THE GREAT **NOTTINGHAM** DEBATE 2016

What can be done to attract and retain graduates, other young people and skilled workers in the short term? What sort of economy should Nottingham aspire to develop in the long term and what are the lessons for Place Marketing?

Research Report

Produced by Chris Lawton and Nelson Blackley, Nottingham Business School

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The Great Nottingham Debate 2016

Introduction and Context

This project, undertaken to inform an event on the 21st April 2016, builds on earlier research by Nottingham Business School (NBS – part of Nottingham Trent University) in partnership with the Nottingham Post to inform *'The Great Nottingham Debate',* a major event held at the Nottingham Conference Centre on the 27th of November 2014. The research outputs and summary findings of this earlier project included:

'*Benchmarking the Economy and Labour Market of Nottingham'* – a mainly statistical report that identified: a relatively high level of economic output per capita in Nottingham, but lower household income and earnings; a recovering but still relatively high rate of unemployment, and a comparative over-representation of employment in low pay, low skill activities (especially for residents of the city compared to commuters). Case studies of similar sized European cities, based on the Eurostat 'Urban Audit', included:

- **Karlsruhe** - part of 'Europe's silicon valley' around the Rhine, with strengths in low carbon, digital content and energy generation and distribution, with a strong R&D base closely associated with Higher Education assets. Karlsruhe is twinned with Nottingham and identified by Nottingham City Council as an exemplar in their international strategy;
- **Malmö** - the commercial centre of southern Sweden, with a very similar sized population and economy to Nottingham, and also a comparable history of de-industrialisation. Malmö is now internationally recognised for urban design and regeneration, with strengths in bio and medical technology and creative and cultural activities; and
- **Utrecht** - has a significantly higher level of GDP per capita and lower unemployment than Nottingham, but is interesting due to similar strategic priorities to those identified in the Nottingham Growth Plan. Utrecht has a very high level of R&D activity, closely linked to Utrecht University (the largest university in the Netherlands) and a large student and graduate population within a city that is similar in size to Nottingham. In addition to strengths in biotechnology research, development and manufacturing, Utrecht has emphasised the importance of arts and culture in economic development and aims to achieve Cultural Capital status by 2018.

This report was accompanied by two qualitative 'think pieces' covering questions identified by the Post and published as articles in the December 2014 edition of '*The Business'*. These drew from the relevant literature and a small number of depth interviews with stakeholders and policy makers:

- **'Nottingham's Emerging Identity as a Creative City'** - reviewed current cultural and artistic assets, including national media interest in popular music from Nottingham and the global success of Nottingham-based artists such as Jake Bugg, actors such as Joe Dempsey and Samantha Morton, and film-makers associated with the city, notably Shane Meadows. Alongside sporting and heritage assets, these developments can be drawn together to project a positive sense of civic identity in place making and place marketing activities – something that anchor institutions in the US and Europe have achieved in recent years. The paper included a discussion of the controversial place of Robin Hood in Nottingham's collective identity; and

- '**Prospects and Challenges for City Region Devolution in Nottingham and the East Midlands'**- reviews the economic history of Nottingham and the East Midlands and how this affects current strengths such as bioscience and healthcare. The paper concluded by summarising the developments required to move towards a 'combined authority' between Nottingham City and Nottingham County Councils and the policy and funding implications of this.

The research findings were presented during the event, where 170 delegates from business, local government, higher and further education and the charitable and voluntary sectors discussed the challenges and opportunities facing Nottingham and key issues for future collective action. Following this event, a number of meetings were held between the Post, NBS, the event's business sponsors and key stakeholders. It was felt that a good level of understanding on the economic issues facing Nottingham had now been established, therefore any follow-up work should clearly address actions for partnership working. It was agreed that the following questions expressed the issues that most clearly require shared actions:

What can be done to attract and retain graduates, other young people and skilled workers over 30 in the short term? What sort of economy should Nottingham aspire to develop in the long term and what are the lessons for place marketing?

These questions provide the focus for this report. They draw attention to the socio-economic push/pull factors influencing different groups to move to, remain in or leave Nottingham, how these factors are related to key assets (including business, cultural, sporting, heritage and infrastructure assets), how this information can be communicated as a coherent story and whether this needs to be adapted for different target groups (for example local businesses compared to retail and leisure visitors). This includes learning from other areas that have successfully marketed a story of place, increasing the number of tourist visits, attracting students and other young people, retaining graduates and attracting and retaining skilled older workers and entrepreneurs.

To address this question, this report will be structured across two sections as follows:

Section 1 – on the attraction and retention of graduates and skilled workers:

- **The population, labour market and business structure of Nottingham,** compared to other cities and towns, to understand the socio-economic factors affecting the attraction and retention of graduates, other young people, and older, skilled workers. This will provide context for current levels of graduate retention, based on the *Destinations of Leavers from Higher Education Survey* (DLHE); and
- **Final year Undergraduate and NTU Alumni perspectives** collected through 4 parallel Focus Groups with 41 participants. The analysis incorporates information from other recent studies on graduate retention, such as those published by Nottingham City Council, student-led

research with SMEs undertaken in the NBS division of HR Management, and a recent report by the Association of Graduate Careers Advisory Services (AGCAS, 2015).

Section 2 – on developing an approach to place marketing in Nottingham:

- **A literature study of place marketing,** identifying the role of key assets in current marketing activity and examples of good practice from other UK towns and cities;
- **Employer perceptions** explored through face-to-face interviews. The interviewees provided qualitative views, from employers' engagement with potential recruits, locally and from across the UK and internationally, on the factors that affect individuals' decisions to apply for or accept posts within Nottingham. The topic guide for these semi-structured interviews prompted discussion on the role of key 'assets' and experiences of and messages for Place Marketing; and
- **Case studies of place marketing in other towns and cities,** drawing from the literature and from primary research with individuals involved in relevant place marketing organisations.

The report concludes with observations for place marketing to improve the attraction and retention of skilled workers and a view on key potential growth areas over the longer term.

Section 1: Attraction & Retention of Graduates and Skilled Workers in Nottingham

This section investigates the factors that affect the city of Nottingham's attraction and retention of skilled workers. The starting point and significant area of interest throughout, as identified by the Nottingham Post and the project stakeholders, is the attraction and retention of university graduates.

1.1 Graduate Retention in Nottingham and the English Core Cities

In this report, 'graduate retention' refers to the proportion of Higher Education students at institutions within a given area who remain in employment or go onto further study in that same area after graduation. This is frequently prioritised in local growth strategies, linked to wider objectives around avoiding 'brain drain' (the out-migration of skilled workers), addressing employer skills gaps, enabling firms to 'upskill' their activities and contributing to other factors associated with higher productivity and growth, such as innovation and entrepreneurship. For example, the Global Entrepreneurship Monitor (GEM) identifies a strong association between graduate-level qualifications and greater rates of entrepreneurial activity.[1]

Despite the common emphasis on graduate retention in local development strategies, there is frequently little clarity in local and regional strategies on what the 'right' or optimum level of retention should be and the relationship this may have with measures of local demand for graduate level skills – and thus the risk for any skills mismatch if retention rates exceed demand. In their study of graduate retention in Sussex, Pratt et al (2006) observed that:

"Economic development and regeneration strategies often stress the importance of graduate retention. However, graduate retention per se will not guarantee economic growth and a flourishing knowledge economy unless there is employer demand for graduate skills and a matching rise in graduate employment opportunities. If not, the result can be hidden under-employment with graduates doing jobs suited to people with Level 2 or 3 qualifications" (p.2)[2]

The Nottingham Growth Plan[3] includes a series of projects aimed at with working with local businesses to improve graduate retention and ensure that graduates are productively deployed within the city's business base. It identifies Nottingham as having the lowest retention rate of the 8 English Core Cities whilst at the same time having a large student population, stating: "Nottingham needs to retain and develop this talent if it is to successfully transform its economy" (p. 48). Recent analysis published by

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[1] Levie, J. and Hart, M., 2011. '*Global Entrepreneurship Monitor: United Kingdom 2009 Monitoring Report*'. Strathclyde University and Aston Business School on behalf of the GEM consortium.

[2] Pratt, J., Matthews, S., Norrington, H., Friday, N., and Underwood, K. (2006), Step Ahead Research on behalf of the Sussex Learning Network. '*Graduate Retention Study*', Online Resource, URL: https://www.heacademy.ac.uk/sites/default/files/sussex_graduate_retention_study.pdf

[3] Nottingham City Council, 2012. '*The Nottingham Growth Plan*', URL: http://www.nottinghamcity.gov.uk/static/nottinghamgrowthplan/files/Nottingham%20Growth%20Plan%20Web.pdf

Nottingham City Council (NCC, 2015) on the 2012-13 *Destinations of Leavers from Higher Education Survey* (DLHE)[4] appears to confirm this challenge, as shown in Table 1 below.

