DocImages/3493.pdf>.
London Chamber of Commerce and Industry, ‘Businesses Suffer Rising Labour Costs’, 17 May 2010, accessed 9 May, 2014, http://www.londonchamber.co.uk/lcc_public/article.asp?id=0&did=47&aid=4317&st

²⁹ Department for Communities and Local Government. (2011), ‘The English Indices of Deprivation 2010’, 24 March 2011, accessed 28 April, 2014, https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/6871/1871208.pdf



3. Perceptions, people and place

This section outlines the perceptions of London from YouGov's two surveys. One national survey (without London) and a survey of 16 cities. The findings cover perceptions of London and central government in London relating to:

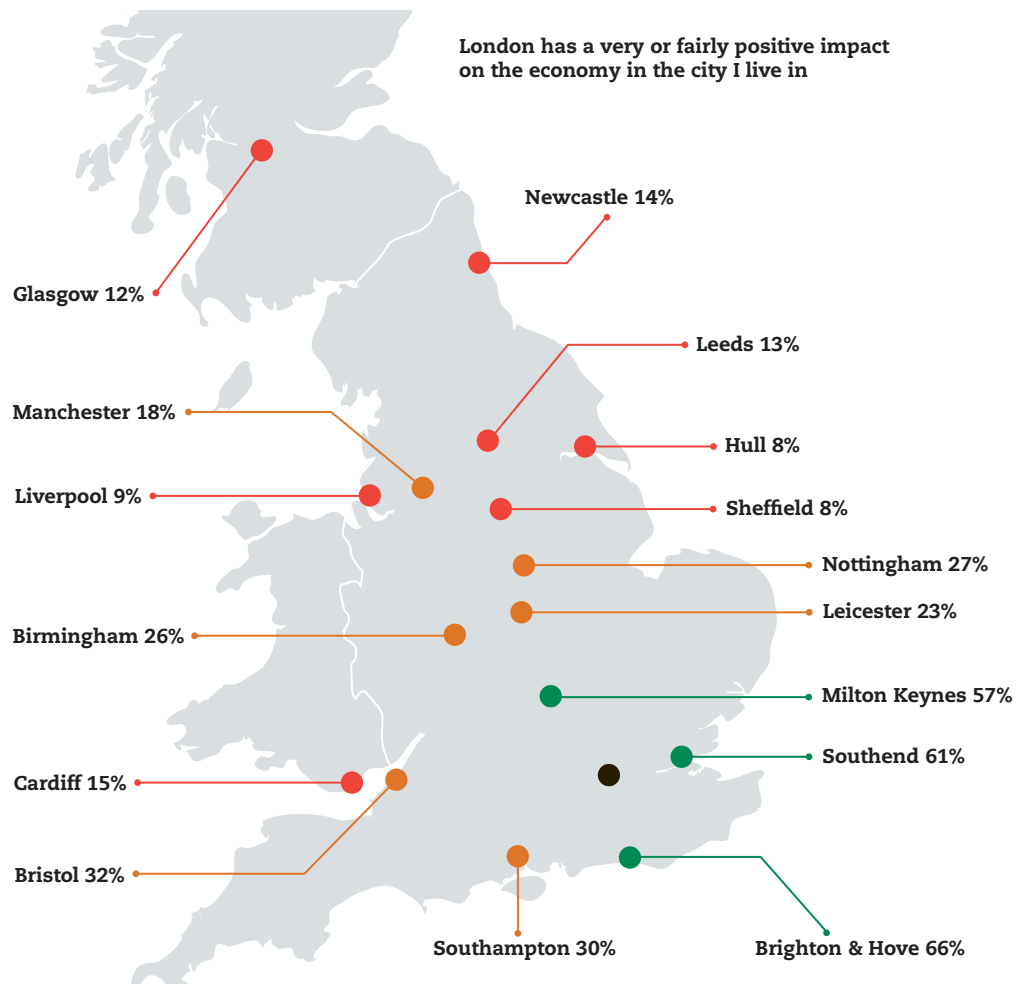
- The economy
- Government and leadership
- Culture and media
- Wellbeing and quality of life
- Connectedness

Economy: Is London's economy good or bad for other UK cities?

Nationally, 66 per cent of UK adults outside London think London has a positive impact on the national economy, but only 24 per cent think London has a positive effect on their local economy.

There is a clear break between politicians' notion of "a one nation economy" or "we're all in this together" and how people think the economy is working. If people believe that London is good for the national economy but not necessarily their local one, then it implies that they think that their relationship with London is not as beneficial as it could be.

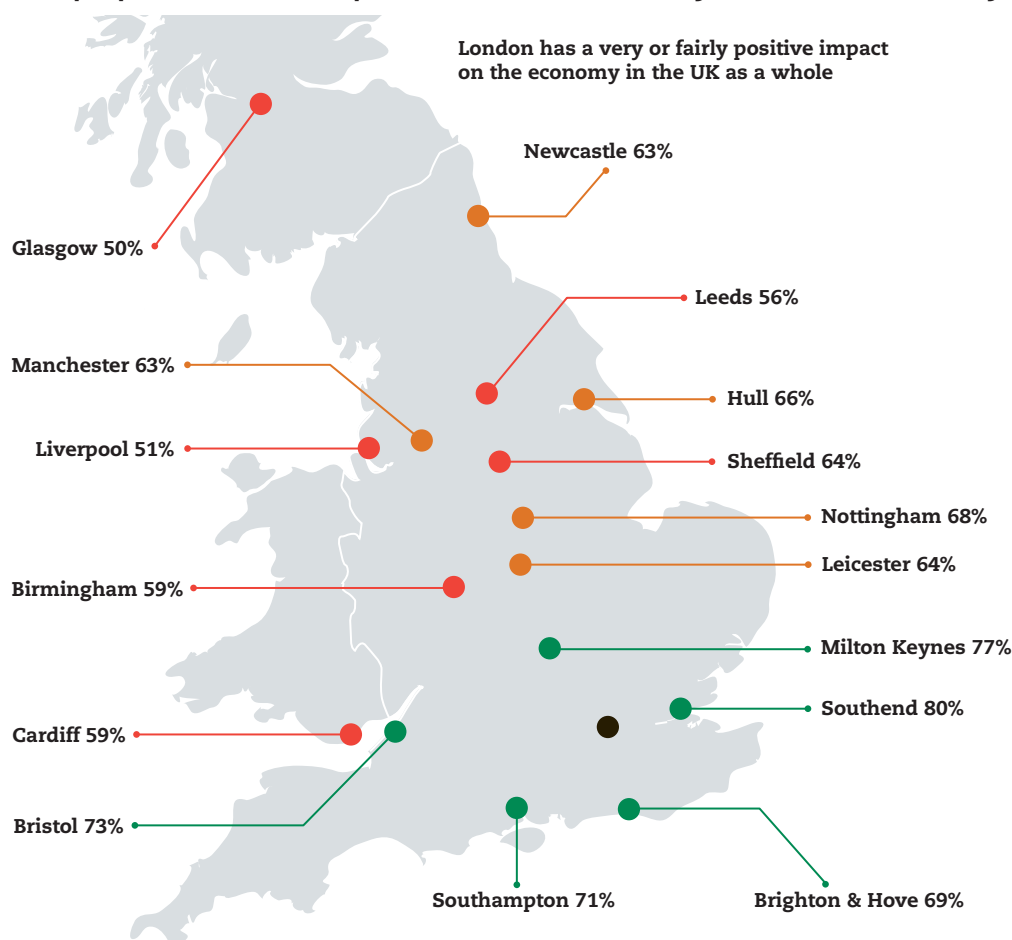
Figure 2: How people see London's impact on the national economy and their local economy



