

The Rebuilding Britain Index

A greener communities special

October 2021



Foreword

In November 2021 the UK will host the United Nations Climate Change Conference (COP26).

Here, all countries will be tasked with putting firm plans in place to limit global warming to 1.5o C above pre-industrial levels.

To mark the COP26 milestone our latest edition of the Rebuilding Britain Index provides a special in-depth look not just at the extent to which the UK is building back better, but also how it can look to build back greener. In truth, the two can and should go hand-in-hand.

While building back better and levelling-up will require widespread investment across the range of built infrastructure across the whole of the UK, so too will building back greener require a multi-faceted approach. This will involve retrofitting existing housing stock and buildings, decarbonising new residential and business developments, investment in our transport and energy networks and behaviour change at both a societal and individual household level.

However, we must be mindful that these developments do not serve to widen existing disparities between and within our communities. It is vital that all communities can benefit from the green and clean technologies of the 21st century and that the transition takes place in a socially inclusive manner. Our research demonstrates that there is a real risk of less affluent communities being left behind.

Central government has a major role to play in facilitating local government and households to adapt local infrastructure to address sustainability and climate concerns.

However, while we grasp with the existential issue of climate change, we are also faced with continued challenges across housing, the economy and health and social services. And we are starting to see these issues really take hold within our index.

For Housing, one of the key index measures, this sees the second successive decline in performance. Given the historic boom in UK house prices and with demand far outstripping (particularly affordable) supply this is perhaps little surprise. According to official figures from the Land Registry, house prices in Richmondshire have risen by 29% over the last year¹. This type of environment is just not sustainable. Indeed, since the initial release of the RBI, the UK index score for the measure of house prices as a proportion of average income has fallen by two-points. This is also filtering down into depressed consumer sentiment with regards to housing stock.

We have actually seen a slight increase in the other key measure of Jobs & Economic Prosperity. Given the scale and success of the government furlough scheme, the unemployment rate during the pandemic rose only from around 4% to 5% and is already much of the way back to pre-pandemic levels. Therefore, while we can perhaps expect to see some improvement across the Jobs & Economic Prosperity measure over the coming quarters as both unemployment and GDP continue to improve, the real test will be in where this improvement is concentrated, the extent to which average earnings change locally and whether we see improved consumer sentiment within the parts of the UK currently lagging behind on this measure.

Finally, 2020 and 2021 undoubtedly saw our health services in the UK stretched to an unprecedented level as it sought to cope with record numbers of patients and closed wards leaving long delays in treatment for many.

We are now starting to see the impact of this across our Health and Social Care measure, with a second successive decline. This is driven by both a slight fall in life expectancy, but also a drop in consumer sentiment with regards to access to health and social care provision across the board, peaking in the perceived access to quality primary care.

Clearly, these are all major challenges and fixing them will take time and commitment from government, business and society at large –

particularly as we enter a time where pressure on public spending has perhaps never been greater. It is therefore vital that public and private investment that is being made is inclusive – and this means long-term assets that are good for society as a whole and allow more people to benefit from economic growth.

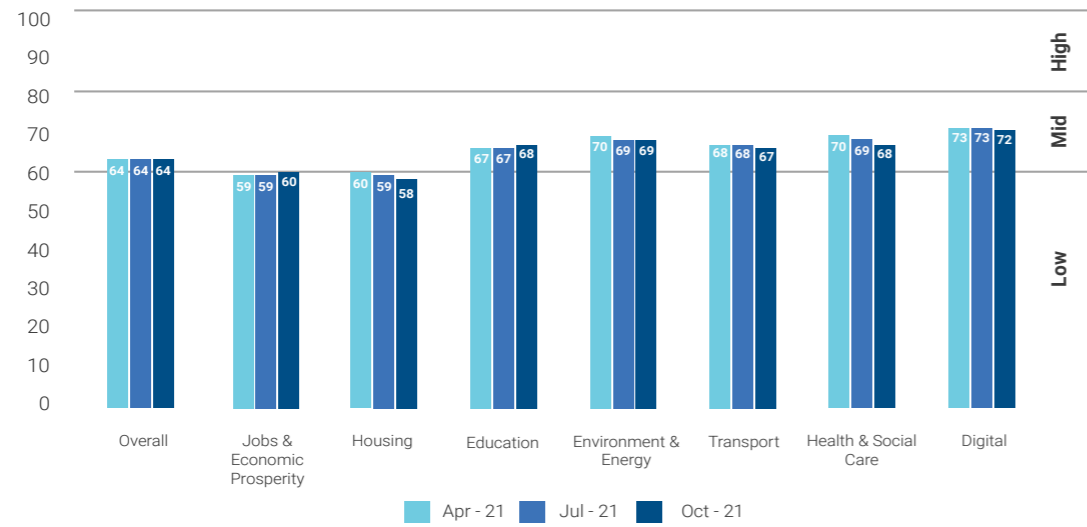
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Central government has a major role to play in facilitating local government and households to adapt local infrastructure to address sustainability and climate concerns.”



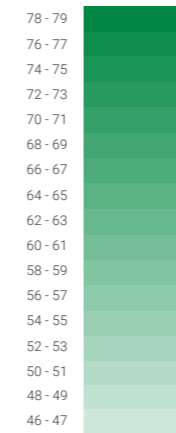
Key findings

RBI performance over time

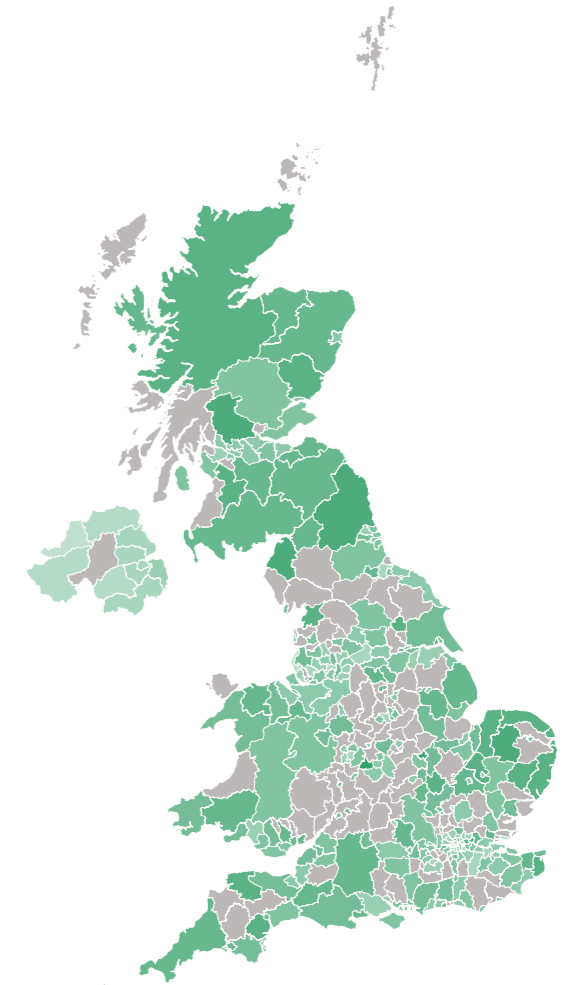


Overall Greener Communities Index score by local authority

Positive index score

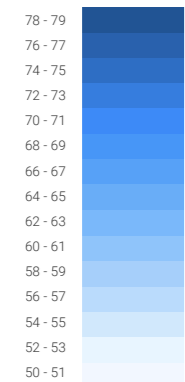


Negative index score

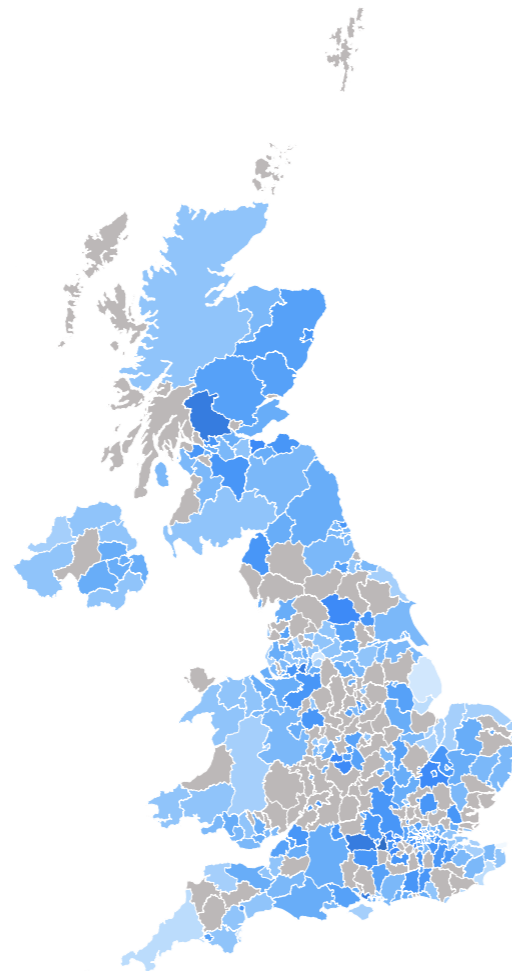


Overall RBI score by local authority





Positive index score



Negative index score

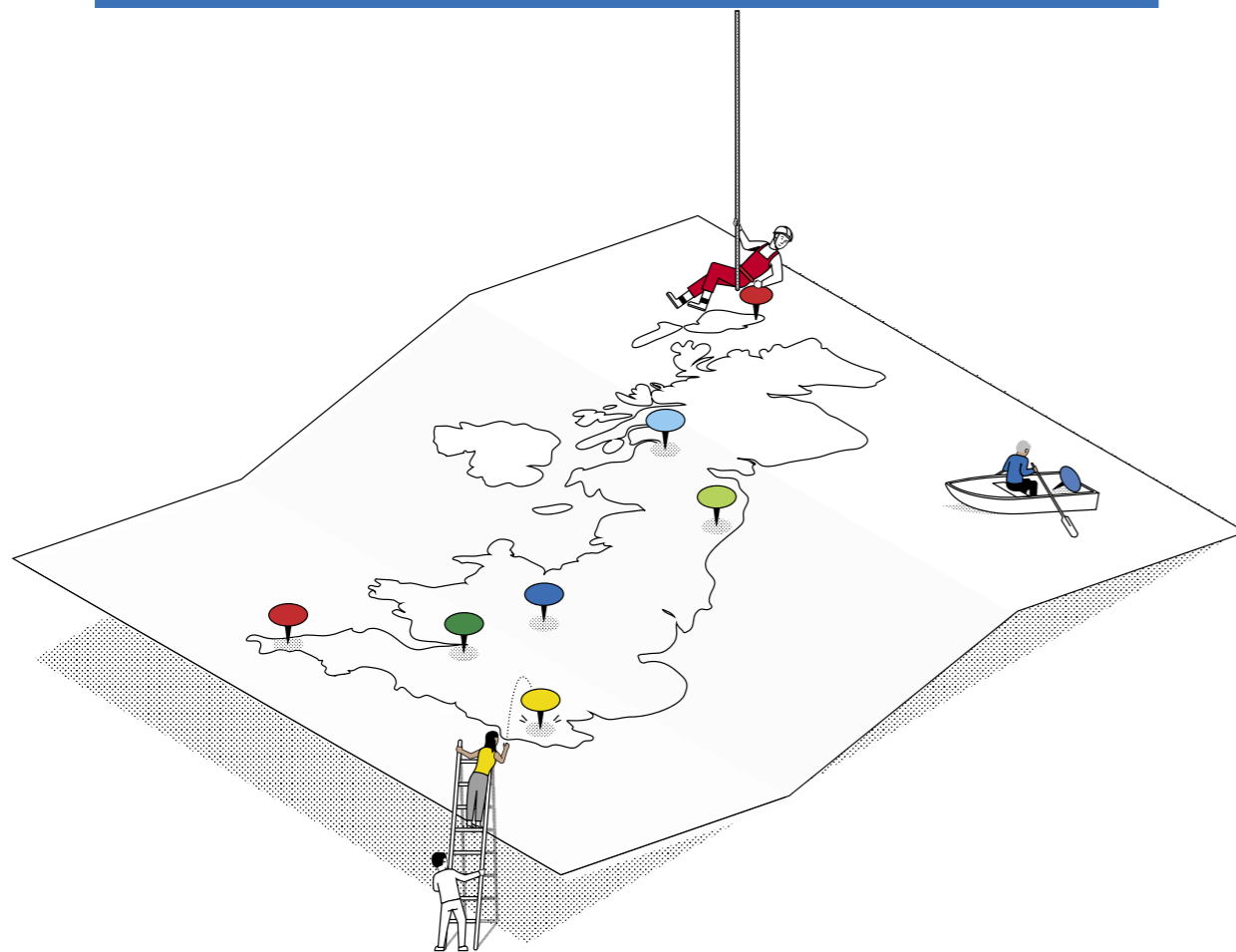


Green Technology Household Funding Shortfall

	% Households Willing to Contribute	Approximate Household Shortfall
 Free standing wind turbine – average cost of £28,000	7%	£26,000
 Domestic solar panel system – average cost of £4,800	13%	£4,175
 New hydrogen gas boiler – assumed costs of £1,250	24%	£950
 Ground source heat pump – average cost of £16,500	10%	£14,850

The Rebuilding Britain Index: Key Indicators

Levelling up will take time.
The pressure is on to act quickly



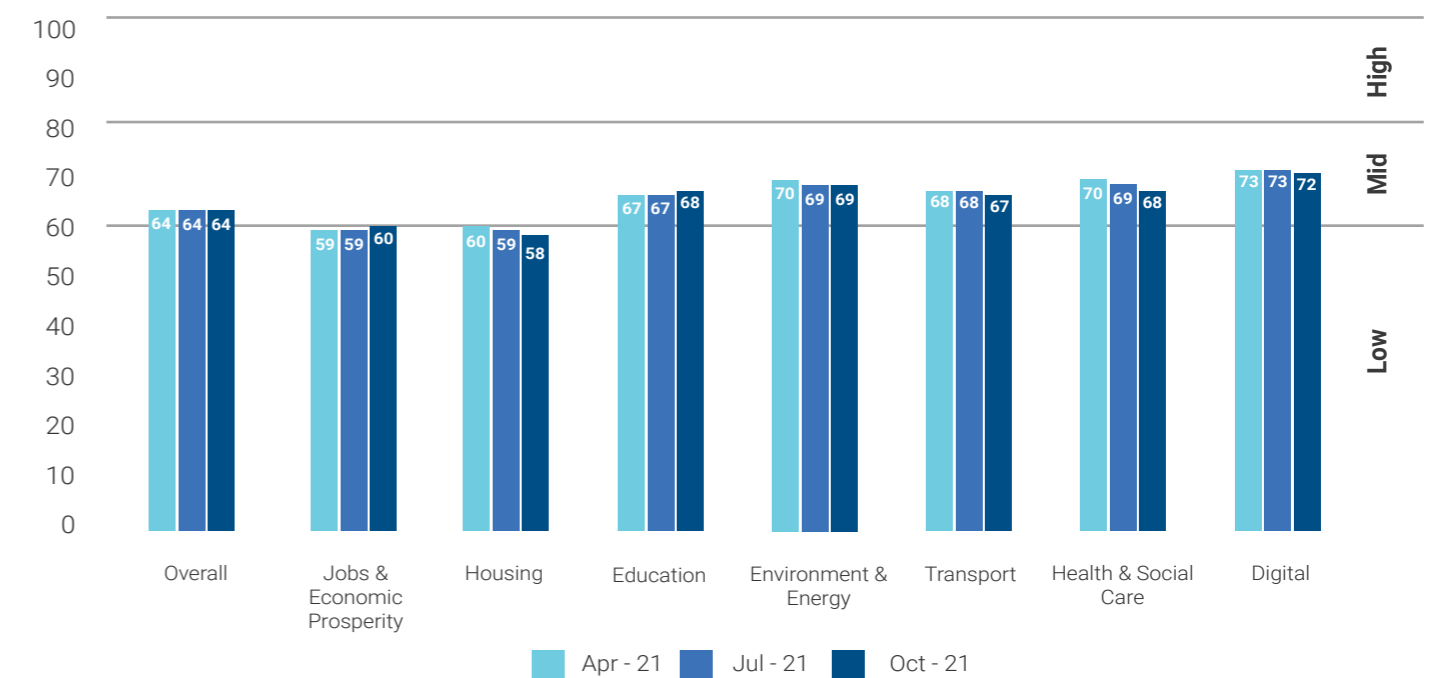
When the Government first pledged to “level up every part of the UK” as part of their 2019 manifesto they could not have foreseen the huge challenges that lay just over the horizon. Despite the financial, social, and logistical challenges brought about by the outbreak of the Covid-19 pandemic, Build Back Better will clearly form a key tenet of the Covid recovery.

