

Investment in Places series

Framing a place-based investment strategy for Walsall

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Abstract

Productivity in Walsall is about how the area converts its resources into better outcomes for firms, workers and residents. These assets span physical infrastructure, population health and skills, community networks, finance, innovation, local leadership and natural resources (such as the UNESCO Geopark). Walsall has sectoral strengths in advanced manufacturing, particularly in the heritage industries of leather saddles and locks and has high business start-up rates. Walsall faces significant challenges, including low productivity, poor health outcomes, and high deprivation.

Our study combines quantitative analysis with qualitative insights to identify barriers and opportunities for inclusive growth.

We conclude that Walsall's path to higher productivity requires a holistic, long-term approach integrating economic and social development. Leveraging physical and financial capital strengths, while addressing deficits in human, social, intangible, and natural capital, is essential. Strategic alignment between local and regional plans with the West Midlands Combined Authority are vital. Increasing investment in education and health and fostering innovation ecosystems will enable Walsall to unlock its potential.

By combining data-driven planning with community engagement and targeted regeneration, Walsall can transition toward sustainable growth and improved wellbeing.

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Executive Summary

We examine how place-based investment strategies can improve productivity and wellbeing in Walsall, in the West Midlands. We apply the “capitals framework” that includes physical, human, social, financial, intangible, institutional and natural assets. Walsall faces persistent challenges such as low productivity, poor health outcomes, and high deprivation, but also benefits from strong transport connectivity, high business start-up rates and cultural heritage. The study combines quantitative analysis with qualitative insights from a workshop and interviews to identify barriers and opportunities for inclusive growth.

Current Position and Key Challenges

Walsall’s productivity level (£31.2 GVA/hour) is below both the West Midlands (£36) and UK (£41.9) averages, though its long-term growth rate (9.5%) exceeds the regional average, placing it in the “catching up” category within the West Midlands. Structural issues include fragmented governance, low business investment, a skills gaps and high child poverty. Natural capital is weak, with high greenhouse gas emissions, while human and social capital rank in the bottom 20% nationally. Despite these challenges, Walsall shows resilience through strong community engagement and emerging innovation hubs.

Sector Strengths and Economic Structure

Manufacturing remains Walsall’s most significant sector with heritage strengths in leather and lock industries. Advanced manufacturing is the borough’s strongest specialisation, alongside growing opportunities in clean energy and logistics. However, employment has declined slightly since 2015, and while new business formation is strong, business investment is low, constraining innovation and productivity growth.

Strategic Vision and Recommendations

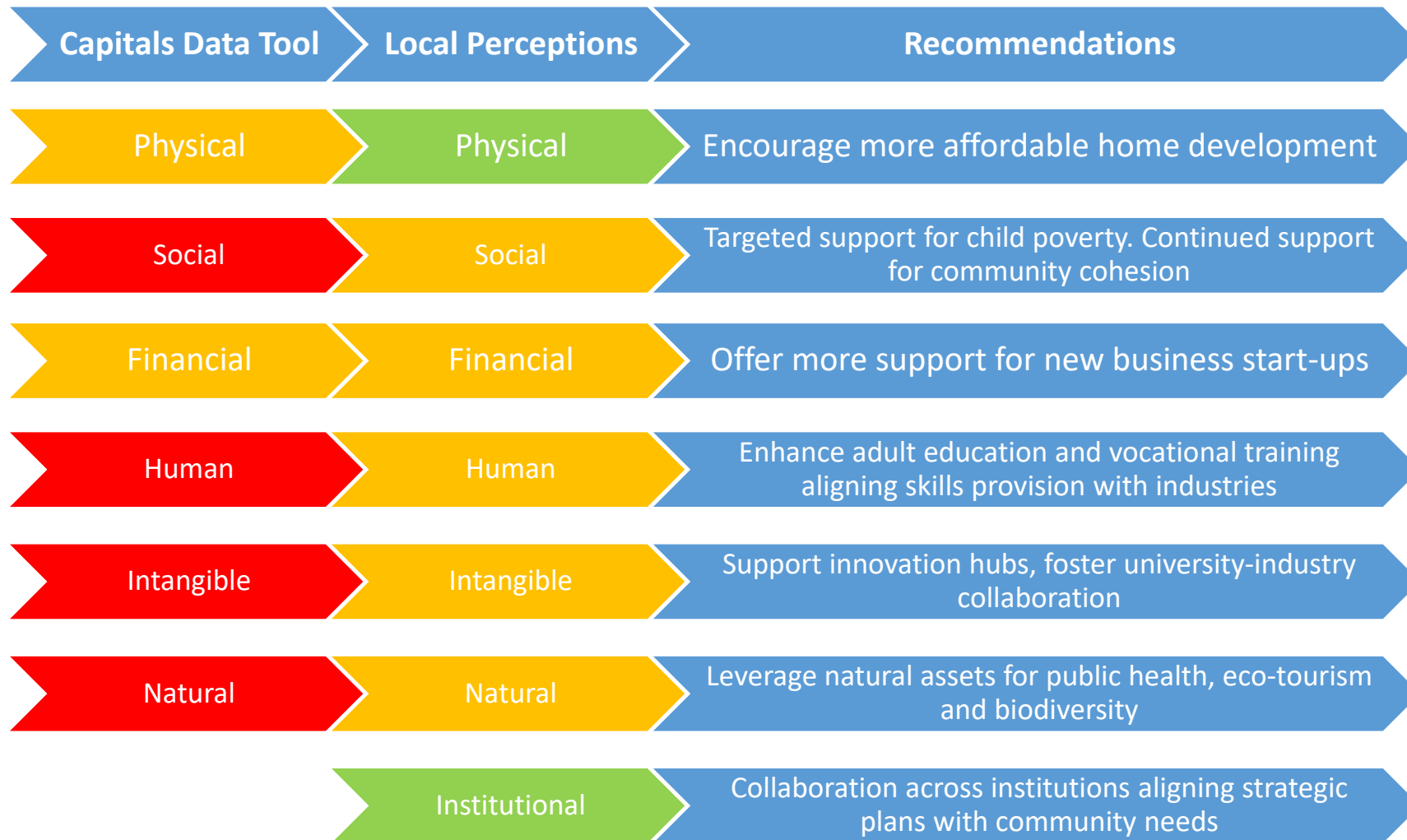
Walsall’s 2040 Vision aims to create a thriving, inclusive, and sustainable borough by improving education, reducing poverty, enhancing health, and promoting environmental sustainability. Recommended actions include: short-term measures such as expanding social programmes, supporting SMEs, and promoting green infrastructure; medium-term goals like aligning skills provision with emerging industries, improving connectivity, and incentivising private investment; and long-term strategies focused on regeneration, industrial diversification, and equitable resource distribution. Cross-sector collaboration and adaptive planning frameworks are critical to overcoming policy instability and fragmented governance.

Conclusion and Outlook

The report concludes that Walsall’s path to higher productivity requires a holistic, long-term approach integrating economic and social development. Leveraging physical and financial capital strengths, while addressing deficits in human, social, intangible, and natural capital, is essential. Strategic alignment between local and regional plans with the West Midlands Combined Authority are vital. Increasing investment in education and health and fostering innovation ecosystems will enable Walsall to unlock its potential. By combining data-driven planning with community engagement and targeted regeneration, Walsall can transition from a low-productivity level towards sustainable growth and improved wellbeing.

Walsall Strength of Capitals

The first column is from the capitals data tool with green for authorities ranking 1-120; amber for those ranking 121-240 and red for those ranking 241-361. Local perceptions gauge the strength of capitals from the qualitative workshop and interviews.



Walsall Recommendations

Key to action: short term (within the next year); medium term (1-5 yrs); long-term (5-10yrs)

The recommendations cut across a number of different areas and need investment simultaneously to improve productivity.

Barriers to Productivity	What needs to be transformed	Recommendations	Capitals
Further Develop and Share Greater Common Purpose: Fragmented governance and policy instability.	Strengthen strategic planning and institutional coordination.	Short-term: promote cross-sector collaboration. Medium-term: align local and regional strategies; establish adaptive planning frameworks to be responsive to policy changes.	Institutional
Continue to Promote Better Welfare Outcome: High levels of deprivation and child poverty. Low skill levels and educational inequalities.	Continue to build on social support systems and community engagement. Education and training systems.	Short-term: expand social programmes, improve access to services. Medium-term: enhance adult education and vocational training; align skills provision with emerging industries; support lifelong learning.	Human Social Intangible
Need to enhance Well-being Outcomes Poor health outcomes and low healthy life expectancy. East–West divide in opportunity and wealth. High greenhouse gas emissions per area.	Health infrastructure and preventative care. Spatial planning and inclusive development. Environmental sustainability and natural capital.	Short-term: support continued community-led initiatives to reduce poverty and improve wellbeing. Promote green infrastructure, energy efficiency, and sustainable transport; leverage UNESCO Geopark status for eco-tourism and conservation. Medium-term: Invest in public health campaigns, mental health services, and local healthcare access; promote active lifestyles and green space use. Long-term: Target regeneration in deprived areas; ensure equitable distribution of resources and opportunities across borough.	Social Human Financial Natural
Economic Outcomes: Low productivity level and short-term decline. Low investment per job. Difficulty retaining skilled workers.	Economic structure and investment strategy. Digital infrastructure and business environment. Job quality and local employment opportunities.	Short-term: support targeted investment plans focusing on high-value sectors and innovation. Medium-term: Improve infrastructure and connectivity. Incentivise private sector investment; support SMEs and start-ups with grants and advisory services. Long-term: Create high-value jobs through industrial diversification; support local entrepreneurship and innovation hubs.	Intangible Physical Human Financial

1. Introduction

Walsall is a place that is leveraging its strengths while also facing challenges. The use of detailed data sources like the "Community Atlas" allows for targeted interventions aimed at meeting residents' needs. Walsall's strategic location and its efforts to create a coherent narrative to attract investment are promising. Despite ongoing challenges, there are great opportunities for enhanced cross-boundary collaboration, and a strong partnership with Birmingham can lead to significant growth and innovation. The transition to a Strategic Authority presents an opportunity for greater autonomy but also requires careful navigation to maintain stakeholder engagement.

Walsall benefits from strong partnerships across key institutions that support a range of drivers of productivity including social and human capital. These collaborations are important for the overall growth and development of the area. Parts of Walsall face challenges of social cohesion and poverty. Strong collaboration between the community and education sectors, supported by knowledgeable staff from local authorities and key institutions, enables rapid collective action to address urgent social issues related to these matters.

The increasing availability of data, and dedicated data research teams within the West Midlands Combined Authority helps inform planning and strategy. There is a growing effort to improve data processes and procedures for long-term planning. The push for data at a more granular level is particularly valuable for identifying specific areas of need and designing interventions.

New local leadership structures, including the move toward Strategic Authority status, give Walsall greater control over funding and decision-making, but also call for stronger partnerships to ensure that the broad range of perspectives are integrated into strategic planning that addresses both social and economic need. As the region shifts away from old frameworks like the Local Enterprise Partnership, business voices must remain part of the conversation.

Reported challenges include an East-West divide in wealth and opportunities, difficulties in retaining skilled graduates, and challenges related to its fragmented geography. Despite high levels of institutional capital across some partnerships, there appears to be some siloed working within institutions and inconsistent national policies, further complicate efforts to create a cohesive, long-term strategy. Walsall must balance immediate needs with the development of a sustainable economic vision and narrative which highlights strengths and opportunities for growth.