“Only 24 per cent of UK adults outside London think London has a positive effect on their local economy”



How people see London's impact on the national economy and their local economy



“Survey respondents are more likely to say London benefits their local economy if they live closer to London”

Survey respondents are more likely to say London benefits their local economy if they live closer to London.

The closer a city is to London, the more likely respondents were to say London has a positive effect on both the local and the national economies (Figure 2). People who have lived in London before are more likely to think that London has a positive effect on their current city's economy and the national economy.

Survey respondents are also more likely to say London benefits their local economy if they visit London more often for work or holiday/leisure purposes. Figure 3 shows the positive relationship between those people who visit London more often for holiday or leisure and what their perceptions are of London's impact, if any, on their local economy.

Local government and business leaders echoed the survey saying the UK benefits from having London as a 'global city'. Broadly, there is consensus that having a global city less than two hours from many UK cities is an asset to their economy. City and business leaders acknowledged that London is naturally attracting investment, businesses and talent through market forces, and other cities need to find ways to link in better to that.

But the roundtables also brought out that business and city leaders think foreign investment is often focused on London. Many participants wanted to know how other cities can complement the London market. They are not necessarily concerned with competing with London for the same investors, but they feel that



they have a different and complementary ‘offer’ that would be beneficial to investors currently only focused on London. These businesses embrace the idea of being part of an investment network – and would like it to happen more. They noted that while investment is focused on London, the core cities together have a similar pull.

Figure 3: Respondents who visit London for leisure tend to perceive its impact on their city more positively³⁰

How often do you visit London for holiday or leisure purposes?	What is London's impact on the economy of the town or city you live in?					
	Very positive impact	Fairly positive impact	No impact	Fairly negative impact	Very negative impact	Don't know
Every day	50%	50%	0%	0%	0%	0%
Not every day, but at least once a week	35%	29%	29%	0%	0%	6%
Not once a week, but at least once a month	24%	46%	12%	12%	3%	3%
Not once a month, but at least once every three months	12%	37%	24%	19%	2%	6%
Not once every three months, but at least once every six months	5%	23%	30%	26%	5%	11%
Not once every six months, but at least once a year	4%	21%	33%	25%	8%	9%
Less often than once a year	2%	18%	32%	25%	13%	9%
Never	2%	10%	37%	21%	16%	14%
Don't know	6%	9%	23%	6%	0%	57%

“Across the UK, most UK workers outside London (59 per cent) never visit London for work purposes”

The roundtables revealed that some businesses are more successful at exporting internationally than they are trading with London. If a business

wants to sell in London or expand their business there, they may have to set up a shop there as well. It is a very similar business process to exporting. So, investing and trading with London is not always seen as beneficial or necessary for businesses in other cities.

Across the UK, most UK workers outside London (59 per cent) never visit London for work purposes. But adults surveyed in cities closer to London (such as Brighton, Milton Keynes and Southend) are more likely to visit London for work.

City and business leaders said being closer and better connected to London can be both a good and a bad thing. Linking in businesses in other cities to customers in London is a good way to grow those firms. But, there is an overall sense from local government and business leaders that London “sucks away” the talent from their city.

“The most successful businesses in Yorkshire are engaged with big client bases in London. Parochial ones don’t do as well ... We need to work with them about how they can break into the London market base. Our top performing SMEs are actively engaging with London, then going somewhere else.”

Implications

Politicians need to better articulate the relationship between London and rest of the country. The public see a real difference between how London benefits the country as a whole and how it has an impact on their local economy, so politics and policy should reflect that, recognising and better articulating the reasons why some major investments

30 Centre for Cities analysis based on YouGov data



“64 per cent of UK adults outside London said the location of Whitehall and Parliament means that political decisions are too focused on London”

happen in London and how that has an effect on other places. UKTI could also do more to encourage investors to consider the skills, infrastructure and opportunities in cities outside London, where this would be a more appropriate fit for the business.

Businesses and city leaders need to balance seeking trading opportunities with other regional cities and with London. A domestic version of UKTI could cost-effectively facilitate better trade relationships between businesses across the country, including facilitating more trade from other cities into London and vice versa.