But Build Back Better is clearly an ambitious target. The left behind communities emerged due to structural fault lines in the UK economy. Progress in addressing those fault lines will be measured not in weeks or months, but in years. With the next three-year spending review and autumn budget just around the corner, it is perhaps prudent for government to

consider where and how those funds can make the most positive difference – particularly given the period of economic recovery we are living through.

Cost-effective government interventions will be required if the aspiration of the levelling up agenda is to be made a reality, working in collaboration with business and local leaders and communities. Indeed, the Rebuilding Britain Index (RBI) has remained flat at a UK level, with a score of 64/100. Ultimately, looking at the UK as a whole, there has been no sign yet of rebuilding during 2021. That period of stasis needs to change rapidly in the course of 2022.

Figure 1. Little progress across key RBI indicators



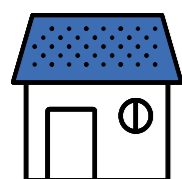
Creating a long-term boost for Britain's housing market

Housing forms one of the RBI's key measures. Alongside jobs, residential property is the metric which is most likely to shift the RBI positively or negatively because there is a higher correlation between owning a home and our overall feeling of wellbeing and prosperity. Worryingly, the trend data reveals a second successive decline in housing sentiment. This trend reflects the historic imbalances between demand and supply, particularly for affordable housing. It also highlights more recent trends with the Covid-related shift towards remote working resulting in many professionals relocating to market towns and rural areas where the housing supply is even tighter. For example, according to official figures from the Land Registry, house prices in

Richmondshire, North Yorkshire, have risen by 29% over the last year². This situation is clearly not sustainable. Indeed, since the initial release of the RBI, the index score for the measure of house prices as a proportion of average income has fallen by two-points (55/100 compared with 57/100 in Q1 2021).

The lack of affordability has become even more pronounced since the end of the Chancellor's Stamp Duty holiday at the end of September and is filtering through into sentiment among the general public with consistent declines in index scores across the following measures:

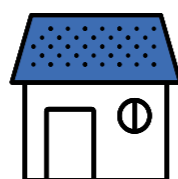
- 2 points



Perceived availability of social housing

(57/100 – down two-points from Q1 2021)

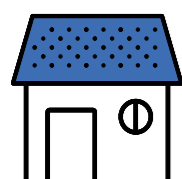
- 2 points



Perceived availability of starter homes

(57/100 – down two-points from Q1 2021)

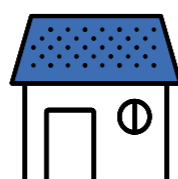
- 2 points



Perceived availability of rental properties

(58/100 – down two-points from Q1 2021)

- 2 points



Perceived extent to which local housing market is meeting local needs

(61/100 – down two-points from Q1 2021)

Further economic stimulus may be required to breathe life into the housing market, but the Chancellor would be sensible to explore long-term measures to boost the supply-side rather than further short-term demand-side measures. The UK needs more homes: boosting the volume of home building is likely to generate positive impacts on the RBI even in the short- to medium-term.

Will the Covid-recovery bring about an economic rebalancing?

We have seen a slight increase in the other key measure of Jobs & Economic Prosperity, with this reflective of the improvement in the unemployment claimant count over the last quarter (up four-points compared to Q1 and Q2 2021).

Given the scale and success of the government furlough scheme, the unemployment rate during the pandemic rose only from around 4% to 5% and is already much of the way back to pre-pandemic levels. By the end of the furlough scheme in September 2021 there were still 1 million workers receiving financial support, but this figure was well down on the peak of 9 million workers in May 2020. The danger of mass unemployment has been averted.

Therefore, while we can perhaps expect to see some improvement across the Jobs & Economic Prosperity measure over the coming quarters as both unemployment and GDP continue to improve, the real test will be in where this improvement is concentrated, the extent to which average earnings change locally and whether we see improved consumer sentiment within the parts of the UK currently lagging on this measure.

Health and Social Care in need of support

The Covid pandemic has refocused public attention on the value of health and physical wellbeing. It has also revealed the cracks in our health and social care system. Throughout the pandemic services were stretched to an unprecedented level as the system sought to cope with record numbers of hospital admissions, pressures on intensive care units, and closed wards leaving long delays in non-Covid related treatment for many. NHS waiting lists now stand at a historic high. In England alone, some 5.45 million people were waiting for treatment in June 2021 up from 4.4 million in February 2020³.

We are now starting to see this have an impact across our Health and Social Care measures, with a second successive decline in the RBI trend data. This is driven by both a slight fall in life expectancy as a result of Covid-related excess deaths (47/100 – down two-points from Q2 2021), but also a drop in public sentiment with regards to access to health and social care provision across the board, peaking in the perceived access to quality primary care (73/100 – down three-points from Q1 2021).

Time to act

Clearly the longer we wait to act, the bigger (and more costly) it will be to fix these problems. Change will take time, but can we truly afford to wait? According to the CBI, improving regional productivity could add £200bn to the UK economy over the next decade⁴, suggesting that despite the costs, the financial gains would be substantial.

The emergence of local disparities



Given our total UK sample of 15,000 individuals to date we have a particularly robust understanding of the specific strengths and weakness of the nation at a country and regional level, while also allowing us a more granular look at the differences across the majority of local authorities and sub-regions.

in figure 2, the picture as described by the index as a whole can appear as though there is often little separating the regions and nations of the UK. However, as we start to unpick this within the seven key index themes, we begin to see that each has its own challenges and strengths.

This additional nuance and granularity are vital given the localised nature of many of the disparities we see within the index. Indeed, as can be seen

Figure 2. Component Index scores by UK country and region

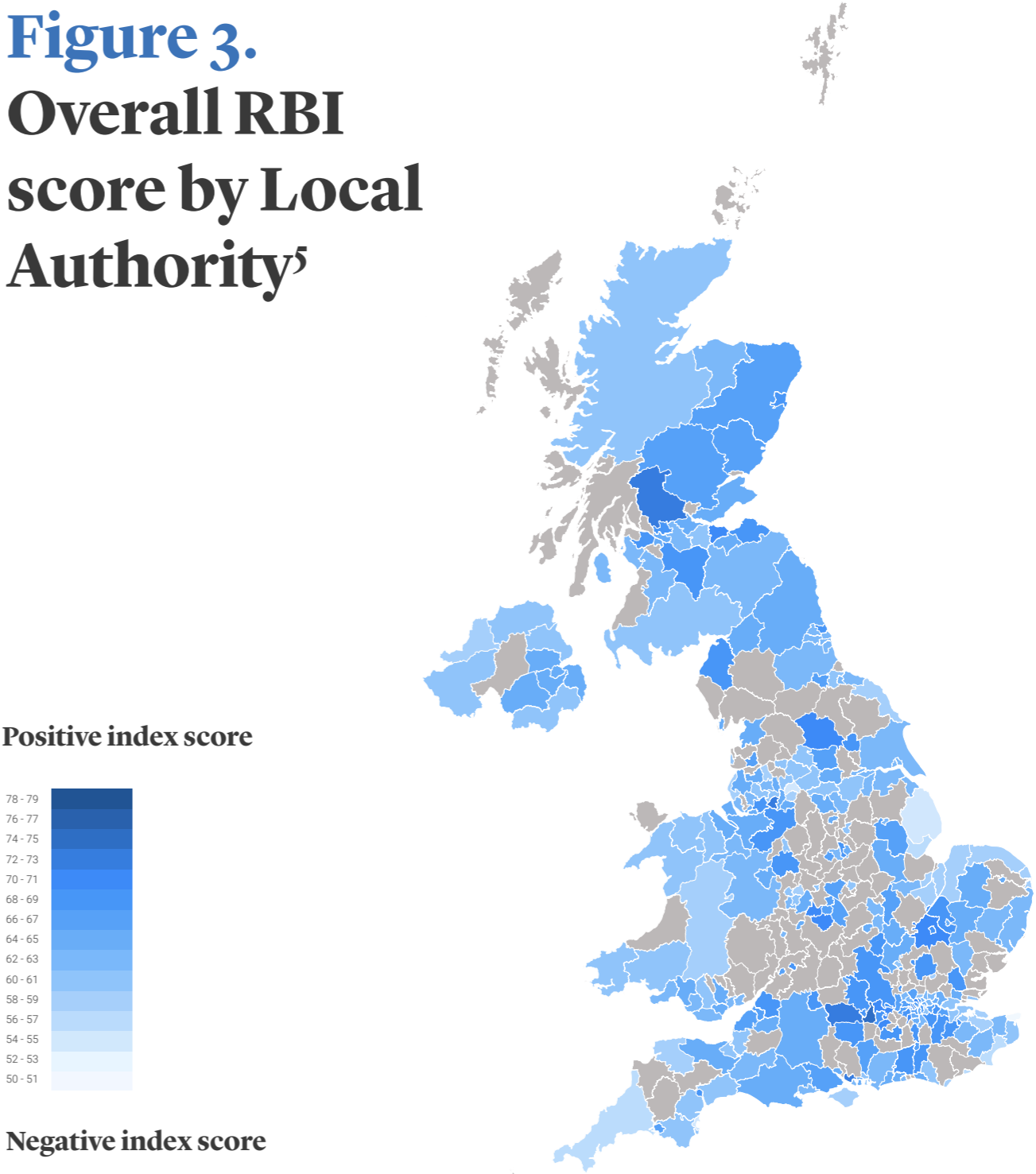
	Scotland	Wales	Northern Ireland	North-East of England	North-West of England	Yorkshire & Humber	East Midlands	West Midlands	East of England	London	South-East England	South-West England
OVERALL RBI SCORE	65	62	63	63	64	64	64	63	64	66	65	63
HEALTH INDEX	64	65	66	65	65	66	66	66	70	73	72	73
EDUCATION INDEX	73	65	63	67	67	64	64	65	65	71	69	73
HOUSING INDEX	65	61	65	67	64	63	63	62	54	50	51	51
JOBS & ECONOMIC PROSPERITY INDEX	59	54	57	52	56	56	57	56	63	66	67	60
ENERGY & ENVIRONMENT INDEX	71	69	69	69	67	69	69	68	70	67	69	72
TRANSPORT INDEX	67	64	64	68	68	67	66	68	65	73	67	65
DIGITAL INDEX	69	70	64	72	74	77	73	75	70	75	71	69

It is across both housing and jobs & economic prosperity measures that these regional differences remain most pronounced, with London and the South of England significantly under-indexing on housing, but generally outperforming on jobs & economic prosperity.

However, within figure 3 we get our first look at just how much disparity exists within our local communities and how using the overall regional picture as a proxy to describe every community within that region would do little to address the real issues each is facing. Every local community within a given region has its own list of strengths and challenges which can be explored in granular detail using our interactive mapping tool. The tool pinpoints the extent to which each local authority is pulling ahead and falling behind across each of the individual 52 metrics captured within the RBI.

Within the appendix we have provided national and regional snapshots that highlights the broader strengths and weaknesses of the constituent local authorities within.

Figure 3.
Overall RBI
score by Local
Authority⁵



⁵ Greyed areas currently have insufficient base size

Introducing the Greener Communities Index

There are a number of environmental measures that we capture within our Rebuilding Britain Index and the wider research activity that this entails. These measures cover the spectrum of green energy, housing and transport.

As the realities of climate change are placed into sharp focus this Autumn, our 'Greener Communities Index' paints a clear picture of how different parts of the UK currently face up to the challenge⁸.

The composite measure is comprised of specific metrics that capture:


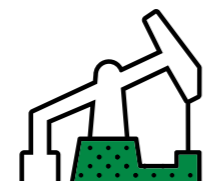
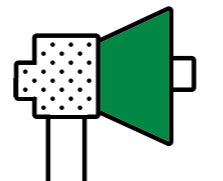
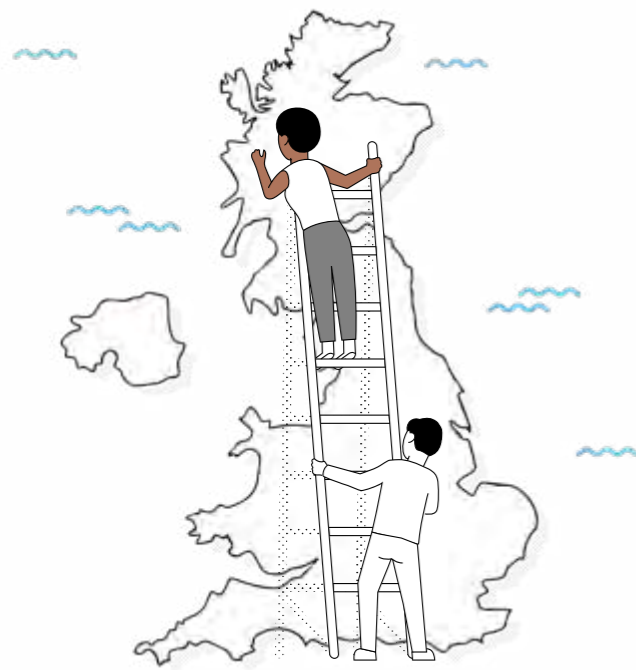
Outcomes	Community Infrastructure	Behavioural
 <ul style="list-style-type: none"> • CO2 per capita • Renewable energy generation per household 	 <ul style="list-style-type: none"> • Availability of EV charging points locally • Availability of public green spaces locally • Perceived air quality locally • Energy efficiency of homes 	 <ul style="list-style-type: none"> • Incidence of smart meter ownership • Incidence of EV ownership • Incidence of renewable energy home installations

Figure 4. Green Community Index Scores by Region / Country

	Scotland	Wales	Northern Ireland	North-East of England	North-West of England	Yorkshire & Humber	East Midlands	West Midlands	East of England	London	South-East England	South-West England
OVERALL GREEN COMMUNITIES INDEX SCORE	59	60	52	59	57	59	59	57	59	57	58	61
AIR QUALITY	80	76	76	76	73	74	74	73	77	68	75	80
PUBLIC GREEN SPACES	82	78	77	79	77	77	77	77	80	77	80	82
CO2 PER CAPITA	78	72	72	78	81	78	81	84	80	85	83	83
RENEWABLE ENERGY GENERATION PER CAPITA	60	70	-	51	44	56	52	34	54	19	46	62
EV CHARGING POINTS	48	44	43	48	47	48	47	51	46	60	46	45
ENERGY EFFICIENCY OF HOME	73	74	73	75	74	74	74	75	74	73	73	75
SMART METER OWNERSHIP	43	51	14	53	51	50	49	52	49	51	45	47
RENEWABLE SOURCE INSTALLED AT HOME	9	12	10	15	13	13	14	14	13	21	13	12

⁸ Smart meter ownership, Renewable energy source installed at home and EV ownership are all expressed as a % out of 100. CO2 per capita & Renewable energy generation are indexed data sources based on published data. Air quality, public green spaces, energy efficiency in own home and availability of EV charging points are based on household satisfaction levels, re-scaled on a 100 point scale for comparability.



Across the regions and countries of the UK, it is the South-West of England and Wales that come out top. Northern Ireland currently lags behind the rest of the UK, largely driven by the continued lack of roll out of Smart Meters.

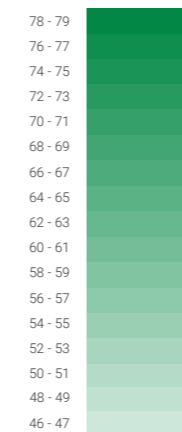
- For both Scotland and the South-West of England, positive household sentiment for air quality is the highest in the UK, whilst both also have strong scores for the production of renewable energy generation per capita.
- The North-East of England leads the way in relation to smart meter ownership and generally performs well across the range of measures in the Greener Communities Index.
- Perhaps unsurprisingly, London performs poorly with regards to perceived air quality. Conversely, London leads the rest of the UK with regards to availability of EV charging points.
- Similarly, London is strides ahead when it comes to sources of renewable energy installed at home.

