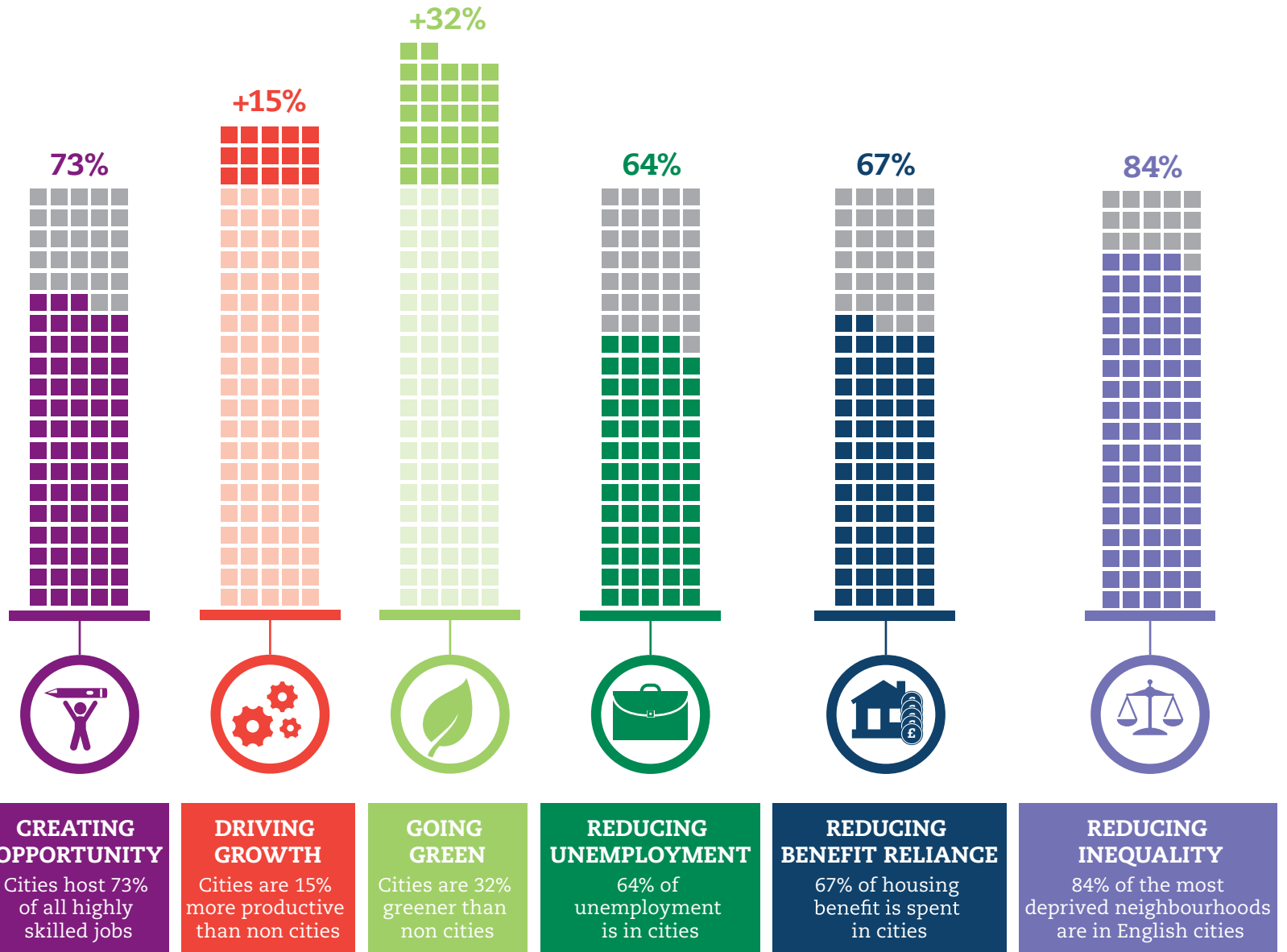


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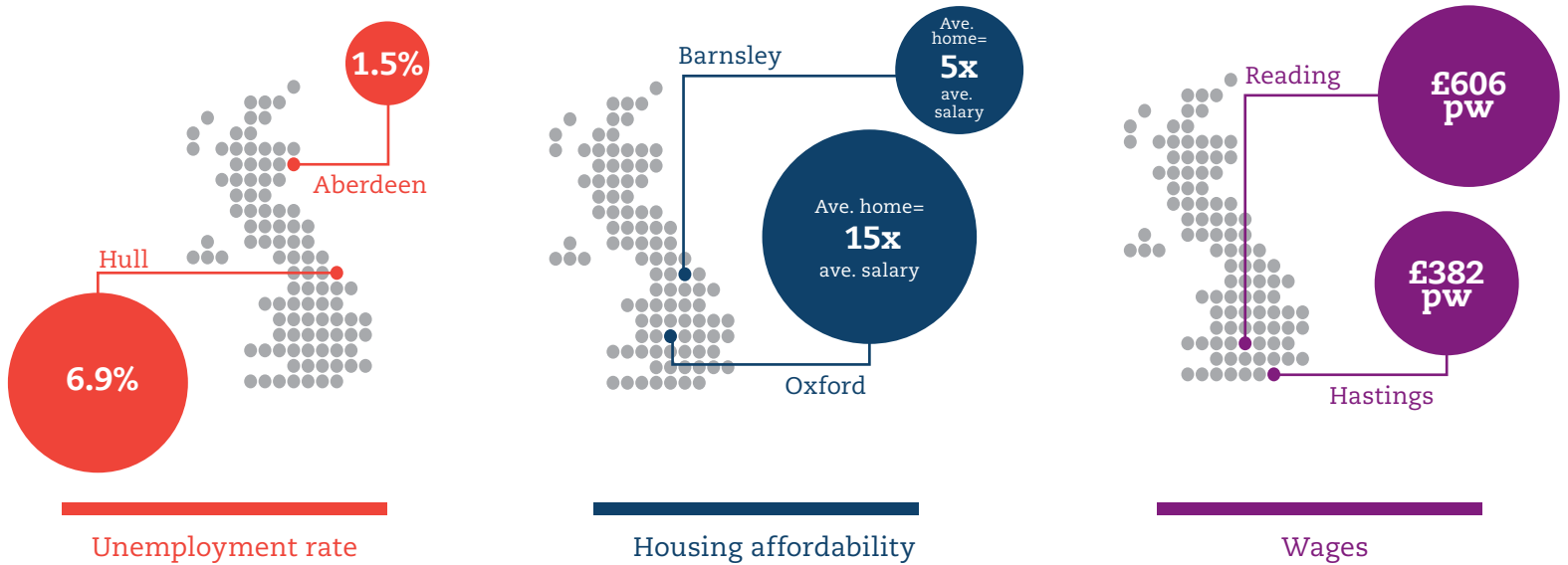


It's time to Think Cities, the UK's future prosperity depends on them

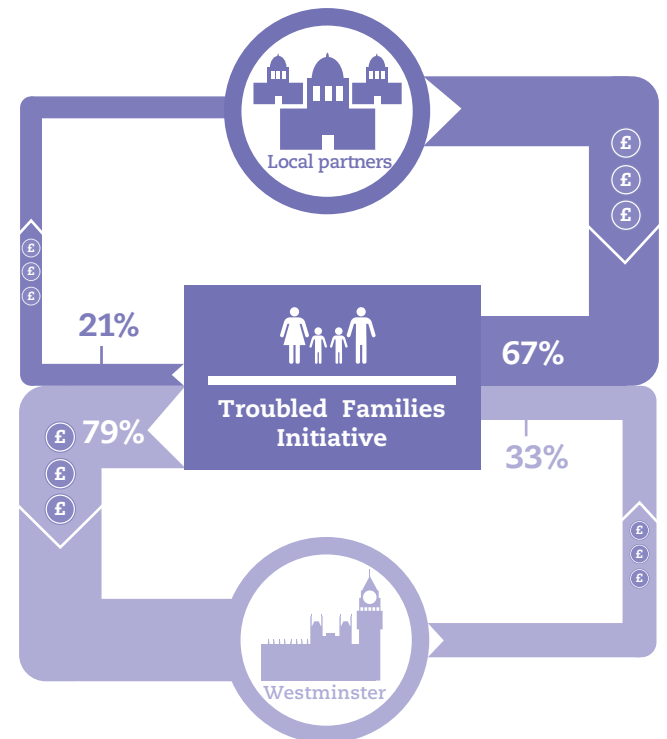
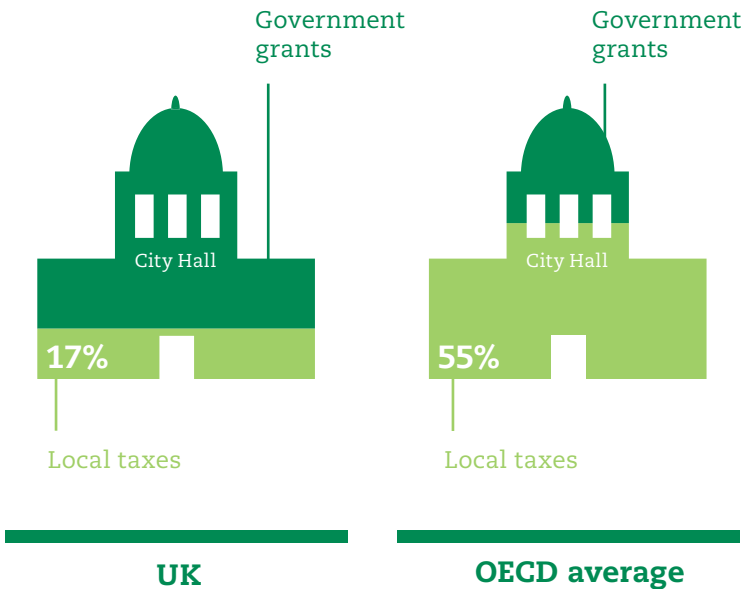


If we want better jobs, more housing and to improve living standards, cities must be at the heart of policy

Different cities have different strengths and different needs



But despite their differences, cities have little control over their money - what they get and how to spend it



Source: Blöchliger H & Petzold O (2009) *Taxes of Grants: what revenue source for sub-central governments?* OECD Economics Department Working Paper, No. 706. France: OECD Publishing

“Centre for Cities and their annual Cities Outlook have consistently presented great research in a uniquely accessible way, combining analysis and new ideas.

This 2014 report highlights just how important our cities are as engines of economic growth, but also rightly draws attention to the persistent and widening inequalities between different parts of the country and the difficulties that many places and people face.

If we are going to see a sustainable and strong economic recovery which is felt by every part of the nation, central government needs to pass far more power, resources and responsibility to local areas so they can build and shape their own future.”

Rt Hon Hilary Benn MP, Shadow Secretary of State for Communities and Local Government

“The evidence is overwhelming that cities are fundamental to driving economic growth and allow the UK to compete internationally. Over recent years, through City Deals and Community Budgets, we have begun with Government to create bespoke packages that provide the essential tools to do this. We are all operating in an economic climate that continues to be extremely difficult and we are facing severe financial challenges. But we cannot deliver jobs and growth without also delivering fundamental reform of the way that public services are delivered. We are now seeking to build on the earlier decentralisation to create a platform for fiscal self-reliance. This will see local authorities empowered to undertake their place-shaping role to create high quality places that attract and retain more productive people and businesses and reforming the way that public services are delivered to improve outcomes for our people.”

Sir Howard Bernstein, Chief Executive, Manchester City Council

“This latest instalment of *Cities Outlook* comes at an important time, as the economic recovery is underway. *Cities Outlook 2014* confirms what the Centre has long argued: Britain’s cities are engines of growth for the national economy.

Centre for Cities’ analysis shows that five of the Core Cities are among the top 10 private sector job creators since 2010. This reflects the huge economic power of England’s great cities, a power that is being enhanced by the City Deals that Government agreed with the Core Cities 18 months ago. And this process of shifting power from Whitehall to Cities continues apace, with a raft of City Deals agreed across a second wave of cities, and a Growth Deal for every part of England to be agreed in 2014.

This report makes clear that our cities need more control over their own future, and more freedom to build on their own strengths rather than be restricted by uniform national ways of doing things.”

