



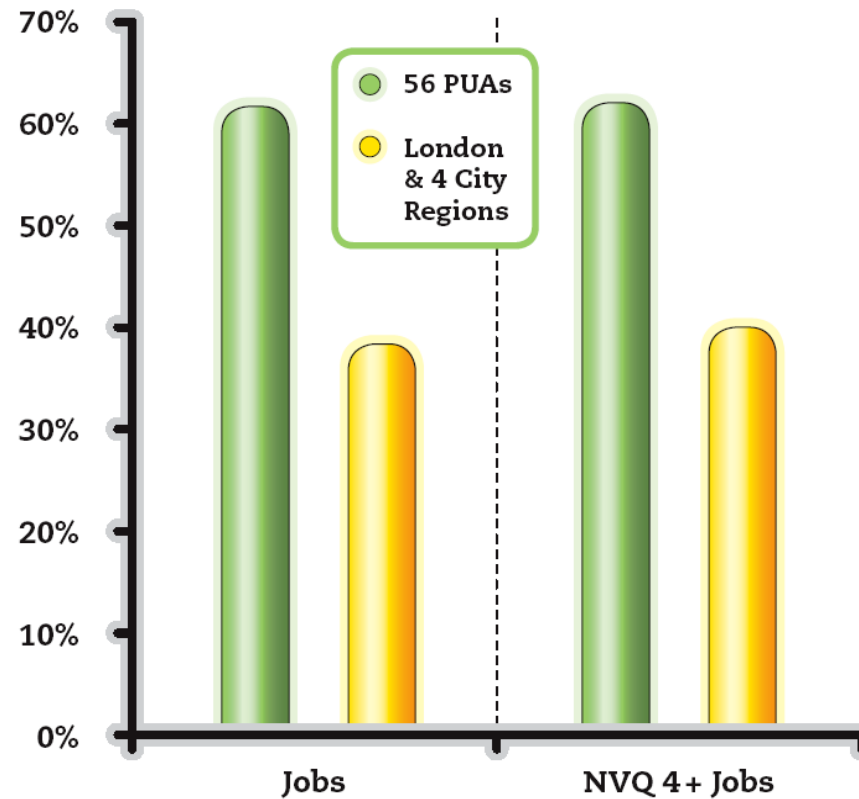
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Cities Outlook 2010





Cities will lead the recovery from the recession

Cities' Contribution to the Economy 2008



Source: NOMIS 2009, Annual Business Inquiry (2008 data). NOMIS 2009, Annual Population Survey (2008 data). Comparison indicative, as both the Annual Business Inquiry and the Annual Population Survey are sample surveys.

The recovery will be uneven. Some cities will bounce back quickly...

Cities	Business stock per 10,000 residents (2008)	Proportion of business start ups per 10,000 residents (2008)	Percentage of residents with degree-level qualifications (2008)	Concentration of knowledge intensive jobs (2008)
Brighton	456.6 (2 nd)	49.6 (6 th)	38.1% (6 th)	23.2% (10 th)
Cambridge	378.7 (11 th)	37.9 (25 th)	51.8% (1 st)	35.2% (1 st)
Edinburgh	338.4 (22 nd)	39.5 (20 th)	45.1% (2 nd)	29.6% (3 rd)
Milton Keynes	432.8 (4 th)	59.6 (3 rd)	29.7% (17 th)	28.0% (4 th)
Reading	425.5 (6 th)	51.1 (5 th)	36.3% (8 th)	27.7% (5 th)
GB average	380.1	44.4	29.0%	17.1%

Ranking out of 64 cities in brackets

* Concentration of knowledge intensive jobs are ranked out of 63 cities

...while others will struggle

Cities	Private sector job gains/losses as % of 2008 jobs	Business start ups per 10,000 residents (2008)	Residents with no qualifications (2008)
Barnsley	- 5.2% (49 th)	30.8 (54 th)	17.9% (54 th)
Burnley	-16.4% (62 nd)	31.9 (45 th)	23.0% (63 rd)
Doncaster	-6.7% (52 nd)	31.6% (50 th)	15.3% (47 th)
Newport	-13.3% (61 st)	28.8 (61 st)	16% (52 nd)
Stoke	-19.4% (63 rd)	30.0 (56 th)	19.2% (58 th)
GB average	4.9%	44.4	12.4%