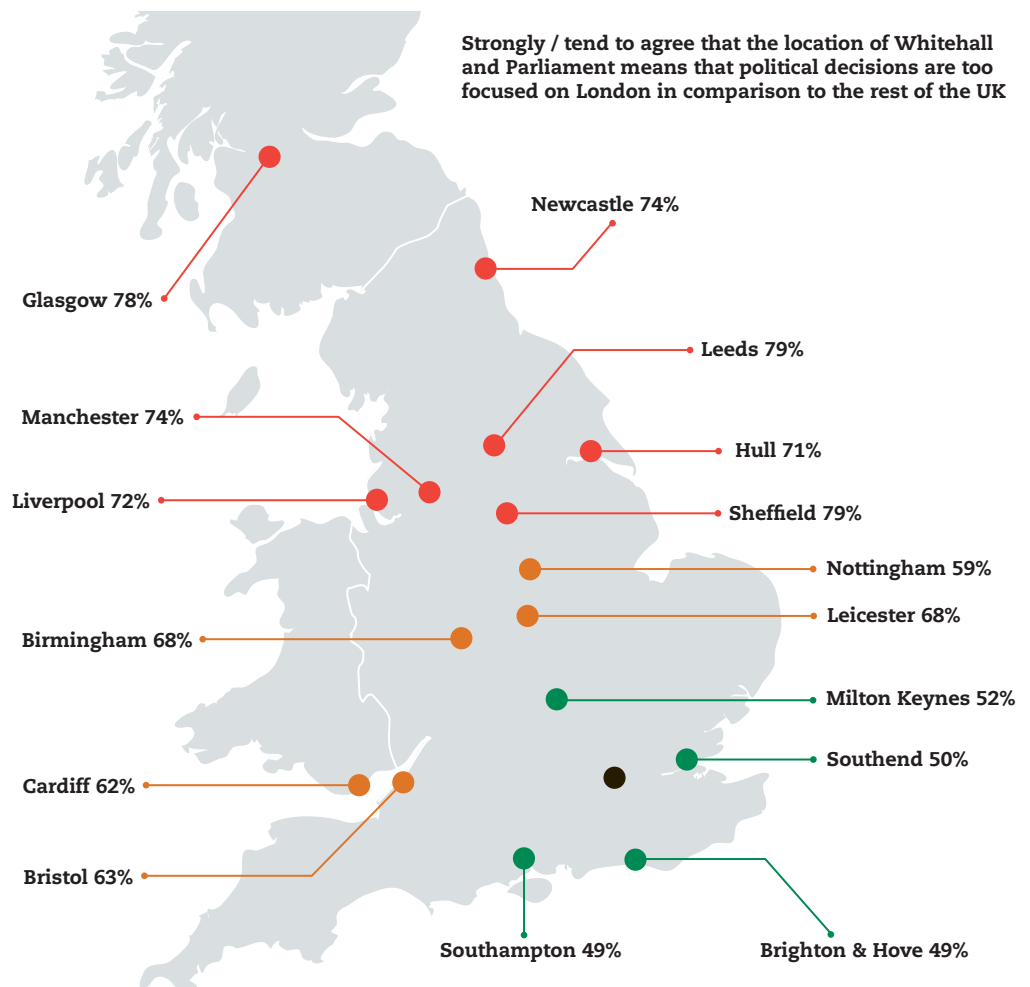
But businesses and city leaders should work within their regional networks as well. There is often too little knowledge, communication or strategy between nearby cities. Some of the cities seem more clued in to what is going on in London than what is going on with their neighbour.

Politics: Are politics, leadership and policy too focused on London?

Political focus

64 per cent of UK adults outside London said the location of Whitehall and Parliament means that political decisions are too focused on London in comparison to the rest of the UK. This perception weakens in cities closer to London, like Southampton, Brighton, Milton Keynes and Southend (see Figure 4).

Figure 4: Respondents views on whether Whitehall and Parliament are too focused on London in comparison to the rest of the UK





Given both Glasgow and Cardiff are in devolved administrations, their respondents' opinion about the impact of government's location in London is particularly interesting. 78 per cent of respondents in Glasgow agreed with the statement, but that is along the same lines as Leeds and Sheffield (both 79 per cent) and other northern cities. And Cardiff respondents agreed with the statement generally on par with the rest of the UK. It appears that these cities' responses have been mitigated by the fact that they are in devolved administrations, meaning Wales and Scotland have more powers over their cities compared to English cities.

In the roundtables, leaders said government policies and programmes were too focused on London, and this has led to a general focus on London to understand where policy is headed, what works and the policy landscape. Anecdotally, meetings between Whitehall and local authorities are held first thing in the morning if they are in London (requiring crack of dawn starts from city leaders across the country), but they have to be later in the morning if they are held in another city (to give those from Whitehall the time to travel). Behaviours like that reflect the point of view of some in Whitehall and the dynamic of the relationship.

Balancing investment

Building on the sentiments of the survey, roundtable participants called for a “more balanced level” of investment between London and other cities. For example, they cited the Department for Transport project appraisal model as being slanted towards London because it only focuses on value for money, rather than growth potential. If there is a fixed amount of investment from the Government in infrastructure, for example, the sheer scale that is invested in London means there isn't much left for the rest of the country.

And some roundtables brought out an us versus them' sentiment. One participant said there is general public anger about what London gets and the others do not. There is a feeling that you're OK if you're inside the London bubble, but if you're outside it, you're “well outside”. They also expressed that, if the Government is interested in sharing the benefits of economic growth across the country, it can't simply jam-spread it across the country. Government needs to focus investment in key city regions as growth hubs, as they do with London.

Responsive government

Only 17 per cent of UK adults outside London think that Whitehall and Parliament are responsive to the issues in the city or town where they live.