Rt Hon Greg Clark MP, Minister for Cities

“As the UK’s economic recovery takes hold, *Cities Outlook 2014* shows that cities are playing a vital role in generating jobs and growth. Just as importantly, the report also illustrates the value of tailoring policies to the distinctive needs of different cities. That’s why we’ve been working to free cities from Whitehall control, with City Deals already supporting cities across the country to realise their potential, whether by giving them the freedom to plug skills gaps, set up local investment funds or unlock local development sites to deliver jobs.

Growth Deals are the next step in freeing up local areas to go for growth. I want cities to continue challenging themselves and Whitehall by coming up with ambitious and innovative proposals to help support jobs and growth. It continues to be an exciting time for cities and I welcome the important contribution that the Centre for Cities is making to the debate.”

Rt Hon Nick Clegg MP, Deputy Prime Minister

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All views expressed are those of Centre for Cities.

Cities Outlook 2014

With 16 months to the next general election all political parties are busy crafting their manifestos. From an economic prosperity and living standards perspective cities should be at the heart of the policies that make the cut. From a democratic and financial perspective cities should be at the heart of the debates about devolution (especially in the context of Scotland) and how to manage with reduced public spending.

The performance of cities is crucial to the performance of the UK economy. They account for 9 per cent of land use, but 54 per cent of population, 59 per cent of jobs and 61 per cent of output. But as well as being important in terms of scale, they are also important in terms of efficiency. Cities in the UK produce 15 per cent more output for every worker than non-city areas, while they produce 32 per cent fewer carbon dioxide emissions than non-city areas.

Cities matter to society because they are where so many people live. With austerity continuing well into the next Parliament, taking advantage of the scale and scope cities offer to change the way public services are delivered – and to engage with both the hardest to help and the most economically advantaged – will be vital to balancing the books.

But there is huge variation between our cities and, as this seventh edition of *Cities Outlook* shows, many cities lag behind the national average on a range of indicators. The focus of the next government, whichever political colour (or mix of colours) it may be, should be to increase the contribution that cities make to UK economic prosperity.

And it should do this by giving cities greater control over decisions affecting their economy, greater freedoms to tax, borrow and invest, and greater flexibility to tailor national policies to address the specific individual challenges that they face.

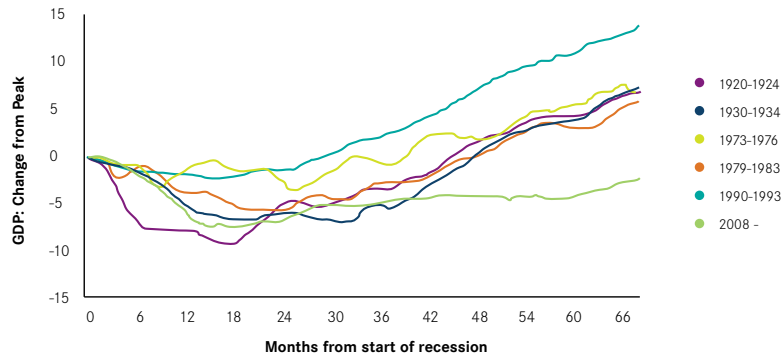
The economy

The good news is that the UK finally seems to be undergoing a sustained recovery from the deepest peacetime downturn in the last 100 years. The economy is now 5.6 per cent larger than it was in the third quarter of 2009, its lowest point during the downturn, and at last forecasts are being revised upwards after many years of them being revised downwards.

But while this is good news, the economy still has some way to go even to return to the size that it was at the beginning of 2008. As Figure 1 shows, economic output is still 2 per cent smaller than it was at its pre-downturn peak.

The performance of the labour market has been much stronger than economic output. In absolute numbers, there

Figure 1:
Economic recovery from recessions



Source: NIESR

are now 135,000 more people in employment than there were at the start of the downturn (although the employment rate is still 1 percentage point below its pre downturn peak). Total hours worked is also now higher than at the start of 2008.

Much of this jobs growth has occurred within cities. As Figure 2 shows, 96 per cent of net new private sector job creation in the national economy has occurred in cities.

However, while the recovery at a national level appears to be taking hold, this is not the case in every part of the country. Since 2010, 79 per cent of net private sector jobs growth has occurred in London. Meanwhile

Britain's next nine largest cities accounted for just 10 per cent of all net new private sector jobs created.

It's interesting to note that London has also seen an increase in public sector jobs over this time. This has been driven by increases in education and health.

Despite the national economy staging a recovery, many cities have seen their number of private sector jobs continue to fall. As Figure 3 shows, cities such as London, Edinburgh and Brighton have led the national recovery. But cities such as Blackpool, Glasgow and Northampton have continued to feel the impact of the downturn despite the improving fortunes of UK plc.

With cities driving global economic growth, this year's *Cities Outlook* suggests that the UK runs the risk of falling behind by relying too much on London for economic growth. London needs to be supported to continue to thrive but it is also important that businesses looking for other attributes in other locations (e.g. suitable premises, access to skilled workers, good transport connections and flexible approaches to planning) are attracted to Birmingham and Manchester as well as Barcelona and Munich.

This means the UK needs to do more to support more of its city economies to thrive and make the most of their strengths. Part of this is about investment in general economic drivers such as national infrastructure projects, reforms to planning, and skills.

But drivers of economic growth will vary according to individual city circumstances and it is important that cities can use their limited resources to invest in what their particular economy needs. The big barrier to this is that, despite the progress made recently with City Deals and Growth Deals, the UK lags behind on devolution of powers to cities too.

Box 1: Definition of the public and private sector

In this analysis, as in previous analysis by Centre for Cities, the public sector is defined as the Standard Industrial Classification (SIC) codes:

- 84: Public administration and defence
- 85: Education
- 86: Human health activities
- 87: Residential care activities

- 88: Social work activities without accommodation

This differs to the definition of the public sector by the Office for National Statistics. Our definition, as with all definitions, is imperfect. It does not include nationalised industries such as RBS, and counts private healthcare providers such as BUPA as public sector. However, we have continued to use our definition of the public sector for two main reasons.

Firstly, there is an issue of consistency using the ONS definition of public

sector. In the 2010 and 2011 data, further education corporations and sixth form colleges are classed as private sector entities, while in 2012 they are counted as public sector. Attempting to measure jobs growth on this definition would mean that the reclassification would appear as jobs growth in the public sector and a jobs loss in the private sector.

Secondly, the ONS definition counts other bodies, such as universities, as private sector; we count them as public sector.

Figure 2:

Contribution to national net private sector job creation, 2010-2012



Source: NOMIS 2013, Business Register of Employment Survey, 2010-2012 data

Figure 3:
Net private and public sector job creation

Rank	City	Private sector jobs change, 2010-12	Private sector jobs growth, 2010-12 (%)	Public sector jobs change, 2010-12	Public sector jobs growth, 2010-12 (%)
Top 10 cities for private sector job creation					
1	London	216,700	5.7	66,300	6.0
2	Edinburgh	23,100	11.0	-3,300	-3.5
3	Birmingham	15,400	2.2	-9,300	-3.0
4	Manchester	13,200	2.0	600	0.2
5	Liverpool	12,800	5.8	-5,400	-4.3
6	Nottingham	8,900	4.3	-6,400	-6.8
7	Brighton	6,400	6.6	-500	-1.2
8	Aberdeen	4,900	3.7	-1,100	-2.4
9	Leeds	4,200	1.4	-4,900	-4.4
10	Warrington	4,000	4.5	-900	-3.3
Bottom 10 cities for private sector job creation					
54	Hull	-3,300	-4.0	2,300	6.5
55	Mansfield	-3,600	-5.8	800	3.0
56	Southampton	-4,300	-3.4	900	1.8
57	Bradford	-4,800	-3.7	-2,900	-4.5
58	Doncaster	-5,300	-6.9	1,300	3.6
59	Blackpool	-5,900	-6.4	-1,900	-4.4
60	Northampton	-7,100	-7.2	-200	-0.7
61	Sheffield	-7,500	-3.2	2,700	2.4
62	Glasgow	-7,800	-2.1	-6,800	-4.1
63	Bristol	-13,900	-4.9	-500	-0.5

Source: NOMIS 2013, Business Register of Employment Survey, 2010-2012 data

Thinking cities and devolution

The UK continues to be one of the most centralised developed countries in the world: in 2009 local government raised just 17 per cent of its income from local taxation compared to the OECD average of 55 per cent.¹ This leaves cities with few levers to pull to tailor economic policy to their specific requirements.

In a year in which manifestos are finalised and debates about the Scottish referendum intensify, devolution and particularly the ‘English question’ are likely to develop into a key talking point of UK politics

in 2014. All parties have to give this question consideration if they want cities to make a larger contribution to the national economy.

Devolution, in different forms, has been a theme of the Coalition Government. But the conversation and progress in different parts of the UK has been variable.

While Scottish devolution has dominated political debate in recent months, in November the Government announced a package of additional powers to be passed down to the Welsh Assembly Government. Specifically, business rates will be devolved in full and the Assembly will

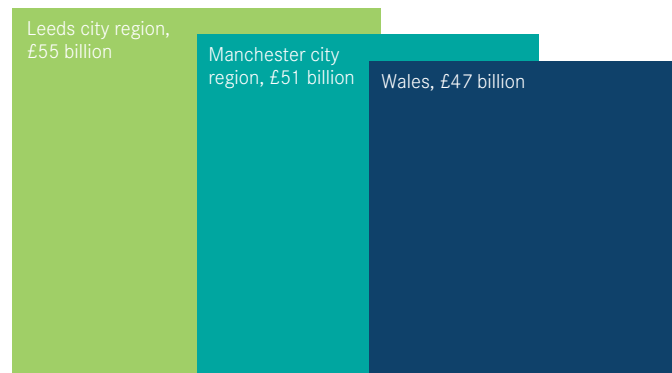
get some control over stamp duty and landfill tax, greater borrowing powers, and will be given permission to hold a referendum on the ability to vary the rate of income tax.

Scotland will of course have its own referendum on its independence from the UK in September 2014. And even if Scotland’s voters choose to remain in the Union, it is likely that it will receive a series of ‘sweeteners’ as its politicians use the referendum to leverage greater powers from Whitehall.

These developments have left many in England, particularly in those areas bordering Scotland, wondering what this means for them. Devolution to Wales means that an area with a smaller economy than the largest city regions now has greater power over its own destiny. As Figure 4 shows, both Greater Manchester and Greater Leeds individually produce more than the whole of the Welsh economy.

Policies including business rates reform and City Deals have started to shift the balance of power between central and local government, allowing cities to vary policies according to local circumstances. Growth Deals are the next stage, with the Government having explicitly

Figure 4:
The size of the Welsh economy relative to the Manchester and Leeds city regions



Source: ONS 2013, Workplace based GVA1,2 NUTS3 at current basic prices, 2012 data; NOMIS 2013, Business Register of Employment Survey, 2012 data; 2013, Mid-year population estimates, 2012 data; own calculations.

1. Blöchliger H & Petzold O (2009) *Taxes of Grants: what revenue source for sub-central governments?* OECD Economics Department Working Paper, No. 706. France: OECD Publishing

asked for new ways of working – on economic growth and public service reform. But, despite progress made, English cities are still behind Wales and Scotland when it comes to autonomy and powers.

This gives rise to the ‘English question’.

London is the one city in England that has already seen some devolution of power in recent years. While by international standards it has relatively few policy levers to pull, having a directly elected mayor sitting above 33 local authorities and power over its transport budget and its police force is significantly more than other English cities have.

At a time when Wales and Scotland are already getting greater devolution and London is asking for more, are we also going to see other English cities get the same powers as London?

Or does London’s runaway economic success mean that in essence it works as a city state and should be given more powers to make the most of its success, with City Deals and Growth Deals being the answer for other English cities?

In the context of economic recovery, the ‘English question’ and growing political and financial pressure for greater devolution, this year’s *Cities Outlook* considers the role that London plays in the wider UK economy. It looks at the extent to which it is a standalone engine of economic growth or a global city whose economy is strongly linked to other British cities. And it reviews what that should mean for discussions about powers and autonomy for cities around the country, not just in the manifestos but as part of a longer term conversation about the future of the UK economy.

Box 2: The use of Primary Urban Areas (PUAs)

The analysis undertaken in *Cities Outlook* compares cities’ Primary Urban Areas (PUAs) – a measure of the built-up areas of a city, rather than individual local authority districts.

A PUA is the city-level definition used in the Department for Communities and Local Government’s *State of the Cities* Report. It is useful as a consistent measure to compare cities across the country and we have used it since the first edition of *Cities Outlook* in 2008.