Table 1: Graduate Retention Rates (work and further study in city/county or PUA of area of study within 6 months of graduation) - Core Cities and Derby

City (Primary Urban Area[5]) of study	Retention rate – working (%)	Retention rate – further study (%)	Total retention rate (%)
Manchester	47.2	58.6	48.7
Birmingham	44.4	59.6	46.3
Newcastle	41.5	59.7	43.7
Liverpool	40.7	46.6	41.5
Leeds	36.9	62.9	41.3
Derby	37.9	64.1	40.7
Sheffield	32.6	54.8	35.3
Bristol	26.5	49.9	29.6
Nottingham	23.3	52.6	27.7

Source: Nottingham City Council, 2015. '*Graduate Retention 2012-13'*, derived from HESA, Destinations of Leavers from Higher Education (DLHE) survey, 2012-13.

Out of those graduates surveyed within six months[6] of completing their courses in 2012-13, Nottingham had the lowest retention rate for those in employment (23.3%), the second lowest for further study (52.6%), and the lowest total retention rate (employment plus further study) at 27.7%. The largest cities, Birmingham and Manchester, have a very much higher rate of retention for working graduates (excluding further study), at 44.4% and 47.2% respectively. This is around twice the proportion for Nottingham. There is less variation in rates of retention for further study.

[4] The DLHE survey is undertaken annually by all UK Higher Education Institutions (HEIs). All leavers from UK institutions are contacted to take part within 6 months of their graduation through a postal and online survey (from 2016 onwards the DLHE will be an online survey only). Of those graduates who received their qualification in the 2013-14 academic year, 79% responded to the DLHE survey. A smaller sample of leavers who completed their initial DLHE are re-contacted 3 ½ years after graduation to provide insight into longitudinal change. The DLHE is the source for a number of important statistics in addition to the graduate retention rate, including the graduate employment rate and the 'Graduate Prospects' rate (the proportion of recent graduates achieving employment in a 'graduate level occupation' as defined by the Higher Education Funding Council for England, HEFCE). Graduate employment and Graduate Prospects are reported by all UK HEIs as part of their Key Information Statistics (KIS) which are required by Government to inform potential applicants of the employment outcomes associated with degree courses.

[5] Primary Urban Areas (PUAs) are geographical areas developed by the ONS and the Centre for Cities that attempt to express the "built-up" physical extent of a city, rather than individual local authority areas. For English cities, they are aggregated from groups of Unitary Authorities/Municipal Districts and Local Authority Districts. For Nottingham, the districts used correspond with the 'Great Nottingham' area used by Nottingham City Council in their analysis, comprising Nottingham City UA and Rushcliffe, Broxtowe and Gedling LADs.

[6] Note that the DLHE should be interpreted as an indication of 'first destination', recorded six months after graduation. It *does not capture* return flows to the region of study after that six month period (for example after 1-2 years working in London) but *will capture* a proportion of graduates who return to their home region immediately after graduation to hunt for jobs (including in their region of study) whilst working in temporary, potentially non-graduate employment in their home region. The Focus Groups with NTU students indicated widespread intentions for short-term return to home regions for this reason.

Bristol, with a total resident population similar to Nottingham, also has a relatively low graduate retention rate (a total rate of 29.6%). Leeds and Newcastle, larger than Nottingham but with much smaller total populations than Birmingham and Manchester, have much higher total retention rates, at 41.3% and 43.7% respectively. In further analysis of the DLHE, NCC also note that:

- Of the 8,940 recent graduates from Nottingham universities who were in some work (full time work, part time work and combinations of work and study), the destination for the largest proportion of graduates was London and the South East, at 29.6%. 'Other East Midlands' (excluding Nottingham and Nottinghamshire) accounted for 14.5% of recent graduates in some form of employment. Nottingham has the highest proportion of recent graduates who move to London and the South East out of the eight English Core Cities plus Derby;
- Earlier analysis by the Institute of Employment Studies (IES) suggests that the higher the proportion of students studying in their 'home region' (in the case of Nottingham universities, students originally from the East Midlands), the higher the graduate retention rate[7];
- The original 'home region' of domicile describes where the graduate came from before attending university. Of all graduates who left Nottingham universities in 2012-13, 56.8% remained in or returned to their home region. This was higher (at 60.8%) for those recent graduates in some form of employment. The Nottingham PUA was the original home region for 18.3% of graduates from Nottingham institutions, whilst London and the South East was the home region for 23.4% of Nottingham graduates. The proportion of Nottingham graduates for whom the Nottingham PUA was their home region was the second lowest proportion of the eight English Core Cities behind Bristol (the home region for 17.5% of graduates from Bristol universities). This compares to Birmingham at 42.5%, Manchester at 41.2% and Liverpool at 41%; and
- Graduate retention in Nottingham appears to have been falling over time. The total retention rate (working and studying) is 3 percentage points lower than the rate of 31% in 2004-5. This can partly be explained by a falling proportion of students at Nottingham universities whose home region was the East Midlands – with a corresponding increase in students from London and the South East. Of the other Core Cities, only Bristol had a higher proportion of students whose home region was London and the South East (at 29.2%). Manchester, which had the highest graduate retention in 2012-13, had only 11.5% of graduates whose home region was London and the South East.[8]

The Higher Education Careers Services Unit (HECSU, 2015) published further analysis of the 2012-13 DLHE for the 9 English regions and 3 UK devolved nations, which provides wider context – including the fact that retention rates in most regions except London have been falling in recent years. The HECSU analysis further investigated the importance of graduates' home regions by categorising employed graduates (leavers with first degrees only who were in some form of work within six months of graduation) into four groups:

- 'Regional Loyals': who studied in their home region and remained to work in that region. Almost half (45.9%) of first degree graduates fell into this group nationally in 2012-13

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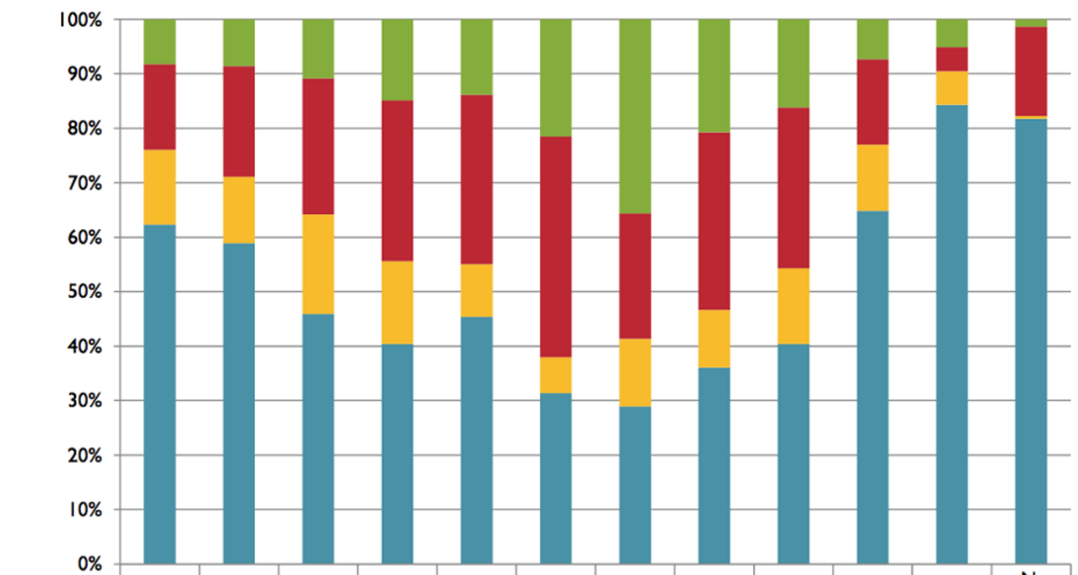
[7] Pollard, E., Williams, M. and Hill, D., Institute for Employment Studies (IES) on behalf of the East Midlands Development Agency (emda), 2005. '*Graduate Employment Choices in the East Midlands*'.
[8] Nottingham City Council, 2015. '*Graduate Retention 2012-13.*'

- 'Regional Returners': who studied in a region other than their home region, and then returned to their region of original domicile to work after graduation. Just under a quarter (24.7%) of all working recent UK graduates fell into this group;
- 'Regional Stayers': who studied in a region other than their home region but remained in the region of study after graduation. This was the smallest group nationally, accounting for 11.5% of working graduates; and
- 'Regional Incomers': who go on to work in a different region to either their original home region or region of study. This group made up 18% of employed UK graduates in 2012-13.

Chart 1 shows how the proportions of graduates in each of these four groups varies by region and nation. The East Midlands is notable for its lower than average proportion of 'Loyals' (40.4%), a large share of whom were older (over 30 at graduation) and female. The East Midlands has a higher proportion of 'Returners', at 29.5%, who were likely to be working in sectors such as education (indicating the importance of the public sector for graduate employment), and a higher proportion of 'Stayers', at 15.2%, who were the group most likely to be working in IT, finance or the arts. However, the East Midlands had a lower than average proportion of 'Incomers' from other regions, at 14.9%.