Green Communities Index - Local Authority Snapshot

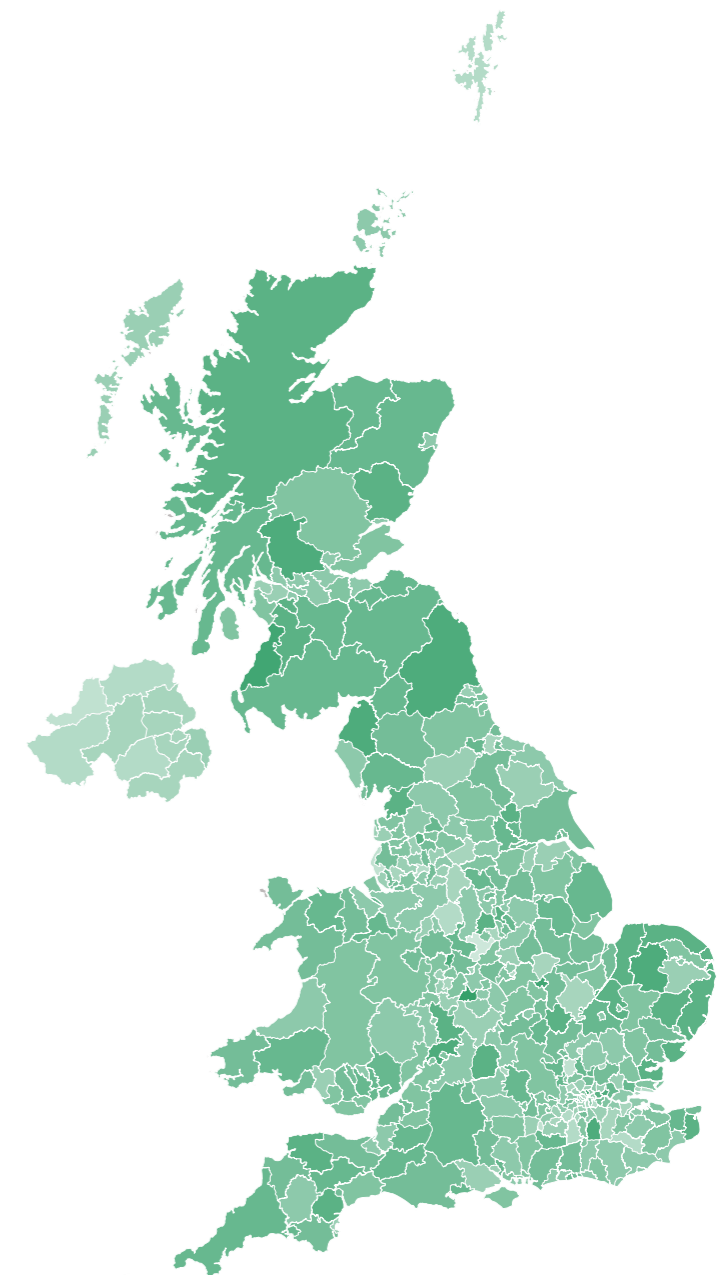
Using the Index above we have ranked the 10 best performing UK local authorities according to the quality of their environmental infrastructure.

Figure 5. Overall Greener Communities Index score by local authority⁹

Positive RBI Score



Negative RBI Score



⁹ Top 10 and bottom 10 local authorities are based on all local authorities with a large enough sample size after 3 waves of fieldwork. Local authorities with a sample size less than 20 are omitted from the ranking

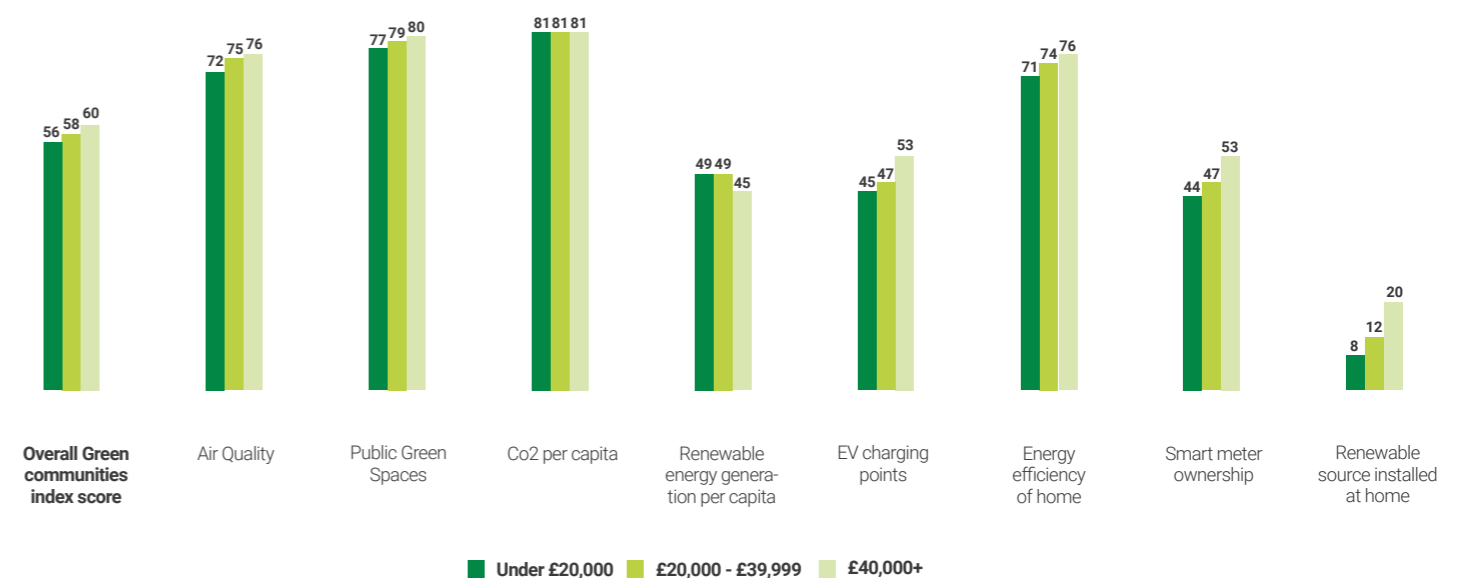


Supporting All Communities To Become Greener

When looking at the performance locally, it is clear that local governments cannot act alone in building a cleaner and greener UK. Disparities in household wealth and income across the UK will have a major impact on the speed at which local communities are able to adopt green infrastructure. Our Index

reveals that there is a strong correlation between household income and performance on our Greener Communities Index: higher income households have the financial means to invest in faster green transition.

Figure 6. Green Community Index Scores by Household Income



As we will see later in this section, many of the home modifications that will facilitate the 'greening' of households, such as installation of renewable energy sources, are attractive to consumers. Cost, however, will certainly be a barrier for many. It is vital that as we as a nation move towards Net Zero 2050, communities of all levels of affluence move at the same pace.

Affecting Household Behaviours

As the component metrics of the Greener Communities Index Scores demonstrate, there are profound variations in the uptake of different technologies at home that will collectively address climate challenges.

Across the UK, Smart Meter ownership is reaching a point of critical mass, with many regions nearing the 50 percent mark for ownership. Clearly great progress has been made since rollout began in 2011. Yet some areas of the UK lag behind, in particular Northern Ireland (14%). This demonstrates the impact that government action can have on individual households. With the Northern Ireland Department for the Economy (DfE) still having no plans at present to install smart meters, there is little incentive or imperative for households to act.

As we might expect, when it comes to the installation of a renewable energy source at home or the ownership of an EV the incidence among households is far lower than that of Smart Metres.

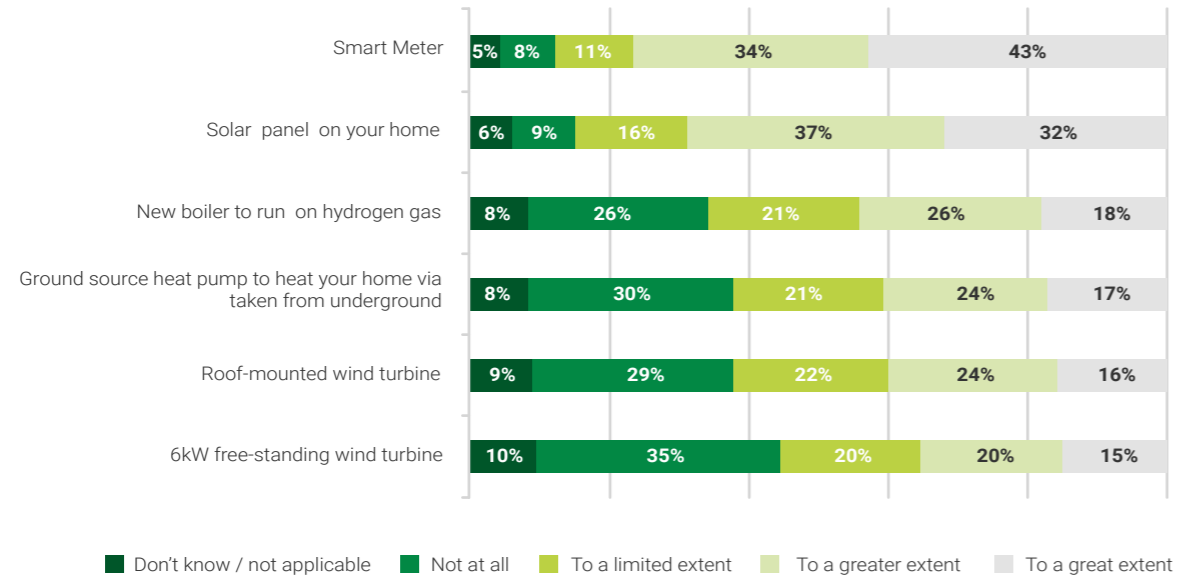
It is clear behaviour change will be needed at the household level, but to what extent do UK households understand these new technologies? How open are households to making home modifications? Do households feel change on the ground can really help meet nationwide climate targets? And ultimately, who should foot the bill for modifications required?

Understanding Of Home Modifications

Understanding is arguably the first step towards behaviour change – particularly when this change is unenforced. Realistically, we cannot expect even the most able households to adopt a different approach to how they live their lives if they do not have a good understanding of what that change entails and the potential benefits and drawbacks.

Perhaps unsurprisingly, given there is such high uptake of Smart Meters across the UK, understanding of what they entail is far higher when compared to many other home modifications.

Figure 7. Understanding of potential modifications at home



Q: To what extent do you feel that you understand each of the following potential modifications? (All respondents)

In terms of renewable energy modifications, 69% of households in the UK feel they have either some or a great understanding of solar panel installation at home. Practically speaking, home solar panels are generally low maintenance and when properly installed can go 20-25 years without needing any upkeep. They also do not require planning permission in the vast majority of cases.

Home wind-turbines are far less understood as a potential home modification. 55% of UK households state they either do not understand or have limited understanding of a free-standing home wind turbine. There are complexities surrounding wind-turbine installation at home in the UK. In England and Scotland, they must adhere to strict conditions, while in Wales and Northern Ireland, they require planning permission.

Notably, despite hydrogen powered boilers not yet being available in the UK, it is the third most readily understood modification in the UK. Currently 85% of UK households use gas and oil boilers¹⁰, but by 2025 the 'Future Home Standard' will come into effect, requiring all new-build homes to adopt lower-carbon heating alternatives. In principle however, individuals won't notice if they have a traditional gas boiler or hydrogen boiler as they operate in the same way for the end-user.



¹⁰ TheCCC, [Heat in UK Buildings Today](#), 2017



Willingness To Make Modifications

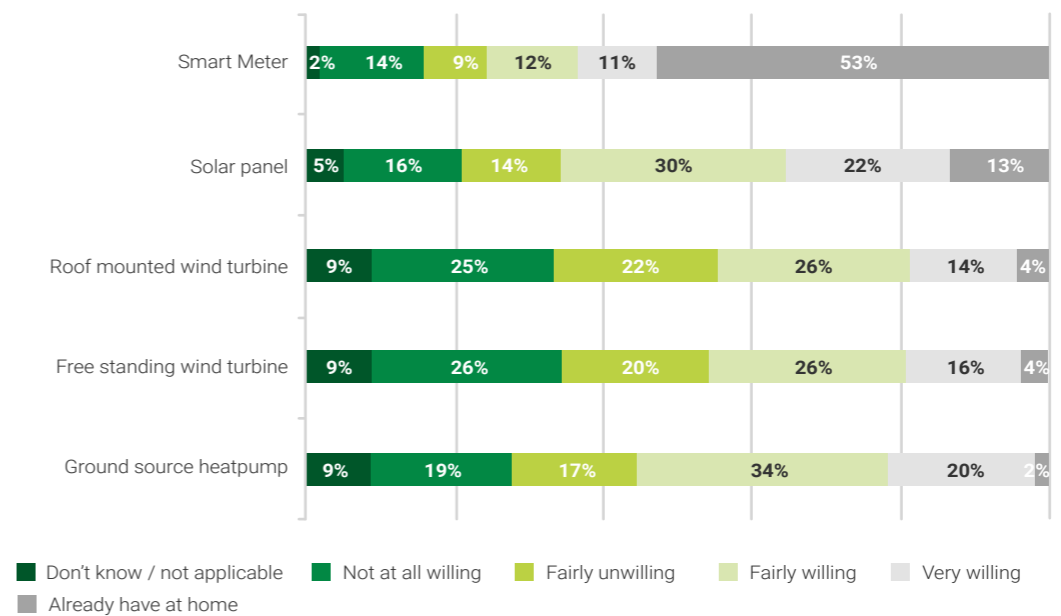
When it comes to willingness of UK homeowners to make home modifications, there are mixed results. However, our findings make it abundantly clear that appetite and willingness to adopt a new approach to energy generation and consumption at home far outstrips current levels of engagement.

- The majority of homeowners already have a Smart Meter installed at their property (53%). While just over a fifth (23%) are willing to install one, an equal number would be fairly unwilling or not at all willing to have one installed (23%).
- Solar panel installation among UK homeowners is still nascent, just

13 percent have some form of solar panel installed on their property. That being said a further 52% of homeowners would be very or fairly willing to have panels installed on their property in the future.

- There is also a majority of homeowners who are willing and open to the idea of ground source heat pumps (54%).
- Homeowners are more averse to the idea of installing either a roof mounted wind turbine or a free-standing turbine at home with almost half being not at all willing or fairly unwilling to install them.

Figure 8. Willingness to make modifications at home



Q. How willing would you be to make the following modifications to your house? (UK homeowners)

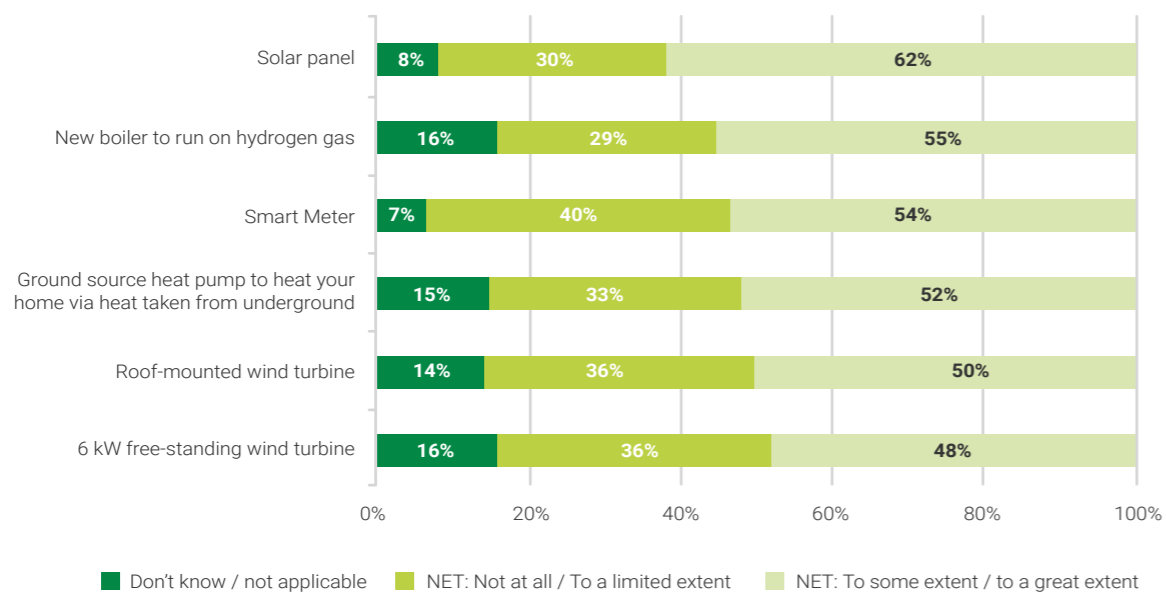
Can One Household Really Make A Difference?

UK households are generally more optimistic than pessimistic about the role the individual household will play in the UK's efforts to become carbon neutral by 2050.

While in all cases people are more likely to feel that making the modification would positively contribute towards the net-zero cause, it is also very clear that a large swathe of the population feel that their individual changes can make little or no contribution.

Along with an understanding of possible home modifications this point of efficacy is also crucial. With the personal cost implications that home renewable energy modifications often entail we are often relying on people's desire to make a positive environmental difference with regards to putting these changes into action. Clearly, if between three-in-ten and four-in-ten people have doubts about the positive difference their actions to help could achieve, then this will put a real brake on adoption.