It is worth noting that, as is the case with almost every definition of geographic units, PUAs are imperfect and fit some areas better than others. Hull and Cambridge PUAs, for example, are slightly under-bounded. Some cities with substantial populations, such as Colchester, never made it into the PUA definition. And Manchester PUA is smaller than Greater Manchester, which also includes Rochdale, Bolton and Wigan PUAs.

PUA data only exists for English cities; for Welsh and Scottish cities we have used local authority data with the exception of tightly-bounded Glasgow, where we have defined the city as an aggregate of five Local Authorities: Glasgow City, West Dunbartonshire, East Dunbartonshire, East Renfrewshire and Renfrewshire. Belfast is defined as the aggregate of Belfast City, Carrickfergus, Castlereagh, Lisburn, Newtownabbey and North Down.

Note: The definition of Birkenhead throughout this report is Wirral Local Authority only. The 2009 reorganisation of local government combined Ellesmere Port & Neston with three other local authorities into Cheshire West and Chester, and many of the statistics used here are now reported for Cheshire West and Chester only.



02

Would UK cities be better off without London?

Would UK cities be better off without London?

London makes a large and growing contribution to the UK economy. It now accounts for around 19 per cent of jobs, 21 per cent of businesses and 25 per cent of economic output. And as shown in the previous chapter, the UK's tentative economic recovery has been one very much led by the capital.

London's rapid growth following the recession has prompted further debate about the role it plays in the UK economy and what this should mean for devolution. On one side of the debate people claim that London has become too dominant, stifling the ability of other cities to achieve success, and that the UK economy needs to be rebalanced away from the capital. On the other side there are commentators who say that London is critical for the country and should be given more devolution and investment to grow. Some commentators have even gone as far to suggest it should become its own city state.

As the quotes below show, this is a decades long debate:

“London acts as a continual drain on the rest of the country both for industry and population, and much evidence points to the fact that it is already too large.”

Report of the Royal Commission on the Distribution of the Industrial Population, 1940

“In the past, London was undoubtedly the locus of England – and even of Britain as a whole – but there remained profound strengths in the regions; now a moat is being dug around the M25 and the bridges that cross it are being strategically mined.”

Will Self, *The Independent*, 27th April 2012

“...for the first time, some are daring to think that if London is so different, maybe it should really be different, and become an independent city state, like Singapore.”

Sunday Times Magazine, 13th October 2013

“London is becoming a kind of giant suction machine, draining the life out of the rest of the country.”

Vince Cable, *Today Programme*, BBC Radio 4, 19th December 2013

“The size of London's economy has led some to suggest that the capital should go it alone, and declare independence from the rest of the country. There are plenty in the rest of the country who might be glad to see it go.”

Stephanie Flanders, BBC Website, 6th July 2010

“It is time for London to ‘get out’, of both the EU and the UK.”

Simon Jenkins, *Evening Standard*, 14th May 2013

These debates more often than not are based on assertion rather than on data. In a year in which economic recovery is starting to take hold, and political interest in devolution



is beginning to grow, it is vital that we understand more about the evidence showing how London links to other cities. This chapter reviews three common perceptions of London's role in the UK economy and asks what the evidence means for debates about how best to support all UK city economies in the years ahead.

It finds that it is the underperformance of other large cities, rather than the dominance of London, that policy makers should be concerned about. The UK's large cities punch well below their weight in terms of their contribution to the national economy, and policy should look to empower these places through greater devolution so that they can increase their contribution to national economic output.

Perception 1: London sucks in all of the talent

London is often accused of sucking in talent from elsewhere. On the whole the data backs this up.

Overall, London loses population to the rest of the country. Between 2009 and 2012,² London saw 933,000 people leaving the city – equivalent to the size of Nottingham and Bolton combined – but only 775,000 people moving in³ – still a population larger than the whole of Leeds. But this aggregate outflow hides the significant variation across

age groups and where people come from and move to.

Firstly, of all of the twentysomethings who decided to relocate in recent years, almost one in three moved to London.

This means that, as Figure 5 shows, there was a large net inflow of people aged between 22 and 30 into the capital. This changes from 30 onwards, when there was a large fall in the number of people moving in and an increase in the number of people moving out. The large outflow of children would suggest that the trigger for this is starting a family, with people choosing to raise their children outside of the capital.

Secondly, the majority of people who leave London don't go very far – over 60 per cent moved to the Greater South East.

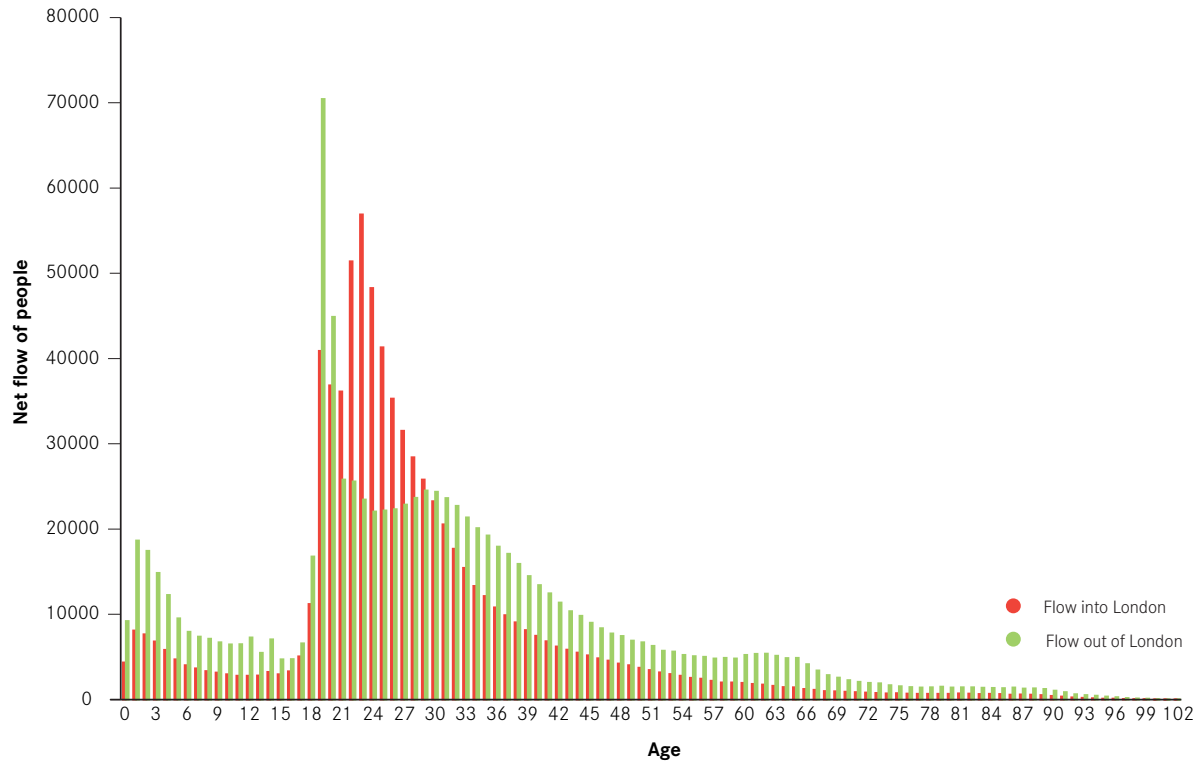
Figure 6 shows that Brighton and Crawley were two of a handful of cities that had a net inflow of people from the capital. While these people may no longer live in London, they very much remain within commuting distance, and commuting patterns suggest that some are likely to remain part of the capital's labour market.

Meanwhile, people that relocate to London tend to move much further distances. Almost every city outside of the Greater South East lost population to the capital between 2009 and 2012.

2. This period is chosen because it is the longest time period of data available that cuts internal migration by individual age.

3. This analysis looks only at migration within England and Wales to look at the links between cities, and so does not look at immigration and emigration. London sees overall increases in population because of the inflow of migrants from outside of the UK and through births.

Figure 5:
Migration to and from London by age, 2009-2012



Source: ONS 2013, Internal Migration by Local Authorities in England and Wales

Figure 6:
Net flow of people to
London from other cities,
2009- 2012

Migration flow

Out of London

- ▶▶▶ -8,450 - -5,000
- ▶▶▶ -4,999 - -1,000
- ▶▶▶ -999 - 0

In to London

- ▶▶▶ 1 - 1,000
- ▶▶▶ 1,001 - 4,000
- ▶▶▶ 4,001 - 7,000



Source: ONS 2013, Internal Migration by Local Authorities in England and Wales
 Contains Ordnance Survey data © Crown copyright and database right 2013.

Figure 7:
Net migration to
London by age group,
2009-2012

22-30 year old migration flows

Out of London

→→→ -1,245 - -500
 →→→ -499 - 0

In to London

←←← 1 - 1,000
 ←←← 1,001 - 6,000
 ←←← 6,001 - 10,000



Source: ONS 2013, Internal Migration by Local Authorities in England and Wales
 Contains Ordnance Survey data © Crown copyright and database right 2013.

Only five cities, all in the Greater South East, saw a net inflow of 22-30 year olds from London (Figure 7). Leeds saw the largest net outflow: 3,200 young Londoners moved to Leeds; 12,300 moved from Leeds to London.

The biggest contributors to London's net inflow of 22-30 year olds were the large cities

(see Figure 8). There was a net inflow of 48,400 22-30 year olds – enough people to fill Manchester City's Etihad Stadium – from large cities into London (80,000 came to the capital, outstripping the 31,600 that left). Of the total net outflow of people in this age group from large cities, 58 per cent – more than half – went to London.

The biggest source of in-migration for large English cities was 18 to 21 year olds.

People from this age group moved to large cities from all other areas of England and Wales (Figure 8). But **large cities** saw a net outflow of people almost universally across all other age groups, including those aged 22 to 30.

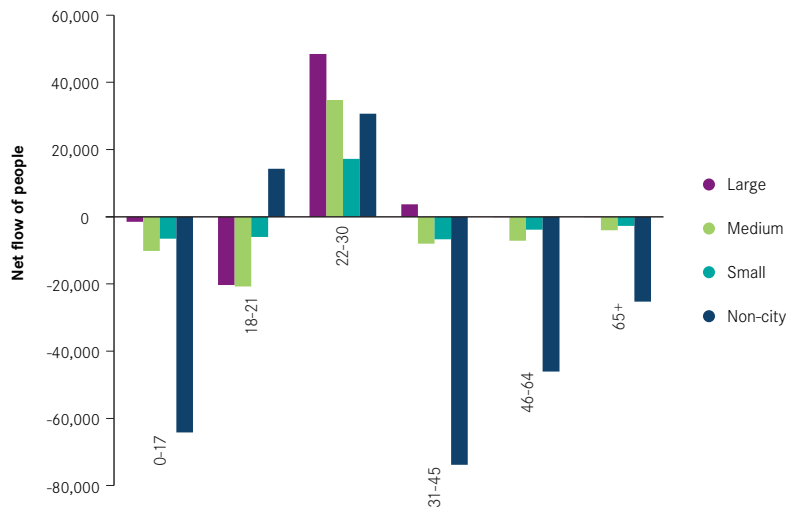
Students were a big driver of city migration patterns. Analysing data on student flows in 2011/12⁴ shows that large cities saw a big inflow of people from non-city areas coming to study at their institutions – the net inflow of students into large cities from non-city areas was three and

a half times higher than the inflow from all other cities combined. But once graduated, there was a large net outflow of these newly qualified workers to London.

So the universities are attracting young people to these cities. But the cities are unable to retain them once they graduate.

Why are most cities seeing an outflow of young people when the same demographic is attracted to the large urban environment of London? There are two possible reasons why this is the case.