Chart 1: Graduates in employment (first degree graduates six months after graduation, 2012-13 academic year) by UK Region and Nation by HECSU 'Migration Category'



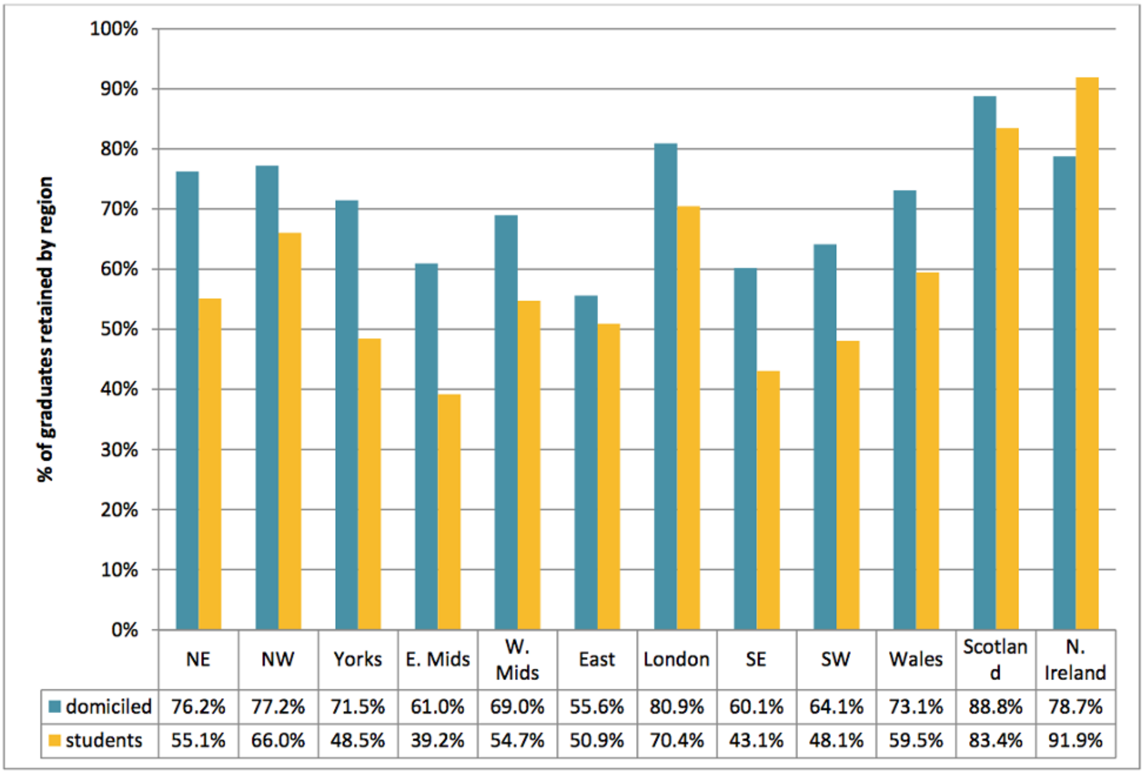
	NE	NW	Yorks	E. Mids	W. Mids	East	London	SE	SW	Wales	Scotland	N. Ireland
Incomers	8.2%	8.6%	10.9%	14.9%	13.9%	21.5%	35.6%	20.7%	16.2%	7.4%	5.1%	1.4%
Returners	15.7%	20.3%	25.0%	29.5%	31.1%	40.5%	23.0%	32.6%	29.6%	15.6%	4.4%	16.4%
Stayers	13.7%	12.2%	18.3%	15.2%	9.7%	6.6%	12.4%	10.5%	13.9%	12.2%	6.2%	0.5%
Loyals	62.3%	58.9%	45.9%	40.4%	45.4%	31.4%	28.9%	36.1%	40.4%	64.8%	84.3%	81.7%

Source: Higher Education Careers Services Unit (HECSU), 2015. '*Graduate Migration Patterns*', data derived from HESA, DLHE 2012-13.

Unsurprisingly, London stands out as the region with the highest proportion of 'Incomers', at 35.6%, more than 10 percentage points higher than the next highest share (the East of England). Scotland, Northern Ireland, Wales and the North East had the highest proportions of 'Loyals'. Yorkshire had the highest proportion of 'Stayers', at 18.3%. The East of England had by far the highest proportion of

'Returners, at 40.5%, which HECSU interpreted as a function of geography (including proximity to London) and graduate job opportunities – which also explains the large proportion of 'Incomers' to the East of England (the largest outside London, at 21.5%).[9]

Chart 2: Graduates by home region working in that region 6 months after graduation (%) and graduates by region of study working in that region 6 months after graduation (%), 2012-13



Source: Higher Education Careers Services Unit (HECSU), 2015. '*Graduate Migration Patterns*', data derived from HESA, DLHE 2012-13.

HECSU summarises the relationship between home region and graduate retention in Chart 2. This compares the proportion of graduates originally domiciled in a region (their 'home region') who went on to work in that region after graduation (wherever they studied) and the proportion of those students retained in each region after graduation (wherever their original home region was). This shows that, with the exception of Northern Ireland, each region and UK nation was more likely to retain students originally domiciled there - regardless of where they studied - than retain those who studied in that region but may have lived elsewhere.

Chart 2 also shows that, of all 11 regions and UK nations, the East Midlands has the lowest proportion of students retained in work in the region six months after graduation, at 39.2%. In an interview with the Guardian, the report's author, Charlie Ball, interpreted the lower retention rate in the East Midlands as follows: "Its transport links mean many graduates may live there but are commuting to jobs in London. Secondly, universities in the East Midlands are 'unusually popular' with people from other regions, particularly neighbouring ones, including the South East and the West Midlands." He went on to comment on changes over time, noting a fall in retention of 'Stayers' in most regions, which may be due to cuts in local government recruitment - as a key graduate employer outside London:

[9] Ball, C., HECSU, 2015. '*Loyals, Stayers, Returners and Incomers: Graduate Migration Patterns*.'

"The broadest trend is graduates are now a little less likely to stay close to the university where they studied and a little more likely to go to London. That's obviously got implications for the regional agenda…. Public sector cuts will have weakened regional labour markets."[10] With HE institutions in the East Midlands in general, and in Nottingham in particular, recruiting a higher proportion of students from London and the South East, these factors are likely to have acute impacts on retention.

A number of studies have explored the role of the local structure of employment in graduate retention. Unsurprisingly, "job opportunities" are cited as the key factor influencing students' choices in various studies, including Pratt el al. (2006) and the recent AGCAS report for Nottingham (2015). Wright (2011), in a study of Labour Force Survey data, observed a strong association between the concentration of graduate level employment in the public sector and higher local graduate retention rates. AGCAS summarise DLHE data in supports of this, with higher retention rates for graduates with degree subjects associated with public sector professions such as education and medicine. Where these courses included placements with local public sector employers, retention was higher still.[11]

The NCC analysis of the 2012-13 DLHE found higher retention rates for graduates from Nottingham universities who were working in the following industries:

- Education: a sector which accounts for 16.9% of employed recent graduates from Nottingham universities and with a retention rate (the proportion of Nottingham graduates employed in the sector working in the Nottingham PUA) of 37.5% ;
- Health: accounts for 18.7% of employed recent graduates from Nottingham universities and has a retention rate of 33.9%; and
- Public administration and defence (including Local Government and Government Agencies): accounts for 4.2% of employed recent graduates from Nottingham universities and has a retention rate of 28.8%.

These three sectors have the highest retention rates of the 18 Standard Industrial Classification (SIC) sectors analysed and together accounted for 39.8% of all working recent graduates from Nottingham universities and 59.6% of all Nottingham graduates working within the Nottingham PUA. Conversely, those employment sectors that have lower graduate retention rates but account for higher proportions of employed Nottingham graduates (together accounting for 25.7% of all Nottingham graduates in work in 2012-13, regardless of location) and are comparatively highly affected by the draw of London and the South East, are: Information and Communication (with a retention rate of 17.3%); Finance and Insurance (12.8%); Property (20.5%); and Professional, scientific and technical services (11.6%).