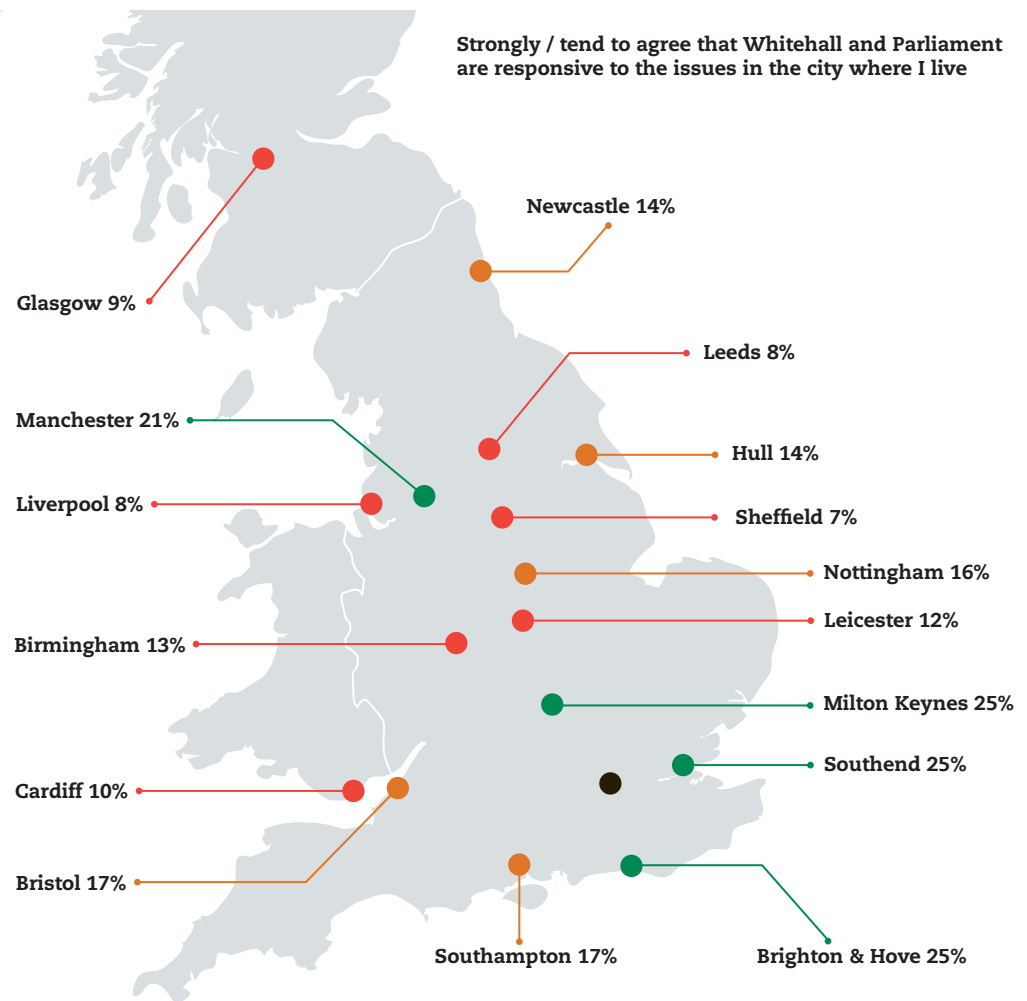
This is a strong finding that supports both the Coalition's and Labour's commitment to give more power to cities. If people do not believe that Whitehall and Parliament are sufficiently responsive to local needs, more decisions should be made closer to the people to make sure government is working for them.

Manchester bucks the trend with 21 per cent of respondents saying that Whitehall and Parliament are responsive to the issues in the city. This could reflect the fact that Manchester has a long history of strong leadership and relationships with Whitehall and as a result has more powers, funding and flexibilities to grow and shape the city. Manchester's recent City Deal and the continuous growth of its tram network, for example, demonstrate how city leaders have worked alongside government in London to drive change and support the economy in Manchester.

“There is general public anger about what London gets and the others do not”



Figure 5: Respondents' views on whether Whitehall and Parliament are responsive to the issues in their cities



“Only 17 per cent UK adults outside London think that Whitehall and Parliament are responsive to the issues in the city or town where they live”

Box 2: Other surveys have found similar opinions

A March 2014 poll by Survation³¹ found:

- 65 per cent of English respondents feel that “too much of England is run from London”
- 8 per cent trusted Government ministers over others for decisions about local service delivery.
- London received “preferential treatment” (70 per cent to 16)
- People supported greater devolution of economic powers (50 per cent to 33) and transport powers (61 per cent to 23) to the local or regional level

Business and city leaders said the size of a city region is important for working with the Government. Larger places with a stronger voice have more clout with the Government. Working across the city region or region as a whole helps attract the attention of the Government and builds scale for the business case to do more in their area.

³¹ Survation. (2014), ‘English Devolution Poll, Prepared of Behalf of Devolve Deliver’, 25 March 2014, accessed 28 April, 2014, http://survation.com/wp-content/uploads/2014/04/English_Devolution_Tables-FINAL.pdf



Political leadership

Nationally, 40 per cent of UK adults outside London think a mayoral position like the Mayor of London would be beneficial for their area. But in Bristol and Leicester, where they have mayors, 57 per cent and 52 percent think it would be beneficial for their city respectively.

Box 3: The role of a mayor

Some places in the UK have mayors that represent their local council. The Mayor of London (a role currently held by Boris Johnson) represents and co-ordinates the whole of London and the councils within it. He sets the visions, plans and policies covering all of the London boroughs including issues like transportation, housing, planning and economic development. The Mayor of London has more powers than mayors that represent their local council.

But when it comes to wanting a Boris for their city, the public is not convinced that a mayor would benefit them – until they have one. The data from Bristol and Leicester suggests that, though places may at first resist a mayor, they acknowledge the benefits once they have one in place or at least are comfortable with one once they have it. In Doncaster 62 per cent voted to retain their existing mayoral system when the subject was put to a referendum in 2012, even after local controversy over the performance of their mayor.³²

City government and business leaders saw London's mayor as a good voice for the city to attract investment. They said the reach of the Mayor of London's influence is strong, and national politicians will pick up the phone for Boris whereas they will not do the same thing for chief executives of councils. If other cities are meant to grow and keep up with London, they need the same tools for growth that London has.

Many cities also see a combined authority as good, but some businesses and local government leaders suggested that places need a mayor for the wider city region area, not just the city. When people talk about brand and competition on the world stage, "London has had Boris [Johnson] and Ken [Livingstone], someone who could champion the city".

But they said that, in some ways, Boris Johnson and the London mayoral office been 'too good' for London. Some think that London receives an unfair share of investment from the Government. They recognise that London requires investment to continue growing, but they also think that the same amount of funding in their city that London receives could solve a majority of their infrastructure problems. Some leaders were willing to say that they need to stop acting parochially and start demanding more from Government and business.

Implications

People are calling for the Government to be more responsive to their local needs.

The public does not feel that the Government is working for them and their local needs. A combination of local and national leaders need to fill this gap, with national policy doing more to allow flexibility to local needs.