Figure 8:
Net migration to London by age group and city size, 2009-2012



Source: ONS 2013, Internal Migration by Local Authorities in England and Wales

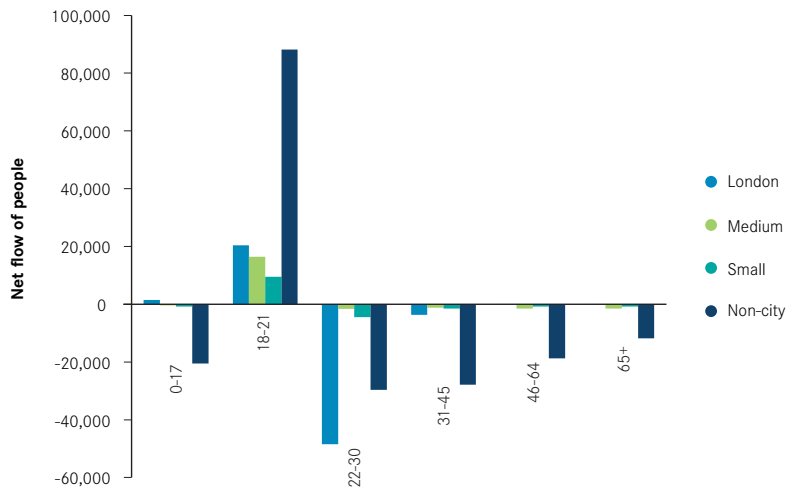
Box 2: Categorisation of cities

City sizes are defined according to population:

- Large cities have populations of between 550,000 and 2.5 million
- Medium cities have populations of between 250,000 and 550,000
- Small cities have populations below 250,000

4. Source: HESA 2013

Figure 9:
Net migration to large cities by age group and city size, 2009-2012



Source: ONS 2013, Internal Migration by Local Authorities in England and Wales

The first is that London attracts young people because of the amenities that only a big city can provide. While the ‘bright lights’ of the capital are likely to play a role, on this basis England’s large cities should also benefit from an in-migration of people from smaller cities and non-city areas. Figure 9 shows this not to be the case.

The second is the availability of jobs and career progression. There are more graduate level⁵ jobs in London than in the large cities - on average between 2009 and 2012, 35 per cent of all jobs in London were graduate jobs, while this figure was

26 per cent for the large cities. And research has shown the opportunity for career progression is also much stronger in London than it is in the next largest cities, with only Manchester seeing any sort of faster progression than the average.⁶

The data indicates that London does appear to suck in talent from the rest of the country. But rather than focus only on London’s dominance, the more pertinent question appears to be: why aren’t other large cities offering people enough economic opportunity to stay – and what can be done about it?



5. Defined as Corporate Managers, Science and Technology Professionals, Health Professionals, Teaching and Research Professionals and Business and Public Service Professionals. Source: NOMIS 2013, annual population survey - workplace analysis, 2009-2012 data.

6. Champion T, Coombes M & Gordon I, (2013), *How Far Do England’s Second-Order Cities Emulate London as Human-Capital ‘Escalators’?* SERC Discussion Paper 132

Perception 2: London's success is a threat to other cities

London has been portrayed as constraining the growth of other cities, with some people calling for its future growth to be limited to help rebalance the economy. The data suggests this would do more harm than good.

London is the biggest employer in other British cities. Of the other 62 British cities, London headquartered businesses were the most prominent in every city.

As Figure 10 shows, this was most prominent in Crawley and York, where more than one in five private sector jobs are employed by a London headquartered business. To put this in context, fewer than one in 40 private sector jobs in York were accountable to businesses headquartered in near neighbour Leeds. Eight of the 10 cities with the smallest share of employment in London branches meanwhile, such as Barnsley and Blackpool, were in Yorkshire or the North West.

The success of businesses from other cities opening up branches elsewhere is much less striking. Leeds was the next strongest performer. As Figure 11 shows, when discounting London, it was the city with the highest share of employment in 20 other cities. But even in the city where it accounted for the highest share of employment – Wakefield – it accounted for less than 5 per cent of all private sector jobs.

Furthermore, while London businesses were responsible for many jobs in other cities, businesses from these other cities were much less successful at creating jobs in London. Edinburgh had the highest number of private sector employment in the capital, but this amounted to just 1.1 per cent of all private sector jobs (London businesses account for 14 per cent of all private sector jobs in Edinburgh).

Figure 10:
Employment in London headquartered businesses as a share of all employment

City	Share of private sector employment in London headquartered businesses, 2012 (%)
Top 10 cities	
1 York	22.4
2 Crawley	22.0
3 Milton Keynes	19.5
4 Southampton	19.0
5 Cardiff	18.5
6 Cambridge	18.2
7 Norwich	17.3
8 Reading	16.7
9 Gloucester	16.5
10 Worthing	16.4
Bottom 10 cities	
53 Burnley	7.8
54 Mansfield	7.7
55 Rochdale	7.5
56 Blackpool	7.3
57 Stoke	6.9
58 Hull	6.9
59 Preston	6.9
60 Huddersfield	6.1
61 Barnsley	5.7
62 Bradford	5.6

Source: ONS 2013, Business Structure Database

Figure 11:
Share of private sector jobs in other cities



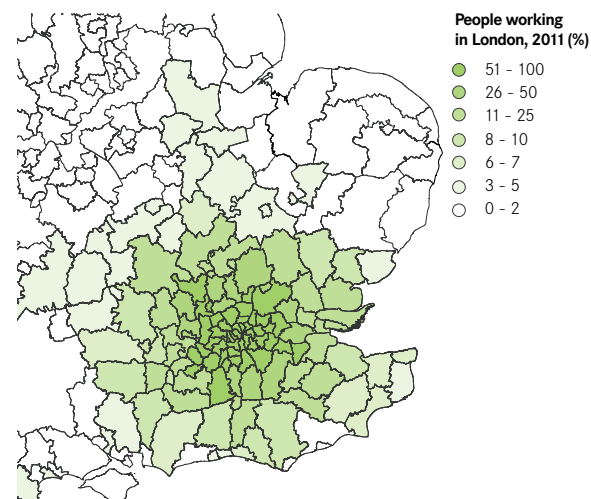
Source: ONS 2013, Business Structure Database

The success of London's businesses in other cities could pose a risk to other cities – when struggling, London businesses could choose to cut jobs in their branch locations rather than at their headquarters. But the data suggests that this has not occurred.

The strong performance of London businesses has had a positive impact on employment in other cities in recent years. Since 2008, firms headquartered in London have increased the number of people they employ in their branches in 49 of 62 cities outside of the capital. By comparison, only 18 cities saw their headquartered business expand the local workforce. For example, Southampton businesses employed 7 per cent fewer people in Southampton in 2012 than 2008, while London based businesses increased their employment in Southampton by 24 per cent over the period.

London has strong direct business links with other cities. And it appears that London's success has been of benefit to other cities in recent years. Businesses

Figure 12:
Commuting patterns to London, 2011



Source: ONS 2013, Annual Population Survey commuter flows, local authorities in Great Britain, 2010 and 2011

headquartered in other large cities have been much less successful at opening branches in other locations.

Perception 3: The rest of the country is a drain on London

London is a net contributor to the exchequer, receiving less in public spending than it earns in tax revenues. But arguing that this means the rest of the country is a drain on London both ignores the capital's dependence on other areas, and is short-sighted about the importance to London and the country as a whole of ensuring the rest of the economy thrives.

When looking at a snapshot only, the picture is very stark. In 2009/10 it was estimated that Greater London⁷ raised £99

7. Greater London is a smaller area than the Primary Urban Area definition of London used elsewhere in *Cities Outlook*.

billion in taxes, but only received £94 billion in public spending. And this 'surplus' was smaller than usual as a result of the recession – in previous years the difference has been between £10 and £20 billion per year.⁸

But London benefits from the outflow of its taxes to the rest of the country in two ways. Firstly, as shown above, there is a large inflow of young people into the capital. These people have been educated in schools and universities and treated by NHS doctors and dentists elsewhere in the country.⁹

Secondly, not everyone who works in London lives in the city. The average distance travelled by those living outside of London is 61 kilometres, the largest of any city.¹⁰ And Figure 12 shows the reach that London's jobs market has. While these commuters make a contribution to the economy of London, helping make it one of our most successful city economies in the country, they consume public services where they live.

While London does contribute tax revenues to the rest of the country, this contribution would not be possible without the rest of the country. In practice London's economy would benefit from strengthening its links to other cities – including transport, housing and business links.

The UK's large cities punch below their weight

London's success is a good thing for the national economy. It is a global city that generates a great amount of economic opportunity, reflected in the migration patterns of young workers shown above. Constraining London's growth will reduce national economic growth, and much of the investment that would have gone to the capital may go elsewhere in the world, rather than elsewhere in the UK. It is for this reason that the Government should progress the recent recommendations by the London Finance Commission to devolve more powers, such as tax raising, down to the capital.

Figure 13:
Comparative size of economies



Source: ONS 2013, Workplace based GVA1,2 NUTS3 at current basic prices, 2012 data; NOMIS 2013, Business Register of Employment Survey, 2012 data; NOMIS 2013, Mid-year population estimates, 2012 data; own calculations.

But London's success does not come without the support of the rest of the UK. Its day-to-day (through in-commuting) and longer term (through migration) relationships are of benefit to the London economy.

In contrast to London's strong performance, the UK's next largest cities punch below their weight. As Figure 14 shows, only Bristol consistently performs better than the national average on a range of indicators, with four of the nine cities consistently underperforming the nation as a whole. This is in line with previous work that has showed that England's large cities are much smaller than large cities in other countries¹¹ and tend to perform less well than their European counterparts.¹²

8. 'Give London back its tax': Boris Johnson demands return on cash that capital makes for Britain, Evening Standard, 4 April 2012

9. For example, in 2012/13 20-29 year olds accounted for just 9 per cent of total admissions to hospital that required an overnight stay.

10. Centre for Cities, (2012), *Cities Outlook 2012*, London: Centre for Cities

11. Overman H & Rice P, (2008), *Resurgent Cities and Regional Economic Performance*, SERC policy paper no 1, London: SERC

12. Liverpool John Moores University (2011), *Second Tier Cities in Europe: In An Age of Austerity Why Invest Beyond the Capitals?* Liverpool: Liverpool John Moores University

Figure 14:
The performance of the UK's large cities on a range of indicators

	Employment rate, Jul 2012-Jun 2013 (%)	Business start-ups per 10,000 population, 2012	Residents with high level qualifications, 2012 (%)	Residents with no formal qualifications, 2012 (%)	Workplace earnings, 2013 (£)
UK Average	71	42	34	10	502
London	71	76	47	8	684
Bristol	73	44	39	8	489
Birmingham	63	34	26	15	474
Glasgow	65	34	41	13	485
Leeds	69	39	35	10	488
Liverpool	63	30	23	16	479
Manchester	68	44	33	11	484
Newcastle	65	30	31	11	469
Nottingham	66	30	31	8	452
Sheffield	68	29	30	11	444

Source: 2013, Annual Population Survey, residents analysis, July 2012- June 2013, 2012, data; ONS 2013, Business Demography, 2012 data; NOMIS 2013, Mid-year population estimates, 2012 data; ONS 2013, Annual Survey of Hours and Earnings (ASHE), average gross weekly workplace based earnings, 2013 data. Green signifies that a city outperforms the national average, whereas red means that it underperforms it.



Cities around the world drive economic growth, not only because they are the location of so much economic activity – an issue of scale – but also because the concentration of this activity allows them to be more productive. This can certainly be seen for London, but it appears that the next largest cities do not benefit from their size in the way that London does. And this is bad for the performance of the UK economy.

This applies as much to the combined scale of cities as well as their individual size. Combined, the economies of Manchester and Leeds are just one-fifth of the size of London. But they are unlikely to even make the most of this combined scale. Weak transport links are one reason for this; the distance between Leeds and Manchester is around 30 per cent shorter than between Cambridge and London, yet the quickest train takes four minutes longer to do the former route than the latter.

Other cities should have access to the same policy powers that London has

London is one of the UK's strongest performing cities. It is also the city that, while limited by international standards, has the greatest autonomy over its own economy. For example, it has:

- A directly elected mayor with a remit across Greater London, and an elected assembly
- Power over the budget of its transport system and police force
- Strategic planning powers

London has been preferenced over other cities in recent years by national politicians in that it has been afforded a range of policy freedoms and flexibilities that have not been extended to the UK's other cities. If policy makers are serious about increasing the contribution that other cities make to the national economy they need to extend the freedoms and flexibilities held by London to other large urban areas.

Every city faces unique challenges that cannot be properly addressed by one-size-fits-all policies created in Whitehall. If devolution is deemed a good thing for London, then it should be deemed a good thing for other cities too.

Key messages

The debate around London's role in the UK economy has polarised. One side claims that London sucks the life out of the UK, while the other argues that the rest of the nation is a drain on the capital. Neither position is accurate or helpful.