The NCC analysis of the DLHE shows little difference in the occupational profile of graduates from Nottingham universities working in the PUA compared to those who have left to work elsewhere. The proportion of recent graduates working in the PUA who were in Managerial, Professional and Associate Professional Occupations, at 77.1%, was the same as for all recent graduates from Nottingham universities – wherever they were located. Moreover, the median salary for graduates in full-time employment who remained in the Nottingham PUA to work, at £21,400, was above the

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[10] Allen, K., The Guardian, 2015. '*Brain Drain: which UK regions hold on to their graduates?*' 4th February 2015.
[11] Zhu, H., AGCAS on behalf of Nottingham City Council, 2015. '*Understanding graduate employment and retention opportunities and challenges in the city of Nottingham*'.

median for graduates working in all other regions and PUAs, at £20,500, and only slightly below the median for Nottingham graduates working in London or the South East, at £21,500. The City Council related this to the high proportion of retained graduates working in the Health or Education sectors, where starting salaries were likely to be higher than average. (NCC, 2015)

In addition to an interest in the importance of the public sector in graduate retention, recent research has also investigated the potential role of Small-to-Medium sized Enterprises (SMEs). Research on stated graduate career intentions suggests a prioritisation of large employers, particularly Multi-National Companies, by both graduates and university careers services. Large companies are more likely to offer graduate training schemes, more likely to work with the Higher Education sector on recruitment and placements, including through graduate employment fairs, and align their graduate recruitment activities to the academic calendar. This includes the practice known as the 'milk round' in the UK, where, since the 1960s, top graduate recruiters tour universities at key points in the academic year. The milk round is dominated by large employers with dedicated graduate schemes, the majority of which are based in London and other large cities, such as Manchester, Birmingham or Leeds. The idea that students, in their job search and wider career management activities, often focus exclusively on obtaining graduate schemes with large employers will be explored in the analysis of the NTU student Focus Groups and employer interviews later in this report.

Table 2, shows the proportion of UK businesses, employment (including self-employees), employees and turnover by size of business. This demonstrates that although large companies (with over 250 staff) account for more than half of all UK employees (56.4%), small businesses with less than 50 staff account for a significant proportion, at more than a quarter of all employees (27.1%).

Table 2: Businesses (all businesses, including Private, Public and Non-Profit sectors) in the UK Economy and associated employment and turnover, start of the year 2015

	% of Businesses	% of Employment	% of Employees	% of Turnover
Zero or 1 employees*	77.8	14.7	3.1	6.7
2 to 49 employees	21.3	24.7	27.1	24.6
50-249	0.6	11.8	13.4	14.3
250+	0.2	49.0	56.4	54.4

Source: Department for Business, Innovation & Skills, 2015. '*Business Population Estimates for the UK and the Regions, 2015'*.

* "Zero or 1 employee" comprises sole proprietorships and partnerships comprising only the self-employed owner-manager(s) with 0 or 1 employees, and companies comprising an employee director with 0 or 1 further employee.

Stefanos Nachmias, Senior Lecturer in the Division of HR Management at NBS has undertaken a number of studies into the role of SMEs in graduate retention and employability in UK cities, including Leeds and, most recently, Nottingham. The Nottingham research was carried out with two groups of final year HRM undergraduates. (Nachmias, 2016)

Key points from this student-led research[12] include:

- Graduates across the UK can overlook the potential of working in a SME, instead favouring work in large companies, especially Multi-Nationals offering established graduate training schemes. This is despite the fact that graduate placements in the UK account for only 15-18% of new graduate jobs each year (Phillips, 2013). Therefore whatever students' stated early career preferences, the majority still go on to find their first jobs with smaller organisations – with qualitative research suggesting that students may regard employment in an SME as 'settling' or a 'second choice'. If large proportions of graduates initially return to their home region due to concerns around financial security, this failure to positively identify and target jobs within SMEs before graduation could exacerbate lower retention rates;
- Graduates may have expectations for salary, training and career advancement that SMEs are unable or unwilling to provide (Barratt and Hart, 2009);
- On the other hand, SMEs can be reluctant to recruit graduates. The literature identifies concerns around cost and risk (Hawkins and Winter, 1996), lack of technical knowledge, communication skills and commercial awareness (Kaplan, 2014), and experience and track record of employment (Kaplan, 2014). This could be because many SMEs lack formal training programmes, or even general HE expertise, whilst owner-managers of small firms may not have had experience of higher education themselves (Barratt and Hart, 2009). Small employers tend to recruit reactively, according to need, and do not schedule recruitment programmes to coincide with any particular time of year - in contrast to large graduate recruiters;
- Conversely, large employers are more likely to have formal recruitment strategies, higher budgets for advertising graduate vacancies and the capacity to engage with both individual universities and the Higher Education sector collectively. Large employers are also more able to work with universities to influence curricula design, ensuring graduate skills are more tailored to their needs. (Woods and Dennis, 2009);
- A strand of the literature focuses specifically on the role of Local Authorities in improving information on graduate job opportunities with local SMEs and the benefit of employing graduates, as well as case studies of Local Authorities taking a direct role as graduate employers. In Sheffield, the RISE initiative comprised collaborative work between Sheffield City Council, the two universities and private sector partners to employ over 200 graduates by 2015. The Local Authority supported SMEs with tasks such as candidate short-listing. In Warwick, the City Council maintains a database of graduate schemes and job vacancies offered by local businesses, including active placement and recruitment schemes in the Local Authority itself. Worcester City Council provide trial employment schemes for graduates with full-time posts offered to successful candidates;
- In line with the findings of the AGCAS research for Nottingham summarised later in this section, the student-led research identified literature (Polimeni et al, 2008) that linked graduate retention with the quality of the student experience of a city during their study. In Manchester, key 'urban assets' were identified that were of comparable importance to

[12] Both reports produced by the two student groups comprised literature reviews and primary research with employers, students and alumni. Where findings from the literature are summarised in this report, the original citation is provided in the NTU/Harvard style (Author's name, date of publication). The full citation for the student-led research is provided as a footnote at the end of this summary.

graduate career choices as local job opportunities. These included quality of housing, public services, and the city's leisure, cultural and tourism offer;

- Survey evidence did suggest lower than average starting salaries for graduates within SMEs, with alumni employed within SMEs feeling that there should be higher rewards for the level of responsibility given, compared to graduate schemes in large companies that may have lower responsibility but higher salaries;
- The issue of salaries was seen as key to the retention challenge in light of increased tuition fees and rising living costs, with large proportions of the graduates surveyed stating an intention to return to their home region (to return to parents' houses): "Evidence from the research on graduates…. Shows that students feel that moving home after graduation is a better option financially, pay proving to be a significant factor…. It was also felt that they would also benefit from having support networks as they start in their career. With rising house prices and cost of living, the interviewees felt that moving home after graduation was a better option financially." (NTU Student Report 1, p. 8)
- Graduates particularly valued the opportunity to gain further professional qualifications, which they felt would ensure they remained with the SME for longer periods. However, some SMEs viewed graduates as being unlikely to remain in their roles for significant periods of time, so were less likely to invest in accredited training schemes. Alumni employed in SMEs noted the lower staff turnover compared to larger firms, and felt that greater training opportunities would complement the opportunities to remain and progress within the firm.[13]

In response to some of the issues outlined so far, the Nottingham Growth Plan identifies projects that include internships with local employers, both within the undergraduate course and after graduation, to "stimulate employer demand and provide students with valuable experience." This is strongly based on the assumption that the information failures noted above affect both students/graduates and local employers: a latent demand is not being met, because many employers have a lack of information on the skills graduates have whilst many graduates may not be aware of local job opportunities, including those in the Growth Sectors identified in the Plan (digital, life-sciences and clean technology) and in the Creative Quarter: "As a result, many employers are unfamiliar with the potential contribution a graduate can make and are unwilling to recruit from the large pool of graduates leaving Nottingham's two universities each year." (p. 48)

The initial stage of this research project included a number of meetings with key stakeholders, including senior colleagues at NTU and the University of Nottingham (including staff at each institution with employability portfolios), Nottingham City Council and Experience Nottinghamshire, and members of the developing Place Marketing Organisation, currently known as Marketing Nottingham and Nottinghamshire. In the meetings with staff from the two universities and the City Council, concerns were noted around a tendency to discuss retention rates compared to other cities without reference to the size and nature of their local economies or the differing nature of their student populations and the student experience. Specific concerns included:

[13] Nachmias, S., 2016. NTU Division of HR Management, student-led research for the final year Leadership and Employability module. '*Report on the graduate retention findings in Nottingham City: Student perspective*', Reports 1 and 2.

- Manchester, as a very large city, has selling points around both the significant size of its labour market and its proximity to areas of outstanding natural beauty (for example, the Peak District National Park). Sheffield is a smaller conurbation, closer in size to Nottingham, but for many years students have reported extremely positive views of the city and a strong affinity with it, resulting in high retention rates. However, this may also contribute to lower graduate prospects, with higher levels of under-employment in non-graduate roles in Sheffield;
- Some evidence suggests that graduates from Manchester universities may prioritise remaining in Manchester above other considerations because of their experience of the city's creative, cultural and social offer during their studies. This may mean working in non-graduate activities before gaining jobs in their desired sector. Where the affinity with the city is less strong, graduates will prioritise opportunities in their desired sector above location; and
- Manchester, Leeds and Sheffield have long legacies of physical regeneration. High quality public realm and evidence of investment that encourages students to associate a city with opportunity. Nottingham has clearly seen very significant investment in both public realm and transport infrastructure in recent years, but some areas where student accommodation is concentrated (for example Lenton, Radford, the Meadows and Sherwood) are still associated with significant deprivation and more limited amenities.