Walsall recognises the need to improve its housing stock and the social and economic benefits of developing housing projects in targeted areas, which helps to reduce antisocial problems and create affordable housing opportunities. There were examples shared of infrastructure partners working with the local authority to strengthen community ties and stimulate local economic activity by involving tradespeople, subcontractors, and providing employment and training opportunities. There are also initiatives to support a greener economy and increased innovation in the area.

Investment in Productive Places Campaign

This report sets out our findings for Walsall for the Investment in Productive Places Campaign (IPPC)¹. We discuss how a joined-up strategy for investment can help productivity to grow in places that have the potential to improve and fully leverage investment opportunities. To deepen our understanding of how some of the most abstract and difficult-to-quantify elements of the capitals' framework are being thought about in practice, we use a mixed methods approach presenting both quantitative and qualitative analysis. In addition to gaining insights into how the capitals are viewed across a range of stakeholders, we are also interested in the interdependencies between the capitals. Our qualitative work involved a survey and workshop in Walsall on 20th March 2025. Then interviews were conducted between April and September 2025.

Regional inequalities in productivity and living standards across the UK are stark and have been increasing over time (see McCann, 2020). The need to address such inequalities not only matter for the lived experiences of citizens - the quality of life for individuals and families, but also the levels of economic growth, development and productivity achieved by businesses and organisations that in turn support the level of goods and services that the public benefit from. Although the UK is world leading across a range of sectors and with many places exhibiting high levels of productivity, innovation and good jobs, this is still overly concentrated in specific areas and the long tail of low productivity is a prevalent issue to address.

We argue that a broad-based investment strategy across different types of "capital" is required to help to lift places out of low productivity traps and create better and lasting outcomes for their communities and businesses.

The former Government's Levelling Up White Paper (DLUHC, 2022) recognised that reducing spatial disparities would require an understanding of a number of interdependent factors and identified six capitals to address this, these included:

- Physical capital – infrastructure, machines and housing.
- Human capital – the skills, health and experience of the workforce.
- Intangible capital – innovation, ideas and patents.
- Financial capital – resources supporting the financing of companies.
- Social capital – the strength of communities, relationships and trust.
- Institutional capital – local leadership, capacity and capability

In our research we add to this list natural capital, this refers to a place's stock of natural resources and ecosystems that provide a wide range of valuable services and products for humanity. The investment in natural capital supports environmental conservation, access to green space, and contributes to net-zero targets by reducing greenhouse gas emissions.

These capitals need to be utilised as productively as possible to foster local growth, as all resources are scarce and better outcomes are required to help close the large gap in regional inequalities (TPI, 2024). The community capitals framework has been applied to US regions. Emery and Flora (2006) note that a community could become stronger by strategically

¹ See The Productivity Institute's Investment in Productive Places Campaign web-site: <https://www.productivity.ac.uk/regions-nations/investment-in-places/>.

increasing its capacity within each capital. As the flow of assets are connected, investing in one capital can trigger positive outcomes across the other capitals. A study by Losada-Rojas et al, (2024) analyses the community capitals at the US county level for the Great Lakes Region. They find that to build community resilience there was a need to increase active partnerships among education, non-profits, community foundations, businesses and government institutions.

Table 1: Drivers of Productivity, Stakeholders, Capitals and Growth Missions

Drivers of Productivity	Primary Stakeholders	Capitals	Growth Mission
Business performance & characteristics	Firms	Intangible Financial Social	Industrial strategy & trade + Innovation
Skills & training	Individuals in the workforce	Human	People: more people into good jobs
Policy & institutions	Government	Institutional Social	Place: devolution & reform
Health & wellbeing	Individuals in society	Human Social	Build an NHS fit for the future
Investment, infrastructure & connectivity	Business environment	Physical Natural	Investment, infrastructure & planning + Net Zero

Source: Donaldson et al (2025) Table A9.2 and HM Government (2024) Plan for Change.

The Productivity Institute research on the “drivers of productivity” are discussed in Donaldson et al (2025) to understand the prosperity gap between Northern Ireland and the UK. Donaldson et al (2025) note who the primary stakeholders are of the drivers of productivity and how these map onto the capitals, this is summarised in Table 1. The HM Government (2024) Plan for Change outlined the missions and milestones of the UK Government. Table 1 notes how the components of the growth mission link to the capitals and drivers of productivity (except for health and wellbeing that links into the mission to building an NHS fit for future).

The Productivity Institute’s Productivity Lab (see Watson and Ortega-Argilés, 2025, and McKeogh et al, 2025) has produced further scorecards and dashboards² for the drivers of productivity for ITL1 region and for ITL3 sub-regions in the West Midlands (see also van Ark et al, 2025). In the next section of this report, we produce a scorecard for Walsall’s drivers of productivity compared to the West Midlands. We also include details of the experimental data tool for Walsall and the other local authorities in the West Midlands Combined Authority. The data tool includes variables for human, social, financial, physical, intangible and natural capitals³.

² The 2025 TPI Scorecards has been published by TPI’s Productivity Lab <https://www.productivity.ac.uk/the-productivity-lab/the-2025-tpi-uk-itl3-productivity-scorecard-series/> and the interactive West Midland’s dashboard <https://lab.productivity.ac.uk/tools/productivity-dashboards/tpi-itl3-2025/west-midlands/>.

³ IPPC interactive data tool: <https://lab.productivity.ac.uk/insights/tpi-local-authority-capitals-dashboard/>

The structure of the report is as follows. First, we discuss Walsall's demography and geography, policy context and recent investments. In the second section we discuss the labour productivity metrics and the drivers of productivity. The third section sets out the sector strengths within Walsall. The fourth section describes the capitals and the indicator variables within the experimental data tool. The fifth section focuses on the qualitative findings from the study and presents a word cloud from the workshop discussion and the themes that have emerged. The final section concludes, setting out our recommendations.

Walsall Geography and Demographics

The population of Walsall was 284,392 in the Census 2021 and had increased by 5.2% since Census 2011, with the ONS 2024 mid-year estimate at 295,678⁴. The two most populated wards are Willenhall South (17,176) and St Matthews, (17,240). The largest percentage growth since 2011 has been in Blakenall with a 7.8% increase in the ward population. The more prosperous areas north of Streetly and south-west of Aldridge Central and South have witnessed some of the most limited population growth. The ethnic make-up of Walsall is 78.9% White as of the 2011 census, with Asian/Asian British constituting 15.2% of the local population.

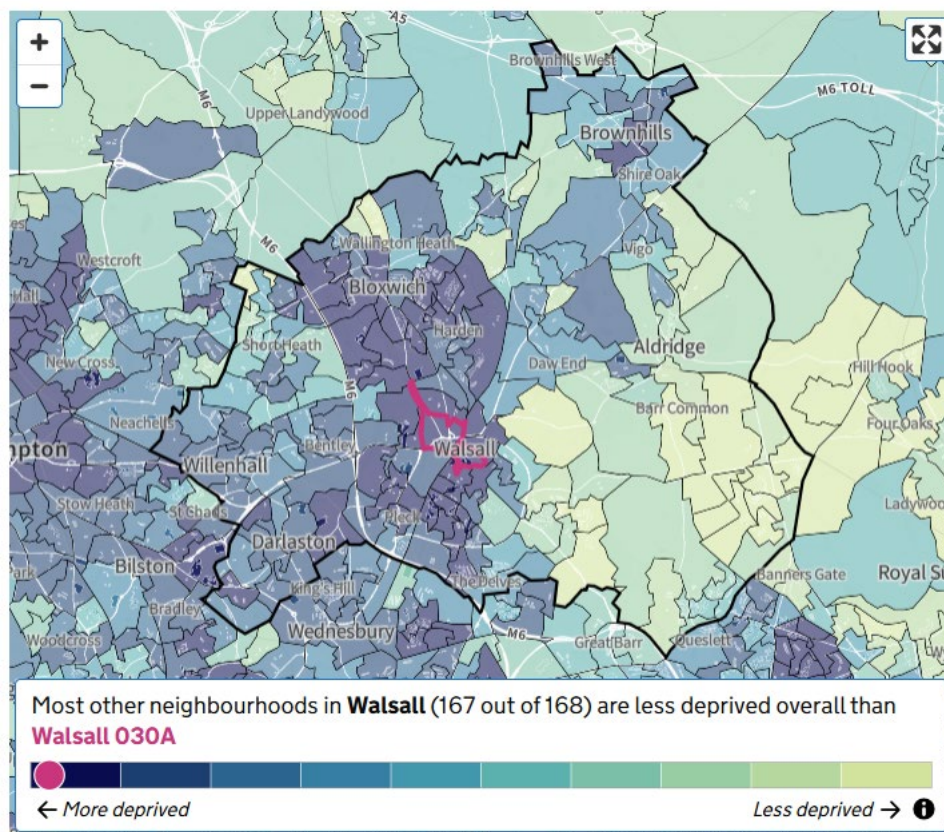
Figure 1 presents a map of the Index of Multiple Deprivation (IMD) for Walsall, from the Ministry of Housing, Communities and Local Government (MHCLG, 2025). The IMD measures show relative levels of deprivation with the darker shading indicating the most deprived neighbourhoods. Walsall is made up of 168 neighbourhoods (or Lower Super Output Areas, LSOA) with 42 LSOAs in the top 10% of the most deprived LSOAs in England (or 25% of the total, see MHCLG, 2025). This ranks Walsall as the 27th most deprived English local authority out of 296 (based on the rank of local authorities with the most 10% deprived LSOAs in England). The majority of the most deprived LSOAs are around Walsall town centre and south of Bloxwich, particularly within the wards of Blakenall and the areas east of St Matthews. There is also an area of high deprivation just south of Darlston. The map clearly presents a form of east-west divide with areas south of Aldridge being some of the least deprived LSOAs in the country.

Access to greenspace is deemed essential for mental health and physical activity. Central Walsall is an area with 38% of housing lacking private gardens and are reliant upon community greenspace. Much of the community greenspace are found within pockets in the north, north-east and north-west of the borough. Housing quality issues are particularly concentrated within the south of Walsall in wards such as Palfrey, Peck and Paddock. By early 2022, growth in household incomes were being outpaced by rising inflation and rapidly increasing fuel prices pushing an increasing number of families into fuel poverty. By the end of 2021, 19.7% of Walsall households were in fuel poverty compared to the national average of 13.1%. The LSOA's of Birchills East, Harden North-West and Rough Hay West mainly concentrated to the

⁴ See Nomis <https://www.nomisweb.co.uk/reports/lmp/lad/1778385152/report.aspx?town=Walsall> and [ONS Population estimates for England and Wales: mid-2024](#).

central areas of Walsall were in the top 5% in England when it came to the proportion of households in fuel poverty in 2022.

Figure 1: Walsall, Index of Multiple Deprivation 2025 Map



Source: Index of Multiple Deprivation 2025, overall measure from the Ministry of Housing, Communities and Local Government. The neighbourhood Walsall 030A is where Walsall Further Education College is located with postcode WS2 8ES. [See MHCLG](#).

Walsall's Joint Local Health and Wellbeing Strategy⁵ identifies the emerging needs for the borough that were identified by the Joint Strategic Needs Assessment (JSNA⁶) in 2021. The needs of the population to be addressed include: 1) mental health; 2) healthy weight; 3) behaviour choices; 4) dealing with the long-term effects of the COVID-19 pandemic; 5) health inequalities; 6) dementia prevalence; 7) diabetes detection; 8) childhood immunisations; 9) changing the town centre; 10) the impact of poor air quality with the M6 motorway junction 10 redevelopment works.

⁵ [Walsall Joint Local Health & Wellbeing Strategy 2022-25 Document](#).

⁶ JSNA is a process used by local authorities, the NHS, and other partners to understand the current and future health and wellbeing needs of a local population. The assessment helps to inform decisions about how to improve services and reduce health inequalities.