32 BBC, 4 May 2012, Doncaster votes to keep elected mayor <http://www.bbc.co.uk/news/uk-england-south-yorkshire-17924410>

"The public is not convinced that a mayor would benefit them – until they have one"



But people are not calling for a mayor to fill that leadership gap. If London's mayor does, in fact, make the difference to transport or raises the city's profile in Whitehall, Parliament and investor circles that roundtable participants suggested, then the general public requires some convincing that a city region mayor could make a difference where they live.

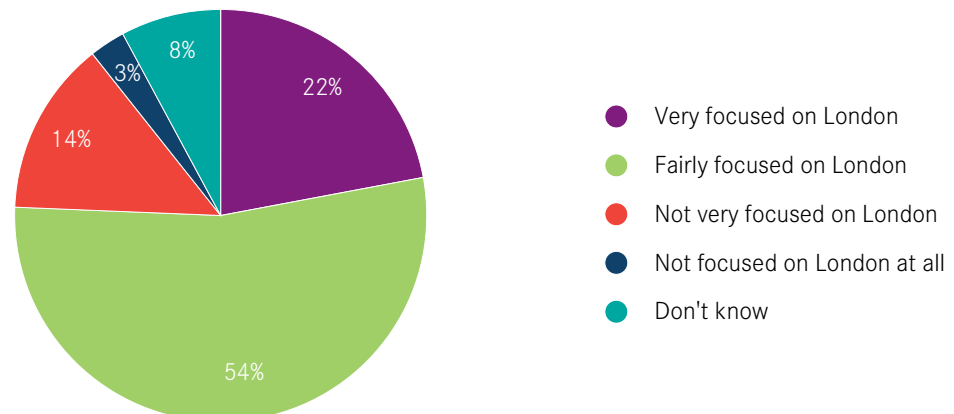
Government would be seen as more responsive to local needs if it empowered cities more. Most people and businesses do not know which part of government is responsible for certain services; but they do know if things are going well. Survey respondents in Manchester were more likely to say that national Government was responsive to their local needs than most cities, certainly most Northern cities. This could be because of the actions the city has taken on its own (for example, partnership working between 10 local authorities) as well as the additional powers and funding the city has received from national Government that has contributed to additional investment and growth.

Culture and media: Are culture and media London-centric?

News and media

Over three out of four UK adults outside London (76 per cent) think national coverage of news stories in the UK is very or fairly focused on London.

Figure 6: Responses to national survey without London: "To what extent, if at all, do you think the national coverage of news stories in the UK is or is not focused on London?"



London is a major cultural centre for the UK. Part of this is because of London's economic success and cultural attractions. People recognise that London attracts "young, highly-skilled, highly mobile talent" because of the cultural and social offer of the city.³³ 18 per cent of leading visitor attractions nationally are in London,³⁴ and 54 per cent of attraction visits were in London.³⁵

Business and city leaders said London's cultural importance is also due to the concentration of media and news in the South. A roundtable participant suggested there are too few restaurant reviews in the national papers from restaurants outside London because the reviewers would have to travel from London, requiring too much time and money.

³³ Centre for Cities roundtable.

³⁴ Members of the Association of Leading Visitor Attractions in 2013

³⁵ ALVA (Association of Leading Visitor Attractions). 2013. Latest Visitor Figures: Visits made in 2013 to visitor attractions in membership with ALVA.

"Over 3 out of 4 UK adults outside London think national coverage of news stories in the UK is very or fairly focused on London"



The BBC's recent move to Salford in Manchester demonstrates Government's commitment to rebalancing the economy and media influence in the UK. But the move has provided benefits as well as challenges. The BBC has provided a basis for regeneration in Salford and has encouraged more media companies to locate in the area. Yet with most politicians, media companies and celebrities based in London, they have had to conduct more remote interviews rather than hosting people on shows.³⁶

Culture, leisure and tourism

The most common reason (selected from a list) for respondents living outside London to visit the capital is for holiday or leisure purposes, and that increases with proximity to London. Nationally, 36 per cent of UK adults outside London visit the capital at least once a year for holiday or leisure; but that number rose to 80 per cent in Brighton and Hove, 76 per cent in Southend, and 67 per cent in Milton Keynes. So, while London is a major cultural centre, Britons do not necessarily come to London to experience the culture and attractions there.

Young adults are most likely to come to London for holiday or leisure, 85 per cent of 18-24 year olds having visited London for this purpose, followed by 80 per cent of 25-34 year olds.

Implications

If news and media are biased towards London, they might be creating a self-reinforcing cycle of people viewing London as the economic, political and cultural hub of the UK. Part of this is down to location: if media companies are based in London, then London is more familiar and easier to report on than other areas of the country. The trick is finding the right balance between highlighting what London has to offer alongside the events, news and culture in other cities – all the while acknowledging that most media are based in the capital.

But the survey also demonstrated London's cultural pull. With holiday and leisure being the top reason people visit the capital, there is a draw from the cultural attractions of the city. London businesses benefit from this pull, and the London economy overall benefits from having tourism and leisure money from around the country being spent in the city.

Wellbeing and quality of life: How does quality of life compare between London and other cities?

Describing London

UK adults outside London were asked to select five words from a list that best described London. People viewed London as expensive (62 per cent) and crowded (59 per cent) more than any other descriptors they could choose from, followed by cosmopolitan (35 per cent), lively (32 per cent), cultural (32 per cent), diverse (30 per cent) and chaotic (30 per cent).

“36 per cent of UK adults outside London visit the capital at least once a year for holiday or leisure”

³⁶ Frost, Vicki. 26 September 2012. “Should BBC Breakfast move back to London?” The Guardian. <http://www.theguardian.com/tv-and-radio/tvandradioblog/poll/2012/sep/26/should-bbc-breakfast-move-back-london>.



“Quality of healthcare, schools and local councillors is seen as fairly equal between London and rest of the UK”

Building on some of the challenges London faces, most roundtable participants think that their city is a better place to live than London, especially at their current stage of their career. They stated that young professionals are attracted to London to get started in their career and for the lifestyle or university graduates may move to London because they can earn higher wages and need to pay off their student loans.