Figure 9. Extent to which households feel making this modification will positively contribute towards efforts for the UK to be carbon neutral by 2050



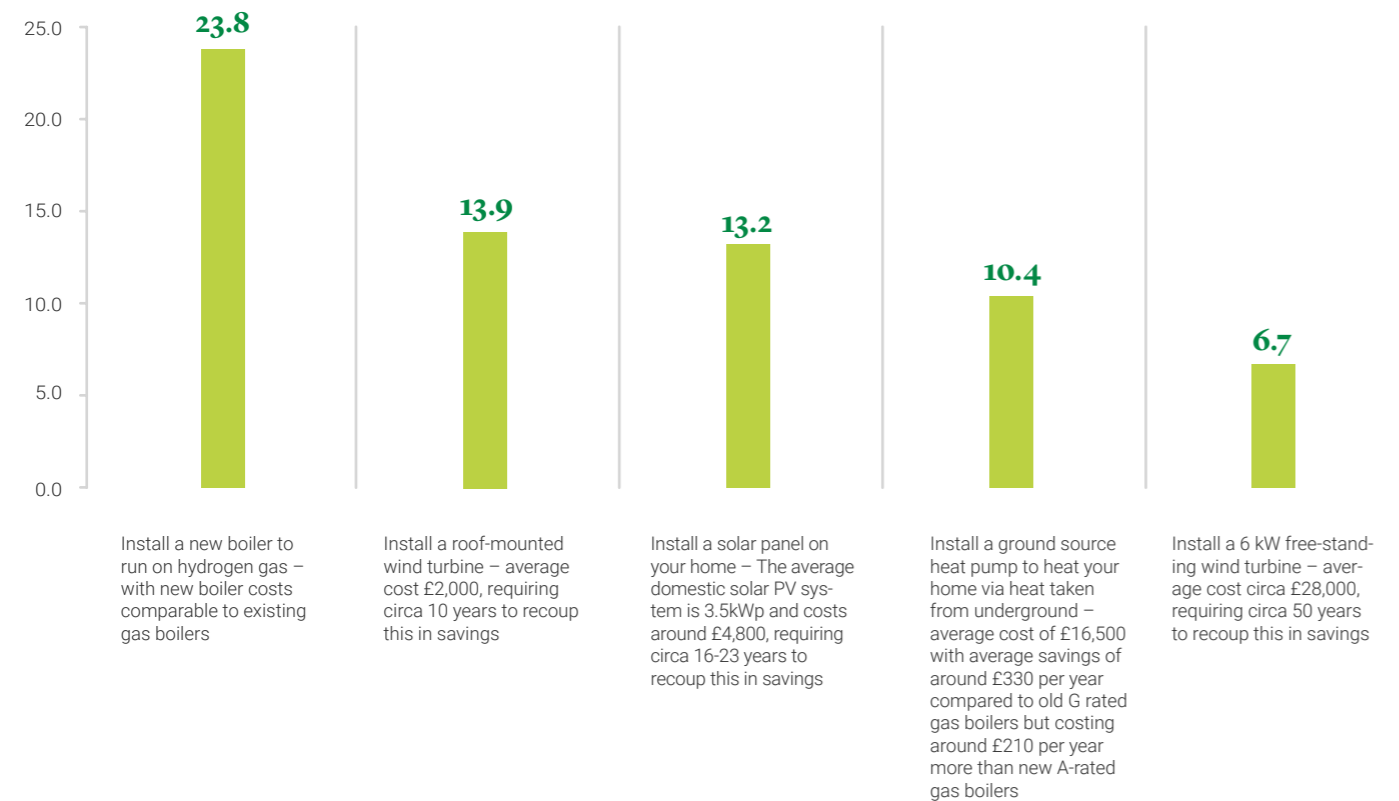
Q. And to what extent do you feel that your household making this modification will positively contribute towards efforts for the UK to be carbon neutral by 2050? (UK homeowners)



The Sticking Point: Who Pays?

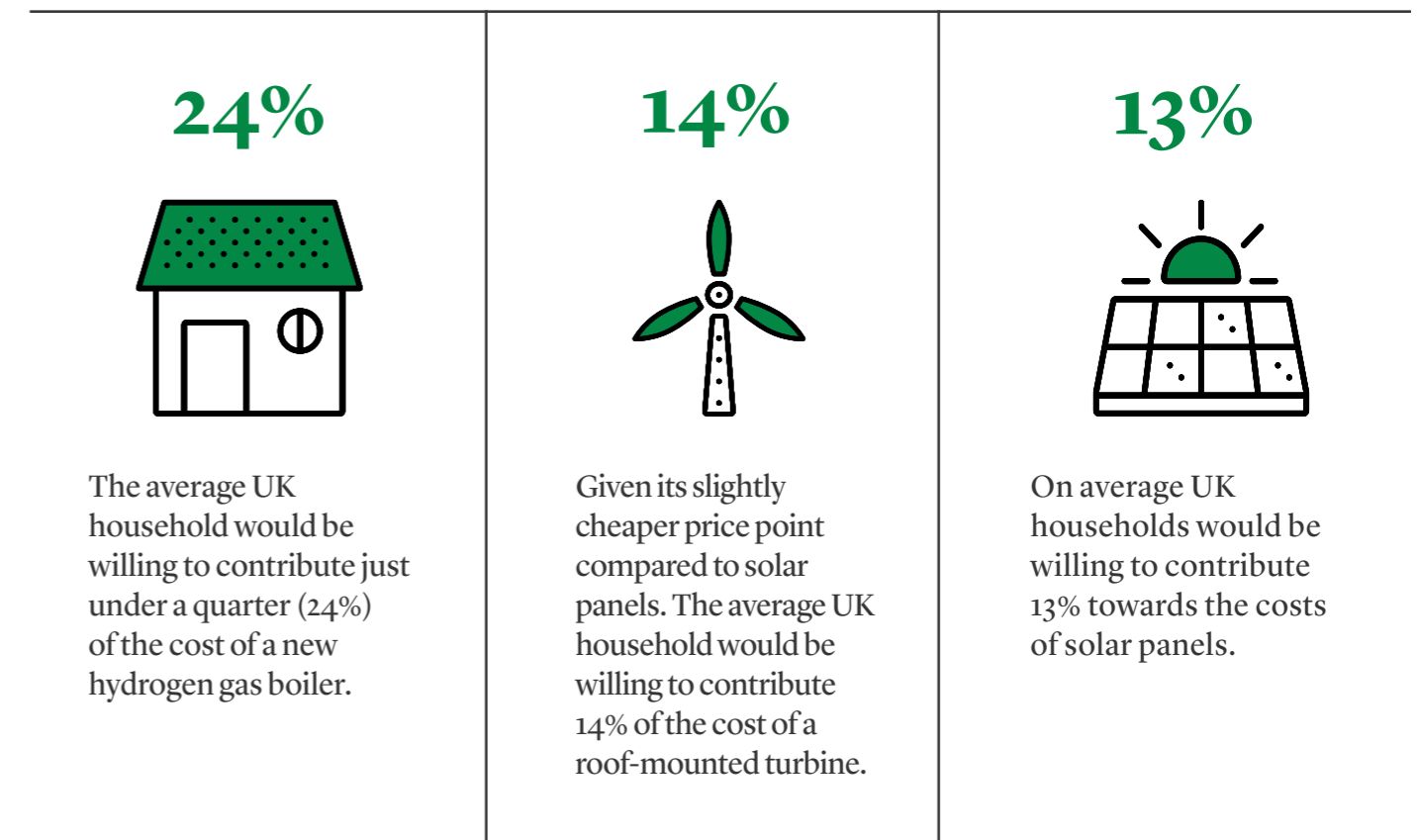
While in principle, there is firm willingness among UK households to adopt renewable technologies, when faced with the financial reality of home modifications a different story emerges.

Figure 10. % of likely associated cost households are willing to contribute in order to modify their home



Q. Given the following financial implications, how much would you be willing to contribute in order to make the following modifications to your home? (%)

Overall, there is an expectation across the array of sustainable technologies, that somebody else should pick up most of the costs:



Each renewable technology comes with its own trade off in terms of upfront costs and relative timeline of returns. What is clear however, is that faced with the stark reality of cost implications, UK households are far more hesitant than first perceived.



‘Levelling Up’ And ‘Building Back Greener’ Go Hand-In-Hand

In September this year, the UK government launched its inaugural “green gilt” sale, joining many other European neighbours who have already sold bonds earmarked for environmental spending. The issuance has been marked as a great success and the £10bn raised makes it the largest sovereign green bond sale on record, with further rounds of issuance set to follow later in the year.

The funds raised from this sale and future sales are set to be spent on projects including flood defences, renewable energy and carbon capture and storage.

The UK has been a relatively slow mover when it comes to green sovereign debt, with that in mind the role of private green finance should also be recognised. As the Chair of the Green Finance Institute, Sir Roger Gifford outlines:



Considerable investment is required to catalyse the transition of the global economy towards a more sustainable future. It is critical that financial market participants and policymakers collaborate to co-create the solutions.”

The current rate of progress is arguably insufficient. Take the challenge of retrofitting UK homes with more sustainable technologies. It is estimated that the UK’s retrofit industry must grow 10-fold to address 23% of UK emissions. At this point in time the sector is mostly made up of SMEs and there is an estimated £360 billion investment gap to decarbonise the UK’s building stock.¹¹

This comes against the backdrop and vast costs of grand infrastructure projects, such as HS2, with the current bill running close to the £100bn mark.¹² While the issuance of green bonds by the UK government is a promising sign, green sovereign debt is nascent in the UK. If swift action is to be taken to address the green infrastructure needs of households to face-up to the climate change challenge, collaboration of public and private finance is vital.

As such, building back better and levelling up require local investment in green infrastructure. We cannot build healthy and prosperous communities without building and retrofitting infrastructure which reduces emissions, improves air quality and access to green jobs.

Currently, the UK runs the risk of creating two visions of Britain: one where more affluent communities benefit from the green and clean technologies of the 21st century, and another where less affluent communities are saddled with polluting technologies from the 20th century. Climate transition cannot be restricted to the better off. If the UK is to successfully hit its carbon neutral target by 2050, this transition needs to take place in a socially inclusive manner.

To ensure this outcome, central government has a major role to play in facilitating local government and households to adapt local infrastructure to address sustainability and climate concerns.

11 GFC, UK retrofit industry must grow 10X to address 23% of UK emissions, 21 September 2021
12 BBC News, [‘No clear end to HS2 cost and delays’ say MPs](#), 22 September 2021

Appendix 1: Detailed Methodology



L&G is working in partnership with research specialists Cicero/amo, to develop an index that combines key indicators of social and economic progress. The index – called the Rebuilding Britain Index (RBI) - Is designed to provide a benchmark of the UK's success in 'levelling up' the economy across the left behind communities and households in the wake of the global pandemic.

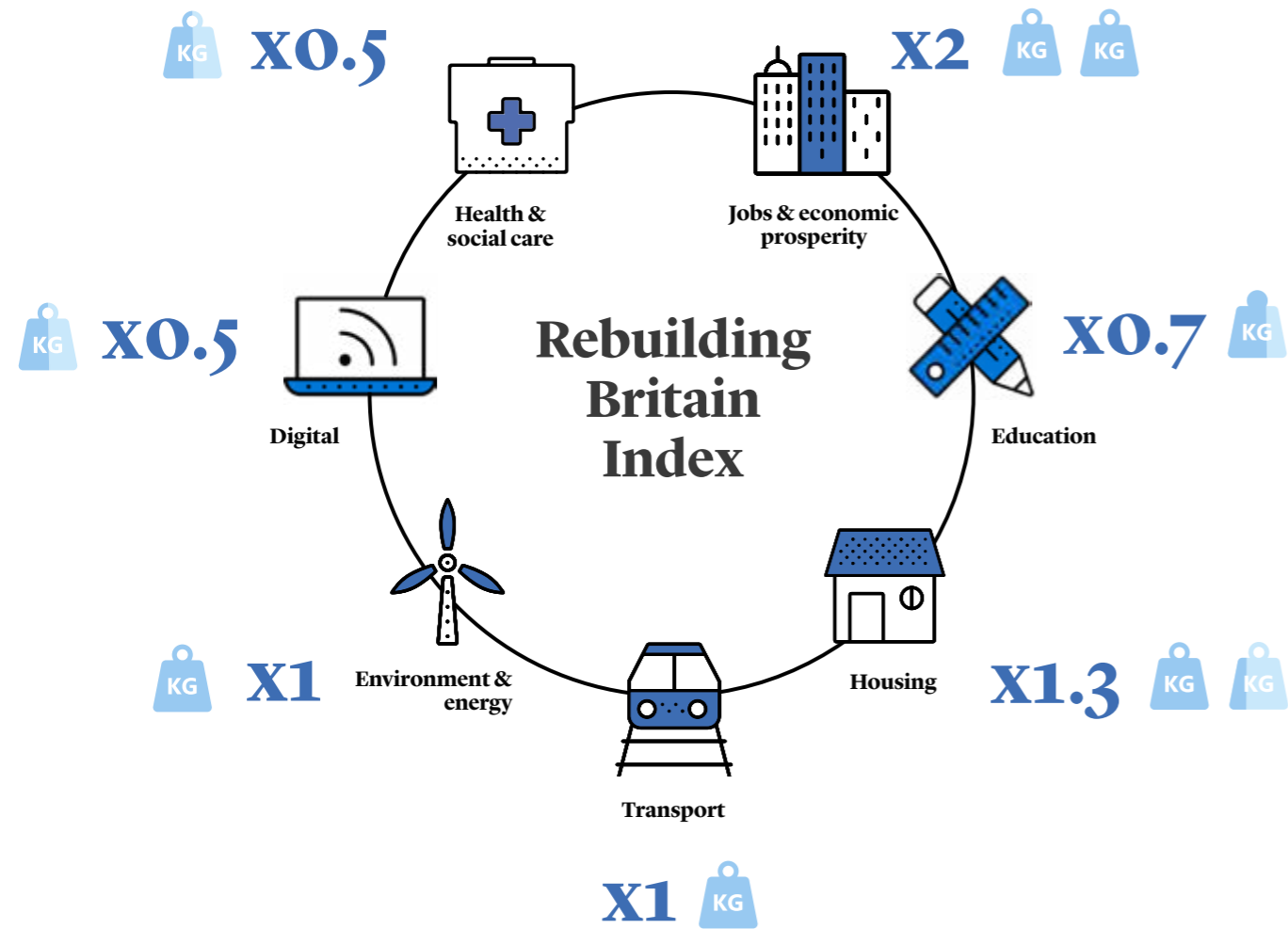
In developing the Index, we have identified seven key areas covering all aspects of the UK's economic and social infrastructure. For each of these seven areas we built out a series of quantitative and attitudinal statistical measures. In total, the RBI combines 52 different measures to provide a comprehensive assessment of how the UK's economic and social infrastructure is helping the UK to build back better. These measures are based on:

- A nationally representative survey (by age, gender and region) of 15,000 UK adults. March 2021 data is based on 5,000 households, July 2021 is based on rolling data of 10,000 households and October 2021 is based on a rolling sample of 15,000 households.
- Secondary data collected on eleven outcomes measures. The measures were chosen based on the following criteria: being updated quarterly, data being reported to a Local Authority level and consistency and comparability of data across the devolved nations. Data was sourced from:
 - ONS
 - Gov.Wales
 - Gov.Scot
 - Education NI
 - Gov.UK
 - Ofcom

Using the data collected, the index was created based on the following approach:

- A standardisation of all 52 measures onto a 1-100 scale – where 100 equals a positive score and one a negative score.
- Undertaking analysis in order to identify the extent to which each measure correlates with perceived quality of life in the local community.
- We have assigned a relative weight of importance for each of the seven key areas. This is based on a statistical analysis to assess the strength of correlation between a given measure and the extent to which households feel quality of life locally is improving or worsening. Ultimately, this ensures that our index has been built with our communities in mind and with what matters most to them front and centre

How the RBI is weighted across the seven key measures



‘Up-weighted’ factors

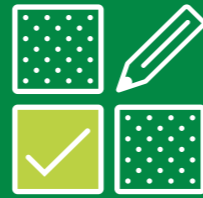
Our research analysis reveals that access to jobs, economic prosperity and housing are the key drivers in boosting a household’s perceived quality of life and economic wellbeing. To reflect this, we have upweighted the jobs and economic prosperity and housing measures accordingly – meaning they have a greater influence on the overall RBI score.

‘Down-weighted’ factors

Other factors, such as health, social care, and education, are clearly important. But they have less of a daily touch point on most people’s lives, and therefore have a weaker influence in determining a person’s sense of quality of life and economic wellbeing. The overall index score has been weighted to reflect this.