Source: NOMIS

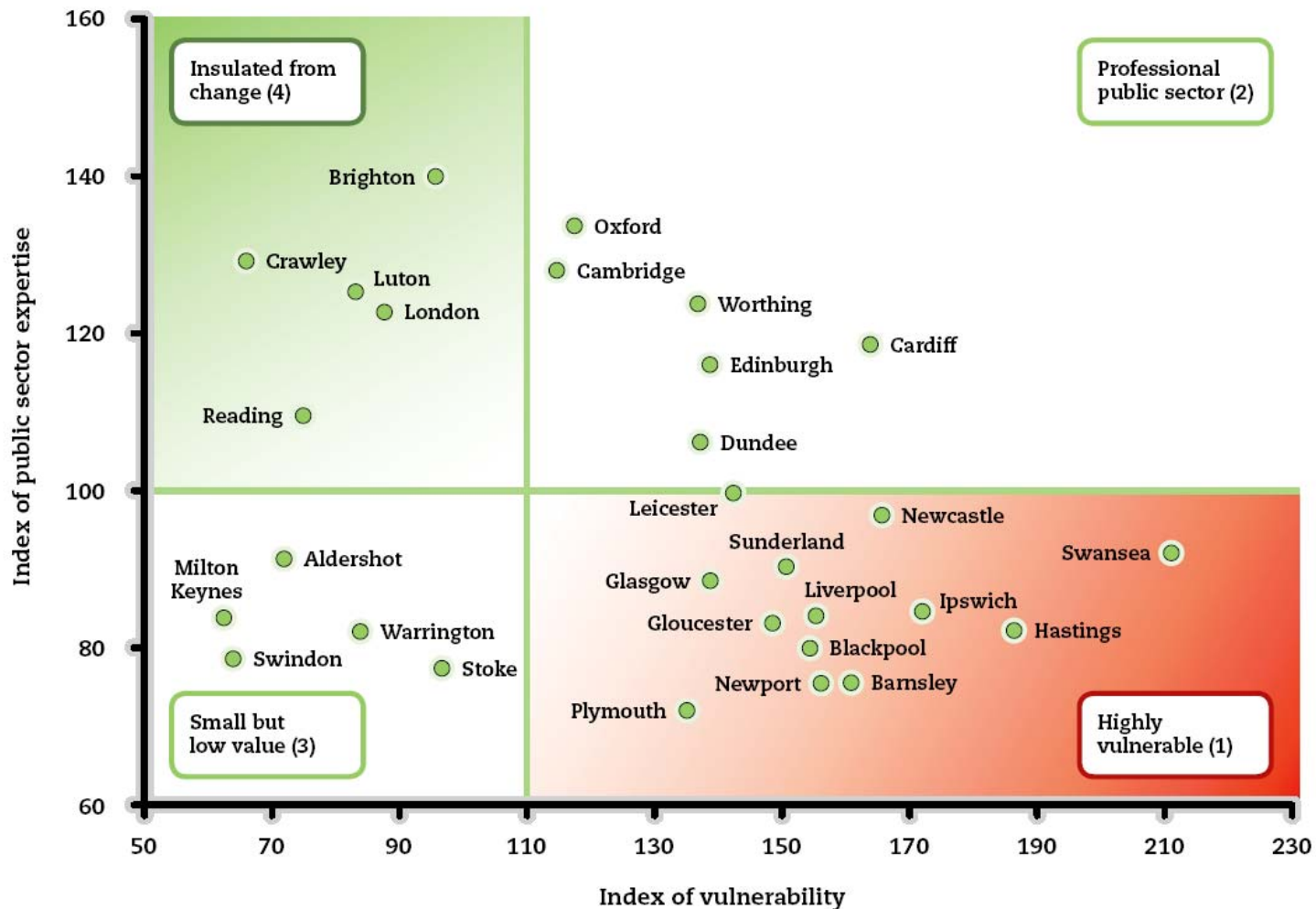
Ranking out of 64 cities in brackets

* Cities with the highest percentage of residents with no qualifications and private sector gains/losses as % of 2008 jobs are ranked out of 63 cities



Impending public sector jobs cuts create challenge to create private sector jobs

Public Sector Cities Exposed





New business formation could be a source of jobs growth

Rank	Cities	Business Births	Business Deaths	Churn Rate
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10 cities with highest business births

1	London	75.1	51.9	4.5
2	Grimsby	70.2	67.0	0.9
3	Milton Keynes	59.6	40.3	4.5
4	Aldershot	54.9	36.4	4.1
5	Reading	51.1	39.9	2.6
6	Brighton	49.6	42.4	1.6
7	Crawley	48.1	39.0	2.3
8	Bournemouth	47.8	41.0	1.6
9	Preston	47.1	41.3	1.5
10	Aberdeen	45.2	30.7	3.9