Cities are not islands. London and other cities benefit from the relationships that they have – be that through in-commuting or through businesses selling in to markets. Discussions about London as a city state fail to take this into account. A stronger London means a stronger UK economy. But a stronger UK economy also needs strong performing cities outside of London. Growth is not a 'zero-sum' game.

Talk of constraining London is misplaced. London is one of the most successful city economies not only in the UK but the world. Constraining its growth would harm the UK economy overall. Taking steps to ensure London continues to grow and reinvest in its own economy, while still generating revenue that can be redistributed across the country, would be a more fruitful approach.

The next largest cities punch well below their weight. Cities such as Birmingham and Manchester should be making a much larger contribution to the national economy than is currently the case and understanding how to change this should be an economic and political priority.

The policy privileges afforded to London should be extended to other cities. In the context of the on-going English question, policy makers should be giving those cities that can demonstrate appropriate scale and capacity greater flexibilities and freedoms to tailor policy to their requirements.



03

**City monitor:
the latest data**

City monitor: the latest data

The indicators in this section highlight the divergent nature of economic activity in cities across the UK. For most indicators the 10 strongest and 10 weakest performing cities are presented only. Tables of the full list of cities for every indicator can be found at www.citiesoutlook.org.

Introduction

This section draws on a range of datasets released during 2013 to provide a detailed analysis of the performance of the 64 largest cities in the UK:

- Population
- Business dynamics
- Innovation
- Employment
- Skills
- Earnings
- Disparities
- Housing
- Environment
- Digital connectivity
- Well-being

Each of the indicators offer different insights into cities' performance. This year, well-being (life

satisfaction) is included as a new variable to show how this subjective measure contrasts to other measures of economic performance.

Figure 15:
Cities' contribution to the national economy



Population

Growing populations can give an indication of the economic opportunity that is available in cities. Cities that provide many job opportunities are likely to retain and attract more people than cities that do not.

- **Overall, 54 per cent of the UK's population live in cities.**
- Population in cities grew, on average, at almost the same rate (7 per cent) as the UK's growth rate during the decade from 2002 to 2012.
- Peterborough and Milton Keynes saw the largest growth in population, expanding by 17 per cent over the decade.
- Almost all cities (with the exception of Burnley and Sunderland) saw their population grow over the decade. 14 cities expanded their population by more than 10 per cent during the same period.
- London's population growth was the largest in absolute terms, expanding by 1,031,100 in the period from 2002 to 2012. This was equivalent to the growth seen in the next 22 cities combined.
- Eight of the 10 fastest growing cities are located in the South. By contrast, all of the slowest growing cities are located in the North of England and Scotland.
- In 2012, just four cities - London, Birmingham, Manchester and Glasgow - accounted for 23.6 per cent of the UK's total population and 42.4 per cent of all people living in cities. London alone accounted for 15 per cent of the UK's total population and for almost one third of the population living in cities.



Table 1:
Population growth

Rank	City	Annual growth rate (%)	Population, 2012	Population, 2002	Change, 2002-2012
10 fastest-growing cities by population					
1	Peterborough	1.6	186,400	158,800	27,600
2	Milton Keynes	1.6	252,400	215,100	37,300
3	Swindon	1.5	211,900	182,100	29,800
4	Cambridge	1.3	125,200	109,500	15,700
5	Ipswich	1.3	134,500	117,800	16,700
6	London	1.1	9,629,600	8,598,500	1,031,100
7	Cardiff	1.1	348,500	312,000	36,500
8	Oxford	1.1	152,500	136,600	15,900
9	Gloucester	1.1	123,400	110,600	12,800
10	Leicester	1.1	482,300	432,300	50,000
10 slowest-growing cities by population					
55	Liverpool	0.3	791,700	770,600	21,100
56	Rochdale	0.3	212,000	206,700	5,300
57	Dundee	0.2	147,800	144,200	3,600
58	Glasgow	0.2	1,056,600	1,039,100	17,500
59	Birkenhead	0.2	320,200	315,100	5,100
60	Blackpool	0.1	325,900	322,300	3,600
61	Grimsby	0.1	159,700	158,000	1,700
62	Middlesbrough	0.1	466,100	463,600	2,500
63	Burnley	-0.1	176,700	177,700	-1,000
64	Sunderland	-0.3	275,700	283,000	-7,300
United Kingdom		0.7	63,705,000	59,354,500	4,350,500

Source: NOMIS 2013, Mid-year population estimates, 2002 and 2012 data

Business dynamics

Strong city economies depend on the dynamism of businesses and entrepreneurs. The overall number of businesses in a city and the rates at which businesses are starting up and closing down are key indicators of the health of a city's economy.

Business starts and closures

- **60 per cent of the UK's total business starts occurred in cities.**
- **While much improved relative to two years ago, the recovery in business creation faltered in 2012.** In 2010, just 12 cities had more businesses start than close. In 2012, this increased to 43, but was down from 48 in 2011.
- Eight of the top 10 cities with the highest start-up rates were the same as in 2011. Northampton and Warrington entered the top 10 in 2012, replacing Edinburgh and Crawley. Hull was the only city to drop into the bottom 10, replacing Doncaster.
- London far outstrips other cities in terms of business start-ups. Its business starts were 32 per cent higher than second placed Aberdeen, while it had 3.5 times more starts per 10,000 population than Belfast, the bottom city in 2012.
- Cities at both the top and the bottom are small and medium-sized cities, with London and Belfast the exceptions at the top and bottom respectively.

Business stock

- **Cities are home to 53 per cent of all UK businesses.**
- **London, the top city, had 2.6 times more businesses per population than Sunderland, the bottom city in 2012.**
- As with business starts, London is the only large city in the top 10. Both Newcastle and Liverpool feature in the bottom 10.
- The North-South divide is clearly seen through business stocks: with the exception of Aberdeen all top-ranked cities are located in the South whereas, with the exception of Plymouth, all bottom-ranked cities are in the North and Scotland.
- At 3.1 per cent, Aberdeen experienced the biggest increase in its number of businesses. Bolton experienced the biggest fall (3.5 per cent).
- Large cities accounted for 35 per cent of all UK businesses. London alone accounted for 21 per cent of the national total.



Table 2:
Business starts and closures per 10,000 population

Rank	City	Business start-ups per 10,000 population, 2012	Business closures per 10,000 population, 2012	Churn rate*
10 cities with the highest start-up rate				
1	London	75.5	60.4	3.3
2	Aberdeen	57.1	39.6	4.7
3	Brighton	54.5	48.1	1.6
4	Milton Keynes	54.5	44.0	2.8
5	Reading	51.9	45.2	1.7
6	Aldershot	48.5	45.7	0.7
7	Grimsby	46.6	50.7	-1.6
8	Southend	45.7	44.4	0.4
9	Northampton	45.0	35.9	2.9
10	Warrington	44.9	37.1	2.4
10 cities with the lowest start-up rate				
55	Wakefield	27.9	27.5	0.2
56	Plymouth	27.5	26.9	0.3
57	Barnsley	27.4	26.1	0.6
58	Dundee	27.1	25.0	1.0
59	Hull	26.8	25.9	0.5
60	Swansea	25.3	30.7	-2.4
61	Mansfield	24.7	24.7	0.0
62	Stoke	24.5	26.3	-0.8
63	Sunderland	22.5	23.9	-0.8
64	Belfast	21.7	26.9	-2.0
	United Kingdom	42.3	40.0	0.7

Source: ONS 2013, Business Demography, 2012 data. NOMIS 2012, Mid-year population estimates, 2012 data.
*Difference between business start-ups and business closures is as a percentage of total business stock.

Table 3:
Business stock per 10,000 population

Rank	City	Business stock, 2012	Business stock, 2011	Change, 2011-12 (%)
10 cities with the highest number of businesses				
1	London	463.3	457.8	1.2
2	Brighton	403.5	401.9	0.4
3	Reading	396.8	397.2	-0.1
4	Aldershot	393.9	397.9	-1.0
5	Milton Keynes	375.0	369.5	1.5
6	Aberdeen	373.1	362.0	3.1
7	Crawley	348.9	353.9	-1.4
8	Southend	345.8	340.0	1.7
9	Cambridge	345.4	349.6	-1.2
10	Bournemouth	340.1	344.1	-1.2
10 cities with the lowest number of businesses				
55	Newcastle	218.5	219.0	-0.2
56	Barnsley	217.4	220.6	-1.4
57	Mansfield	216.1	218.9	-1.3
58	Doncaster	213.9	215.0	-0.5
59	Liverpool	210.0	210.8	-0.4
60	Hull	208.4	211.1	-1.3
61	Middlesbrough	206.6	203.8	1.4
62	Plymouth	203.3	205.6	-1.1
63	Dundee	199.9	198.4	0.8
64	Sunderland	175.7	178.2	-1.4
	United Kingdom	332.5	333.9	-0.4

Source: ONS 2013, Business Demography, 2012 data. NOMIS 2012, Mid-year population estimates, 2012 data.

Innovation

Innovation is a driver of long-run economic growth. Finding new or better ways of making goods or delivering services improves the performance of businesses which in turn increases the capacity of city economies.

Patents granted

- **51 per cent of the UK's patents granted were registered in cities.**
- London alone accounted for 30 per cent of patents granted in cities. However, when accounting for population, London is ranked 23 out of all cities.
- **When accounting for population, Cambridge continues to be the UK's most innovative city.** It had more patents granted per 100,000 residents than the next five most innovative

cities combined (Swindon, Edinburgh, Aberdeen, Aldershot and Gloucester). It also had 3.5 times as many patents granted per 100,000 population as Swindon, the second city.

- Across the top five most innovative cities, firm concentration varies:
 - In Swindon and Edinburgh more than 50 per cent of patents originated from one single firm.
 - In Cambridge, Aldershot and Aberdeen one firm accounted for 30, 22 and 17 per cent of patents granted respectively.
- With the exception of Bristol, most innovative cities were small in size.
- Eight of the top 10 cities are in the South, with only Edinburgh and Aberdeen being the exceptions.



Table 4:
Patents granted per 100,000 population

Rank	City	Patents granted per 100,000 residents, 2012
10 cities with highest number of patents granted		
1	Cambridge	68.7
2	Swindon	19.3
3	Edinburgh	12.2
4	Aberdeen	10.7
5	Aldershot	9.9
6	Gloucester	8.9
7	Bristol	8.3
8	Hastings	7.8
9	Worthing	7.6
10	Reading	7.0
10 cities with lowest number of patents granted		
55	Hull	1.9
56	Chatham	1.9
57	Middlesbrough	1.7
58	Liverpool	1.5
59	Dundee	1.4
60	Grimsby	1.3
61	Belfast	1.2
62	Wigan	0.9
63	Blackpool	0.9
64	Sunderland	0.4
	United Kingdom	4.6

Source: Intellectual Property Office 2013, FOI release: Patents granted registered by postcode, 2012 data. NOMIS 2013, Mid-year population estimates, 2012 data.

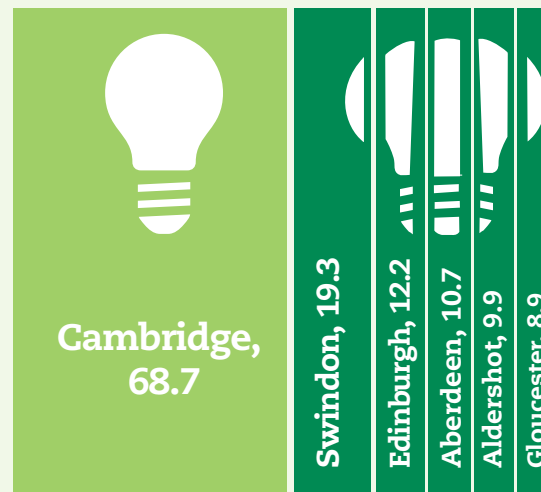
Box 4: Measuring innovation

Patent data is widely used to measure innovation. Patents are registered with the Intellectual Property Office and have an address allocated to them making it easy to assign them to a particular city.

However, we note that using patent data is an imperfect measure of innovation. There is no way to verify that the innovative activity happened at the address on the application.

Patents also only demonstrate more technical innovations and exclude process innovations, trademarks and creative innovation, much of which takes place within service sector businesses.

However, while patents do not capture all forms of innovation, they do act as a good proxy, and there is large variation across the country.



Employment

High employment rates point to well-functioning labour markets, with the demand for workers amongst employers being high. Low employment rates and high unemployment are suggestive of a combination of poor skills and weak employer demand.