This remainder of this section will therefore explore the level of demand in order to contextualise graduate retention rates in Nottingham and comparable cities, before moving onto more qualitative evidence from the primary research into students', graduates' and employers' perspectives.

Summary

- Destinations data collected by UK universities suggest that Nottingham has the lowest retention rate of the eight Core Cities (and Derby), due to significantly lower proportions of graduates remaining in the city to work - especially compared to Manchester and Birmingham, where retention rates for work are around twice the rate in Nottingham. The East Midlands has the lowest rate of retention of the nine English regions and three devolved administrations.
- London and the South East are the destination regions for the highest proportion of Nottingham graduates.
- Reasons include the importance of students' 'home region' (the place of original domicile), with large proportions of students at institutions in all regions returning to their home region after graduation. The two Nottingham universities have a relatively low proportion of students studying in their home region compared to elsewhere and are notably successful in recruiting students from London and the South East compared to elsewhere.
- The literature suggests that retention is closely associated with higher proportions of graduate-level employment in the public sector. In Nottingham, Education, Health and Public Administration account for the highest proportions of employed graduates and have the highest retention rates.
- NTU student-led research with Nottingham SMEs identified issues around information, both a lack of information on behalf of SMEs on the benefits of employing graduates and a lack of awareness on behalf of students on the opportunities and benefits of employment in local SMEs. Progression can be faster for graduates in an SME compared to larger companies, but large companies have advantages such as significant resources for graduate

recruitment, including formal graduate training programmes, and well established interactions with universities.

- Graduate retention in an area cannot be meaningfully interpreted without an analysis of demand. Cities that achieve relatively high graduate retention rates, such as Manchester and Sheffield, don't necessarily attain comparable levels of graduate-level employment (in the short term). Under-employment can be a challenge if employer demand does not match the supply of available graduates. The student experience, including involvement in a city's cultural and social networks during their period of study, can increase graduates' affinity with their place of study.

1.2 The Demographic and Labour Market Context and the Role of Higher Education Institutions

Chart 3 presents the total resident populations for the 55 English Primary Urban Areas (PUAs) outside London, based on the geographical boundaries (aggregations of local authority districts to represent the physical extent of the "built-up" area of each conurbation) developed by the ONS and the Centre for Cities.[14] This shows that, with 655,400 residents of all ages in 2014, the Nottingham PUA has the 8th largest population of the English cities and towns outside London.

There are a number of important points from Chart 3. Firstly, Birmingham and Manchester are clear outliers. With a population of 2.5 million, Birmingham is almost 4 times the size of Nottingham and more than 6 times the size of the average PUA population (the mean population of the 55 English PUAs is 396,800). Manchester is smaller, with a population of 1.9 million - but this is still more than twice the size of Newcastle, the next largest PUA. The remaining 6 PUAs in the Core Cities group (Newcastle, Sheffield, Liverpool, Leeds, Bristol and Nottingham) vary less in size, with resident populations between 841,800 (Newcastle) and 655,400 (Nottingham). Nottingham is then significantly larger than the next largest PUA (Portsmouth, with 529,900 residents). The population of Nottingham PUA is twice the size of Coventry and Brighton.

Birmingham and Manchester, as very large city regions, are qualitatively different than the other PUAs in England. The remaining 6 Core Cities have populations that are significantly larger than the mean for all 55 PUAs. In this context therefore, Nottingham is a relatively large city. Compared to other countries in Europe, UK cities tend to be significantly larger. Eurostat (2015) estimate that the conurbation of London, with more than 8.3million residents, is the largest in Europe, exceeding Paris (6.7 million) and Berlin (3.5 million), while more than half of European cities only have between 50,000 and 100,00 residents. This would put all the larger UK cities, including Nottingham, amongst the top of the distribution of European cities.

Another notable factor of the eight largest English PUAs is the high proportion of working age population (residents aged between 16 and 64), which (with the exception of Birmingham) exceeds the national average of 63.5%. Nottingham has one of the highest proportions, at 65.8%, which is the

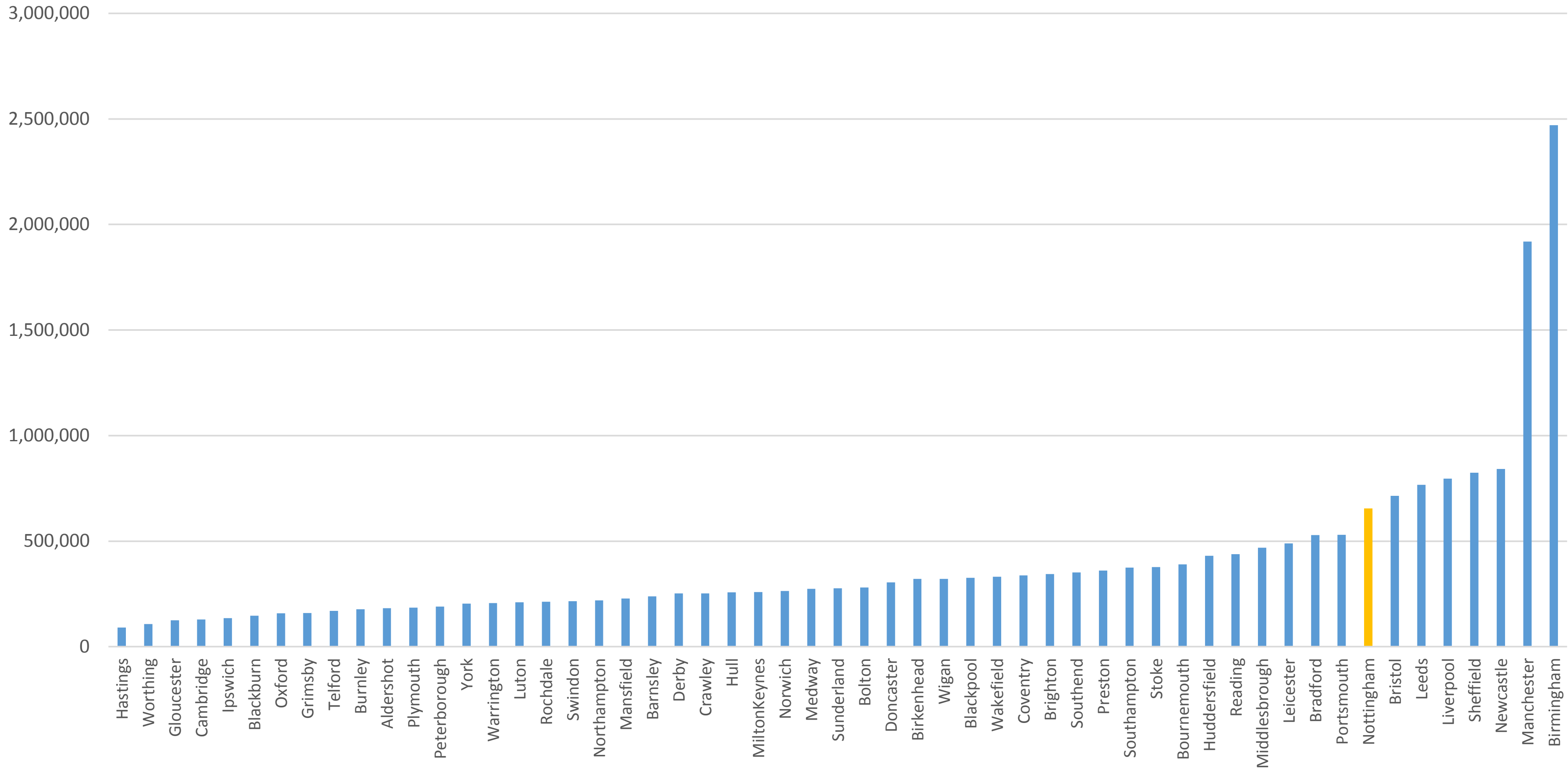
[14] Centre for Cities, 2014. *'Primary Urban Areas: Spatial Definitions'*: http://www.centreforcities.org/wp-content/uploads/2014/07/12-03-19-Primary-Urban-Areas-deffinitions.pdf

fourth highest behind Liverpool, Bristol and Leeds. However, Nottingham stands out in its population of young adults (18 to 24), who account for 13.7% of the 2014 population - exceeding the national average (9.1%) and all of the other Core Cities. Of the 21 English PUAs shown in Chart 4, only Southampton and Coventry have higher shares of 18-24 year olds. Both are significantly smaller cities (between 40 and 50% smaller than Nottingham). The ONS estimate that almost 90,000 residents of Nottingham were aged between 18 and 24 in 2014.