Walsall Policy Context

The Walsall Borough Council 2040 Vision⁷ presents a strategic plan to transform Walsall into a thriving, inclusive, and sustainable community. The plan addresses key challenges such as climate change, health and education inequalities, and an ageing population, while leveraging opportunities in technology and community engagement. Central to the vision are goals to improve education, reduce child poverty, enhance public safety, and foster empowered communities. By 2040, Walsall aims to be the most improved borough in the region, with public services shaped by resident input, strong community cohesion, and a focus on wellbeing through accessible health services and active lifestyles.

The strategy also prioritises economic growth, housing, transport, and environmental sustainability. Walsall plans to halve deprivation levels, eliminate rough sleeping, and ensure all homes are energy efficient. Improved transport and digital connectivity will support residents and businesses, while green initiatives will promote biodiversity and carbon sustainability. Cultural development and town centre regeneration will make Walsall a vibrant destination, celebrating diversity and heritage. Success will depend on collaboration across public, private, and community sectors, guided by principles of honesty, inclusivity, and sustainability, with ongoing resident engagement and annual progress reviews.

Walsall Investments

Walsall is well located in the West Midlands with access to the M6 motorway (junctions 7, 9 and 10) and on the train line between Birmingham and Staffordshire. Walsall is part of the West Midlands Combined Authority (WMCA) which has secured Trailblazer Devolution funding in 2023 (HM Government, 2023). WMCA has prioritised the Walsall Growth Corridor for investment with an aim to catalyse economic development, housing, and job creation. The corridor is along the A454 from Walsall town centre to Willenhall. This funding will see a rail line between Walsall and Wolverhampton reopened in 2026 and new rail station in Willenhall. A direct train line to London is proposed to start in 2026⁸.

In 2023 the council announced the successful bid to the Levelling Up funding round 2 (£20m) for the initial development of Willenhall Garden City, unlocking a £210 million regeneration plan, enabling the delivery of new homes, parks, and the Willenhall railway station⁹.

A number of Government grants have been awarded to Walsall Borough Council (WBC) to improve the public realm. Walsall Town Centre Masterplan sets out the council's vision over 20 years. The Masterplan has helped to secure funding from the Government's Future High Streets fund and Walsall Town Deal. The 2019 Town Deal for Walsall and Bloxwich aimed to revitalize the towns by investing in digital infrastructure (building a new digital centre¹⁰),

⁷ <https://wearewalsall2040.walsall.gov.uk/>

⁸ <https://www.bbc.co.uk/news/articles/cgmnp4zp7p8o>

⁹ <https://go.walsall.gov.uk/newsroom/levelling-fund-bid-successfully-secures-ps20m-transform-willenhall>

¹⁰ <https://www.bbc.co.uk/news/articles/c80z6085g05o>

supporting local businesses, improving the public realm (including investment in canal towpaths¹¹) and engaging the community in the regeneration process.

The Walsall Growth Zone will strengthen the Black Country Enterprise Zone clustered near the M6 junction 10 and the planned Darlaston rail station. The Long-Term Towns Fund £20m for Darlaston was confirmed by Walsall council in 2023¹². Work has recently been completed on the £78m enhancement of the M6 junction 10 to improve connectivity to employment sites including the new SPARK site. SPARK is a 44 acre brownfield site alongside the M6. The aim is to transform the site into a modern manufacturing and logistics hub.

The £20m Levelling Up Partnership for Walsall was announced by Government in March 2023. In March 2024¹³ Walsall Council announced this would now be a Healthy Levelling Up Partnership to bring together public and private sector partners along with the council to devise a programme of activity that will create opportunities for Walsall people and tackle health and inequality problems. In 2025¹⁴ the council announced that the £20m has been renamed the Community Regeneration Partnership under the Government's Plan for Change. The programme plans to develop a bespoke package of funding that will kickstart a range of projects to help the community, tackle local issues and address inequalities. The town centre will be at the epicentre of driving growth for Walsall, with a crackdown on crime including improved CCTV and creation of a Youth Hub that will provide a safe and supportive environment for young people to tackle the root causes of anti-social behaviour.

2. Labour Productivity

The Midlands Insight's report (Mazhikeyev et al, 2025) has provided detailed analysis of productivity trends in the West Midlands and revealed important insights when compared to other UK nations and regions. The report identifies challenges across the Midlands including workforce shortages, infrastructure and connectivity gaps, lower R&D investment and innovation capacity and weaker supply chain resilience. To address these challenges the report recommends the expansion of vocational training, reskilling programs, and lifelong learning initiatives aligned with high-growth sectors to deal with workforce challenges. Targeted investments to improve transport and digital networks, particularly in underserved areas, ensuring better access to jobs and services. R&D investment can be bolstered through increased funding and incentives for private-sector participation, particularly within collaborative R&D hubs that connect industry with regional universities. The report calls for strengthened supply chain resilience through greater integration, regional logistics hubs, and initiatives to reduce dependence on international sources.

¹¹ <https://go.walsall.gov.uk/newsroom/canal-towpaths-across-walsall-borough-see-huge-improvement>

¹² <https://go.walsall.gov.uk/newsroom/ps20million-government-investment-darlaston>

¹³ <https://go.walsall.gov.uk/newsroom/walsall-will-be-one-only-3-4-healthy-levelling-areas-country>

¹⁴ <https://go.walsall.gov.uk/newsroom/walsall-receives-ps20million-regeneration-and-growth-partnership>

We compare ONS productivity levels¹⁵ versus the growth rate in the Figure 2 for the West Midlands Combined Authority (WMCA) local authority areas¹⁶. The chart's axis is set at the West Midlands productivity level of £36 (GVA per hour worked) and growth rate (for the constant prices productivity series) of 6.5% between 2008 to 2023.

Figure 2: West Midlands CA Productivity Levels vs. Growth Rates (2008-2023)



Source: ONS (2025i), Table A3 for productivity levels and Table A5 for the growth rate calculation.

The chart shows a four-type taxonomy¹⁷ to describe how the local authority is progressing compared to West Midlands. By comparing the region's productivity along these two dimensions, the taxonomy of relative productivity performance is constructed as follows:

- **Falling behind:** both the authority's 2023 productivity and its productivity growth (between 2008 and 2023) are below the West Midlands.

¹⁵ Please note that the ONS (2025g) have stated there are measurement issues with the Labour Force survey used to produce the labour productivity data (particularly at the lower levels of geography). This volatility in the ONS Labour Force survey is due to the low response rates during and since the COVID-19 pandemic. ONS also notes a reweighting of this series with 2021 Census population estimates. For more information on the issues see ONS (2025a), Gouma et al (2025) and Prothero (2025).

¹⁶ WMCA local authorities with full voting rights include Birmingham, Wolverhampton, Coventry, Dudley, Sandwell, Solihull and Walsall. Those with reduced voting rights include Cannock, North Warwickshire, Nuneaton and Bedworth, Redditch, Rugby, Shropshire, Stratford-on-Avon, Tamworth, Telford and Wrekin, Warwickshire County Council and Warwick.

¹⁷ The taxonomy is based on the method from Garcia et al (2024).

- Catching up: the authority's 2023 productivity is below the West Midlands, but its productivity growth is above the West Midlands.
- Losing ground: the authority's 2023 productivity is above the West Midlands, but its productivity growth is below the West Midlands.
- Steaming ahead: both the authority's 2023 productivity and its productivity growth are above the West Midlands.

In Figure 2 we can see that Walsall's level of productivity at £31.2 is below the West Midlands level of £36, and since 2008 it has increased by 9.5% to 2023, above the 6.5% growth for the West Midlands, so is within the catching up quadrant. The UK level of £41.9 is included in Figure 2 with a growth between 2008 and 2023 of 8%.

Walsall Productivity Metrics and Drivers

The Productivity Institute's (TPI) research on the "drivers of productivity" are set out in TPI's Productivity Lab scorecards and dashboards for the West Midlands sub-regions (ITL3 García et al, 2024). Walsall is an ITL3 sub-region (code TLG15). The Productivity Lab scorecards examine four regional productivity drivers: business performance, skills and training, health and well-being, and investment and infrastructure. We set out economic variables and the drivers of productivity in a scorecard for UK productivity and Walsall in Table 2. We present the short-term growth rate (growth for 2022-2023), the cumulative average growth rate¹⁸ (CAGR) between 2019 and 2023 for the medium-term and the long-term growth rate (CAGR between 2008 and 2023). The UK labour productivity level is £41.9 (GVA/ hour) in 2023 with a fall since 2022 (-0.2% growth rate), then the CAGR of 0.7% per year in the medium term and 0.5% per year in the long term.

In the economy measures for Walsall in Table 2 we see that productivity (Gross Value Added, GVA per hour and GVA per filled job from ONS, 2025i), output (Gross Domestic Product, GDP, per capita from ONS, 2025d) and income (Gross Disposable Household Income, GDHI, per head from ONS, 2025j) are below the West Midlands levels in 2023 (the West Midlands figures are in brackets). This could reflect the lower income of residents in Walsall. Table A1 in the appendix shows commuting patterns for workers during the 2021 Census, with Birmingham the most popular work destination for commuters to and from Walsall.

In terms of growth rates, productivity has increased in the medium and long term but decreased in the short term (the annual growth rate between 2022-2023 is -1.2%). Output (GDP per capita) has contracted over time, with gross disposable household income (GDHI) per head increasing over the short and long-term. In Figure 3 we compare Walsall productivity (GVA per hour) and its components, GVA and hours, to the West Midlands. Walsall's productivity (GVA per hour) grew after 2008 to a peak in 2015, this was due to an increase in GVA and reduction in hours worked, see Figure 3. An increase in hours worked to 2016 then leads to a fall in productivity. A further contraction in hours during the pandemic leads to

¹⁸ The calculated cumulative average growth rate excludes the COVID-19 disrupted years from the data series. The formula is $CAGR = 100 \times (((2023 \text{ Value} / 2019 \text{ Value})^{(1/4 \text{ Years}))} - 1)$ applied to the real series (with price effects removed).

increased productivity up to 2021. In Figure 4 we present the employment series for Walsall, and the other local authorities in the West Midlands Combined Authority. The number of jobs in Walsall continued to fall after 2008 to a trough in 2011, after this employment increased to 2017 but contracted after this to 2022. Figure 5 compares the trends in the WMCA local authorities' employees on Pay As You Earn (PAYE) payroll, an ONS (2025h) real time indicator series. All authorities do experience a drop during the pandemic but then increases in employees between 2021-24.

In terms of business performance, we present export intensity and the rate of new businesses in the scorecard in Table 2. Export intensity is an important productivity driver as firms competing in international markets tend to increase their productivity through process efficiencies and cost reduction, so higher export performance by local firms leads to higher regional productivity. García et al, (2024) calculated export intensity by adding the nominal values of trade in goods exports and trade in services exports and then dividing by the GDP. Export intensity for Walsall is 31.7% (share of exports to GDP) in 2023 higher than the West Midlands share of 29.5% (ONS, 2025b), and this has increased in the short and medium term. In 2023 Walsall's traded exports amounted to £1,955mn (with exports in goods of £1,372mn and exports of services £583mn).

According to García et al (2024) entrepreneurship, firm dynamicity and firm creation has been found to be important drivers of regional productivity and local prosperity. The rate of new businesses for Walsall was 13.7% above 11.3% in the West Midlands in 2023. We see from Table 2 that the rate of new business starts has increased in the short and medium term, when business starts are falling across the West Midlands.