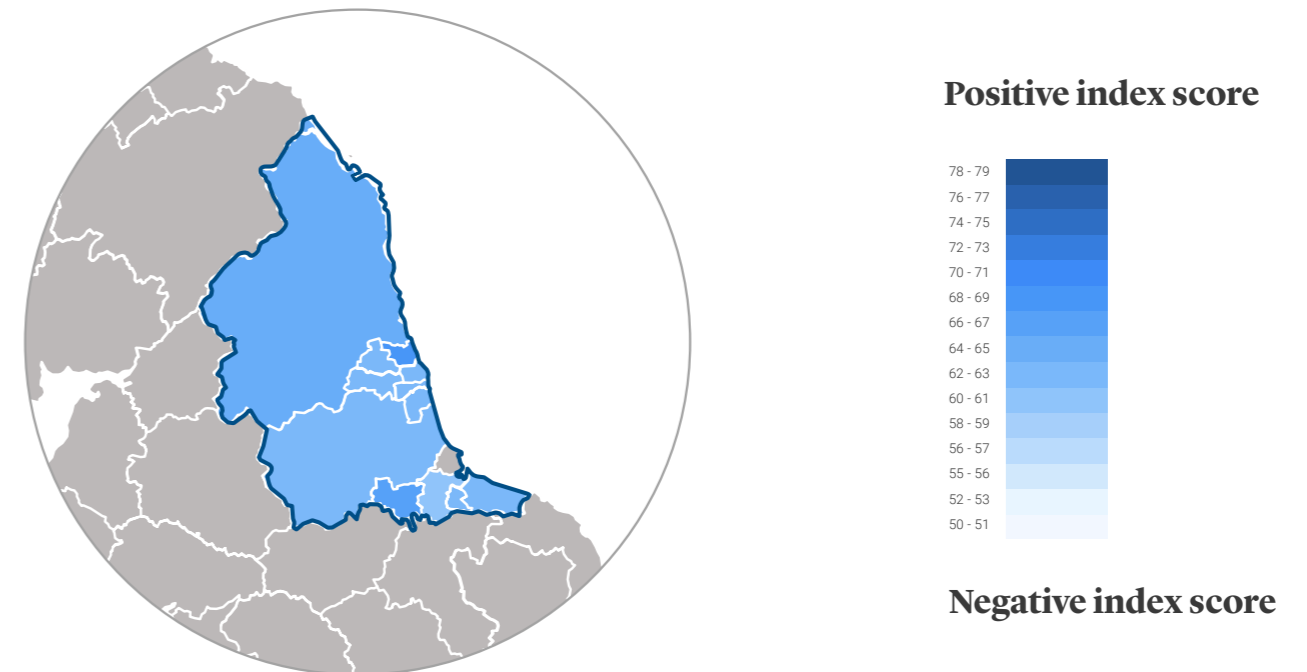
Appendix 2: National and Regional Snapshots



North-East of England

The overall regional picture demonstrates that, as a whole, the North-East of England is the lowest scoring region of England on the measure of jobs & economic prosperity but outperforms all other regions on the housing measure.

Figure 11. RBI scores in the North-East of England by Local Authority



While we might take this as evidence that investment in the region should therefore be focused on levelling-up the economy, a quick glance at performance at a local authority level clearly demonstrates that this would be overly simplistic and fail to address wide ranging disparities across the region.

Newcastle-upon-Tyne, as the key regional urban hub, will likely continue to attract economic investment akin to the Newcastle Helix development that aims

to create 4,000 jobs and put the city at the forefront of the knowledge economy. However, investment will be required in South Tyneside, Stockton-on-Tees and Middlesbrough, in particular, if some of the local disparities are to be addressed.

For Newcastle-upon-Tyne there are also housing and health disparities to be addressed, while Stockton-on-Tees faces issues relating to energy & environment, education and transport.

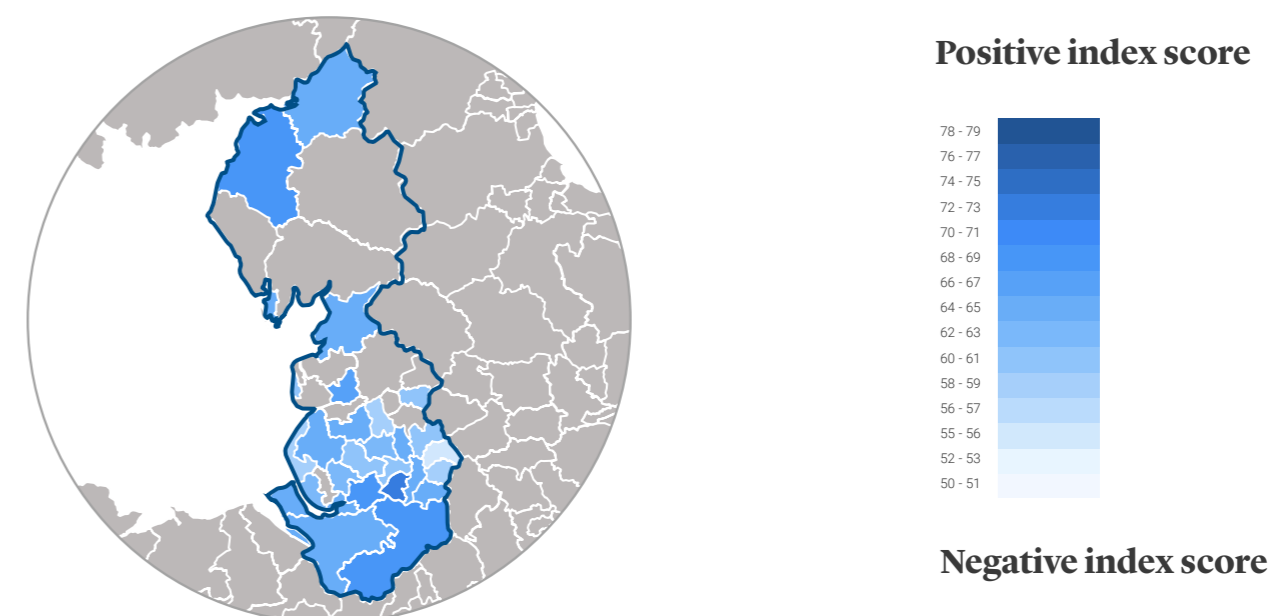
Figure 12. Component Index scores in the North-East of England

	County Durham	Darlington	Gateshead	Middlesbrough	Newcastle-Upon-Tyne	North Tyneside	Northumberland	Redcar & Cleveland	South Tyneside	Stockton-on-Tees	Sunderland
OVERALL RBI SCORE	63	67	63	62	63	69	64	63	62	61	62
HEALTH INDEX	64	65	63	66	63	67	72	69	65	64	65
EDUCATION INDEX	65	75	63	65	65	81	68	65	67	61	65
HOUSING INDEX	69	73	69	67	62	68	63	67	71	68	66
JOBS & ECONOMIC PROSPERITY INDEX	51	60	50	48	57	60	55	46	44	52	50
ENERGY & ENVIRONMENT INDEX	71	70	69	69	64	70	75	72	68	63	67
TRANSPORT INDEX	66	69	71	66	70	74	66	68	68	64	67
DIGITAL INDEX	66	71	81	74	74	79	64	82	77	71	76

North-West of England

The North-West of England mirrors many of the characteristics of the North-East in that the region under-indexes on both health and jobs & economic prosperity measures, while outperforming on the housing index. That said, there is generally comparatively little separating the region from the overall UK average.

Figure 13. RBI scores in the North-West of England by Local Authority



Focusing first on the under indexing of jobs & economic prosperity in the region, it is evident that there are left behind communities found in many parts of Lancashire (Blackburn with Darwen, Blackpool and Burnley in particular), Greater Manchester (Oldham, Rochdale, Tameside and Wigan in particular) and Greater Merseyside (Sefton and St Helens in particular). Elsewhere, it is the local authorities of Trafford and Cheshire East – both of which have welcomed significant investment over the previous 12-months – which bring the regional average up.

However, our index scores also make clear that there remain deep disparities across health, education, housing and digital measures, that will require informed local decision making in order to truly begin to address them in a targeted way. Blackburn with Darwen, Burnley and Oldham under-index across the majority of measures and are seemingly those most in need of targeted investment.

Figure 14. Component Index scores in the North-West of England¹⁶

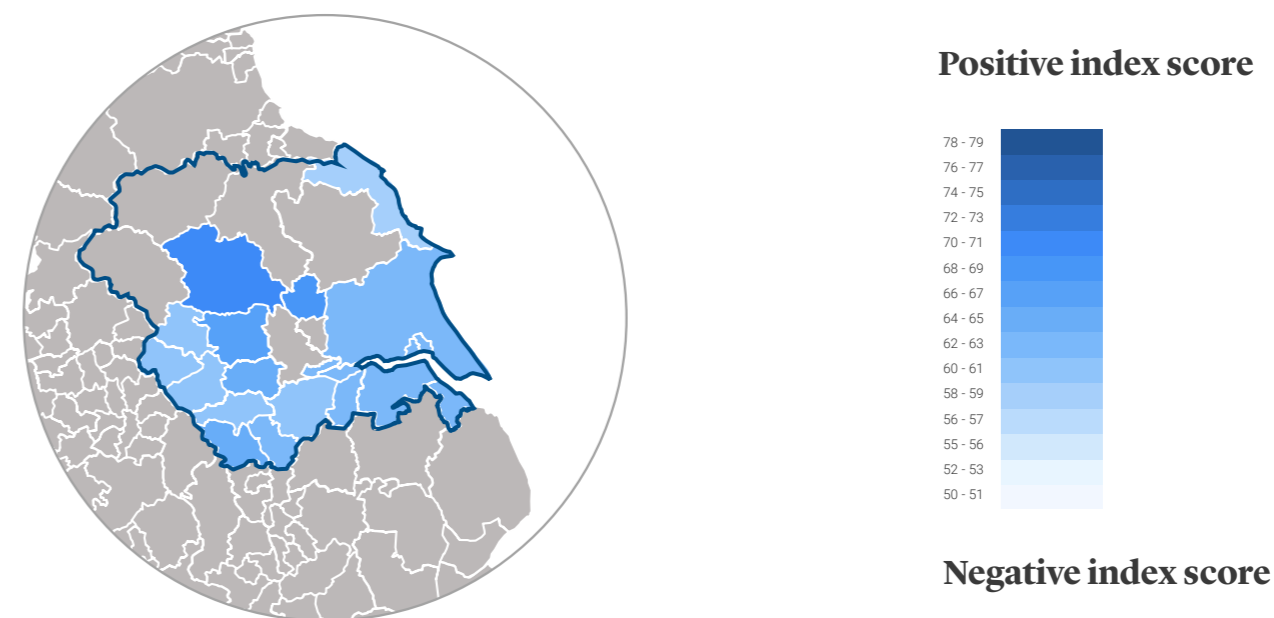
	Allerdale	Barrow-in-Furness	Blackburn with Darwen	Blackpool	Bolton	Burnley	Bury	Carlisle	Cheshire East	Cheshire West and Chester	Chorley	Halton	Lancaster	Liverpool
OVERALL RBI SCORE	69	64	58	60	62	60	65	64	68	65	65	65	65	62
HEALTH INDEX	69	60	56	62	61	60	69	66	74	70	71	62	65	59
EDUCATION INDEX	83	64	61	66	65	56	66	70	71	75	69	69	72	61
HOUSING INDEX	72	69	66	64	67	68	67	69	61	60	64	68	65	66
JOBS & ECONOMIC PROSPERITY INDEX	64	66	41	44	51	48	54	59	73	63	59	55	56	53
ENERGY & ENVIRONMENT INDEX	76	65	63	65	66	66	69	71	69	66	72	66	75	65
TRANSPORT INDEX	65	60	60	66	68	60	73	61	66	69	68	73	68	69
DIGITAL INDEX	63	55	83	81	74	72	75	59	61	63	65	77	73	76

	Manchester	Oldham	Preston	Rochdale	Salford	Sefton	St. Helens	Stockport	Tameside	Trafford	Warrington	West Lancashire	Wigan	Wirral
OVERALL RBI SCORE	65	55	67	61	61	59	62	65	58	72	68	65	61	64
HEALTH INDEX	64	57	66	61	56	63	61	69	59	78	67	69	62	68
EDUCATION INDEX	66	52	70	60	66	68	61	68	63	80	77	70	66	75
HOUSING INDEX	62	56	69	72	61	61	70	56	60	54	62	67	65	62
JOBS & ECONOMIC PROSPERITY INDEX	59	41	61	43	54	46	49	61	41	77	67	60	50	52
ENERGY & ENVIRONMENT INDEX	68	65	70	67	62	63	65	67	64	68	68	69	64	69
TRANSPORT INDEX	72	65	68	71	66	64	71	71	67	73	67	65	67	67
DIGITAL INDEX	77	79	75	80	77	77	79	78	82	86	73	61	76	81

Yorkshire & Humber

As is the case nationally, it is the jobs & economic prosperity and housing elements of the RBI that score most poorly in Yorkshire and Humber. That said, it is only on the measures of education and jobs & economic prosperity where the region under-performs versus the national average. As a regional average Yorkshire and Humber leads the way on the digital measure, though there are significant variations locally which demonstrates that the picture is not so clear cut.

Figure 15. RBI scores in Yorkshire & Humber by Local Authority



The North Yorkshire authorities of York and, in particular, Harrogate, generally score well on the index – significantly outscoring all other authorities in the region on the key measure of jobs & economic prosperity. Indeed, Harrogate outperforms across all measures, with the obvious exception of housing, where it, along with York, perform most poorly across the whole region.

That said, the North Yorkshire coastal authority of Scarborough shows signs of falling behind the rest of

the region, particularly in relation to jobs & economic prosperity, transport, health and digital.

We similarly see Bradford and Rotherham as specific areas of concern with regards to jobs & economic prosperity. However, it is arguably on the measure of education where we see the widest disparities, with a number of local authorities within West Yorkshire, South Yorkshire and South Humber falling well below the average regional score.

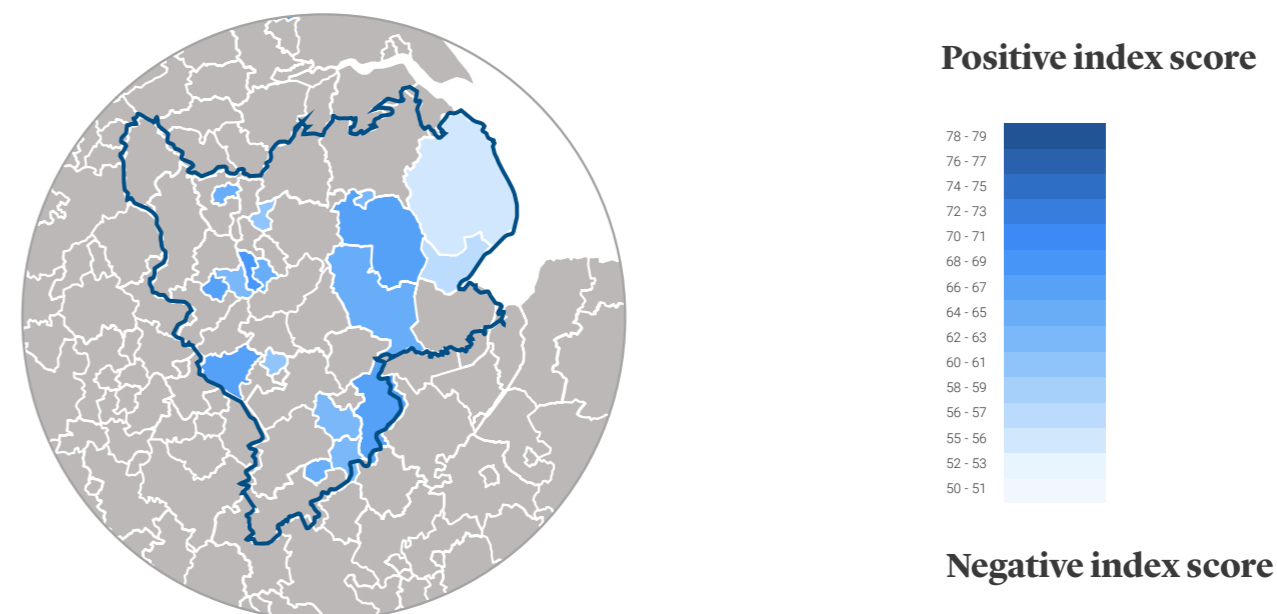
Figure 16. Component Index scores in Yorkshire & Humber¹⁸

	Barnsley	Bradford	Calderdale	Doncaster	East Riding of Yorkshire	Harrrogate	Kingston-Upon-Hull	Kirklees	Leeds	North-East Lincolnshire	North Lincolnshire	Rotherham	Scarborough	Sheffield	Wakefield	York
OVERALL RBI SCORE	61	61	60	61	63	71	63	60	67	62	62	63	58	65	64	68
HEALTH INDEX	62	63	67	62	68	83	62	63	68	66	63	66	62	68	64	71
EDUCATION INDEX	57	58	57	57	64	83	66	63	69	54	56	70	62	66	58	75
HOUSING INDEX	68	65	62	66	61	56	68	61	62	68	65	66	59	63	65	54
JOBS & ECONOMIC PROSPERITY INDEX	50	47	52	50	58	73	49	48	64	52	57	47	47	56	56	70
ENERGY & ENVIRONMENT INDEX	68	68	66	66	73	75	71	63	69	71	65	70	69	72	68	73
TRANSPORT INDEX	64	68	61	66	61	68	66	64	70	65	67	69	59	70	70	69
DIGITAL INDEX	77	82	75	74	68	72	84	79	81	72	67	81	70	78	77	73

East Midlands

The overall RBI for the East Midlands region (64/100) mirrors that of the UK average. However, this hides elements of regional under and over performance. This is most evident on the education measure, where a score of 64/100 places the region as the second-lowest performing.