City business and local government leaders also saw that cost of living and long commuting time as major reasons for thinking that their quality of life is better in their city. If rent in London continues to rise and push young professionals further out, then other cities think this may work to their advantage and will attract talent to jobs in their city.

Public services

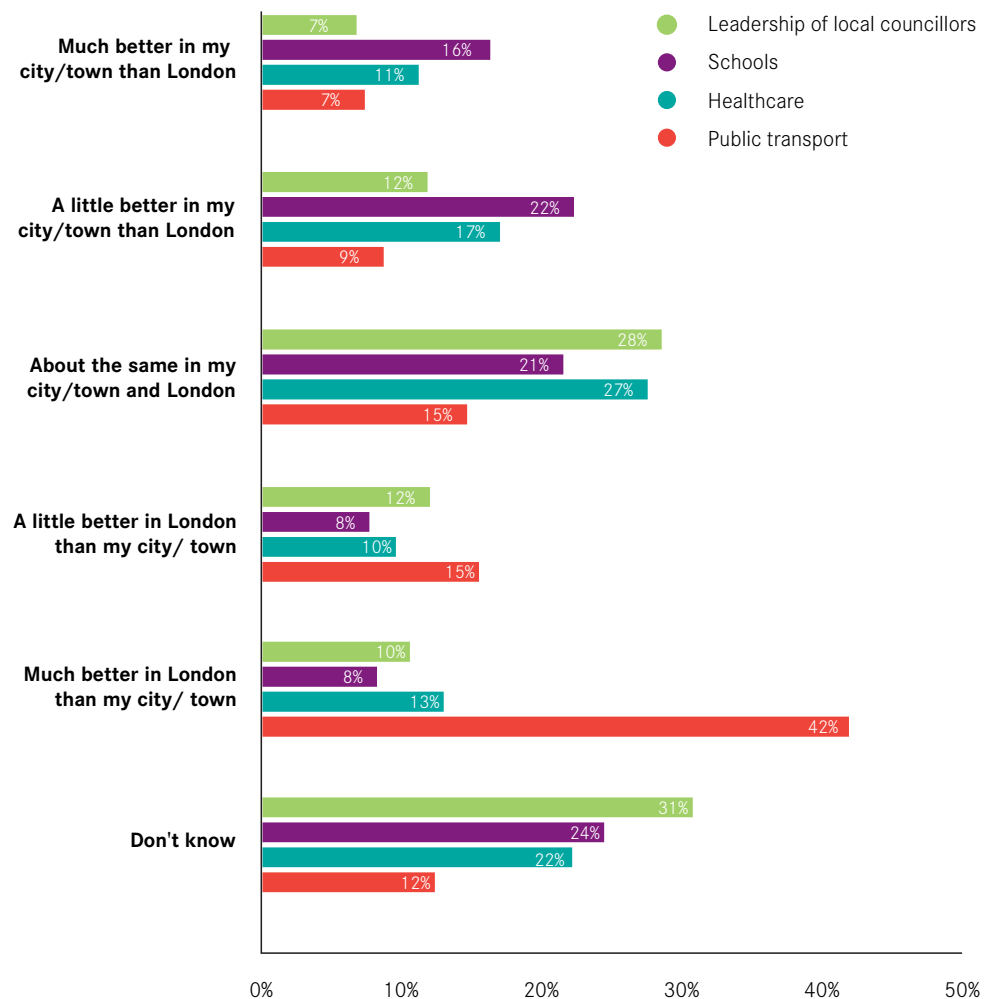
Quality of healthcare, schools and local councillors is seen as fairly equal between London and rest of the UK. For the most part, people think that local services in these areas are as good as in London. But, there are some deviations from this. **38 per cent of UK adults outside London think the overall quality of schools are better where they live than in London, whereas only 16 per cent of people think schools are better in London.**

57 per cent of UK adults outside London think that the overall quality of public transport is better in London than in their city or town. During roundtables, local government and business leaders voiced that London receives an unfair share of investment from government, especially in transport. Some community and business leaders envy London’s unique transport regulation powers. **They said that government policy is completely different in London. Regulation of transport is wonderful for London, but it is impossible to achieve outside London.**



“Quality of healthcare, schools and local councillors is seen as fairly equal between London and rest of the UK”

Figure 7: Comparisons of quality of services between London and the city or town of respondents nationally (excluding London).



Quality of life

Only 32 per cent of UK adults outside London think the capital is a good place to raise a family (Figure 8). But, this opinion changes based on other factors, such as whether you are more familiar with London. People who would consider living in London in the future, whether they have lived there or not, are more likely to think that London is a good place to raise a family (Figure 9). And people who visit London more often for work or holiday or leisure purposes are more likely to say it is a good place to raise a family.

Figure 8: National response (without London) to “Overall, to what extent, if at all, do you think London is a good or poor place to raise a family?”

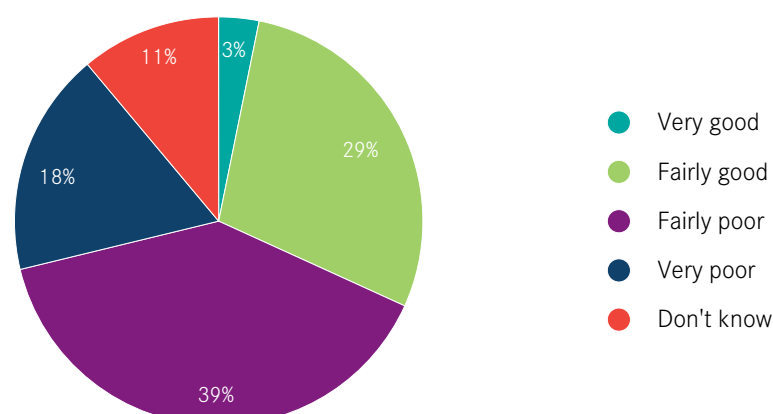




Figure 9: Responses from those in cities to “Overall, to what extent, if at all, do you think London is a good or poor place to raise a family?”³⁷

		Very good	Fairly good	Fairly poor	Very poor	Don't know	Total
Would consider living in London in the future	I have lived in London and I would consider living there again in the future	11%	54%	28%	4%	4%	100%
	I haven't lived in London, but I would consider living there in the future	5%	50%	32%	5%	9%	100%
Would not consider living in London in the future	I have lived in London, but I wouldn't consider living there again in the future	3%	30%	41%	23%	4%	100%
	I haven't lived in London and I wouldn't consider living there in the future	1%	23%	44%	22%	10%	100%
	Don't know	2%	8%	10%	4%	76%	100%

“Quality of healthcare, schools and local councillors is seen as fairly equal between London and rest of the UK”

Business and city leaders said that they do not want to be as big as London as this would affect quality of life.