Charts 4 and 5 present the rate of population growth between 2004 and 2014 for these 21 larger PUAs for the working age (16-64) and young adult (18-24) populations respectively. Chart 4 shows that the working age population of the Nottingham PUA experienced a slightly higher than average rate of growth between 2004 and 2014, at 6.8% compared to 6.1% in the UK overall. However, Chart 5 shows that Nottingham experienced a much higher rate of growth for those aged 18-24, at 14.9% compared to 9.2% in the UK. This is fifth highest of the 21 PUAs selected.

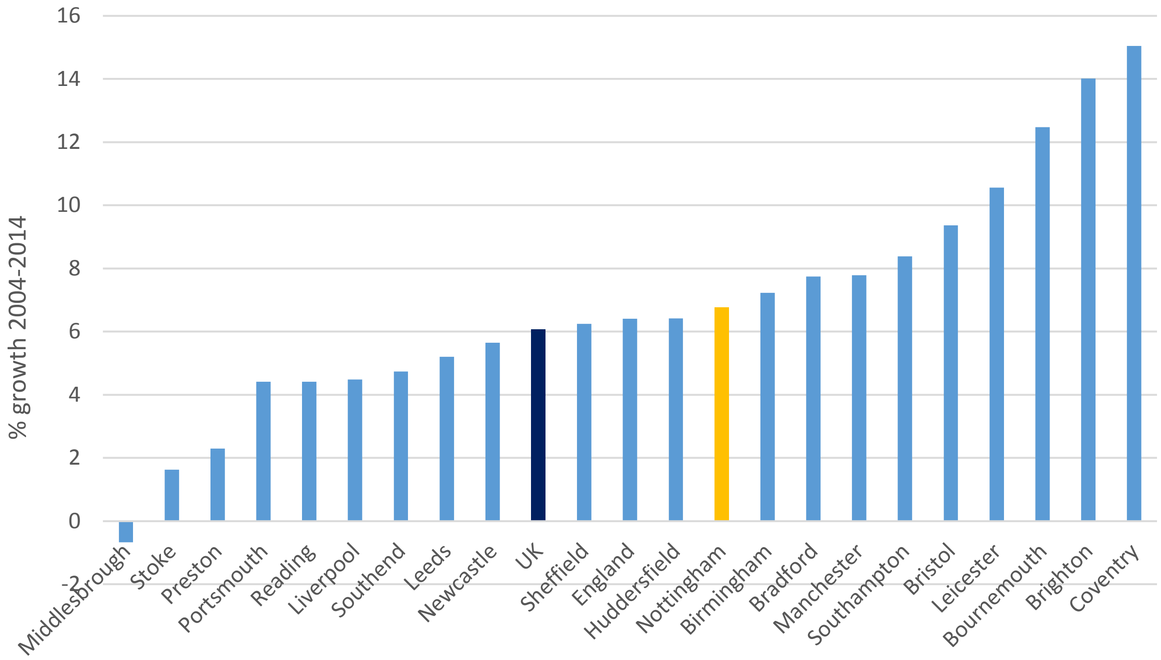
Coventry had the highest rate of total working age population growth, at 15%, and the second highest growth in the population of young adults, at 29.5%. Of the largest cities, Manchester had a significantly above average rate of growth in the working age population (7.8%), but a below average rate of growth in the young adult population (6.2%), whilst Birmingham has experienced a similar rate of working age population growth to Nottingham but a lower rate for young adults (9.7%).

Chart 3: Resident Population by Primary Urban Area (PUA), 2014



Source: ONS Crown Copyright, 2015. '*Mid -Year Population Estimates, 2014*', from NOMIS [accessed 18th February, 2016].

Chart 4: Growth in working age population (residents aged 16-64), 2004-2014

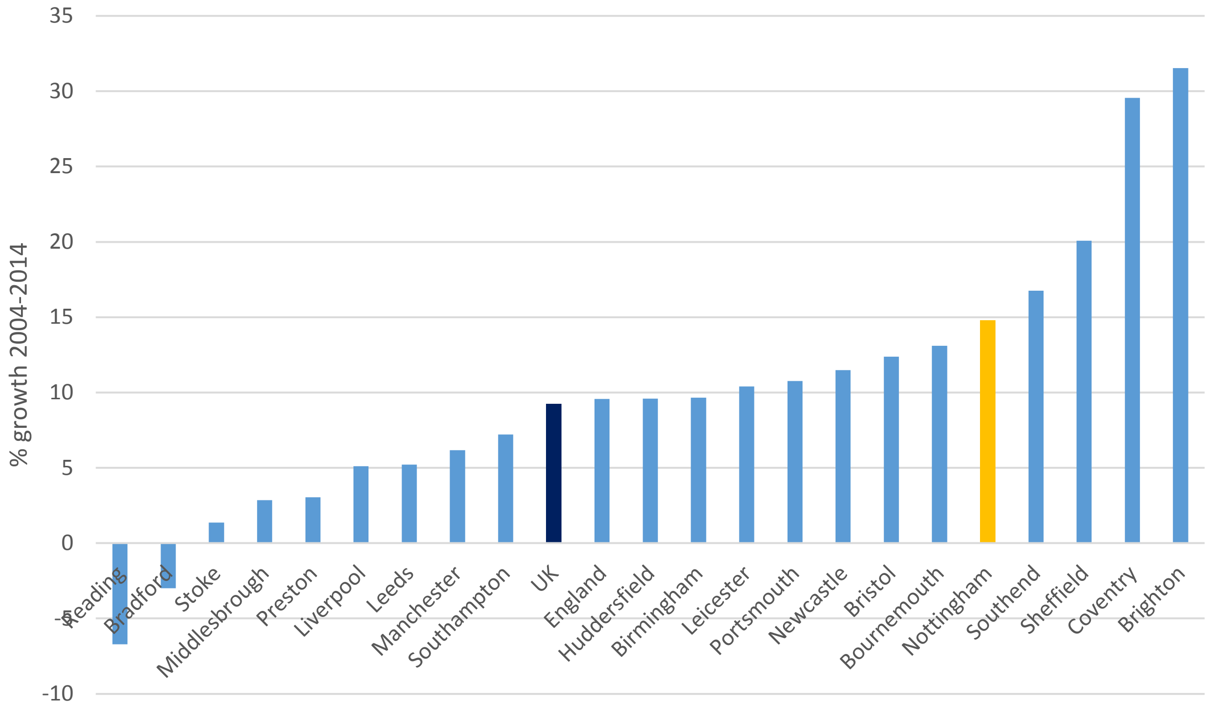


Source: ONS Crown Copyright, 2015. '*Mid -Year Population Estimates, 2014*', from NOMIS [accessed 18th February, 2016].

Other notable PUAs include Brighton**,** which experienced the strongest growth in the 18-24 age group (31.5% between 2004 and 2014), and Sheffield, one of the larger cities (the 4th largest total population) that also experienced strong growth amongst its young adult population (20.1%).

In many of these cities, the Higher Education student population is likely to be a significant contributor to both the number of 18-24 year olds residents and the growth rate over time. Chart 6 shows the total HE population (under-graduate and post-graduate) likely to be resident at institutions whose main campus/campuses fall within the city PUA, derived from the Higher Education Statistics Agency (HESA). The institutions assigned to each PUA are listed in Annex 2.

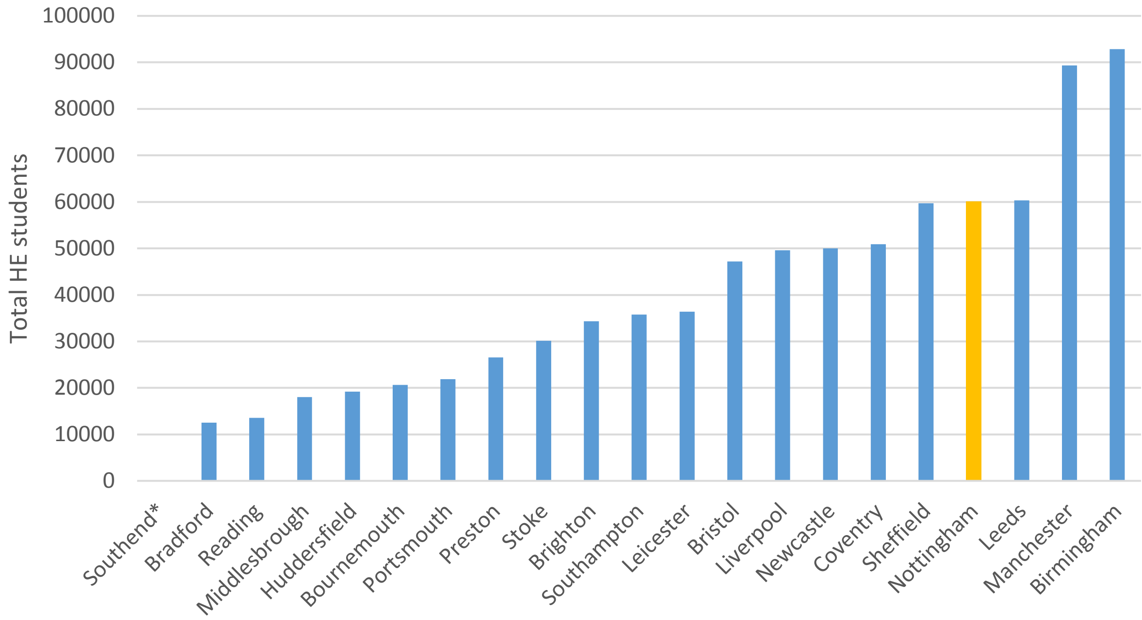
Chart 5: Growth in young adult population (residents aged 18-24), 2004-2014



Source: ONS Crown Copyright, 2015. '*Mid -Year Population Estimates, 2014*', from NOMIS [accessed 18th February, 2016].