Measures in skills include the share of the population with medium-level skills (Regulated Qualification Framework 3 plus, RQF3+, includes technical skills below degree level) and those with low skills (this includes the 16-64 year old population with no qualifications and those with RQF1 qualifications). A higher share of the working population with no qualifications is expected to be detrimental to regional productivity. The share of medium-level skills in Walsall at 58.9% of the working population (aged 16-64 years) in 2023 below the West Midlands level of 63.6%, but has increasing over time. The share of the working population with low skills is at 13.5% above that for West Midlands of 10.5%, this has increased since 2022 but has been falling over time so both the skills measures are improving. The employment rate for Walsall was at 73.5% in 2023, lower than the West Midlands at 75.1%. The Walsall employment rate has increased over time.

Health and wellbeing indicators include the activity rate and then the share of the inactive population that is inactive due to illness, along with the working population share. The activity rates are calculated as those that are active in the labour market (either employed or unemployed) as a share of the working age population (aged 16-64 years). Walsall has a higher activity rate at 79% compared to that of the West Midlands at 78.8% in 2023. The active population has been increasing. The share of the inactive population in Walsall who are inactive due to long-term ill health is 38.9% in 2023, higher than 29.3% for the West Midlands, this has increased sharply over the pandemic years. The dependency ratio is (calculated as

the share of population <16 and >64 divided by the share of 16-64 year olds), is at 61.1% in Walsall is lower than 61.8% for the West Midlands.

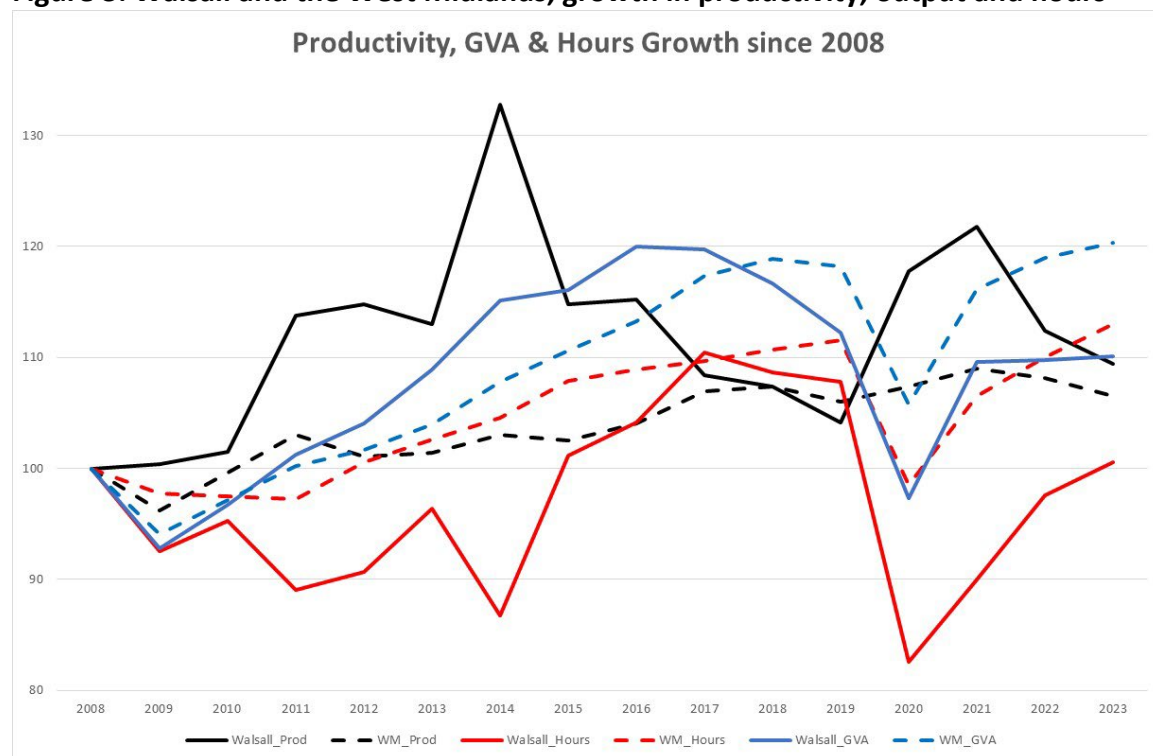
Table 2: Scorecard for Walsall's Drivers of Productivity

Walsall (West Midlands)		Growth (% cumulative annual growth rates)		
Economy	2023 Level	Short term (2022-2023)	Medium term (2017-2023)	Long term (2008-2023)
UK Productivity (GVA/hour)	41.9	-0.2	0.7	0.5
Productivity, GVA/ hour (£)	31.2 (36)	-1.2 (-0.3)	1.7 (0.5)	0.6 (0.4)
Productivity, GVA/ filled job (£)	47,758 (57,024)	-6.6 (0.8)	-0.4 (0.5)	0.4 (0.5)
GDP per capita (£)	21,986 (32,077)	-0.5 (-0.1)	-0.7 (-0.2)	-0.03 (0.5)
GDHI per head (£)	18,199 (21,141)	1.4 (1.6)	-0.04 (-0.2)	0.6 (0.3)
Gross median weekly pay (£) (Full-time workers)	658.2 (656.9)	6.2 (-0.4)	1 (-0.1)	0.8 (-0.1)
Drivers of productivity				
Businesses Performance				
Export Intensity (%)	31.7 (29.5)	13.8 (1.1)	9.9 (-1.7)	-
Rate of New Business (%)	13.7 (11.3)	0.4 (-0.8)	0.7 (-6.3)	-
Skills & employment				
Medium skilled (% RQF3+)	58.9 (63.6)	0 (1.2)	6.3 (4.7)	3.7 (2.9)
Low skilled (%)	13.5 (10.5)	0.4 (-0.9)	-15 (-15.4)	-6.3 (-7.1)
Employment Rate (%)	73.5 (75.2)	1.9 (1.4)	1 (0.4)	0.5 (0.5)
Health & wellbeing				
Activity Rate (%)	79 (78.8)	0.8 (1.3)	1.1 (0.4)	0.3 (0.3)
Inactive due to illness (%)	38.9 (29.3)	14.4 (4.5)	21.1 (7.2)	3.5 (1.8)
Working Age (%)	61.1 (61.8)	0.1 (-0.01)	0.1 (0)	-0.1 (-0.2)
Investment, Infrastructure & Connectivity				
5G coverage (%), 2025	100 (84.5)			
Gigabit capable broadband (%), 2025	93.7 (89.2)			
GFCF per job (£), 2020	5,969 (9112)			
ICT per job (£), 2020	237 (380)			
Intangibles per job (£), 2020	1,002 (2,399)			

Source: GDP from ONS (2025d), Productivity from ONS (2025i) and Gross Disposable Household Income from ONS(2025j). Connectivity data from ONS Local Statistics Data:

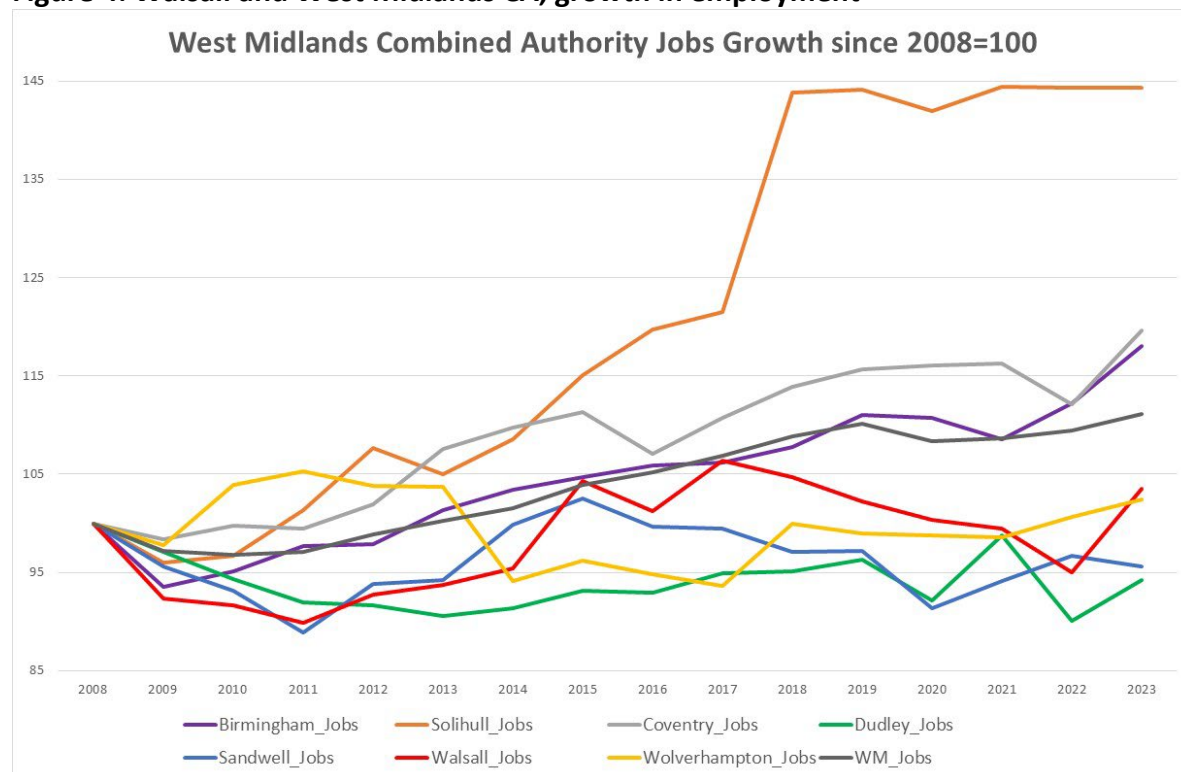
<https://www.ons.gov.uk/explore-local-statistics/areas/E08000030-walsall/indicators>

Figure 3: Walsall and the West Midlands, growth in productivity, output and hours



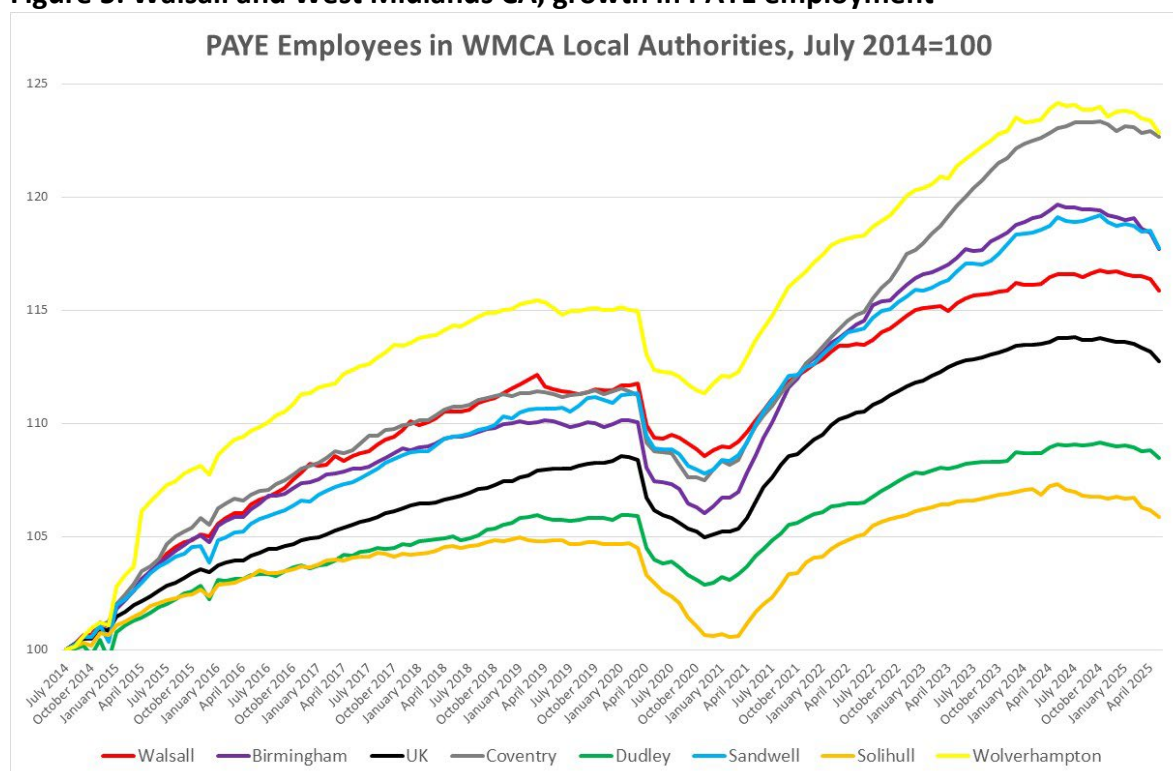
Source: ONS (2025d and 2025i), Local Authority GDP and Productivity.