Some places have resisted growth at the levels London has because they want to maintain a certain feel and quality of life – although city leaders also said they want to make their place more attractive for young professionals. To that end, some felt they could capitalise on negative perceptions of London to push their own perceived quality of life advantages.

But people still want to live in London

Nationally, one in five UK adults outside London (20 per cent) would consider living there in the future.

Younger people are much more likely to consider living in London in the future. Regardless of whether they have lived in London before, 51 per cent of 18-24 year olds outside London in the national poll said they would consider living there in the future. That falls to 28 per cent in 25-34 year olds and then to 21 per cent for 35-44 year olds.

Implications

The surveys and roundtables revealed that London does, in fact, have an image problem. The capital is seen as a place of opportunity and growth, but also crowded, expensive and not necessarily a good place to raise a family.

But despite its challenges, people still want to live in London. London is still a magnet for talent because of the opportunities that it has to offer. The large net migration from twentysomethings and the willingness of younger people to move to London speaks of the career and cultural opportunities of the city.

London's success poses a real challenge for how it will accommodate the growing demand of businesses and workers who wish to locate there. By the time Crossrail is built, it will be filled to capacity; keeping up with growth is a real challenge.³⁸ To keep up with demand and deal with overcrowding and cost of living, London needs a step-change in the rate it builds homes, invests in transport and unlocks new areas of the city.

³⁷ Centre for Cities analysis based on YouGov data

³⁸ Centre for Cities interviews.



At the same time, other cities should communicate their opportunities to workers and businesses. Part of this lies in generating jobs in their city; graduates will go where they think the jobs are. But, part of this is also marketing the opportunities in other cities more to graduates both for work and for quality of life.

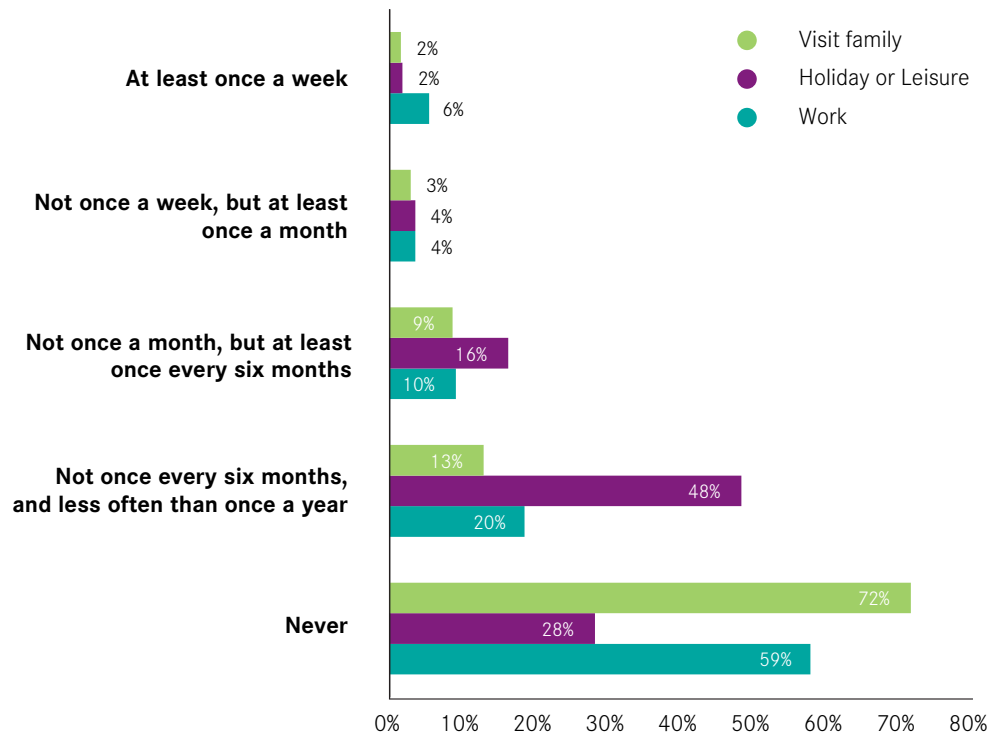
Despite the perception of long commute times and congestion, public transport is seen to be better in London than most other cities. Currently the system is too centralised, and local government has neither the power nor the resources to improve traffic, buses and the wider transport network in the same way London does. To bolster public transport in cities and make them more competitive, they need more of the powers that Transport for London has.

Connections: How connected are people with London?

The vast majority of people do not come to London very often.

- 59 per cent of workers polled nationally (excluding London) never come to London for *work*
- 28 per cent of those polled nationally (excluding London) never come to London for *holiday or leisure purposes*.
- 72 per cent of those polled nationally (excluding London) never come to London to visit family.

Figure 10: Percent of national (excluding London) survey respondents who visit London for various reasons



Note: Figures for those visiting London for work are for all respondents in employment

“Quality of healthcare, schools and local councillors is seen as fairly equal between London and rest of the UK”



Proximity to London affects how people interact with the capital including how often they visit for different purposes or whether they have lived there. People in Brighton, Southend and Milton Keynes reported coming to London more often for work or leisure purposes than cities further away. Although Bristol and Nottingham have a larger proportion of commuters than you would expect given their distance from London.

How often people visit London is influenced by their physical connections to the city: roads and rail.

Cities are very much at the mercy of their train lines and quality of train services for linking to London. And they are also at the mercy of travel costs to London, which has become more expensive. Birmingham is very interested in what it will mean for them to be 'closer' to London as a result of HS2.

The survey shows that being closer to London matters for how people are linked into the capital. In turn, business and city leaders are thinking about what HS2 will mean for them. Some noted that being 'closer' to London will be good for their city, and others noted it was more important to be better connected to other cities in their region.