Employment rate

- **Employment prospects continue to improve in cities.** Over half saw their employment rates increase, with 17 seeing an increase of over 2 percentage points.
- That said, 39 cities had employment rates below national average. **To bring those cities up to the national average, an extra 558,900 residents in those cities would need to find employment.**
- Hull, the city with the lowest employment rate, would need 16,500 of its residents to find a job (either in Hull or elsewhere) to bring the city up to the national average.
- In Birmingham, the city with the largest employment gap, an extra 112,300 Birmingham residents would need to find employment to bring the city up to the national average.
- The North-South divide is clearly visible: bar Warrington and Aberdeen, all top-ranked cities are located in the South. Conversely, with the exception of Glasgow and Dundee all bottom-placed cities are in the North and the Midlands.
- Five cities (Reading, Warrington, Aberdeen, Crawley and Norwich) remain in this year's top 10 compared to last year, while five cities (Blackburn, Middlesbrough, Rochdale, Liverpool and Hull) remain at the bottom.



Table 5:
Employment rate

Rank	City	Employment rate, Jul 2012-Jun 2013 (%)	Employment rate, Jul 2011-Jun 2012 (%)	Percentage point change
10 cities with highest employment rate				
1	Reading	78.1	76.3	1.8
2	Gloucester	77.8	73.4	4.4
3	Warrington	77.5	75.2	2.3
4	Cambridge	76.8	68.4	8.3
5	Aberdeen	75.6	77.9	-2.3
6	Ipswich	75.6	73.8	1.8
7	Bournemouth	74.5	71.9	2.6
8	Crawley	74.3	77.5	-3.1
9	Norwich	74.2	75.1	-0.9
10	Portsmouth	74.1	72.8	1.3
10 cities with lowest employment rate				
55	Glasgow	64.8	66.3	-1.5
56	Blackburn	64.7	61.0	3.7
57	Dundee	64.3	66.2	-1.9
58	Coventry	64.1	64.8	-0.7
59	Middlesbrough	64.0	63.9	0.2
60	Burnley	64.0	68.5	-4.5
61	Birmingham	63.4	62.3	1.1
62	Rochdale	63.4	63.5	-0.1
63	Liverpool	63.2	61.9	1.3
64	Hull	61.9	61.7	0.2
United Kingdom		71.0	70.2	0.8

Source: NOMIS 2013, Annual Population Survey, residents analysis, July 2011- June 2012 and July 2012- June 2013. Department for Trade and Investment (DETINI) 2013, District Council Area Statistics for Belfast, 2011 and 2012 data.

Unemployment

- **64 per cent of those claiming Jobseekers' Allowance live in cities.**
- All cities reduced their claimant count rates from 2012 to 2013. On average, cities reduced their claimant count by 0.9 percentage points.
- Two thirds of cities had claimant count rates above the national average.
- Hull continued to have the highest claimant count rate of all cities. Despite this it has seen a sharp reduction in the number of people claiming unemployment benefit, down 1.7 percentage points between November 2012 and November 2013 (more than double the fall at the national level).

Private sector employment growth

- Contrary to what happened between 2010 and 2011 - where more cities saw their private employment grow than decline - between 2011

and 2012 more cities saw their private employment sector jobs decline than grow.

- 32 cities had a decrease in private sector employment whereas 28 saw their private sector employment grow and three were constant.
- Again, there was little change nationally in private sector employment between 2011 and 2012 (0.1 per cent growth).
- With the exception of Telford and Stoke, the top cities are concentrated in the South whereas bottom cities are mainly located in the North.
- Aldershot, the top city, grew by almost twice as many jobs as the second city, Peterborough.
- The top 10 cities added almost 141,300 net more private sector jobs to the economy between 2011 and 2012.
- London led private sector jobs growth with 109,600 net jobs in 2012. But, together all cities outside London had a net loss of 22,100 jobs during the year.



Table 6:
Claimant count

Rank	City	Claimant count, November 2013 (%)	Claimant count, November 2012 (%)	Percentage point change
10 cities with the lowest JSA claimant count				
1	Cambridge	1.4	1.8	-0.4
2	Aberdeen	1.5	1.9	-0.5
3	Aldershot	1.5	2.0	-0.6
4	Reading	1.6	2.3	-0.8
5	York	1.6	2.2	-0.6
6	Oxford	1.6	2.1	-0.5
7	Crawley	1.7	2.2	-0.6
8	Worthing	1.9	2.8	-0.9
9	Bournemouth	2.1	2.4	-0.3
10	Southampton	2.1	2.7	-0.7
10 cities with the highest JSA claimant count				
55	Hastings	4.4	5.6	-1.1
56	Sunderland	4.4	5.7	-1.3
57	Newport	4.8	5.5	-0.7
58	Liverpool	4.9	6.0	-1.1
59	Belfast	5.1	5.5	-0.4
60	Bradford	5.2	5.9	-0.7
61	Grimsby	5.2	6.1	-0.9
62	Birmingham	5.4	6.4	-1.1
63	Middlesbrough	5.5	6.9	-1.4
64	Hull	6.9	8.7	-1.7
	United Kingdom	3.0	3.8	-0.8

Source: NOMIS 2013, Claimant Count with rates and proportions, November 2012 and November 2013 data; Mid-year population estimates, 2012 data. Note: Data differs to NOMIS claimant count rates as latest available mid-year population estimates are used to calculate the figures above.

Table 7:
Private sector jobs growth

Rank	City	Change, 2011-2012 (%)	Total private sector employment, 2012	Total private sector employment, 2011	Net job gains/losses
10 cities with the highest private sector employment growth					
1	Aldershot	9.4	78,500	71,800	6,700
2	Peterborough	5.4	77,200	73,200	3,900
3	Telford	4.2	59,700	57,300	2,400
4	Cambridge	3.6	54,700	52,900	1,900
5	Crawley	2.9	119,600	116,200	3,400
6	London	2.8	4,029,000	3,919,400	109,600
7	Edinburgh	2.8	232,700	226,300	6,300
8	Aberdeen	2.7	136,100	132,500	3,600
9	Chatham	2.2	57,300	56,000	1,300
10	Stoke	2.1	109,600	107,400	2,200
10 cities with the lowest private sector employment growth					
54	Oxford	-4.1	53,000	55,200	-2,200
55	Bristol	-4.1	270,800	282,400	-11,600
56	Barnsley	-4.4	48,100	50,300	-2,200
57	York	-4.9	71,100	74,800	-3,700
58	Huddersfield	-5.0	105,800	111,300	-5,500
59	Doncaster	-5.1	72,200	76,100	-3,900
60	Bradford	-5.3	127,000	134,100	-7,100
61	Luton	-5.8	60,300	64,000	-3,700
62	Northampton	-6.0	90,900	96,700	-5,800
63	Newport	-6.5	48,000	51,400	-3,400
Great Britain		0.1	20,336,400	20,308,100	28,200

Source: NOMIS 2013, Business Register and Employment Survey, 2011 and 2012 data.



Links between public and private sector employment

- **There is large variation across cities in terms of their reliance on public sector jobs.**
- In general, the jobs market in cities tends to be more dominated by the public sector than the national average. For every public sector job, just one third of cities had more private sector jobs than the national average.
- Crawley had the lowest proportion of public sector jobs, with 4.2 private sector jobs to every one in the public sector. Oxford had the greatest reliance – as a result of its two universities – with one in every two jobs in the public sector.
- London was the only large city to feature in either the top or bottom 10 cities. With a private-public jobs ratio of 3.4, relative to the size of its economy, the capital had one of the smallest public sectors of all cities.



In Crawley there were over 4 private sector jobs to every public sector job

Table 8:
Ratio of private sector to public sector employment

Rank	City	Private to public ratio	Private employment, 2012	Public employment, 2012
10 cities with highest proportion of private sector employment				
1	Crawley	4.2	119,600	28,600
2	Aldershot	4.1	78,500	19,000
3	Swindon	4.1	86,500	21,300
4	Milton Keynes	3.8	116,200	30,600
5	Warrington	3.7	93,700	25,700
6	Reading	3.7	177,700	48,700
7	Peterborough	3.6	77,200	21,700
8	London	3.4	4,029,000	1,169,400
9	Aberdeen	3.2	136,100	42,700
10	Telford	2.9	59,700	20,500
10 cities with lowest proportion of private sector employment				
54	Blackburn	1.9	40,100	21,600
55	Plymouth	1.8	69,100	39,000
56	Gloucester	1.7	39,000	22,800
57	Swansea	1.6	62,300	39,400
58	Birkenhead	1.6	60,700	38,700
59	Hastings	1.5	19,000	12,400
60	Worthing	1.5	28,000	18,200
61	Cambridge	1.5	54,700	36,400
62	Dundee	1.4	43,200	29,900
63	Oxford	1.0	53,000	53,400
Great Britain		2.7	20,336,400	7,536,100

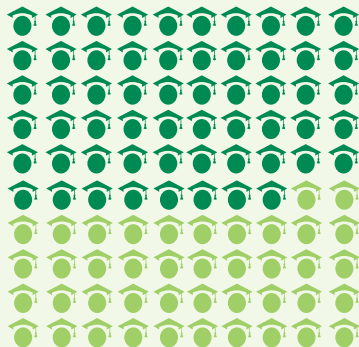
Source: NOMIS 2013, Business Register and Employment Survey, 2012 data.

Skills

Skill levels are a key component of the success of a city economy. Those cities that have a high proportion of graduates tend to have stronger economies than those that have a large number of people with no formal qualifications.

High qualifications

- **Cities are home to 58 per cent of the UK's high-skilled people.**
- But this is dominated by cities in the Greater South East, which accounted for 28 per cent of the country's highly qualified workforce (compared to 21 per cent of the total population).
- Cities in the North and Midlands, on the other hand, accounted for 21 per cent (compared to 25 per cent of the total population).
- **This is most prominent when contrasting Cambridge to Burnley; the former had almost three times more highly skilled workers living in its city than the latter (despite Cambridge having a smaller population).**



58%
of high
skilled
workers
live in
cities

Table 9:
Residents with high-level qualifications

Rank	City	Working age population with NVQ4 & above, 2012 (%)
10 cities with the highest percentage of high qualifications		
1	Cambridge	65.9
2	Oxford	62.3
3	Edinburgh	56.1
4	London	46.5
5	Reading	42.6
6	Brighton	42.4
7	York	41.3
8	Glasgow	41.1
9	Aberdeen	41.0
10	Bristol	38.6
10 cities with the lowest percentage of high qualifications		
55	Liverpool	23.2
56	Stoke	22.9
57	Hull	22.9
58	Sunderland	21.9
59	Barnsley	21.4
60	Wakefield	20.2
61	Grimsby	20.2
62	Southend	20.2
63	Mansfield	19.9
64	Burnley	19.4
United Kingdom		34.2

Source: NOMIS 2013, Annual Population Survey, residents analysis, 2012 data.
Department for Trade and Investment (DETINI) 2013. District Council Area Statistics for Belfast, 2012 data.

No qualifications

- **Cities are also home to 58 per cent of the UK's residents who have no formal qualifications.**
- Most of the cities with the lowest proportions of their working age population with no formal qualifications were medium-sized cities.
- Three of the largest cities (Birmingham, Liverpool and Belfast) had some of the highest proportions of people with no formal qualifications.
- It is not necessarily the case that those cities that have many highly qualified workers also have few people with no qualifications. Five cities (Brighton, Cambridge, Edinburgh, Reading and York) had both low rates of residents with no formal qualifications and high rates of high-skilled workers.
- Glasgow in particular had a polarised labour market: it had the eighth highest proportion of high-skilled workers and the 13th highest proportion of residents with no formal qualifications.

Table 10:
Residents with no formal qualifications

Rank	City	Working age population with no formal qualifications, 2012 (%)
10 cities with the lowest percentage of no formal qualifications		
1	Worthing	4.4
2	Cambridge	5.4
3	Edinburgh	5.5
4	Reading	6.1
5	Plymouth	6.2
6	Brighton	6.4
7	York	6.5
8	Crawley	6.8
9	Southampton	7.1
10	Milton Keynes	7.1
10 cities with the highest percentage of no formal qualifications		
55	Bradford	15.0
56	Coventry	15.2
57	Birmingham	15.4
58	Mansfield	15.5
59	Liverpool	15.6
60	Luton	16.1
61	Hull	16.1
62	Belfast	16.8
63	Stoke	17.1
64	Blackburn	17.1
United Kingdom		9.9

Source: NOMIS 2013, Annual Population Survey, residents analysis, 2012 data. Department for Trade and Investment (DETI) 2013. District Council Area Statistics for Belfast, 2012 data

Earnings

Earnings reflect the types of jobs available in cities. Those that have higher wages are likely to have a greater number of high skilled jobs than those that do not.