Figure 17. RBI scores in the East Midlands by Local Authority¹⁹



As is the case across all regions, jobs & economic prosperity is the lowest score metric across the region, though there are some large disparities with scores at a local authority level, with both Broxtowe and North Kesteven far outperforming the rest of the region. Conversely, East Lindsey, Boston and Mansfield all significantly underperform across this key metric.

Indeed, East Lindsey and Boston – both forming the bulk of the eastern border of the region – also significantly underscore the regional averages across health, transport and digital measures.

What the index makes clear is that there are often wide disparities in scores between local authorities across all measures, with almost all of them falling behind the rest of the region in at least one of them. Concerningly, in some cases, those gaps are substantial – with a gap of 23 points between East Lindsey and Broxtowe in the measure of jobs & economic prosperity and 33 points between East Lindsey and Nottingham on the digital measure.

Figure 18. Component Index scores in the East Midlands²⁰

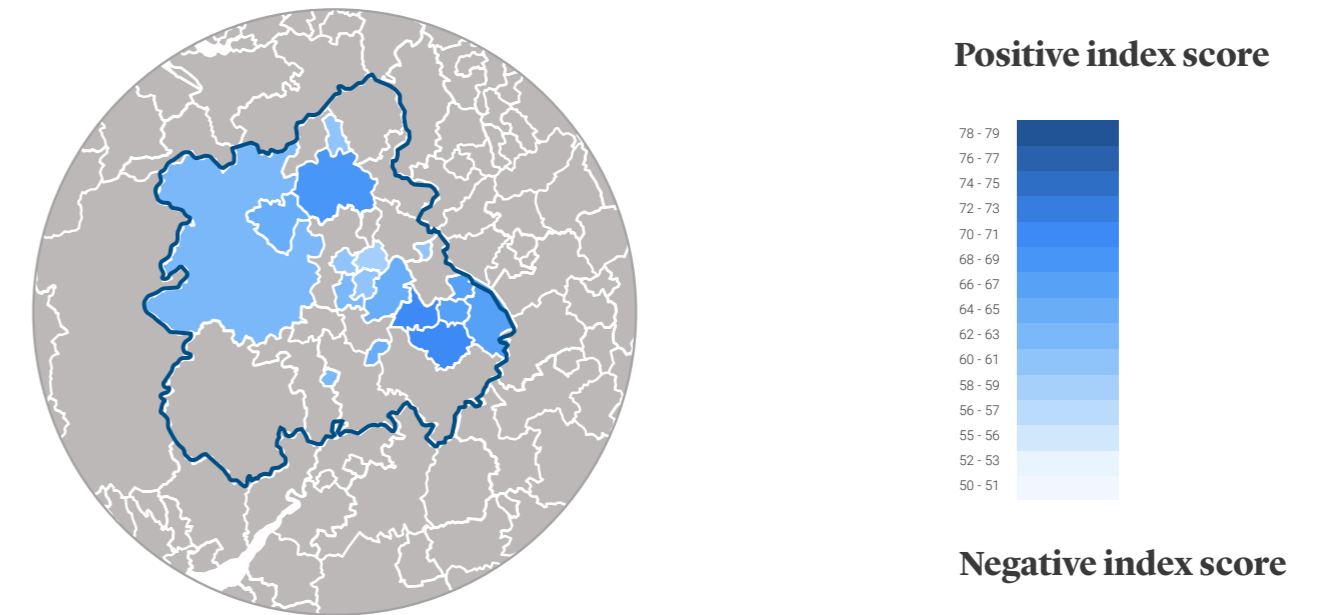
	Boston	Broxtowe	Chesterfield	Derby	East Lindsey	East Northampton-shire	Erewash	Hinckley & Bosworth	Kettering
OVERALL RBI SCORE	57	69	65	66	55	66	62	66	63
HEALTH INDEX	54	71	65	66	61	71	64	72	65
EDUCATION INDEX	58	65	66	60	62	61	71	68	57
HOUSING INDEX	62	66	66	67	59	62	63	57	67
JOBS & ECONOMIC PROSPERITY INDEX	47	68	57	58	45	65	54	62	57
ENERGY & ENVIRONMENT INDEX	69	69	70	69	70	72	63	73	68
TRANSPORT INDEX	55	71	69	70	52	71	66	69	62
DIGITAL INDEX	66	73	72	84	50	61	73	72	74

	Leicester	Lincoln	Mansfield	North Kesteven	Northampton	Nottingham	South Kesteven	Wellingborough
OVERALL RBI SCORE	61	63	60	67	64	65	64	63
HEALTH INDEX	63	62	68	70	69	63	70	66
EDUCATION INDEX	57	70	61	72	61	67	80	60
HOUSING INDEX	60	66	63	66	61	64	55	60
JOBS & ECONOMIC PROSPERITY INDEX	51	57	48	63	63	54	56	57
ENERGY & ENVIRONMENT INDEX	67	68	70	73	66	69	72	71
TRANSPORT INDEX	68	60	61	59	66	71	64	67
DIGITAL INDEX	85	66	67	71	68	85	77	75

West Midlands

The West Midlands is the region of the UK that most closely resembles the UK average picture. While the region does slightly under-index on both health and education measures, it is on the key measure of jobs & economic prosperity where the region is really being left behind – with only Wales and the North-East of England scoring lower.

Figure 19. RBI scores in the West Midlands by Local Authority²¹



While it can often be the regional urban hubs that perform more strongly across the jobs & economic prosperity measure, this does not appear to be the case in the West Midlands. Rugby and Warwick significantly outperform Birmingham and the wider metropolitan districts on this measure, though Solihull does also perform strongly. Elsewhere, the Black Country authorities of Walsall, Dudley, Sandwell and Wolverhampton are those most being left behind economically.

Figure 20 does make clear that those same Black Country authorities are also falling behind on both education and health measures. That said, it also makes clear that investment is required to address housing challenges in Solihull, Worcester, Shropshire and Warwick.

Understanding these disparities and applying that knowledge to funding decisions will be key in starting to make a positive difference where it really matters.

Figure 20. Component Index scores in the West Midlands ²²

	Telford & Wrekin	Stoke on Trent	Shropshire	Stafford	Tamworth	Nuneaton & Bedworth	Rugby	Warwick	Redditch
OVERALL RBI SCORE	65	61	62	68	60	65	67	70	65
HEALTH INDEX	63	62	68	71	65	66	72	76	71
EDUCATION INDEX	70	56	73	75	64	68	72	68	69
HOUSING INDEX	61	69	53	67	57	66	58	54	61
JOBS & ECONOMIC PROSPERITY INDEX	59	50	59	63	52	55	66	79	57
ENERGY & ENVIRONMENT INDEX	72	66	71	70	65	70	66	69	69
TRANSPORT INDEX	68	64	61	69	64	70	72	71	71
DIGITAL INDEX	77	78	56	74	74	75	74	78	79

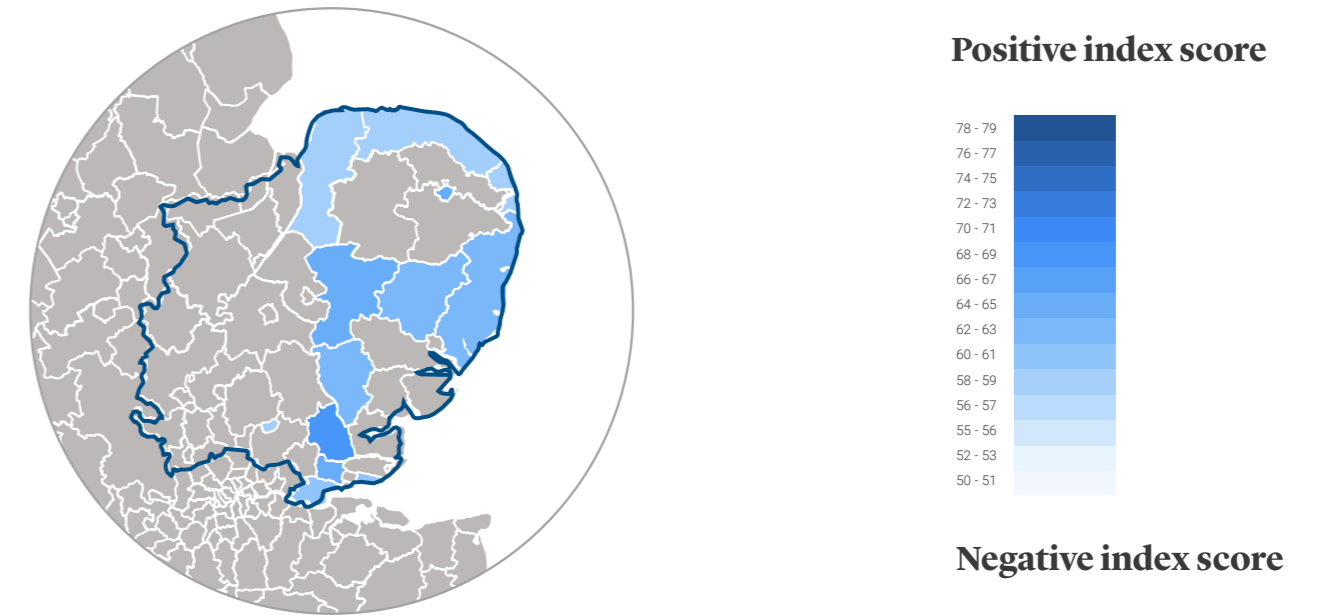
	Worcester	Birmingham	Coventry	Dudley	Sandwell	Solihull	Walsall	Wolverhampton
OVERALL RBI SCORE	63	64	66	62	60	70	58	61
HEALTH INDEX	68	65	67	69	62	76	60	63
EDUCATION INDEX	67	64	66	54	56	81	51	58
HOUSING INDEX	56	64	65	65	64	53	63	67
JOBS & ECONOMIC PROSPERITY INDEX	59	55	59	50	45	71	43	47
ENERGY & ENVIRONMENT INDEX	67	68	68	65	66	68	65	67
TRANSPORT INDEX	63	70	73	68	70	78	68	70
DIGITAL INDEX	74	77	73	83	84	84	79	78

²² Herefordshire, Cannock Chase, East Staffordshire, Lichfield, Newcastle-Under-Lyme, South Staffordshire, Staffordshire Moorlands, North Warwickshire, Stratford-on-Avon, Bromsgrove, Malvern Hills, Wychavon and Wyre Forest excluded due to insufficient base sample

East of England

Across the East of England as a whole it is the housing measure that is the lowest scoring measure across our index and indeed falls notably below the UK average. While the jobs & economic prosperity measure is the second lowest scoring measure, the East Midlands outscores the UK average on this front, falling behind only London and the South-East of England.

Figure 21. RBI scores in the East of England by Local Authority ²³



Across the East of England region there are some wide disparities in RBI scores by local authorities, with Fenland, Harlow, Great Yarmouth and North Norfolk achieving a significantly lower RBI scores than the likes of South Cambridgeshire, Watford and East Hertfordshire.

Economically, coastal authorities of Southend-on-Sea and Great Yarmouth are falling behind the rest of the region, though the same is true of more urban centres including Peterborough and Luton.

The education measure within the East of England as a whole is lower than anywhere else across the

entire UK, though some of the differences locally are stark. Great Yarmouth, for example, achieves an education score that is significantly lower than East Hertfordshire, which is the top performing authority in the region on this measure.

The education measure within the East of England as a whole is lower than anywhere else across the entire UK, though some of the differences locally are stark. Great Yarmouth, for example, achieves an education score that is points lower than East Hertfordshire, which is the top performing authority in the region on this measure.

Figure 22. Component Index scores in the East of England²⁴

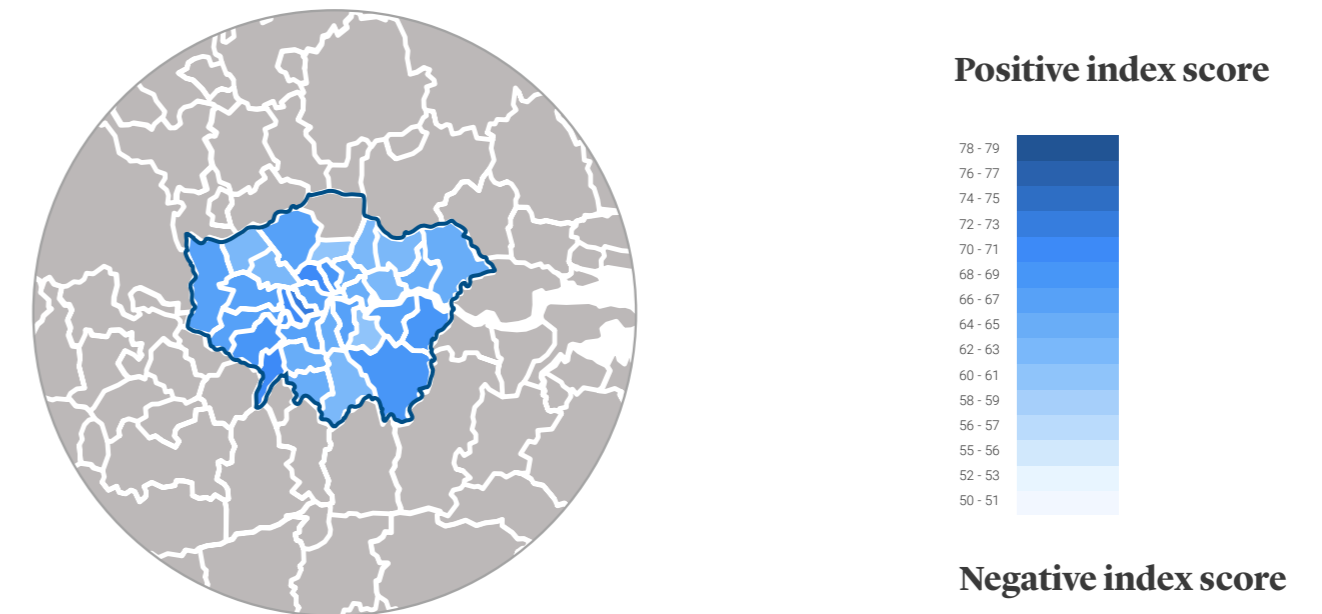
	Peterborough	Luton	Southend-on-Sea	Thurrock	Bedford	Central Bedfordshire	Cambridge	East Cambridgeshire	Fenland	South Cambridgeshire	Basildon	Braintree	Chelmsford	Colchester
OVERALL RBI SCORE	62	60	61	59	64	64	68	68	58	71	65	62	68	64
HEALTH INDEX	65	62	70	61	69	72	76	75	61	78	72	71	77	69
EDUCATION INDEX	57	49	59	53	63	63	71	73	67	75	63	59	69	68
HOUSING INDEX	60	60	53	54	57	52	47	60	56	52	53	55	54	56
JOBS & ECONOMIC PROSPERITY INDEX	54	54	53	55	62	66	79	69	51	80	63	60	71	64
ENERGY & ENVIRONMENT INDEX	69	64	65	65	71	68	69	73	68	76	73	70	73	69
TRANSPORT INDEX	66	71	70	60	64	64	67	65	57	68	69	61	73	69
DIGITAL INDEX	78	77	77	77	67	73	73	62	58	64	80	67	67	54

	Harlow	Watford	Breckland	Great Yarmouth	King's Lynn & West Norfolk	North Norfolk	Norwich	Ipswich	Mid Suffolk	East Hertfordshire	Stevenage	East Suffolk	West Suffolk
OVERALL RBI SCORE	58	69	64	58	59	58	64	64	63	69	68	62	65
HEALTH INDEX	64	68	74	64	64	69	67	71	75	76	70	70	70
EDUCATION INDEX	59	78	69	50	59	67	59	61	69	80	77	68	66
HOUSING INDEX	49	54	58	62	51	44	60	61	52	50	59	54	55
JOBS & ECONOMIC PROSPERITY INDEX	54	72	56	43	54	52	62	58	62	75	67	58	67
ENERGY & ENVIRONMENT INDEX	68	71	75	68	73	74	69	71	71	69	64	73	69
TRANSPORT INDEX	66	75	65	64	58	59	68	64	61	68	72	61	61
DIGITAL INDEX	62	70	69	79	62	66	67	79	59	78	81	64	70

London

London performs comparatively strongly across almost the entire range of measures within the index and achieves an overall RBI score higher than any other UK region, though this is only marginal. Along with the South-East of England region, London is the best performing region on the jobs and economic prosperity measure – though, indicative of the picture across the entire UK, this measure remains one of the poorest scoring in the capital.