Rank	Cities	Business Births	Business Deaths	Churn Rate
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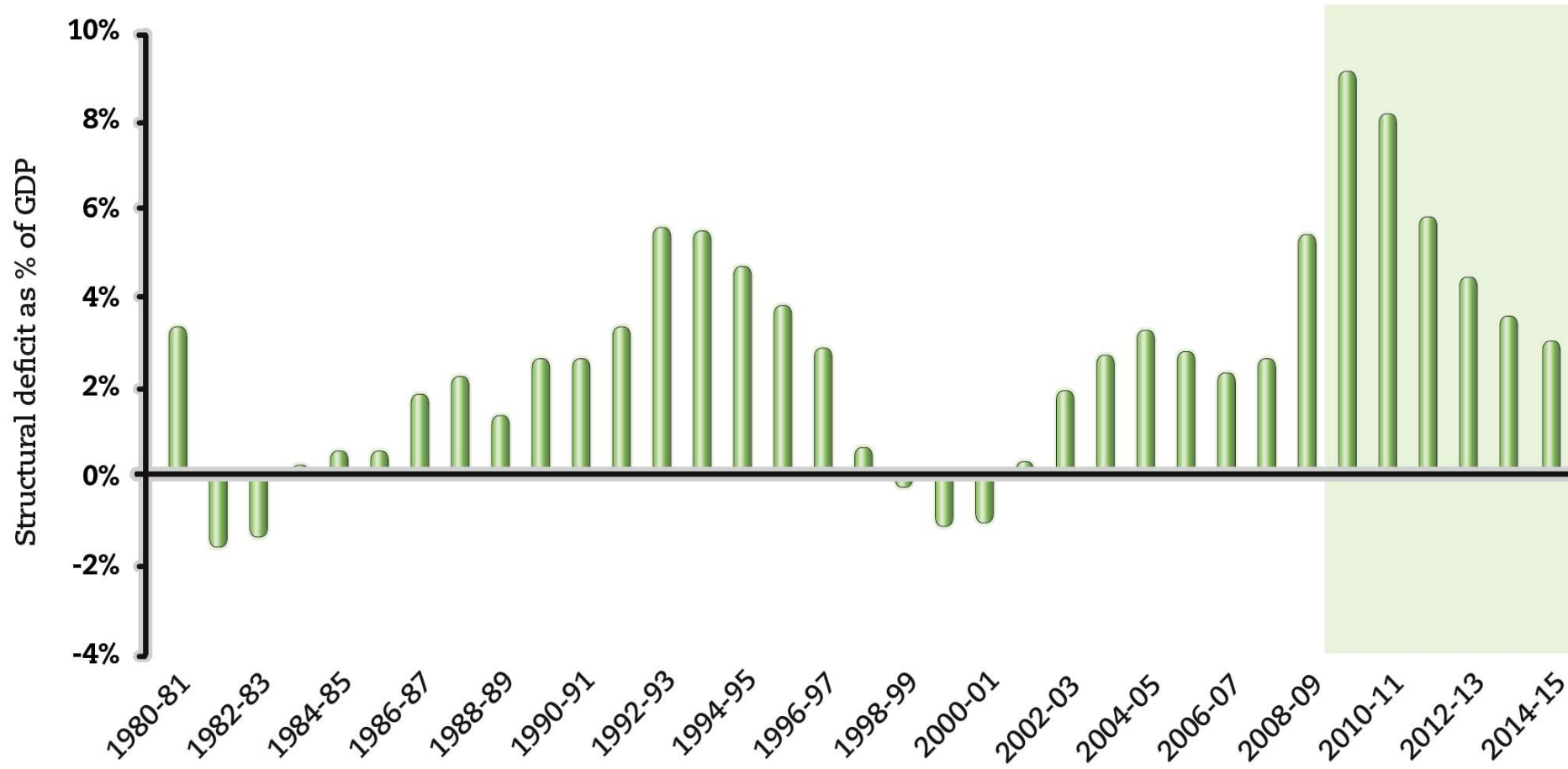
10 cities with lowest business births

47	Mansfield	30.4	25.8	1.7
48	Stoke	30.0	28.5	0.6
49	Hull	30.0	27.3	1.1
50	Sheffield	29.9	30.3	-0.1
51	Middlesbrough	29.7	22.4	3.2
52	Wakefield	29.3	26.1	1.2
53	Newport	28.8	28.4	0.1
54	Plymouth	27.7	22.0	2.4
55	Dundee	23.2	20.7	1.1
56	Sunderland	22.3	23.0	-0.3

Source: ONS



Public spending cuts will also force tough choices



Source: HM Treasury



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