Figure 4: Walsall and West Midlands CA, growth in employment



Source: ONS (2025i), Local Authority Productivity Jobs.

Figure 5: Walsall and West Midlands CA, growth in PAYE employment



Source: ONS (2025h), Local Authority PAYE employees.

The final block on Table 2 notes information on investment, infrastructure and connectivity. In Walsall the share of 5G coverage and gigabit capable broadband connectivity are above the West Midlands average. Whole economy investment (Gross Fixed Capital Formation, GFCF) per job and components of this include investment in Information and Communication Technology (ICT) and intangibles¹⁹, both per job. Walsall is below the West Midlands average for whole economy, ICT and intangible investment per job in 2020. These series are from the ONS (2022).

3. Sector Strengths

We analyse the companies within Walsall for their industrial strategy sector strength. We present analysis by The Data City using their Real-time Standard Industrial Classification (RTICs) codes gathered from searching firms' websites for sector keywords. We compare Walsall to the other 6 local authorities in the West Midlands Combined Authority (WMCA). Table 3 shows the specialisation in the eight priority sectors outlined in the Government's Modern Industrial Strategy 2035 for local authorities. The location quotients (LQ) are calculated by taking the number of operating addresses of companies classified in the sectors (company counts) as input data. A location quotient greater than one shows the local

¹⁹ Within intangibles are research and development; mineral exploration and evaluation; computer software and databases and entertainment, literary or artistic originals.

authority has a greater strength in that sector than the UK average. From Table 3 we see that Walsall's greatest specialisation is in advanced manufacturing with a LQ of 1.58.

Table 3: Walsall Companies Industrial Strategy Sector's Location Quotients

IS-8 Sector	AM	CE	CI	D	DT	FS	LS	PBS
Walsall	1.58	0.78	0.42	0.37	0.37	0.5	0.7	0.63
Birmingham	0.82	0.41	0.86	0.59	0.87	0.85	0.74	0.85
Coventry	1.01	0.65	0.71	0.62	0.81	0.51	0.73	0.76
Dudley	1.88	0.75	0.68	1.08	0.59	0.84	0.68	0.84
Sandwell	1.97	0.58	0.41	0.24	0.31	0.32	0.89	0.57
Solihull	0.88	0.76	0.94	1.39	1.66	1.41	1.2	1
Wolverhampton	1.05	0.62	0.56	0.32	0.8	0.93	0.8	0.74

Source: The Data City Real Time SIC Codes, <https://thedatacity.com/real-time-sic-codes/>. Key to sectors: Advanced Manufacturing (AM); Clean Energy (CE) Industries; Creative Industries (CI); Defence (D); Digital and Technology (DT); Financial Services (FS); Life Sciences (LS); Professional and Business Services (PBS). The Data City indicators are from July 2025.

We also calculate the relative specialisation for the employment sectors in Walsall, utilising the Business Register Employment Survey (BRES) and compare Walsall to Great Britain (GB). A location quotient greater than one indicates higher specialisation than the GB level of employment in that sector. Table 4 shows the highest 20 location quotients for Walsall employment sectors at the 2-digit SIC code level (average between 2015-23) along with the employment numbers in 2015, 2023, the 2023 employment sector share and the growth rate between 2015 and 2023.

In Walsall we can see from Table 4 that according to the BRES the total number in employment has decreased by -2.85% between 2015 and 2023. The largest location quotients for employment is in the manufacture of leather and related products, this is the heritage industry of the area with a specialism in producing horse saddles and related equipment²⁰. The importance of the history of the lock industry to Walsall is reflected in the associated activities for manufacture of basic metals and metal fabrication, along with more digital specialisation in this industry reflected in the manufacture of electrical equipment.

²⁰ Walsall Council manage the Leather Museum, see <https://go.walsall.gov.uk/museums-libraries-and-galleries/walsall-leather-museum> and the Walsall Football Club are known as "The Saddlers", see <https://www.saddlers.co.uk/>

Table 4: Walsall Employment Sectors by Highest Location Quotients

Sector	2015	2023	Share in 2023	Growth Rate 2015-2023 (%)	Location Quotient 2015-23 (average)
15: Manufacture of leather and related products	500	350	0.34	-30	27
24: Manufacture of basic metals	1,500	2,000	1.94	33.3	7.8
25: Manufacture of fabricated metal products, except machinery and equipment	5,000	4,500	4.37	-10	4.44
65: Insurance, reinsurance and pension funding, except compulsory social security	1,500	1,000	0.97	-33.3	4.16
19: Manufacture of coke and refined petroleum products	30	100	0.1	233.3	3.52
52: Warehousing and support activities for transportation	4,500	4,000	3.89	-11.1	2.28
53: Postal and courier activities	2,500	2,000	1.94	-20	2.15
27: Manufacture of electrical equipment	600	450	0.44	-25	2.07
36: Water collection, treatment and supply	300	300	0.29	0	2.04
77: Rental and leasing activities	1,250	700	0.68	-44	1.89
78: Employment activities	5,000	5,000	4.86	0	1.75
14: Manufacture of wearing apparel	250	75	0.07	-70	1.67
22: Manufacture of rubber and plastic products	1,000	800	0.78	-20	1.652
37: Sewerage	100	150	0.15	50	1.649
46: Wholesale trade, except of motor vehicles and motorcycles	6,000	6,000	5.83	0	1.61
92: Gambling & betting activities	800	300	0.29	-62.5	1.60
38: Waste collection, treatment and disposal activities; materials recovery	800	900	0.87	12.5	1.58
82: Office administrative, office support and other business support activities	2,000	2,500	2.43	25	1.57
28: Manufacture of machinery and equipment n.e.c.	800	700	0.68	-12.5	1.37
29: Manufacture of motor vehicles, trailers and semi-trailers	700	600	0.58	-14.3	1.33
Total	105930	102910	100	-2.85	

Source: Business Register Employment Survey (BRES) from Nomis <https://www.nomisweb.co.uk/> at the 2 digit level Standard Industrial Classification code.

Table 5: Walsall GVA and Employee Shares of Sectors in 2023

Sector	Walsall GVA	Walsall Employees	West Midlands GVA	West Midlands Emp.
B: Mining & quarrying	0	0.1	0.9	0.0
C: Manufacturing	13.7	12.1	14	10.2
DE: Electricity, gas, water; sewerage & waste management	2.9	1.3	2.8	1.4
J: Information & communication	4.2	0.9	3.9	3.1
K: Financial & insurance activities	2.2	1.8	5.8	2.2
R: Arts, entertainment & recreation	0.5	2	1.2	2.4
S: Other service activities	1.2	2	1.9	2
T: Activities of households	0.1	-	0.05	-
Share of Tradeable Sectors	25	16.2	30.5	18.3
F: Construction	8.3	5.1	6.7	4.4
G: Wholesale & retail trade	11.7	19.2	11.3	15.3
H: Transportation & storage	7.6	9.1	4.3	6.1
I: Accommodation & food services	1.9	5.1	2.5	7.5
L: Real estate activities	15	1.8	12.3	1.7
(Owner-occupiers' imputed rental) ²¹	(10.1)		(9)	
(Excluding imputed rental)	(4.9)		(3.3)	
M: Professional, scientific & technical	2.4	4	5.8	8.2
N: Administrative & support services	6.8	10.1	5.3	8.7
O: Public administration & defence	3.6	2.3	4.8	4.2
P: Education	8.1	11.1	7.1	8.9
Q: Human health & social work	9.7	14.1	9.4	13.6
Total GVA in 2023 (£mn, 2022 prices)	5,091	99,000	160,747	2686000

Source: Employee sectors from Nomis, excludes farm-based agriculture, self-employed, government supported trainees and HM Forces. Regional GVA (balanced) by industry, West Midlands from ONS (2025e) & ONS (2025f).

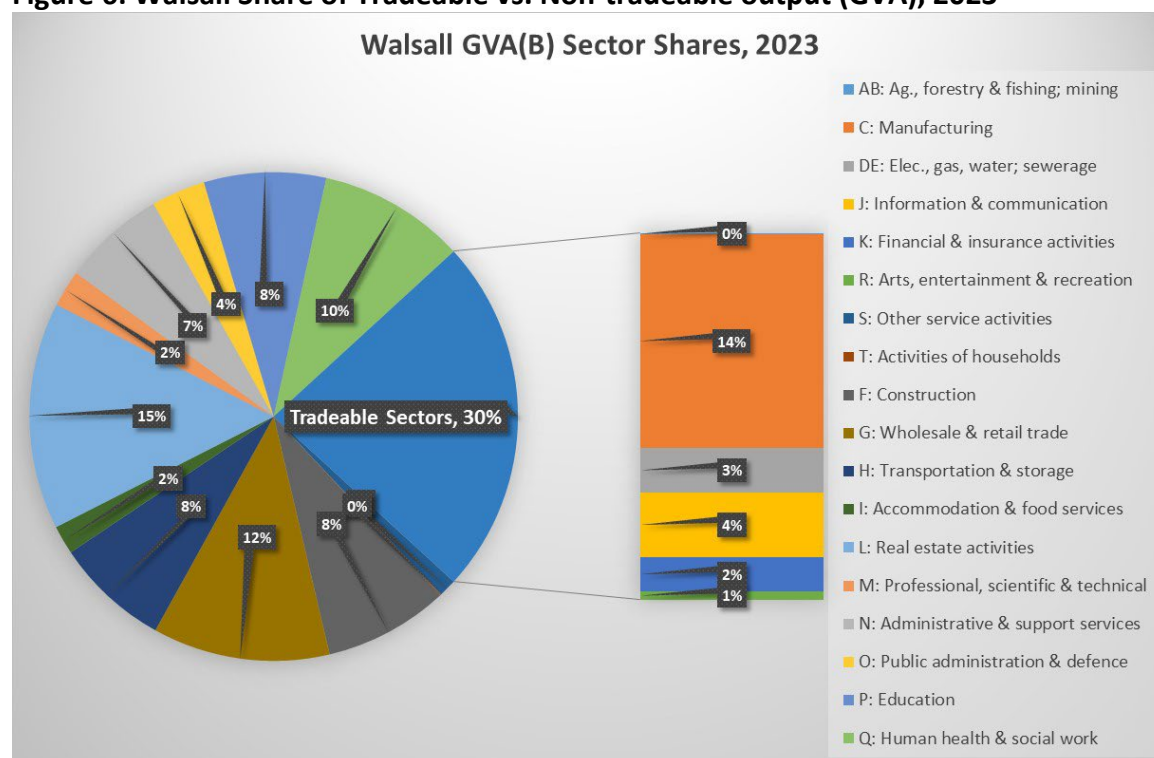
The OECD (2016) found that regions with larger tradeable sectors²² were able to catch up to the frontier regions quicker than those regions with lower shares that were diverging. Tradeable sectors bring money into the community, together with the wages of residents who commute to other parts of the region. We calculate the share of tradeable sectors for Walsall and the West Midlands. Table 5 presents the Gross Value Added share of the sectors in

²¹ ONS use imputed rental data to estimate the housing services that households consume when they do not rent their residence. Imputed rent is the rental price that an individual would pay for an asset they own. The methodology ONS use to calculate imputed rent uses the share of the different types of housing stock multiplied by median house prices of an area. In Table 5 a large share of sector L (real estate activities) is divided into the estimates for imputed rent and excluding it leaving the real estate sector a smaller share.