Figure 23. RBI scores in London by Local Authority



What is immediately evident, however, is the issue of housing, with London scoring only 50/100 and continuing to fall behind the rest of the UK on what is part of a wider challenge facing the UK as a whole.

London, as we would expect given the fact that it is comprised of 32 individual boroughs and one of the most diverse cities in the world, is by no means uniform in how it performs across the index as a whole and the individual measures.

That being said, the crucial issue of housing within London is evidently consistent across the entire city. Even Barking & Dagenham and Bexley (the top scoring boroughs on this measure) achieve a housing index score only comparable with the UK average. All other boroughs under-index

compared to the national picture – with this reaching a low in Merton and Wandsworth.

Conversely, while we also see differences across the boroughs on the jobs & economic prosperity measure, only six fall below the UK average on this measure, while Bexley, Kingston-upon-Thames and Richmond-upon-Thames outscore the other boroughs.

Across London there are particularly wide disparities in relation to both digital and education measures. Hounslow and Redbridge, in particular, under-index against both the London and UK score with regards to education. Similarly, boroughs including Tower Hamlets, Newham and Waltham Forest appear to be facing more issues with digital coverage.

Figure 24. RBI scores in London by Local Authority

	Barking & Dagenham	Barnet	Bexley	Brent	Bromley	Camden	Croydon	Ealing	Enfield	Greenwich
OVERALL RBI SCORE	65	67	68	62	69	70	63	67	64	66
HEALTH INDEX	66	78	73	73	78	82	73	74	73	71
EDUCATION INDEX	67	78	62	66	74	74	62	67	73	74
HOUSING INDEX	58	49	58	48	50	49	52	50	48	51
JOBS & ECONOMIC PROSPERITY INDEX	54	65	68	59	71	77	60	66	59	62
ENERGY & ENVIRONMENT INDEX	71	67	69	63	67	68	65	69	68	69
TRANSPORT INDEX	78	74	73	71	74	73	72	76	72	77
DIGITAL INDEX	85	82	80	80	84	80	78	84	81	79

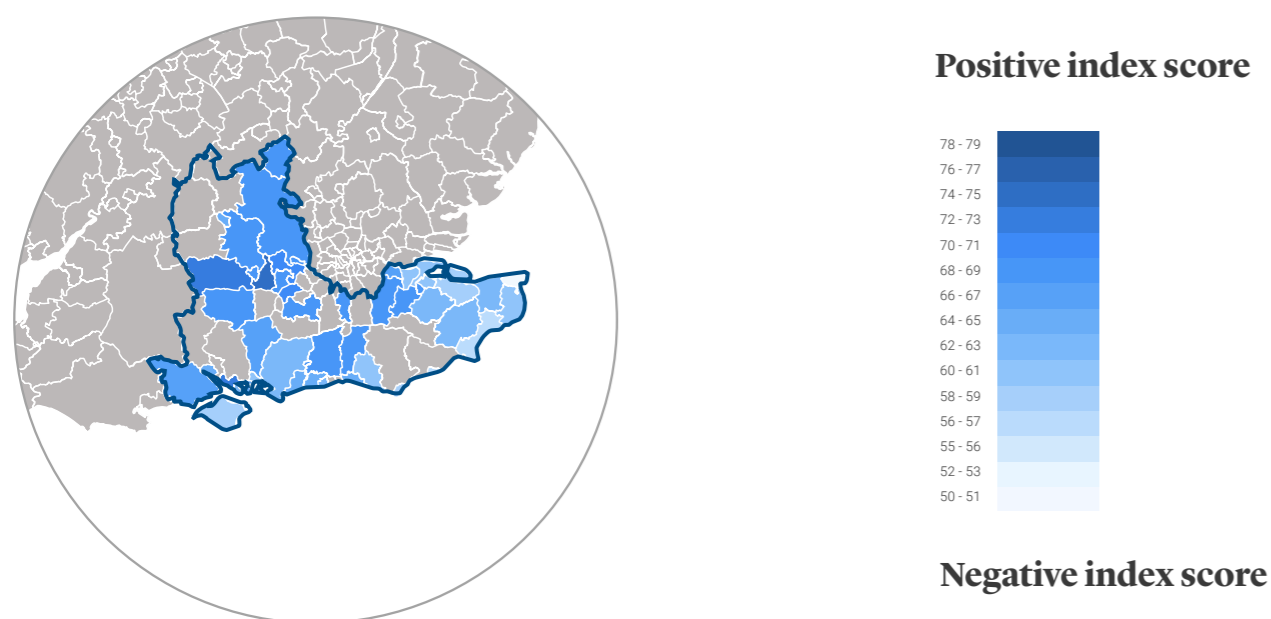
	Lewisham	Merton	Newham	Redbridge	Richmond upon Thames	Southwark	Sutton	Tower Hamlets	Waltham Forest	Wandsworth	Westminster
OVERALL RBI SCORE	61	65	62	62	69	66	65	65	62	67	67
HEALTH INDEX	68	75	69	75	78	73	76	69	70	78	76
EDUCATION INDEX	76	72	70	58	74	77	71	76	68	82	76
HOUSING INDEX	51	44	52	48	48	47	48	51	51	44	47
JOBS & ECONOMIC PROSPERITY INDEX	55	66	55	59	79	69	65	68	59	69	74
ENERGY & ENVIRONMENT INDEX	63	67	70	66	69	64	71	64	67	67	63
TRANSPORT INDEX	71	72	71	73	71	73	74	73	73	72	72
DIGITAL INDEX	62	82	61	69	60	68	66	55	61	72	71

	Hackney	Hammersmith & Fulham	Haringey	Harrow	Havering	Hillingdon	Hounslow	Islington	Kensington & Chelsea	Kingston upon Thames	Lambeth
OVERALL RBI SCORE	64	70	61	63	65	67	66	68	73	71	65
HEALTH INDEX	69	74	72	74	72	70	73	72	83	80	71
EDUCATION INDEX	66	83	73	65	62	66	63	70	82	81	77
HOUSING INDEX	46	51	45	49	48	49	47	48	52	48	47
JOBS & ECONOMIC PROSPERITY INDEX	65	71	54	62	65	69	68	74	79	77	67
ENERGY & ENVIRONMENT INDEX	65	68	65	63	71	68	71	69	70	70	65
TRANSPORT INDEX	73	79	70	68	74	76	76	74	78	76	71
DIGITAL INDEX	84	81	78	81	78	83	80	77	85	81	64

South-East England

Like London, the South-East of England achieves a UK high score across the key index measure of jobs & economic prosperity, while also performing comparatively strongly across the health measure. Conversely, housing is an area of the index that is a challenge for the whole region.

Figure 25. RBI scores in the South-East of England by Local Authority²⁵



While Slough and Fareham do outperform both the UK and regional average for the housing measure, the vast majority of authorities in the South-East of England fall below the UK average. Chichester, Bracknell Forest, Brighton & Hove, Oxford and South Oxfordshire are the specific local authorities within the region falling furthest behind on the issue of housing.

Similarly, while the regional average shows the South-East as outperforming the UK average on the measure of jobs & economic prosperity, the local authority picture shows signs of some communities being left behind. Thanet, with a score of 37 on this measure, is

among one of the lowest scoring authorities in the UK, while Hastings and Isle of Wight also perform poorly.

While it is clear that the experience within individual authorities are often very different among the seven measures and that most face their own set of challenges, the findings show that Thanet, Swale, Folkstone & Hythe, Isle of Wight and Hastings face a wider range of challenges than is typically seen elsewhere in the region.

Figure 26. Component Index scores in the South-East of England²⁶

	Medway	Bracknell Forest	West Berkshire	Reading	Slough	Windsor & Maidenhead	Wokingham	Milton Keynes	Brighton & Hove	Portsmouth	Southampton	Isle of Wight	Buckinghamshire	Eastbourne	Hastings
OVERALL RBI SCORE	60	69	73	69	68	70	75	68	65	64	64	58	68	59	56
HEALTH INDEX	62	78	79	72	70	78	79	68	71	67	68	65	81	69	62
EDUCATION INDEX	61	74	77	68	58	76	80	70	75	70	71	66	70	61	52
HOUSING INDEX	52	43	55	55	63	51	54	56	44	58	58	52	49	52	51
JOBS & ECONOMIC PROSPERITY INDEX	57	77	80	72	64	78	85	70	66	58	61	47	74	50	43
ENERGY & ENVIRONMENT INDEX	68	72	71	70	72	70	73	71	67	70	66	72	73	66	72
TRANSPORT INDEX	63	71	72	73	76	73	75	71	71	71	68	57	67	62	63
DIGITAL INDEX	74	80	82	75	80	75	81	77	83	70	72	68	64	74	70

	Swale	Thanet	Tonbridge & Malling	Oxford	South Oxfordshire	Guildford	Reigate & Banstead	Surrey Heath	Woking	Arun	Chichester	Crawley	Horsham	Mid Sussex	Worthing
OVERALL RBI SCORE	58	51	68	65	68	69	69	70	66	64	62	66	68	68	63
HEALTH INDEX	61	53	73	72	79	77	79	81	77	78	75	72	77	78	66
EDUCATION INDEX	64	55	73	67	66	73	71	73	66	72	68	72	75	80	67
HOUSING INDEX	53	47	57	45	43	47	46	54	47	53	42	54	47	48	53
JOBS & ECONOMIC PROSPERITY INDEX	50	37	76	73	78	79	76	78	74	55	65	63	74	72	63
ENERGY & ENVIRONMENT INDEX	66	63	68	66	72	69	71	67	61	72	71	69	74	71	69
TRANSPORT INDEX	59	61	67	68	67	66	71	67	65	66	61	71	69	66	61
DIGITAL INDEX	68	71	57	66	74	76	82	80	79	85	60	73	63	75	77

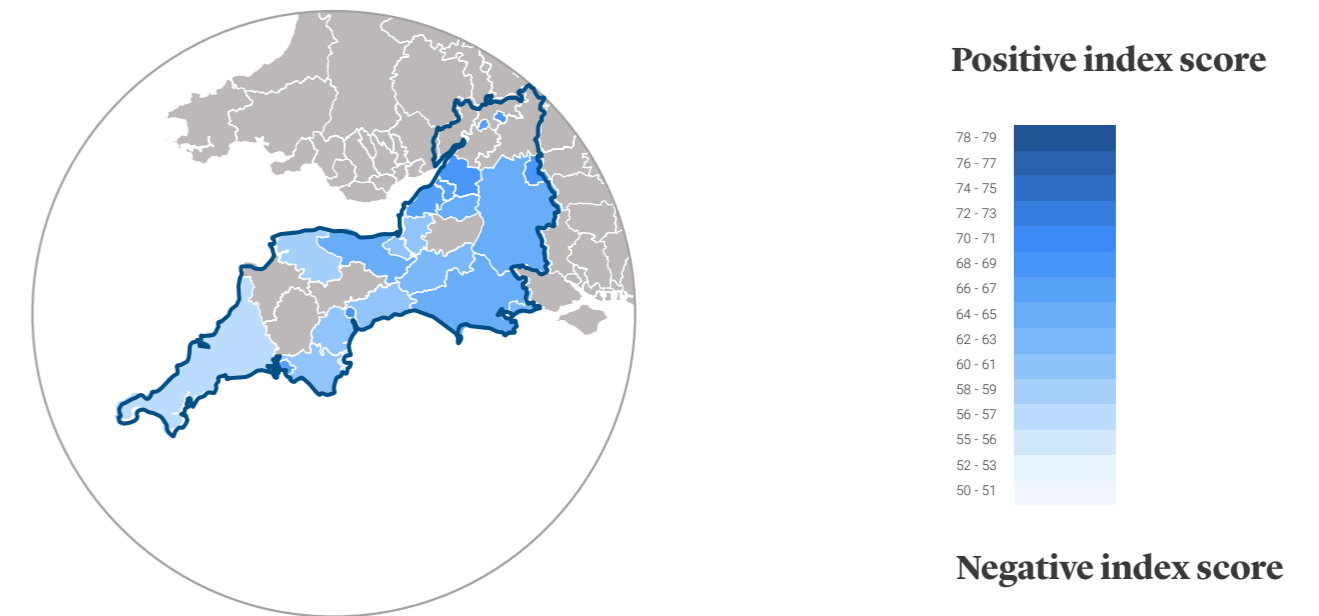
²⁵ Rother, Wealdon, Eastleigh, Hart, Rushmoor, Test Valley, Winchester, Tunbridge Wells, Cherwell, Vale of White Horse, West Oxfordshire, Elmbridge, Epsom & Ewell, Mole Valley, Runnymede, Spelthorne, Tandridge, Waverley and Adur excluded due to insufficient base size

	Lewes	Basingstoke & Deane	East Hampshire	Fareham	Gosport	Havant	New Forest	Ashford	Canterbury	Dartford	Dover	Gravesham	Maldstone	Severoaks	Folkstone & Hythe
OVERALL RBI SCORE	61	68	66	72	62	60	66	63	62	67	61	57	62	68	57
HEALTH INDEX	73	71	78	80	65	73	78	70	69	71	63	66	70	80	62
EDUCATION INDEX	59	72	77	79	64	59	76	66	68	71	66	57	65	73	59
HOUSING INDEX	49	52	50	63	60	48	46	51	46	55	52	49	51	47	53
JOBS & ECONOMIC PROSPERITY INDEX	59	77	70	74	55	53	67	60	62	71	56	51	64	75	48
ENERGY & ENVIRONMENT INDEX	69	69	68	74	69	69	71	69	71	68	71	64	65	69	66
TRANSPORT INDEX	62	65	65	68	65	68	65	66	65	70	64	65	67	69	62
DIGITAL INDEX	66	63	63	76	81	75	74	72	64	67	73	67	60	72	70

South-West England

As a region, the South-West of England performs comparatively well across a number of the index measures – most notably in the health and education measures, with the former only surpassed by London and the latter matched only by Scotland.

Figure 27. Component Index scores in the South-West of England²⁷



However, it is the housing measure that offers the greatest challenge to the South-West of England region, second lowest to only London. The extent to which local authorities are falling behind on these measures differs widely across the region.

On the issue of housing, even the top performing local authorities of Gloucester, Plymouth and Swindon only marginally outscore the UK average. Furthermore, the region houses some of the lowest scoring local authorities across the UK on the housing measure and, in Cornwall, has the lowest scoring authority in the UK. Given the well-publicised house pricing, second-homes and availability issues facing many areas of the South-West, this should perhaps come as little surprise. It does, however, go to further underline

the depth of negative sentiment in some of these local areas.

However, the challenges facing Cornwall, Torbay and North Devon in particular extend beyond just housing – with all three the lowest scoring on the other key index measure of jobs & economic security. Torbay, with a score of only 42/100 on this measure significantly under-indexes against both the UK and regional average. It is perhaps reassuring that the Torbay authority has already made a £20m application to the Government’s Levelling-Up Fund for works that will extend Brixham’s Fish Quay and Market and create a new Electronics and Photonics Production Park²⁹.