Earnings growth

- **Average weekly earnings paid to residents in cities, (£512), was higher than the UK's average wage per week (£505) in 2013.**
- **Residents in cities, on average, saw their 'real' wages fall on par with the national average between 2012 and 2013.**
- London residents had the highest average weekly wage of all UK cities in 2013 (£634), £28 more than second placed Reading. However, London residents, on average, saw their real wage decline by £8 from 2012 to 2013.
- Hull had the lowest average weekly wages at £373 per week, less than 60 per cent of London's figure.
- About one third of residents in cities saw their real wages rise from 2012 to 2013.
- Six cities (Blackpool, Cambridge, Crawley, Hastings Rochdale and Wigan) had the largest real wage drop from 2012 to 2013 with more than £20 less in real terms, the largest fall being in Cambridge.
- Four cities (Aldershot, Blackburn, Peterborough and Stoke) experienced real wage increases of more than £20 per week.
- Residents in large cities, on average, were paid £21 less than the national average. Only two large cities (Liverpool and Newcastle) saw their average weekly wage rise from 2012 to 2013 in real terms. Leeds and Sheffield experienced the largest average weekly wage decline of more than £10 from 2012 to 2013.



Table 11:
Average earnings

Rank	City	Earnings, 2013 (average £ per week, 2013 prices)	Earnings, 2013 (average £ per week, 2012 prices)	Earnings, 2012 (average £ per week, 2012 prices)	Real earnings growth, 2012-2013
10 cities with highest weekly earnings					
1	London	634	619	627	-8
2	Reading	606	592	594	-3
3	Crawley	605	591	612	-21
4	Aldershot	578	564	543	21
5	Edinburgh	559	546	537	9
6	Cambridge	556	543	574	-31
7	Milton Keynes	550	537	543	-6
8	Aberdeen	533	520	528	-8
9	Southend	523	511	512	-1
10	Warrington	507	495	496	-1
10 cities with lowest weekly earnings					
55	Stoke	422	412	390	22
56	Grimsby	418	408	392	16
57	Doncaster	416	406	409	-3
58	Plymouth	415	405	422	-17
59	Sunderland	414	404	411	-8
60	Blackpool	408	399	419	-20
61	Blackburn	408	398	374	24
62	Mansfield	397	387	392	-4
63	Hastings	382	373	394	-20
64	Hull	373	364	361	4
United Kingdom		502	490	490	0

Source: ONS 2013, Annual Survey of Hours and Earnings (ASHE), average gross weekly residence based earnings, 2013 data. Own calculations for PUA-level weighted by number of jobs, CPI inflation adjusted (2012=100). Earnings data is for 'employees' only, whereas the rest of the tables used 'employment' data.

Note: ASHE statistics are based on a sample survey, so the statistical significance of the results should be treated with caution.



Disparities

As in previous editions of *Cities Outlook*, we use the percentage point difference between a city's lower super output area (LSOA)¹³ – neighbourhoods within a city with an average population of 1,500 – with the highest JSA claimant count and a city's LSOA with the lowest claimant count as a proxy indicator for inequalities within a city. The measure is only a proxy – income data would serve as a better measure but is not made available on a comparable basis across cities.

- Cities with lower levels of disparities tended to be concentrated in the South. However, unequal cities were evenly spread across the country.
- Size seems to matter: Small cities tended to be more equal than larger ones. Three of the smallest cities (Cambridge, Oxford and Worthing) were amongst the top-ranked cities whereas seven of the 10 largest cities were amongst the bottom-placed cities.
- Glasgow, the city which had the widest disparity, was more than five times less equal than Cambridge, the top city.

13. Data Zones in Scotland and SOAs in Belfast.

Table 12:
Disparities within cities

Rank	City	Difference between highest and lowest JSA rate	Highest JSA rate, November 2013 (%)	Lowest JSA rate, November 2013 (%)
10 cities with the lowest levels of inequality				
1	Cambridge	3.9	4.1	0.2
2	Crawley	4.0	4.2	0.2
3	Aldershot	4.1	4.1	0.0
4	Worthing	4.5	5.0	0.5
5	Oxford	4.9	5.0	0.1
6	York	5.6	5.8	0.2
7	Reading	6.0	6.3	0.3
8	Aberdeen	6.7	6.7	0.0
9	Brighton	6.8	7.3	0.5
10	Luton	6.9	7.3	0.4
10 cities with the highest levels of inequality				
55	Newcastle	16.5	16.8	0.2
56	Belfast	17.1	17.7	0.6
57	Manchester	17.1	17.4	0.4
58	Bradford	17.1	17.4	0.3
59	London	17.5	17.5	0.0
60	Dundee	17.7	17.7	0.0
61	Leeds	18.5	18.9	0.4
62	Middlesbrough	19.0	19.7	0.6
63	Birmingham	19.9	20.2	0.3
64	Glasgow	20.6	20.6	0.0
	City Average	11.5	11.8	0.3

Source: ONS 2013, 2011 Census: Usual resident population by five-year age group, Lower Layer Super Output Areas (LSOAs), 2013 data. General Register Office for Scotland 2013, Small Area Population Estimates Scotland, Data Zones, 2012 data. Census Office for Northern Ireland 2013, Usual Resident Population, Super Output Areas, 2013 data. NOMIS 2013, Claimant Count, November 2013 data. Northern Ireland Neighbourhood Information Service (NINIS) 2013, Jobseekers Allowance Claimants, Super Output Area, 2013 data.



Housing

Housing stocks and prices together provide useful insights into cities' housing markets, showing both supply and demand measures.

Housing stock growth

- **Cities account for 52 per cent of the UK's housing stock.**
- The number of houses in cities increased by 0.5 per cent from 2011 to 2012. Almost all cities saw their housing stock increase. Birkenhead and Burnley were the exceptions – these cities saw no change.
- Among the top-placed cities, only five (Swindon, Milton Keynes, Gloucester, London, Peterborough) have experienced housing supply growth in accordance to their population growth rate.
- With the exception of Telford and Barnsley, all top-ranked cities were concentrated in the South. All bottom-placed cities were located in the North with Brighton and Derby being the exceptions.



Only 5 cities saw housing supply growth match population growth

Table 13:
Housing stock growth

Rank	City	Change, 2011-2012 (%)	Housing stock, 2012	Housing stock, 2011	Change, 2011-2012
10 cities with the highest housing stock growth					
1	Milton Keynes	1.6	103,600	102,000	1,600
2	Gloucester	1.1	53,300	52,700	600
3	Telford	1.0	69,400	68,700	700
4	Swindon	1.0	92,000	91,100	900
5	Peterborough	0.9	77,500	76,800	700
6	Bristol	0.9	301,100	298,400	2,700
7	Barnsley	0.8	105,800	105,000	800
8	Chatham	0.7	110,900	110,100	800
9	London	0.7	3,937,400	3,909,200	28,200
10	Southampton	0.7	155,100	154,000	1,100
10 cities with the lowest housing stock growth					
55	Brighton	0.3	152,600	152,100	500
56	Newcastle	0.3	379,800	378,600	1,200
57	Sheffield	0.3	349,900	348,800	1,100
58	Wigan	0.3	141,900	141,500	400
59	Derby	0.3	106,800	106,500	300
60	Manchester	0.2	820,700	818,700	2,000
61	Blackburn	0.2	59,700	59,600	100
62	Sunderland	0.1	123,500	123,400	100
63	Birkenhead	0.0	145,700	145,700	0
63	Burnley	0.0	79,300	79,300	0
United Kingdom		0.6	27,770,900	27,614,300	156,600

Source: Department for Communities and Local Government (DCLG) 2013, Dwelling stock estimates by local authority district 2011 and 2012 data. Scottish Neighbourhood Statistics 2013, Dwelling stocks estimates 2011 and 2012 data. Northern Ireland Neighbourhood Information Service (NINIS) 2013, Department Finance and Personnel, Valuation Directorate, Land and Property Services, 2011 and 2012 data.

House prices

- Cambridge saw the highest growth in house prices during 2013, with the average price increasing by over 10 per cent. This was almost three times as fast as the national average. London followed as a close second - the average house was 9 per cent more expensive than the previous year.
- Other cities continue to feel the impact of the housing market crash brought on by the financial crisis. There is a distinct spatial pattern to this - 16 of the 20 cities that saw a decline in house prices over the last year are in the North or Scotland.
- The average house price in London in 2013 (£461,100) was almost five times higher than the average house price in Burnley (£97,000).
- Over the last decade house prices in London increased by an average £213,000. This growth alone would be enough to buy two average priced homes in Hull.



Table 14:
House price growth

Rank	City	Annual Growth, 2012-2013 (%)	Average price, 2013 (£)	Average price, 2012 (£)	Difference in average Prices, 2012-2013 (£)
10 cities with the highest rises in house prices					
1	Cambridge	10.7	362,800	327,600	35,200
2	London	9.0	461,100	423,000	38,100
3	Crawley	6.8	314,500	294,400	20,100
4	Coventry	5.5	145,900	138,300	7,600
5	Oxford	4.4	388,100	371,600	16,500
6	Brighton	4.2	286,700	275,200	11,500
7	Cardiff	3.9	187,900	180,800	7,100
8	Peterborough	3.6	157,900	152,400	5,500
9	Bolton	3.4	129,000	124,800	4,200
10	Southend	3.2	224,200	217,300	6,900
10 cities with the lowest rises in house prices					
54	Milton Keynes	-1.1	206,800	209,000	-2,200
55	Edinburgh	-1.2	213,400	216,000	-2,600
56	Glasgow	-1.3	139,500	141,400	-1,900
57	Doncaster	-1.9	123,000	125,400	-2,400
58	Blackburn	-1.9	111,900	114,100	-2,200
59	Middlesbrough	-2.4	130,600	133,800	-3,200
60	Barnsley	-2.9	114,900	118,300	-3,400
61	Wigan	-3.0	117,900	121,500	-3,600
62	Burnley	-4.6	97,000	101,700	-4,700
63	Rochdale	-4.6	121,700	127,600	-5,900
	Great Britain	3.7	235,400	244,100	8,700

Source: Land Registry 2013, Market Trend Data, Price Paid, 2012 and 2013 data. Scottish Neighbourhood Statistics 2013, Mean house prices, 2012 and 2013 data. Note: 2013 prices in Scotland are an average of the first three quarters of 2013. House prices in England and Wales are an average of January to November prices.

Environment

Accounting for over 80 per cent of total greenhouse gas emissions, CO₂ emissions are one way to gauge how 'green' a city is and the size of its carbon footprint.

CO₂ emissions per capita

- **Cities emit less CO₂ than the rest of the UK.** CO₂ emissions per capita were 32 per cent lower in cities than non-cities in 2011.
- Just seven cities had CO₂ emissions per capita above the national average of 6.9 tonnes.
- Birkenhead is the only city not in the South to feature amongst the cities with the lowest emissions, while Crawley is the only southern city to feature amongst the highest emitters.
- On average, small cities reduced their emissions by 10.3 per cent, outstripping the fall of 8.4 per cent in large cities.
- All large cities reduced their CO₂ emission per capita between 2010 and 2011. Manchester saw the largest fall (-11 per cent), while Liverpool saw the smallest (-4.9 per cent).
- London alone accounted for 11 per cent of the total CO₂ emissions of the UK. However, its per person emissions compare favourably with other cities. At 5.1 tonnes per capita, London is placed 16th in the overall ranking.
- Despite being the largest emitter, Middlesbrough continued to see large falls in its overall emissions – emissions in 2011 were half of what they were in 2005. That said, CO₂ emissions per capita in Middlesbrough (17.5) are still almost four times those of Hastings (4.3).