²² The OECD (2018) classifies tradeable sectors as the following: agriculture (A), industry (BCDE), information and communications (J), financial and insurance activities (K) and other services (RSTU). The remaining sectors are then classed as non-tradeable. The OECD defines tradeable sectors as “those that produce goods and services that can be traded across regions and international borders”. Firms can operate in sectors that are tradeable, although they may not actually engage in trade, but they are exposed to competition from abroad. See Chapter 2, page 59 in OECD (2018).

Walsall, along with employees (from Nomis²³) and compared to the West Midlands. Walsall has 25% share of GVA in tradeable sectors, compared to the West Midlands share of 30.5%. Figure 6 presents a pie chart for Walsall's sector shares of GVA, with the largest share of value in tradeable sectors from manufacturing at 14%.

Figure 6: Walsall Share of Tradeable vs. Non-tradeable output (GVA), 2023



Source: Regional GVA (balanced) by industry, for Walsall from ONS (2025e).

In Table 5 we see that manufacturing across all sub-sectors accounts for 12.1% share of employment in Walsall, with 13.7% share of GVA. The largest sector of employment is wholesale and retail trade at 19.2%, this contributes 11.7% to GVA. The second largest employment sector is human health at 14.2%, this contributes 9.7% of GVA.

4. Capital Variables

We compare Walsall with the 6 other local authorities in the West Midlands Combined Authority area. The data tool is calculated with the method detailed in Silva-Ruiz et al (2026) for the capitals of physical, social, financial, human, intangible and natural in the following tables. The indicator data for 361 UK local authority districts is from the ONS (2025c) and The Data City. The variables are grouped into capitals and the strength of the capitals is assessed by ranking all UK local authorities.

²³ <https://www.nomisweb.co.uk/reports/lmp/la/1946157191/report.aspx?town=Walsall>

Experimental Data Tool

In Table 6 we present the physical capital indicators in the experimental data tool for Walsall and the other local authorities in West Midlands Combined Authority (see Silva-Ruiz et al, 2026 for the sources of variables). We present five indicators to represent physical capital including: 2024 median house prices, 2023 electricity consumption, 2024 gigabit capable broadband coverage, 2023 resident population density and 2023 access to amenities indicator with the number of supermarkets per 10,000 of population. We compare the authorities to the West Midlands (across all 30 local authorities) and UK median. Walsall has lower house prices, electricity consumption and access to supermarkets per 10,000 of the population than the West Midlands median. Walsall has higher broadband availability and population density than the West Midlands median.

Table 6: Physical Capital Indicators in the West Midlands Combined Authority

Local Authority	Median House Prices (£), 2024	Electricity Consumption (kwh/meter), 2023	Broadband availability (Gb), 2024	Population Density (resident/ km sqrd), 2023	Supermarkets (per 10,000 population), 2023	UK Rank
Walsall	224,369	3277.5	90.4	2800	2.04	152
Birmingham	240,232	3332.0	92.9	4370	1.83	101
Coventry	236,636	3096.7	96.9	3642	1.88	125
Dudley	238,429	3148.8	93.3	3351	2.53	122
Sandwell	210,440	3121.2	90.9	4088	1.73	158
Solihull	363,977	3489.5	93.3	1232	2.54	79
Wolverhampton	208,922	3254.8	96.4	3969	2.05	115
WM Median	249,994	3333.1	81.65	570	2.58	
UK Median	277,547	3315.9	83.7	575	2.71	
Productivity Correlation:						
WM (N=30)	0.58	0.36	-0.04	-0.13	0.25	
UK (N=361)	0.51	0.19	0.13	0.25	0.22	

Source: see Silva-Ruiz et al (2026) for method and variable sources.

In Table 6 the rankings for the authority's physical capital assets are in the right-hand column. Walsall ranks 152/361 and is in the top half of UK's local authority's ranking. The highest ranking WMCA local authorities in the physical capital index are Solihull and Birmingham which are in the top 30% of the index. Table 6 also shows the cross-correlation coefficient for 2023 productivity (GVA per hour) with the indicators in the last two rows for the West Midlands 30 local authorities and then for all UK local authorities. The highest correlation for the UK is a 0.51 correlation of productivity with median house prices, this is also the highest correlation in the West Midlands at 0.58, so there is an association between authorities with higher productivity and higher median house prices.

Table 7: Social Capital Indicators in the West Midlands Combined Authority

Local Authority	Children in relative poverty (%), 2023	Population Change (%), 2011-2021	Museums (per 100,000 population), 2021	ONS well-being survey 2022/23			UK Rank
				Anxiety	Happiness	Life satisfaction	
Walsall	35.3	5.2	1.41	3.36	7.29	7.35	325
Birmingham	40.8	6.3	2.01	3.43	7.18	7.24	351
Coventry	27.7	8.2	1.74	3.31	7.45	7.35	247
Dudley	28.7	3.3	1.85	3.01	7.49	7.44	249
Sandwell	36.7	9.9	2.05	2.82	7.52	7.41	211
Solihull	15.3	4.4	1.39	3.02	7.6	7.6	127
Wolverhampton	34.9	5.4	1.9	3.11	7.49	7.25	289
WM Median	21.25	5.3	3.55	3.2	7.51	7.49	
UK Median	18	5.2	4.02	3.25	7.42	7.48	
Productivity Correlation:							
WM (N=30)	-0.44	0.39	-0.01	0.16	0.06	0.03	
UK (N=361)	-0.36	0.21	0.08	0.17	-0.09	-0.02	

The social capital experimental data tool indicators are presented in Table 7. These include the 2023 share of children living in relative poverty²⁴, the population change between the 2011 and 2021 Censuses, an indicator of culture with the museums per 100,000 population (from 2021) and then results from the ONS local authority well-being survey for anxiety (inverse of 10-anxiety is used), happiness and life satisfaction.

In Table 7 Walsall scores in the bottom 10% of the social capital index. The highest scoring local authority in WMCA is Solihull in the top 40% for social capital. The indicator of concern for Walsall is the high share of children in relative poverty (35.3%), well above the West Midlands median (child poverty is negatively correlated with productivity in the West Midlands). As noted earlier Walsall is the 27th ranked local authority in the Index of Multiple Deprivation for England. Population change between 2011 and 2021 is 5.2% in Walsall just below than the 5.3% for the West Midlands median. All other measures in Walsall are worse than the West Midlands median. In the well-being survey, anxiety is higher in Walsall than for the West Midlands median, happiness and life satisfaction are lower than the median. For more on social capital see Haldane and Halpern (2025).

The data tool for financial capital in Table 8 includes: prosperity in 2022 (GDP per capita), 2022 Gross Disposable Household Income per head (GDHlph) and the 2023 gross median weekly pay of all residents (working part and full-time) in the borough (this differs from the full-time worker wages shown in the scorecard Table 2). The share of new businesses created

²⁴ This is the percentage of children under 16 who are living in a relative low income household. In these statistics, a family must have claimed Child Benefit and at least one other household benefit (Universal Credit, tax credits or Housing Benefit) to be considered as low income. The inverse of this measure is used.

in 2023²⁵ and the 2023 rate of high growth businesses²⁶ per 10,000 population. In Table 8, we see that Walsall is in the second half of the ranking for financial capital with ranking 204/361. Walsall has lower measures for most of the indicators than the West Midlands median, apart from the new business starts with a rate of 13.7% in 2023 (higher than the 10.3% median for the West Midlands). Solihull is in the top 20% of this financial indicator with all indicators higher than the WM and UK medians. The West Midlands authorities show high correlation of productivity with prosperity and wages. There is negative correlation between productivity and business births in the West Midlands, so those with higher productivity generally have lower rates of business start-ups. Recent research by academics at Aston University has shown that social capital may play a role in helping less ambitious firms start up, particularly during a crisis, (see Mickiewicz, et al, 2025). Their study period takes in the beginning of the covid pandemic between 2018-2021.

Table 8: Financial Capital Indicators in West Midlands Combined Authority

Local Authority	Prosperity (GDP per capita, £), 2022	Income per head (GDHlph, £), 2022	Gross Median Weekly Pay (£), 2023	Businesses births (%), 2023	High growth Business (%), 2023	UK Rank
Walsall	20,665	16,853	561.8	13.7	3.1	204
Birmingham	30,552	16,950	565.4	14.2	3.8	145
Coventry	33,117	17,772	568.2	13.5	3.5	176
Dudley	21,145	17,644	575.3	10.3	3.2	304
Sandwell	22,691	15,305	543.4	13.4	4.0	194
Solihull	48,712	24,228	655.4	12.1	4.5	71
Wolverhampton	25,595	16,987	568.9	12.6	3.0	252
WM Median	29,347	20,507.5	586.35	10.3	3.9	
UK Median	29,380	21,359	603.8	10.4	4.2	
Productivity Correlation:						
WM (N=30)	0.76	0.46	0.49	-0.05	0.27	
UK (N=361)	0.27	0.48	0.57	0.00	0.33	

Human capital indicators for the data tool are shown in Table 9. The variables included are the 2023 employment rate, 2023 share of the population with level 3 skills and above, the dependency ratio²⁷ in 2023, 2018-20 healthy life expectancy (male and female age in years combined) and the 2023 proportion on adults who smoke (the inverse of this measure is used in the tool so 100-CigSmokers). Walsall is in the bottom 20% of the human capital index with all indicators worse than the West Midlands median. Solihull is in the top 20% for human

²⁵ This is the share of newly registered businesses out of the total active business population.

²⁶ High growth businesses have an average growth in employment of greater than 20% per year over a three-year period. This variable shows the share of high growth businesses as a percentage of active businesses with 10 or more employees.

²⁷ The dependency ratio is the non-working age population to working age population (16-64 years).

capital. There is a positive correlation between productivity and level 3 and above skills of 0.5 for the West Midlands local authorities, above the UK correlation coefficient of 0.28.

Table 9: Human Capital Indicators in the West Midlands Combined Authority

Local Authority	Employment Rate (%) in 2023	Skills (RQF level 3+) in 2023	Dependency Ratio in 2023	Healthy Life Expectancy, 2018-20	Cigarette Smokers (%) in 2023	UK Rank
Walsall	73.5	58.9	0.64	58.7	14.8	319
Birmingham	65.9	60.8	0.54	59.7	14.5	312
Coventry	71.9	68.2	0.52	62.5	10.7	173
Dudley	79.7	62.3	0.65	62.8	9.7	185
Sandwell	69.8	47.9	0.58	61.0	17.7	347
Solihull	77.6	67.7	0.69	66.5	8.7	122
Wolverhampton	70.3	60.3	0.6	59.7	14.7	308
WM Median	80.05	65.5	0.63	62.7	11.4	
UK Median	76.5	66.7	0.63	63.4	11.4	
Productivity Correlation:						
WM (N=30)	0.07	0.5	-0.13	0.32	-0.14	
UK (N=361)	0.18	0.28	-0.34	0.31	-0.25	

Intangible capital indicators for the data tool are shown in Table 10. The variables include two variables from the Data City²⁸ to represent the concentrations of innovative and digital firms in the local authority areas. The Data City train its machine learning technology using the website text of companies which spend heavily on research and development, producing a language model that identifies the shared language patterns across all companies that The Data City has collected information on²⁹. For example, with the innovation score, this language model includes keywords like “research,” “cutting-edge,” and “design thinking” but also other less common keywords, such as “apprenticeship” or “training.” The model is then used to score all the Data City companies’ website text, identifying those that use the same language. A location quotient is calculated comparing the share of companies with innovation attributes to the full sample of companies, then compared to the UK level.