Chart 6 shows that, with two universities with main campuses within the PUA, Nottingham has the fourth largest student population of any English city outside London, meaning that it has a significantly larger concentration of students per population head than average. In the 2013-14 academic year, there were more than 60,000 students enrolled at the two Nottingham universities, closely in line with Leeds (a city with a total resident population 17% larger than Nottingham). Although Birmingham, with almost 93,000 students across 6 universities, has a much larger total resident population, Manchester, with more than 89,000 student across 4 universities, has a higher concentration of students. The University of Manchester had the largest student population in the UK in the 2013-14 academic year, with almost 38,000 students. The University of Nottingham has the next largest student population, at more than 33,000. Nottingham Trent University also has a relatively large student population, the 12th largest of 129 English HEIs listed by HESA (excluding the Open University) with a total almost 27,000 students.

Chart 6: Total HE Student population (under graduate and post graduate) by PUA, 2013-14



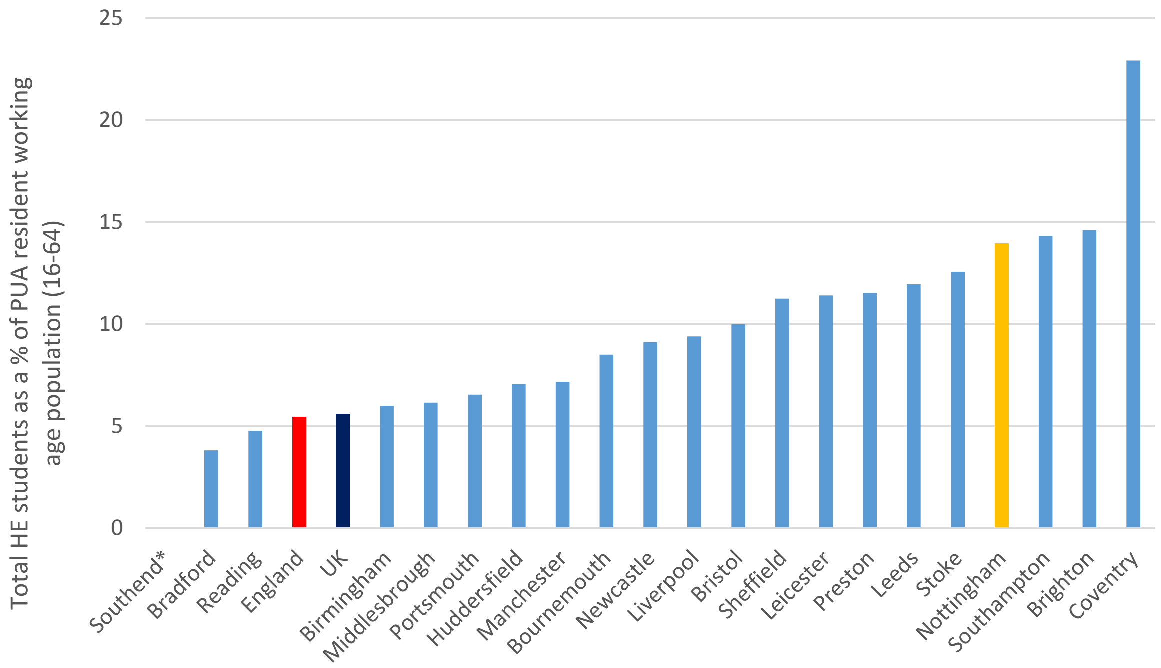
Source: HESA, 2015. '*Table 1: HE students by HE provider, level of study, mode of study and domicile 2013/14*'. Sum of total HE students by PUA by location of main campus/campuses, see Annex 2 for details.
*Although the University of Essex has a campus within the Southend PUA, it is not possible from the HESA data (which does not disaggregate by campus) to identify the number of students likely to be resident in Southend. There is no other Higher Education Institution within the Southend PUA listed by HESA.

Chart 7 presents the total student numbers as a proportion of the resident working age population in 2014. This shows that Nottingham has the fourth highest concentration of students of the 21 larger PUAs in this study, and has the highest of the eight Core Cities. In the 2013-14 academic year, the total number of students in Nottingham was equivalent to 14% of the working age resident population. This is more than double the averages for the UK (6%) and England (5%), and significantly exceeds those cities with high student retention such as Manchester (7%), Birmingham (6%) and Newcastle and Liverpool (both 9%).

The three cities with a higher concentration of students compared to Nottingham all have much smaller total populations. For example Coventry with the highest concentration of students at 23% of the total working age population, has a total population that is just 51% the size of Nottingham. Note from Charts 4 and 5 that Coventry has also experienced some of the highest growth rates for the working age and young adult populations. The high concentration of students within Coventry and the growing student numbers at Warwick and Coventry Universities are likely to be contributing factors in this.

Nottingham is therefore an outlier as a relatively large city (in total population terms) with a very high concentration of Higher Education students. This context is absolutely key to interpreting Nottingham's comparative position in graduate retention presented earlier.

Chart 7: HE Students by PUA (2013-14) as a proportion of the 2014 resident working age population (16-64)



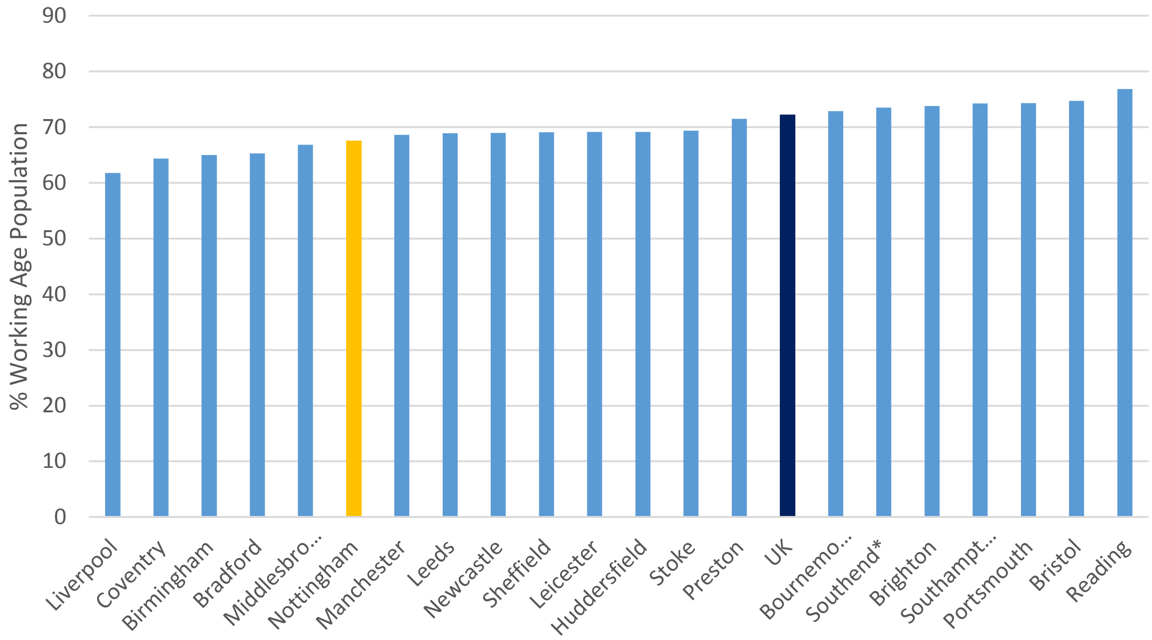
Source: HESA, 2015. '*Table 1: HE students by HE provider, level of study, mode of study and domicile 2013/14*'. Sum of total HE students by PUA by location of main campus/campuses, see Annex 2 for details. Working age population denominator from: ONS Crown Copyright, 2015. '*Mid -Year Population Estimates, 2014*', from NOMIS [accessed 18th February, 2016].