²⁶ Rother, Wealdon, Eastleigh, Hart, Rushmoor, Test Valley, Winchester, Tunbridge Wells, Cherwell, Vale of White Horse, West Oxfordshire, Elmbridge, Epsom & Ewell, Mole Valley, Runnymede, Spelthorne, Tandridge, Waverley and Adur excluded due to insufficient base size

²⁸ Isle of Scilly, Mid Devon, Torridge, West Devon, Cotswold, Forest of Dean, Stroud, Tewkesbury and Mendip excluded due to insufficient base size

Figure 28. Component Index scores in the South-West of England ²⁸

	Bath & NE Somerset	City of Bristol	North Somerset	South Gloucestershire	Plymouth	Torbay	Swindon	Cornwall	Wiltshire	Bournemouth, Christchurch & Poole	Dorset
OVERALL RBI SCORE	64	66	66	68	66	55	68	57	65	63	64
HEALTH INDEX	75	70	75	76	69	67	70	68	75	74	79
EDUCATION INDEX	78	72	70	74	74	66	65	71	74	71	73
HOUSING INDEX	45	53	57	54	62	46	62	39	53	44	48
JOBS & ECONOMIC PROSPERITY INDEX	63	66	65	72	56	42	67	48	64	62	62
ENERGY & ENVIRONMENT INDEX	72	70	71	70	74	64	72	73	71	73	74
TRANSPORT INDEX	69	67	67	64	69	64	70	61	65	66	65
DIGITAL INDEX	64	79	62	81	84	72	80	63	68	72	61

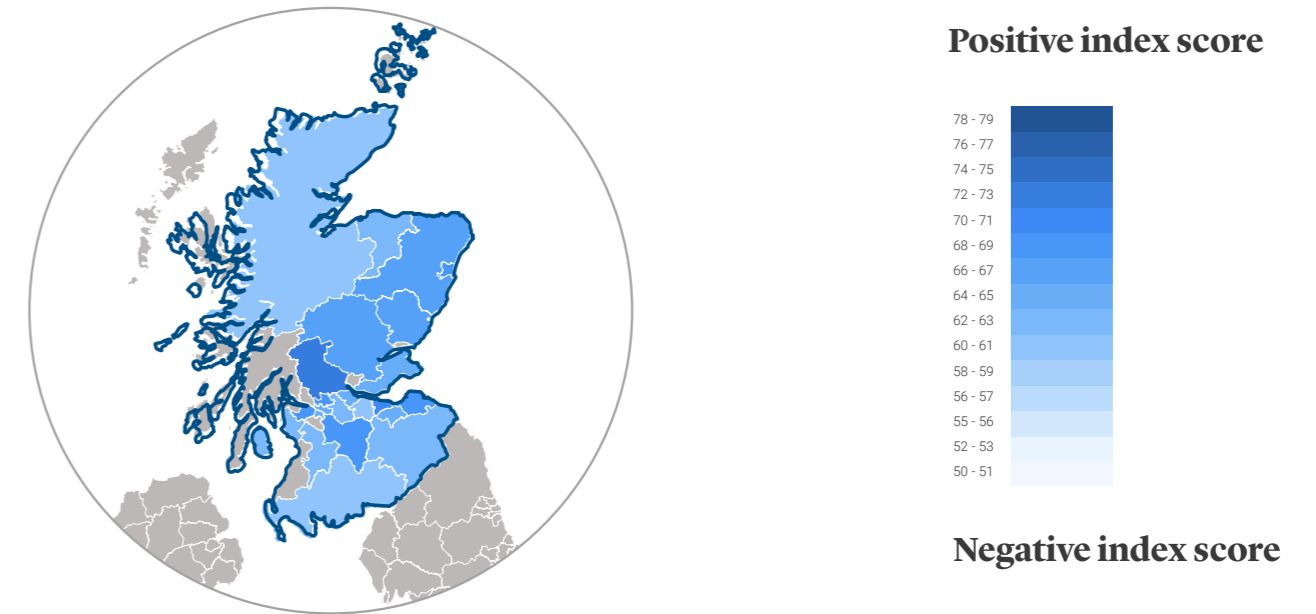
	East Devon	Exeter	North Devon	South Hams	Teignbridge	Cheltenham	Gloucester	Sedgemoor	South Somerset	Somerset West & Taunton
OVERALL RBI SCORE	60	68	59	60	61	69	67	60	62	65
HEALTH INDEX	78	74	76	77	72	75	68	71	75	74
EDUCATION INDEX	75	79	77	74	73	81	73	61	63	72
HOUSING INDEX	42	53	41	43	43	55	62	53	56	59
JOBS & ECONOMIC PROSPERITY INDEX	56	69	55	58	54	68	61	54	58	61
ENERGY & ENVIRONMENT INDEX	73	72	76	71	74	71	71	66	74	71
TRANSPORT INDEX	62	72	61	63	66	69	69	63	63	68
DIGITAL INDEX	59	63	49	49	75	78	83	68	59	57

²⁸ Isle of Scilly, Mid Devon, Torridge, West Devon, Cotswold, Forest of Dean, Stroud, Tewkesbury and Mendip excluded due to insufficient base size

Scotland

Scotland is among the highest performing places in the UK across the RBI – certainly outside of London and the South-East of England. This is largely driven by some of the highest scores across the housing and education measures across the whole of the UK. Despite this, Scotland as a region is still facing a number of challenges. With a health index score among the lowest in the UK and a jobs & economic prosperity score also below the UK average, there are clearly areas for Scotland to focus on over the coming years.

Figure 29. RBI scores in Scotland by Local Authority ³⁰



Given the varied geographic nature of Scotland it is little surprise to see that there are some significant disparities between the local authorities across the seven index measures.

Only four of the Scottish local authorities achieve a health index score that matches or exceeds that of the UK as a whole, with the northerly Highland and Moray authorities, along with North Ayrshire falling scoring particularly poorly on this measure.

There are also a number of authorities being left far behind the rest of Scotland and the UK when it comes to digital, with Highland and West Lothian two of the poorest scoring areas of the UK.

There are similarly wide disparities in the jobs and economic prosperity measure, with the cities of Edinburgh and Stirling enjoying a far higher score than other authorities and Scottish Borders, Dumfries & Galloway and North Lanarkshire coming out as the lowest scoring authorities in Scotland.

³⁰ Inverclyde, West Dunbartonshire, East Renfrewshire, Clackmannanshire, Na h-Eileanan Siar, Argyll & Bute, South Ayrshire, Orkney and Shetland excluded due to insufficient base size

Figure 30. Component Index scores in Scotland³¹

	Renfrewshire	East Dunbartonshire	Glasgow	North Lanarkshire	Falkirk	West Lothian	Edinburgh	Midlothian	East Lothian	Fife	Dundee	Angus
OVERALL RBI SCORE	68	68	65	62	65	60	71	64	68	64	66	66
HEALTH INDEX	69	70	62	63	62	62	71	63	67	61	66	66
EDUCATION INDEX	76	76	66	65	65	64	80	73	77	74	79	78
HOUSING INDEX	72	64	68	68	67	55	59	60	62	64	68	70
JOBS & ECONOMIC PROSPERITY INDEX	59	67	57	51	58	58	75	56	63	58	55	54
ENERGY & ENVIRONMENT INDEX	70	68	67	67	67	67	69	73	74	70	69	76
TRANSPORT INDEX	73	65	71	66	68	63	73	66	71	65	74	70
DIGITAL INDEX	70	78	78	78	78	58	71	71	70	60	69	63

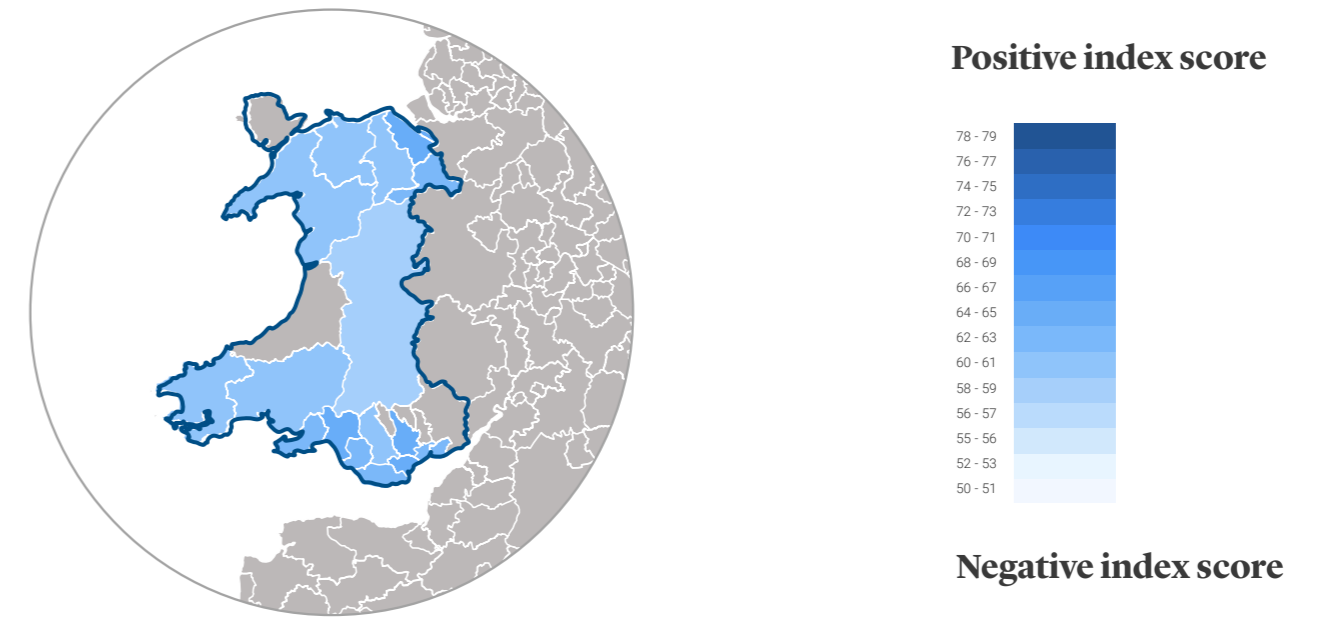
	Aberdeenshire	Aberdeen	Moray	Highland	Perth & Kinross	Stirling	North Ayrshire	East Ayrshire	Dumfries & Galloway	South Lanarkshire	Scottish Borders
OVERALL RBI SCORE	67	68	62	61	67	73	62	63	61	68	62
HEALTH INDEX	65	64	58	60	72	73	60	62	63	66	62
EDUCATION INDEX	81	78	71	77	77	73	70	71	71	70	71
HOUSING INDEX	66	67	65	54	59	70	69	77	63	67	63
JOBS & ECONOMIC PROSPERITY INDEX	66	66	54	58	63	73	47	47	51	59	51
ENERGY & ENVIRONMENT INDEX	76	71	73	75	72	77	72	74	75	76	74
TRANSPORT INDEX	63	67	56	59	65	76	67	67	60	71	60
DIGITAL INDEX	54	66	72	49	78	74	72	59	62	83	71

³¹Inverclyde, West Dunbartonshire, East Renfrewshire, Clackmannanshire, Na h-Eileanan Siar, Argyll & Bute, South Ayrshire, Orkney and Shetland excluded due to insufficient base size

Wales

Wales has a lower RBI score than any other UK nation or region and falls below the UK average on all measures with the exception of housing and energy & environment.

Figure 31. RBI scores in Wales by county³²



Furthermore, Wales falls significantly behind the rest of the UK on the key measure of jobs & economic prosperity as well as the health measure – worth no other area of the UK scoring lower on either of these measures.

With the one exception of Flintshire and Cardiff, all Welsh counties achieve a jobs & economic prosperity index score lower than that of the UK average. The Welsh economy needs strengthening across the board, though arguably none more so than the north coast counties of Conwy and Denbighshire.

With regards to health, the disparities between counties in Wales are relatively narrow when compared to many other areas of the UK, though

only Cardiff and Vale of Glamorgan achieve a UK average score, which highlights that health is another measure that needs to be addressed in Wales effectively across the entire nation.

Perhaps reflecting its status of having the lowest population density in of all the principal areas of Wales and often mountainous nature, Powys achieves a lower RBI score than anywhere else in Wales, with its digital score of 46/100 noticeably lower than elsewhere in Wales.

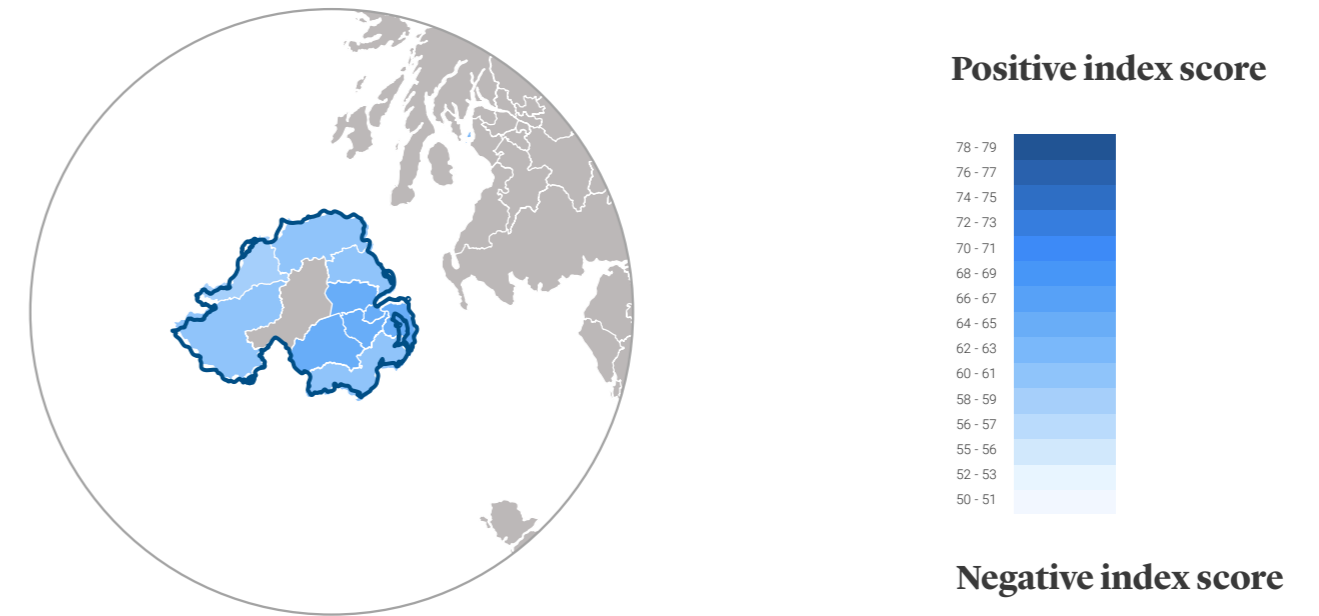
Figure 32. Component Index scores in Wales³³

	Bridgend	Caerphilly	Cardiff	Cardiff	Cardiff	Cardiff	Cardiff	Cardiff	Cardiff	Cardiff	Cardiff	Cardiff	Cardiff	Cardiff	Cardiff	Cardiff
OVERALL RBI SCORE	62	64	65	60	60	61	65	60	64	62	60	58	61	62	62	63
HEALTH INDEX	63	61	68	64	64	63	67	62	66	65	65	64	61	65	68	64
EDUCATION INDEX	65	59	69	65	66	66	67	69	63	60	60	67	56	61	74	65
HOUSING INDEX	61	70	57	62	61	59	64	56	67	62	55	56	67	63	56	64
JOBS & ECONOMIC PROSPERITY INDEX	56	54	61	51	46	50	64	51	53	54	53	51	50	54	56	56
ENERGY & ENVIRONMENT INDEX	69	70	67	71	75	73	67	72	69	67	71	72	71	69	68	67
TRANSPORT INDEX	64	68	68	61	66	64	64	60	69	65	62	57	62	66	66	63
DIGITAL INDEX	71	78	79	52	66	71	70	68	75	76	73	46	72	77	64	71

Northern Ireland

Northern Ireland has the second lowest RBI score than any other UK nation or region, and falls below the UK average on all measures with the exception of housing (on which it significantly outperforms the average) and energy & environment. It is on the measures of education and digital that Northern Ireland most acutely falls behind the rest of the UK.

Figure 33. RBI scores in Northern Ireland by Local Authority³⁴



While Northern Ireland under-indexes as a whole against the UK on the key measure of jobs and economic prosperity, this is being driven by particularly low scores in Causeway, Coast & Glens and in Derry & Strabane, one of the lowest scoring authorities across the entirety of the UK.

underperform on each measure. This is not so the case with regards to the digital measure, with Newry, Mourne & Down falling far behind the rest of a Northern Ireland that is already falling significantly behind the rest of the UK on this measure.

It is noticeable that while there are some local disparities across the health, education and transport measures, these are far less pronounced that seen elsewhere in the UK – although there are outlying local authorities that significantly

Figure 34. Component Index scores in Northern Ireland³⁵

	Antrim & New-townabbey	Ards & North Down	Armagh City, Ban-bridge & Craigavon	Belfast City	Causeway Coast & Glens	Derry & Strabane	Fermanagh & Omagh	Lisburn & Castlereagh	Mid & East Antrim	Newry, Mourne & Down
OVERALL RBI SCORE	65	64	64	64	60	58	61	64	61	60
HEALTH INDEX	69	70	68	58	68	64	67	66	61	69
EDUCATION INDEX	63	62	59	64	65	64	68	63	61	62
HOUSING INDEX	68	66	68	62	60	65	68	65	63	64
JOBS & ECONOMIC PROSPERITY INDEX	61	55	59	60	50	45	55	61	55	55
ENERGY & ENVIRONMENT INDEX	70	73	68	70	67	67	65	68	68	69
TRANSPORT INDEX	68	65	65	69	61	58	52	66	60	58
DIGITAL INDEX	61	67	64	76	68	57	58	61	64	48



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