The digitalisation location quotient also follows a location quotient approach, where the Data City calculate the concentration of firms working on digital activities in each local authority compared to the UK’s average. They obtain the total number of companies working in digital activities using the Real-Time Industrial Classification (RTIC), which is The Data City’s machine learning-based company classification methodology. RTICs are output datasets that group all companies that describe their activity similarly. The model is trained with a set of company websites representative of the digital sectors. Similar to the Innovation Score calculation

²⁸ These variables are discussed in more detail in the TPI Productivity Lab blog: <https://www.productivity.ac.uk/the-productivity-lab/the-digitalisation-and-prevalence-of-innovative-practices-in-firms-in-mayoral-combined-authorities/>

²⁹ <https://thedatacity.com/blog/introducing-our-company-innovation-measure/>

process, the algorithm creates a language model that defines the shared linguistics by the company websites and uses it to score the rest of the company websites against it. So, for example, all companies developing Artificial Intelligence technologies can be grouped in a dataset. The Data City has several RTICs representing digital sectors³⁰.

Table 10: Intangible Capital Indicators in the West Midlands Combined Authority

Local Authority	Innovation LQ	Digital LQ	Patents/Firms (1000)	InnovateUK Grants/Firms (1000)	UK Rank
Walsall	2.27	0.69	3.79	1.58	320
Birmingham	3.77	1.8	2.05	2.09	179
Coventry	3.79	1.46	3.03	3.42	148
Dudley	2.95	1.05	4.45	2.11	208
Sandwell	2.06	0.79	2.93	1.26	347
Solihull	4.25	2	4.62	3.35	59
Wolverhampton	2.82	1.92	1.94	1.21	255
WM Median	2.98	1.29	3.85	2.65	
UK Median	3.21	1.33	3.27	2.86	
Productivity Correlation:					
WM (N=30)	0.77	0.19	0.11	0.46	
UK (N=361)	0.51	0.36	0.13	0.11	

The remaining two indicators in the intangible capital index are from Beauhurst's (2024) Local Growth Index. These include the number of registered patents to firms in an area and the number of firms receiving InnovateUK grants (for data up to 2023). Both of these indicators are then divided by the number of registered companies in the local authority.

Walsall is in the bottom 20% of the intangible capital index in Table 10, ranking 320/361. All the indicators are below the West Midlands median, but the patents (by 1000 firms) are above the UK median so there is promise for future developments.

The indicators we present in Table 11 presents the experimental data tool of natural capital. The indicators are from the Department from Energy Security and Net Zero (DESNZ, 2024). Table 11 shows the territorial greenhouse gas emission estimates for the total of each sector in 2022. The greenhouse gas emissions are measured in kilo tonnes of carbon dioxide equivalent (kt CO₂e). The category for Land Use, Land-Use Change and Forestry (LULUCF) covers the net emissions from land classes including: forest land; cropland; grassland; wetlands; settlements, other land and the pool of harvested wood products (when the emissions are negative they are being taken out of the atmosphere). The DESNZ (2024) report

³⁰ The RTICs selected are: Artificial Intelligence, Cyber, Cryptocurrencies Economy, Data Intermediaries, Design and Modelling Technologies, Digital Creative Industries, E-commerce, Fintech, Gaming, Immersive Technologies, Internet of Things, SaaS, Software Development, Streaming Economy.

presents the emissions per capita and per square kilometre. To create the index each of the above categories are divided by land area in square kilometres before standardising.

Table 11: Natural Capital Indicators in the West Midlands Combined Authority

Local Authority	Industry	Commercial	Public Sector	Domestic	Transport	LULUCF Net Emissions	Agriculture	Waste	UK Rank
Walsall	152.3	77.7	34.9	323.8	384.6	32.6	6.7	48.3	305
Birmingham	591.0	557.4	263.4	1251.2	1335.4	21.7	7.8	288.5	330
Coventry	149.4	146.9	97.3	374.3	412.5	2.5	8.3	101.3	312
Dudley	146.9	88.4	45.5	377.9	383.6	3.4	3.9	68.2	281
Sandwell	235.4	150.6	36.2	363.2	486.8	5.3	1.1	63.0	321
Solihull	72.5	182.6	31.5	283.6	537.8	-1.2	28.3	37.8	218
Wolverhampton	137.7	113.1	48.9	306.4	269.6	3.7	2.8	92.1	316
WM Median	112.3	64.7	20.0	163.3	383.7	-1.6	48.5	43.4	
UK Median	75.8	66.6	23.2	188.3	263.0	0.2	44.8	38.1	
Prod. Corr.:									
WM (N=30)	-0.15	-0.05	-0.04	-0.13	0.01	-0.12	-0.08	-0.07	
UK (N=361)	0.1	0.35	0.36	0.24	0.36	-0.1	-0.19	0.23	

Source: DESNZ (2024). Greenhouse gas emission estimates in kt CO₂e in 2022.

Walsall is in the bottom 20% of the natural capital index. Walsall has emissions higher than the West Midlands median for most categories (apart from agriculture). According to the ONS (2021) Walsall has 7% of woodland coverage. Noting that this tool is experimental, DESNZ present the emissions data divided by the population of each local authority. If we standardised by population in the index it would result in a higher ranking for Walsall of 49/361, in the top 20%.

Walsall is part of the Black Country UNESCO Global Geopark³¹, which was designated in 2020. The geopark recognizes the area's geological and cultural heritage, including sites in Walsall of the Arboretum and Barr Beacon a local nature reserve with historical significance, including its use as a beacon site during the Elizabethan era. The geopark designation aims to promote and protect the area's unique geological and cultural assets, encouraging tourism and showcasing the region's rich history. Access to greenspace is deemed essential for mental health and physical activity. Further use of these natural assets could help with preventative health measures.

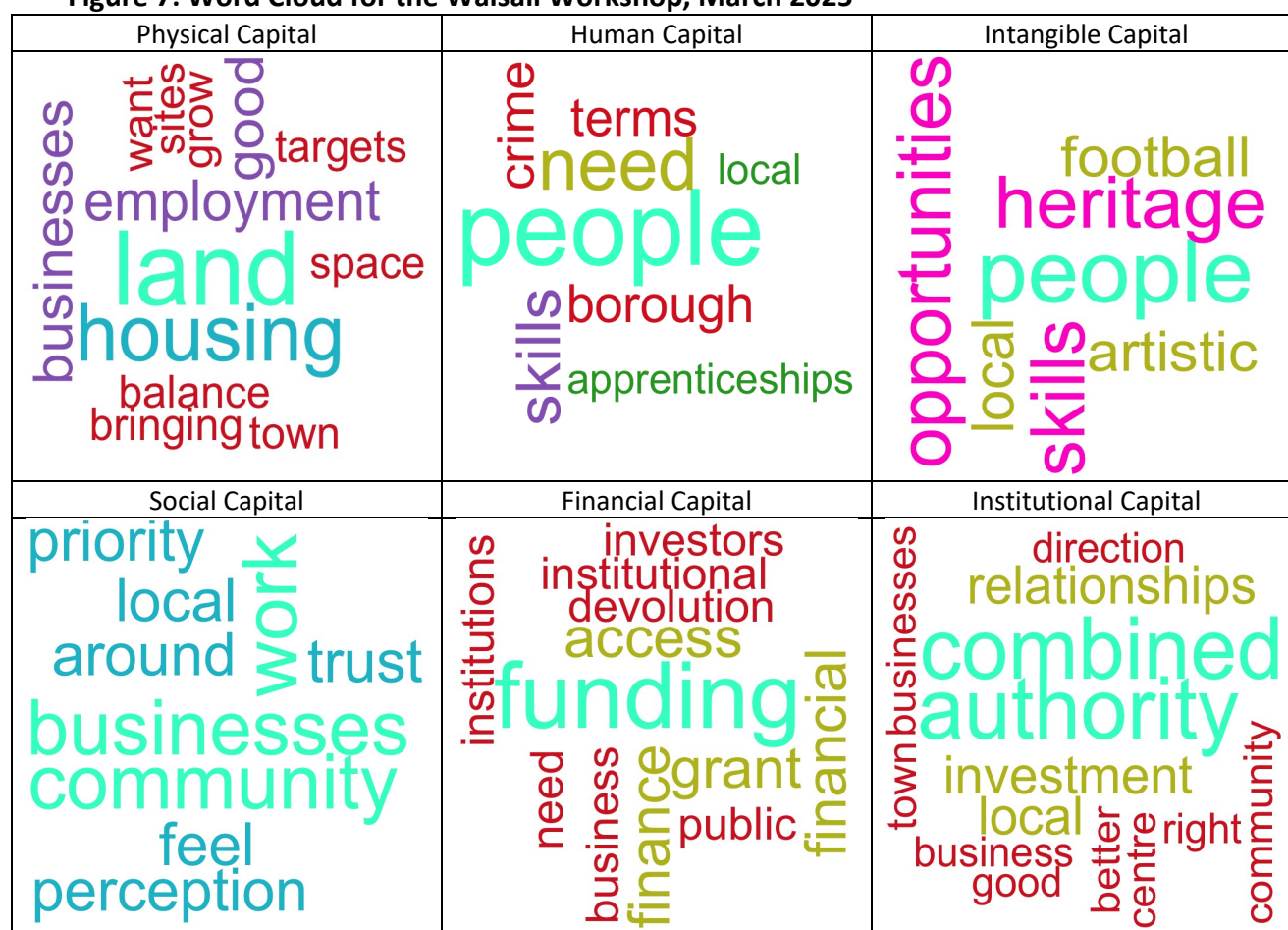
When combining the scores across the 6 capitals in our data tool Walsall scores 346/ 361 of the UK local authorities, in the bottom 10%. The figure at the front of the report reflects the ranking in traffic light colour coding. The local perceptions differ slightly from the data tool measures and these are derived from our qualitative analysis, discussed in the next section.

³¹ <https://go.walsall.gov.uk/parks-and-green-spaces/conservation-and-the-environment/black-country-unesco-global-geopark>

5. Qualitative Analysis

On 20th March 2025, the Investment in Productive Places Campaign (IPPC) project team held a workshop with various public and private stakeholders in Walsall to discuss each of the seven capitals in a group setting. Stakeholders were invited by Walsall Council. These members were selected to be representative of each of the capital asset areas as detailed in the introduction of this report. Following a brief introduction and baseline survey of all members present, the discussion on each individual capital area was limited to 10 minutes. The summary of each of those 10-minute discussions is displayed in the word clouds in the Figure 7 below.