Table 15:
Total CO₂ emissions per capita

Rank	City	Total CO ₂ emissions per capita, 2011 (t)	Total CO ₂ emissions per capita, 2010 (t)
10 cities with the lowest emissions per capita			
1	Hastings	3.9	4.3
2	Chatham	4.1	4.6
3	Ipswich	4.2	4.8
4	Luton	4.2	4.8
5	Southend	4.3	4.7
6	Brighton	4.3	4.8
7	Worthing	4.4	4.8
8	Birkenhead	4.7	5.3
9	Plymouth	4.7	5.2
10	Portsmouth	4.8	5.2
10 cities with the highest emissions per capita			
55	Preston	6.6	7.2
56	Crawley	6.6	7.2
57	Belfast	6.8	7.5
58	Aberdeen	7.0	7.6
59	Wakefield	7.2	7.7
60	Doncaster	7.6	8.2
61	Warrington	7.7	8.8
62	Grimsby	9.2	10.3
63	Newport	10.2	11.2
64	Middlesbrough	14.9	17.5
	United Kingdom	6.9	7.5

Source: Department of Energy & Climate Change (DECC) 2013, CO₂ emissions per capita, 2011 data. NOMIS 2013, Mid-year population estimates 2012 data.

Figure 16:
CO₂ emissions per capita

City	Emissions per capita, 2011 (t)	City	Emissions per capita, 2011 (t)
Hastings	3.9	Glasgow	5.7
Chatham	4.1	Rochdale	5.7
Ipswich	4.2	Cambridge	5.7
Luton	4.2	Cardiff	5.8
Southend	4.3	Bristol	5.8
Brighton	4.3	Oxford	5.9
Worthing	4.4	Dundee	5.9
Birkenhead	4.7	Sheffield	6.0
Plymouth	4.7	Derby	6.0
Portsmouth	4.8	Edinburgh	6.1
Bournemouth	4.8	Norwich	6.1
Gloucester	4.9	Stoke	6.1
Southampton	4.9	Blackburn	6.2
Bradford	5.0	Blackpool	6.2
Coventry	5.0	Leeds	6.3
London	5.1	Barnsley	6.4
Bolton	5.1	Aldershot	6.4
Wigan	5.1	Peterborough	6.4
York	5.3	Liverpool	6.4
Mansfield	5.3	Milton Keynes	6.5
Birmingham	5.3	Swindon	6.5
Northampton	5.3	Telford	6.6
Burnley	5.4	Preston	6.6
Reading	5.4	Crawley	6.6
Nottingham	5.4	Belfast	6.8
Leicester	5.5	Aberdeen	7.0
Hull	5.5	Wakefield	7.2
Newcastle	5.5	Doncaster	7.6
Huddersfield	5.6	Warrington	7.7
Swansea	5.6	Grimsby	9.2
Manchester	5.6	Newport	10.2
Sunderland	5.6	Middlesbrough	14.9

Total CO₂ emissions

- Low < 4.8
- Medium - 4.9-6.5
- High > 6.6



Source: Department of Energy & Climate Change (DECC) 2013, CO₂ emissions per capita, 2011 data. NOMIS 2013, Mid-year population estimates 2012 data.

Digital connectivity

The internet now plays an integral part in the way that most businesses operate. Broadband connection is now a key component of the infrastructure offer that a city can make to attract businesses as well as support the growth of its existing business base.

- Luton, the top performing city, had near universal access to Super-Fast Broadband (SFBB) in 2013. It is followed by the university cities of Oxford and Cambridge.
- On average, cities increased their SFBB from 2012 to 2013 by 6.6 percentage points (from 66 per cent to 72.6 per cent). Five cities – Hastings, Aberdeen, Rochdale, Sunderland and Southend – saw a significant improvement, with their SFBB coverage increasing by over 20 percentage points.

- Of the large cities, Glasgow, Liverpool, Newcastle and Sheffield all had access rates lower than the city average.¹⁴

Box 5: Defining digital connectivity

Cities Outlook uses Super-Fast Broadband (SFBB) as the indicator for measuring digital connectivity.

SFBB is defined by Office of Communication (Ofcom) as 30Mbit/s.¹⁵ This is in line with European Union Digital Agenda's standard that sets the threshold for SFBB.

Data for maximum broadband speed for each postcode is available from Ofcom. Some postcodes do not have data due to insufficient data or no premises, and these have been excluded from the analysis.



14. Data for Belfast is not available.

15. Ofcom (2012), *2012 UK Communications Infrastructure Report*, London: Ofcom

Table 16:
Cities' postcodes with maximum broadband

Rank	City	Postcodes achieving SFBB speeds, 2013 (%)*
10 cities with the highest SFBB penetration rate		
1	Luton	93.6
2	Oxford	89.9
3	Cambridge	88.3
4	Derby	87.6
5	Worthing	87.3
6	Dundee	86.9
7	Ipswich	86.1
8	Plymouth	86.0
9	Brighton	85.9
10	Portsmouth	85.7
10 cities with the lowest SFBB penetration rate		
54	Wakefield	60.5
55	York	58.4
56	Norwich	57.1
57	Doncaster	55.8
58	Barnsley	55.3
59	Burnley	55.3
60	Blackburn	48.1
61	Aberdeen	42.4
62	Blackpool	40.4
63	Hull	7.4
City Average		72.6

Source: Ofcom 2013, Broadband data, postcode level, 2013 data. Postcode data are allocated to PUAs. Note: Due to variations in broadband performance over time, the file should not be regarded as a definitive and fixed view of the UK's fixed broadband infrastructure. However, the information provided may be useful in identifying variations in broadband performance by geography and the impact of superfast broadband on overall broadband performance.

*Postcodes with available data

Well-being

For the first time in 2013 the ONS published data on well-being. The issue has attracted considerable attention in recent years, and whilst the data is very much subjective – for example, it’s unlikely that one person’s assessment of well-being is the same as another’s or indeed consistent between surveys – presenting the data at the city level provides an additional perspective alongside Cities Outlook’s other indicators.

- There is little difference in reported life satisfaction between cities, and there is no statistical difference between cities on average and the UK as a whole.
- There is no clear geographical pattern to the data.
- 45 cities (70 per cent) saw their measure of life satisfaction increase from 2011-12 to 2012-13.
- Aldershot had the highest increase change and, along with Crawley and Ipswich, also has the highest absolute life satisfaction rating in the period 2012-13.



Table 17:
Life satisfaction change

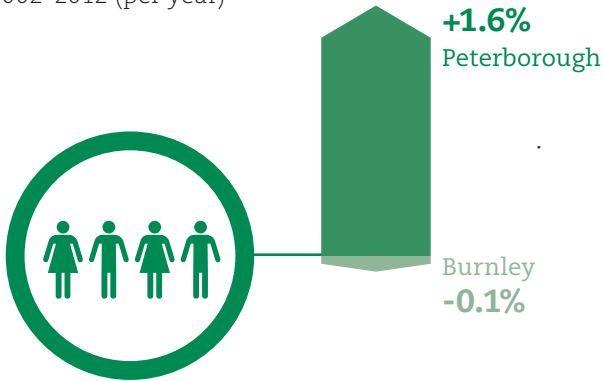
Rank	City	Change, 2011-12 - 2012-13 (%)	Life satisfaction, 2012-13	Life satisfaction, 2011-12
10 cities with the largest life satisfaction increase				
1	Aldershot	5.5	7.7	7.3
2	Ipswich	5.0	7.7	7.4
3	Cambridge	4.6	7.5	7.2
4	Gloucester	4.4	7.6	7.3
5	Crawley	3.9	7.7	7.4
6	Birkenhead	3.6	7.4	7.1
7	Coventry	3.5	7.4	7.1
8	Bradford	3.1	7.4	7.2
9	Birmingham	3.0	7.4	7.1
10	Luton	2.8	7.3	7.1
10 cities with the largest life satisfaction decrease				
55	Grimsby	-0.9	7.3	7.4
56	Sunderland	-0.9	7.3	7.4
57	Newport	-1.1	7.2	7.3
58	Burnley	-1.2	7.2	7.3
59	Swindon	-1.2	7.4	7.5
60	Aberdeen	-1.3	7.5	7.6
61	Brighton	-1.7	7.4	7.6
62	Worthing	-2.3	7.2	7.4
63	Hastings	-3.6	7.1	7.4
64	Dundee	-4.1	7.3	7.6
	United Kingdom	0.5	7.5	7.4

Source: ONS 2013. Personal well-being across the UK. 2011-2013 data

Cities vary in a number of ways...

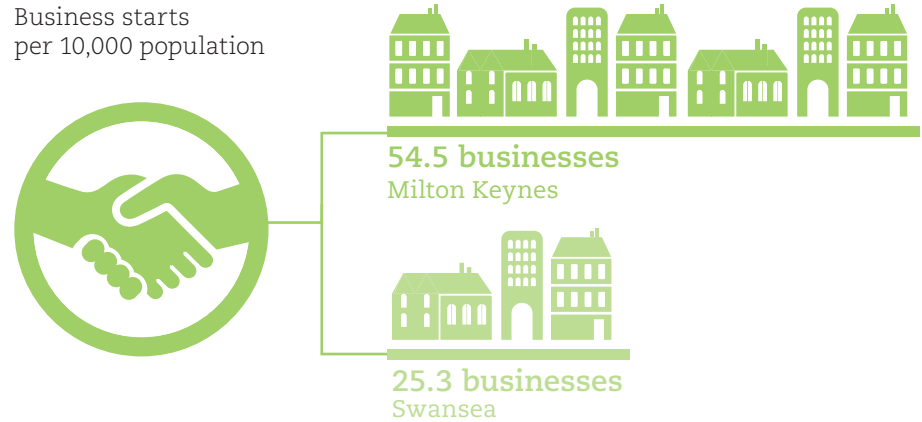
Population

2002–2012 (per year)



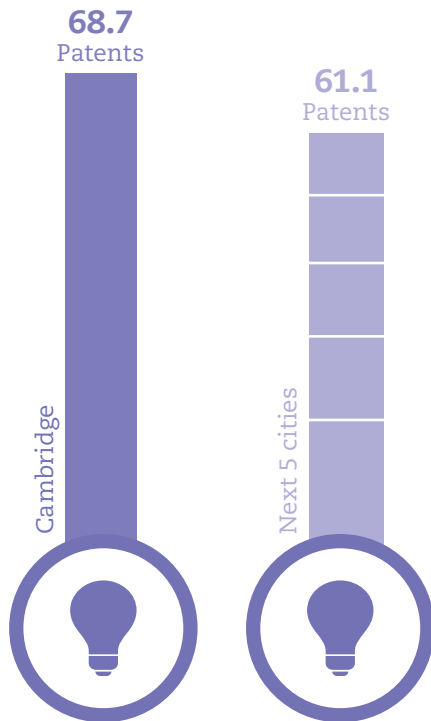
Business starts

Business starts per 10,000 population



Innovation

Patents granted per 100,000 population in 2012



Next 5: Swindon (19.3); Edinburgh (12.2); Aberdeen (10.7); Aldershot (9.9); Gloucester (8.9)

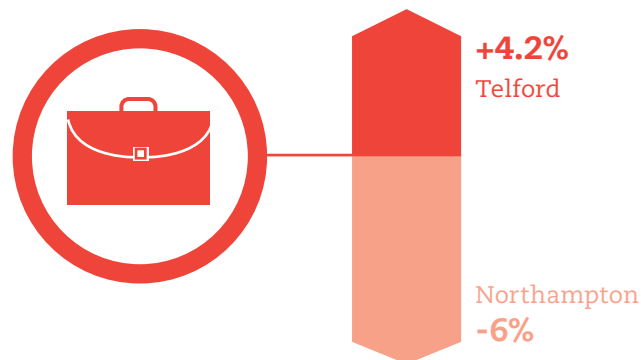
Employment rate

2011–2012



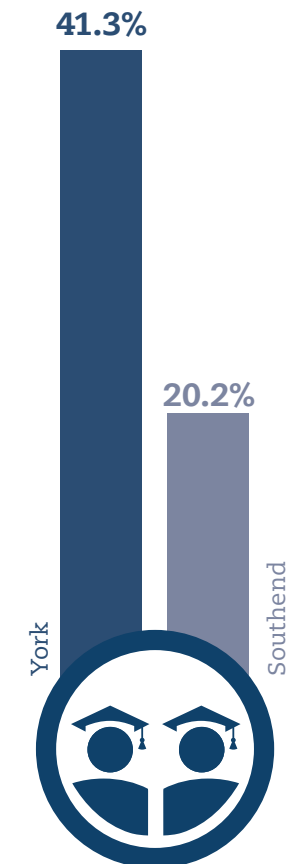
Jobs growth

2011–2012



Skills

NVQ4+ quals





January 2014

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