Past connections

Nearly one in four UK adults outside London (23 per cent) have lived in the capital. People who live in cities closer to London are more likely to have lived in London before (40 per cent in Southend, 45 per cent in Milton Keynes and 51 per cent in Brighton). But people in two of these cities do not appear more likely to say they would consider living in London in the future (11 per cent and 14 per cent of adults in Southend and Milton Keynes respectively said they would consider living in London in the future, compared to 29 per cent and 31 per cent who would not).

Implications

People tend to visit London more often if they live closer to the capital. That means that proximity – and similarly cost and the time it takes to get between cities – will shape the relationships between London and other cities for business, leisure and personal purposes.

HS2 and other road and rail improvements will effectively 'shorten' the distance between UK cities and open up new opportunities for both. But how and where the benefits are felt will be down to how the cities work together and how cities outside London link in to their regional networks. Overall, the more people live, work and visit other cities, the more influence they will have on one another, economically, politically and culturally.

When cities are better connected, their economies become more interlinked. With so many people coming to London for holiday or leisure purposes, London businesses benefit from people from elsewhere spending their money there. Much of London's success comes from London's ability to attract business, people and money from other parts of the country.

“Nearly one in four UK adults outside London have lived in the capital”



Reflections

The British public does not feel that the UK is a “one nation economy” or that “we are all in this together.” While people recognise the positive effect of London on the national economy, few think that the capital has strong economic links with their city or town. Even national coverage of news stories and cultural events tends to be regarded as London-centric.

But, it’s not necessarily ‘London versus the rest.’ Many of those cities closer to London, especially those within 100 miles of the capital, have a much more positive opinion of their relationship with London. The visible benefits of London’s growth only appear to fall within this boundary, and people living in cities beyond that 100-mile radius perceive decreasing benefits of the capital the further they are from it.

The survey sheds light on perceptions in the devolved administrations: Scotland and Wales. Surveyed adults in Glasgow and Cardiff were amongst those least likely to agree that Parliament and Whitehall are responsive to their local needs. This reflects the relationship between those institutions and the devolved administrations covering those areas. But it also highlights the importance of how people perceive central Government’s effectiveness in their area at a time when Scotland and Wales are calling for more powers themselves.

These results are a call to action for national politicians. As the country heads for a general election in 2015 and faces a Scottish referendum for independence, Parliament and Whitehall will need to convince people that the UK is working for them. While London’s growth is quite visible, its impact on the rest of the country is not, and it is not well understood.

Perceptions about unbalanced investment between London and the rest can have long-term implications. *Cities Outlook 1901* illustrates the way that lack of investment is compounded over time. Failure to invest in skills or infrastructure in 1901 had knock-on long-term impacts on a place and its people over decades, while targeted investment in infrastructure and ongoing investment in skills succeeded in helping some places and people improve performance.

To keep London growing, the Government will have to keep making major investments in the capital. But doing that while trying to convince the public that those investments will benefit the national economy and other cities is difficult. For example, the Northern Line extension in Battersea, London is often perceived to be a major government investment, but it actually receives no central funding (only a guarantee). In addition, London and the South East are net contributors to the Exchequer and could argue that they do not get their fair share of investment. So the perception of ‘haves’ and ‘have nots’ of the policy and economic world will prove a significant communication challenge for the Government.

And there are clear implications for business and local government leadership:

Cities need to work together.

London and other cities need to focus on how to build mutually beneficial relationships. London clearly benefits from the university-educated workers that come from other cities, and other cities benefit from London-based firms employing workers in their cities.

“The British public does not feel that the UK is a ‘one nation economy’ or that ‘we are all in this together’”



Other cities can take advantage of some of London's weaknesses. Recognising people view the capital as expensive and crowded and not necessarily a good place to raise a family, other cities can build on their strengths of being affordable and family-friendly. But this is also dependent on the job opportunities, housing quality and sense of place in other cities.

Cities need to demand more from central government.

Cities want to create their own identity, complementary to London and their neighbours, that helps them grow. Not every city wants to be like London, nor should every city strive to be like London. But in order to differentiate themselves, they also need to demand more from the Government to control their destiny. So much policy is blind to the fact that places are different. Cities need to argue more for their place and demonstrate why they are different. They need to get more from Whitehall than blanket policy, and they need to get more out of Whitehall and Parliament to help their place.

Cities need to fill the leadership gap people perceive from central government.

Cities should demonstrate why they can be more responsive to local needs than Whitehall and Parliament. Local leaders need to engage more with the public in order to explain how national policies translate locally and how more local responses can help the economy grow.

**“So much policy
is blind to the
fact that places
are different”**



Appendix

Methodology and Survey Information

Methodology: This survey has been conducted using an online interview administered to members of the YouGov Plc UK panel of 350,000+ individuals who have agreed to take part in surveys. Emails are sent to panellists selected at random from the base sample. The e-mail invites them to take part in a survey and provides a generic survey link. Once a panel member clicks on the link they are sent to the survey that they are most required for, according to the sample definition and quotas. (The sample definition could be “UK adult population” or a subset such as “UK adult females”). Invitations to surveys don’t expire and respondents can be sent to any available survey. The responding sample is weighted to the profile of the sample definition to provide a representative reporting sample. The profile is normally derived from census data or, if not available from the census, from industry accepted data.

YouGov plc make every effort to provide representative information. All results are based on a sample and are therefore subject to statistical errors normally associated with sample-based information.

City Survey: All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 1,688 adults. Fieldwork was undertaken between 11th – 19th March 2014. The survey was carried out online. The figures have been weighted and are representative of all adults in each city surveyed (aged 18+). These were Newcastle, Kingston-Upon-Hull, Nottingham, Birmingham, Bristol, Cardiff, Glasgow, Leeds, Liverpool, Manchester, Sheffield, Brighton and Hove, Leicester, Southampton, Southend, and Milton Keynes.

National Survey: All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 2,478 adults, of which 2,209 were from outside of London. Fieldwork was undertaken between 11th – 12th March 2014. The survey was carried out online. The figures have been weighted and are representative of all UK adults (aged 18+).

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All views expressed in this report are those of the Centre for Cities and do not necessarily represent the views of those we interviewed. All mistakes are the authors' own.



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