Figure 7: Word Cloud for the Walsall Workshop, March 2025

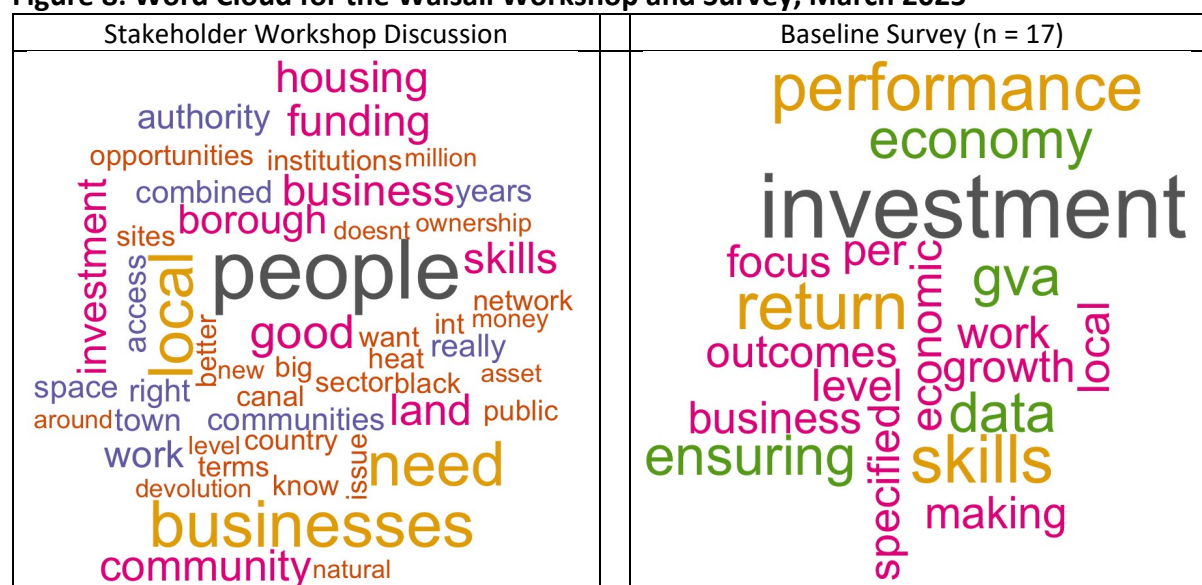


In Figure 7, regarding the participants' discussion of physical capital, the main focus was on land use, particularly housing, employment and businesses. There is a clear constraint of available space, with calls to balance the interests of residents, through housing targets, and businesses to promote development for the town and prospects for employment creation. Similarly, on human capital, these community needs are also reflected. In particular, the conversation here extended to the practical skills people and businesses need and what can be achieved through training schemes, such as apprenticeships.

On intangible capital in Figure 7, the stakeholders focused on the heritage assets in the local area, such as the canals and waterways. There was also a discussion of the strengths of local sport, particularly football, and the need to cherish this, as well as developing the cultural and artistic capacity of the area, to boost inclusive opportunities for creatives. Indeed, this leads us to the discussion of trust among the community and some of the negative perceptions held by some residents, and externally. Respondents also discussed the issue of crime rates and the impact on the image of the local area. This is a clear priority for the stakeholders, to work to build trust across the local area and the communities within.

The last two capital areas, financial and institutional in Figure 7, were discussed in a more interconnected way; with a key emphasis on access to funding and the role of institutions. Specifically, this covered the multilevel governance structures of the region, and how to best engage with these devolved structures, versus other local authorities and national Government agencies. The discussion explored how the relationships with the local area and these institutions often mediated and inhibited access to funding, finance, project grants and business investment. In this regard, there was a sense of an inequality of the direction of these funding streams and investments away from the area, and how to best to reorient these processes and relationships.

Figure 8: Word Cloud for the Walsall Workshop and Survey, March 2025



The summaries of the discussions overall and from the baseline survey prior to the session are shown in Figure 8. From these two datasets, we can see that the discussion is much more focused on community and businesses, their needs and concerns when discussed as a group. The need to attract capital investment and funding to improve spaces in the region to generate growth is a primary concern. On the right, when we ask several questions pertaining to participants' understanding of productivity, here the discussion becomes more related to investment, skills and performance, and mobilising the resources of the local region for

greater productivity. This is with a view to improving the value of individual, firm-level and economic outcomes, as well as life satisfaction and wellbeing.

We followed up the workshops with interviews on each of the capitals. The qualitative analysis highlights the multi-faceted nature of driving productivity and prosperity in Walsall, requiring collaboration across sectors, flexibility to adapt, and a long-term, holistic approach that addresses both economic and social factors.

The following section outlines key insights drawn from qualitative research, highlighting the structural, social, and economic factors that influence Walsall's development trajectory. These themes reflect the broad perspectives of local stakeholders and provide insights on the enablers driving progress and the persistent challenges that require targeted policy intervention.

Strengthen Strategic Alignment

There is a clear recognition across regional stakeholders of the necessity for a cohesive and integrated strategy that aligns regional and local priorities. Walsall is actively working to refresh its economic strategy, reflecting a commitment to adapt and align with the WMCA's regional growth plans. This initiative shows a proactive approach to improving economic and social outcomes. There are several examples of stakeholders actively engaging with their communities and the Local Authority, including the community teams and further education institutions. High levels of stakeholder involvement in strategic planning indicate a strong commitment to making decisions based on evidence. By basing their strategies on data, Walsall is better equipped to tackle current economic and social challenges.

Despite this, there are some challenges in creating an integrated strategy. Both regional and local plans need to be aligned to reduce fragmentation and ensure clarity of priorities. There is an opportunity for the Combined Authority to provide strong guidance to local authorities. By enhancing leadership and direction, efforts can be coordinated to effectively identify key sectors for targeted development, leading to growth and progress for the community and economy. At times, there appears to be some siloed institutional working which presents communication barriers that hinder strategic alignment. Promoting collaboration across sectors and institutions will be vital in creating a unified approach to strategic planning.

The evolving landscape of national policies and funding poses challenges for the effective implementation of integrated strategies. Understandably, this in turn can lead to a tendency to prioritise "quick wins" over long-term economic strategies. However, aligning immediate decisions with broader economic and social objectives is essential.

Walsall appears to be taking positive steps towards enhancing its strategic planning through a renewed focus on integration and evidence-based approaches. Addressing the fragmentation of plans, fostering a long-term strategic perspective, and enhancing collaboration among institutions will be critical for achieving the desired economic objectives. Ongoing initiatives provide a positive outlook, suggesting that Walsall is on the right path

towards developing a more cohesive and effective strategic framework. Developing adaptive planning frameworks that can respond to policy changes will strengthen strategic resilience.

Building a vibrant community for living, working and leisure

Walsall faces challenges in retaining skilled workers due to a lack of high-value job opportunities and the prevalence of low-paid work. Educational institutions, while strategically focused on addressing skill gaps, are challenged by funding inflexibility and policy instability. There are positive contributions from regeneration projects and new industries that create local employment and training opportunities, and the potential for greater devolution in adult education offers provides new opportunities for skills provision.

Limited local job opportunities, coupled with the need to improve the quality of housing and a town centre which needs regeneration, are given as reasons that many residential and employment opportunities are sought in surrounding areas such as Birmingham.

Conflicting priorities between national objectives and local issues make long-term planning difficult, particularly in areas requiring sustained coordination such as skills development and social development. To overcome these challenges, educational and social objectives need to be integrated into broader strategic development plans and foster collaborative ecosystems between colleges, councils, and employers.

Despite these challenges, there are several enabling factors and positive contributions to the training, jobs and skills landscape. The college's strategic planning is informed by a robust process that includes local labour market intelligence, ensuring alignment with local, regional and national priorities. There are examples of housing regeneration projects that as well as creating new housing, contribute directly to local job creation and skill development by generating local economic activity through trades, subcontractors, and employment/training sessions. The emergence of new industries in Walsall is expected to create skilled jobs during construction and operation, indicating a potential for higher-value employment.

Cross-sector partnerships among educational institutions, local government, employers, and community leaders can align education and training with emerging industries and labour market needs, creating both entry-level and high-value job opportunities. Aligning regeneration projects with skills and training initiatives enables investments in housing and infrastructure to create direct job and apprenticeship opportunities for residents. Effective collaboration among partners is essential to address mutual needs and overcome barriers.

Simultaneous Social and Economic Development

The qualitative analysis highlights an important interplay in Walsall's economic and social development, with a particular focus on how collaboration, data use, and regeneration efforts are strengths, whilst also presenting persistent challenges. There are examples of strong partnerships, effective use of granular data, and regeneration projects that can drive progress, but the challenges are significant and include poverty, workforce retention issues, policy instability, and bureaucratic barriers.

Despite the challenges faced by Walsall, positive efforts are being made to promote social development. Key initiatives include strong collaboration with the voluntary community sector, the use of targeted data for interventions, brownfield regeneration projects that provide economic benefits and community cohesion, and a commitment to create a strong narrative. These factors collectively contribute to improving social well-being and creating skilled job opportunities.

6. Conclusions

Walsall's productivity level is below both the West Midlands and UK averages, but its long-term growth rate has outpaced the regional average, suggesting it is catching up. Key barriers to productivity include fragmented governance, low investment in infrastructure, high levels of deprivation (especially child poverty), poor health outcomes, and weak human, social, intangible and natural capital. However, strengths include strong physical capital (good transport links), financial capital (high business start-up rates), and a rich industrial (specialisms in the leather and lock industries) and natural heritage (UNESCO Geopark status), which offer opportunities for regeneration and eco-tourism.

To improve productivity, we recommend a place-based investment strategy across seven types of capital: physical, human, social, financial, institutional, intangible, and natural. Key actions include enhancing strategic planning and cross-sector collaboration, improving adult education and vocational training, investing in preventative health and mental health services, supporting SMEs and innovation hubs, and promoting green infrastructure. The report highlights the importance of aligning local and regional strategies, using granular data for targeted interventions, and fostering partnerships among education providers, businesses, and community organisations. A holistic, long-term approach that integrates social and economic development is essential for Walsall to overcome its challenges and unlock its full productivity potential.

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Appendix A1: Commuter Flows from Census 2021

Table A1: Walsall Workplace and Residents Flows, Census 2021

Workers	Walsall	Birmingham	Sandwell	Wolverhampton
People working in LA	107,815	463,148	133,854	105,749
Lived and worked in LA	76,385 (70.8%)	355,671 (76.8%)	87,163 (65.1%)	74,003 (70%)
Travelled from another LA	31,430 (29.2%)	107,477 (23.2%)	46,691 (34.9%)	31,746 (30%)
Most popular areas commuted from	Sandwell (6,652) Wolverhampton (6,525) Birmingham (4,815)	Sandwell (22,798) Solihull (16,859) Walsall (12,097)	Dudley (13,296) Birmingham (11,477) Walsall (7,702)	Dudley (6,289) Walsall (6,256) South Staffordshire (5,749)
Residents	Walsall	Birmingham	Sandwell	Wolverhampton
Total Population	284,392	1,143,285	341,895	264,260
Working people living in the LA	118,543	442,409	141,059	111,315
People who worked from home or no fixed place of work	41,002 (34.6%)	176,115 (39.8%)	47,818 (33.9%)	36,972 (33.2%)
Workers travelled within the LA	35,383 (29.8%)	179,556 (40.6%)	39,345 (27.9%)	37,031 (33.3%)
Travelled to another area	42,158 (35.6%)	86,738 (19.6%)	53,896 (38.2%)	37,312 (33.5%)
Most popular areas commuted to	Birmingham (12,097) Sandwell (7,702) Wolverhampton (6,256)	Solihull (23,181) Sandwell (11,477) North Warwickshire (7,434)	Birmingham (22,798) Dudley (9,760) Walsall (6,652)	Walsall (6,525) Sandwell (5,394) South Staffordshire (5,210)

Source: ONS, <https://www.ons.gov.uk/visualisations/censusorigindestination/>, Census Origin Destination Visualisation.