**Although the University of Essex has a campus within the Southend PUA, it is not possible from the HESA data (which does not disaggregate by campus) to identify the number of students likely to be resident in Southend. There is no other Higher Education Institution within the Southend PUA listed by HESA.

This student population could be interpreted as a potential 'pool' of skilled labour, but the extent to which graduates are then recruited and deployed in skilled jobs depends on the extent and nature of employer demand for higher level skills. This is indicated by the occupational structure of local employment (the kind of jobs workers do and the level of skill needed to do them) and its sectoral structure (the kind of activities employers engage in, the goods and services they produce, and thus the specific occupations and skills they recruit for), as well as the level of churn and the structure of the local business population. These indicators enable broad discussion of the optimum level of graduate retention in the local labour market, although it is not possible to identify an exact quantitative rate of retention, given the complexity around the skills required for different sectors and occupations and how adequately these are represented by formal qualifications. The degree of 'work-readiness' of graduates will be discussed later in the analysis of the depth interviews with employers.

Chart 8 presents employment rates as a comparative measure of labour utilisation. In the 2014 *'Benchmarking…'* report, employment and unemployment estimates indicated that the recession that started in 2008 had affected Nottingham significantly compared to the other PUAs, with an above average fall in employment and higher increase in unemployment. This resulted in Nottingham having one of the highest unemployment rates in 2011. The time-series presented in the earlier report showed a significant recovery from 2012. Chart 8 shows that in common with other PUAs in the north of England and the midlands, in 2014 Nottingham had a lower employment rate than the UK average, at 67.6% compared to 72.2%. This is slightly lower than Manchester (68.6%), Leeds (68.9%), Newcastle (69%) and Sheffield (69.1), but now exceeds the employment rate in Birmingham (65%) and Coventry (64.4%) and significantly exceeds Liverpool (61.8%). This is a significant improvement on 2011, when Nottingham had a lower rate of employment than both Liverpool and Birmingham.

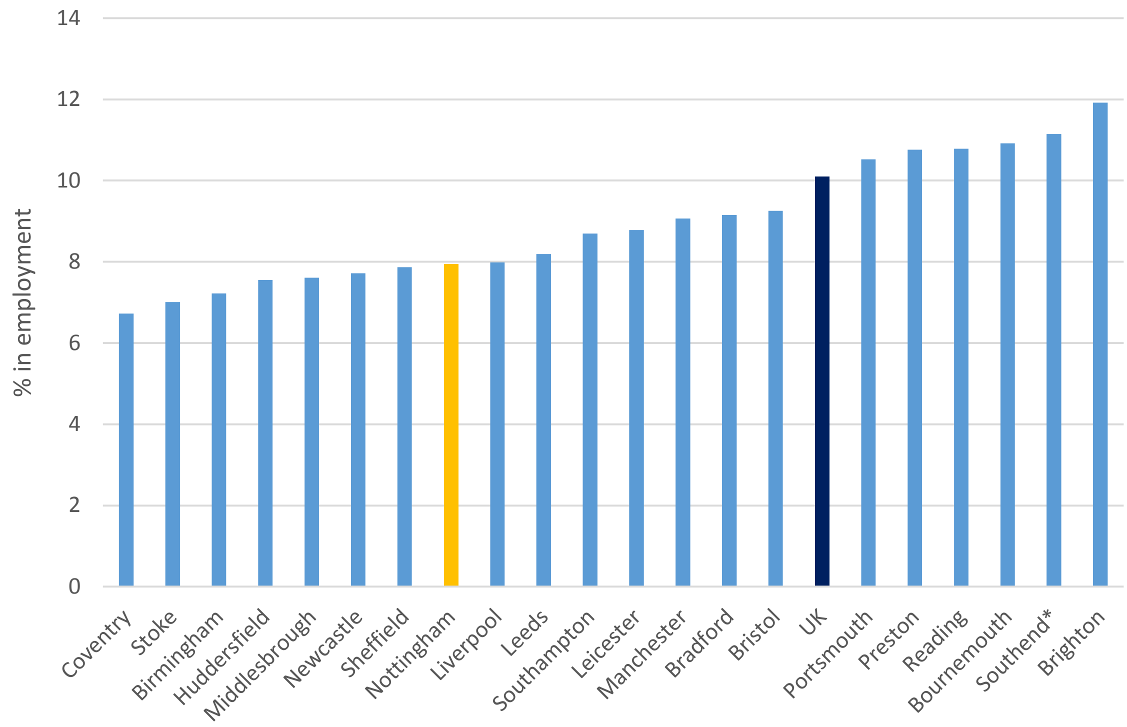
Chart 8: Employment Rate (% of residents aged 16-64 in employment), medium to large PUAs in England, January-December 2014



Source: ONS Crown Copyright, 2015. '*Annual Population Survey*', January-December 2014. From NOMIS [accessed 18th February 2016].

Charts 9 to 11 illustrate the proportion of employment in occupations associated with higher or higher-intermediate level skills. The charts show the proportion of employed residents in Standard Occupational Classifications (SOC) that require skills equivalent to at least a first degree (Managers, Directors and Senior Officials in Chart 9 and Professionals in Chart 10) and skills equivalent to at least 2 A-levels at grades A-C or a higher vocational qualification (Technicians and Associate Professionals in Chart 11, which is a higher-intermediate skilled occupational group that graduates may work in for the first stages of their career, for example teaching assistants, laboratory technicians, medical assistants, etc.)

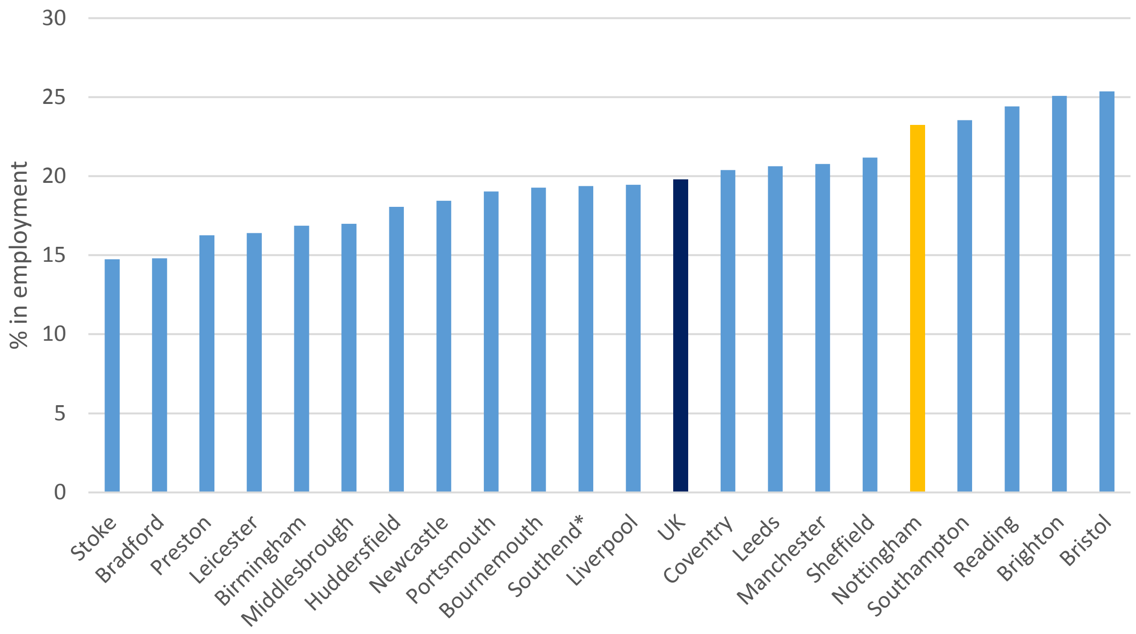
Chart 9: Employment as Managers, Directors and Senior Officials (SOC 1) (% of all employed residents), medium to large PUAs in England, January-December 2014



Source: ONS Crown Copyright, 2015. '*Annual Population Survey*', January-December 2014. From NOMIS [accessed 18th February 2016].

Chart 9 shows that Nottingham has a lower proportion of employed residents working in the occupation associated with the highest level of skill, Managers, Directors and Senior Officials (SOC 1), at 7.9% compared to 10.1% in the UK overall. This is likely to be affected by head office locations, with a higher proportion of this group resident in London (not shown, at 11.5%) and also commuting effects between cities and surrounding counties – with Managers likely to be resident in the more affluent outskirts of towns and cities. For example, in the district of Rushcliffe, within the Nottingham PUA, 13.8% of residents worked in SOC 1. However, compared to other larger cities in the north and midlands like Manchester (9.1%) and Leeds (8.2%) this does suggest that Nottingham has a lower demand for this highly skilled occupation than elsewhere - although it is important to note that higher proportions of residents of Nottingham PUA work in this occupation than Sheffield, Newcastle or Birmingham.

Chart 10: Employment as Professionals (SOC 2) (% of all employed residents), medium to large PUAs in England, January-December 2014

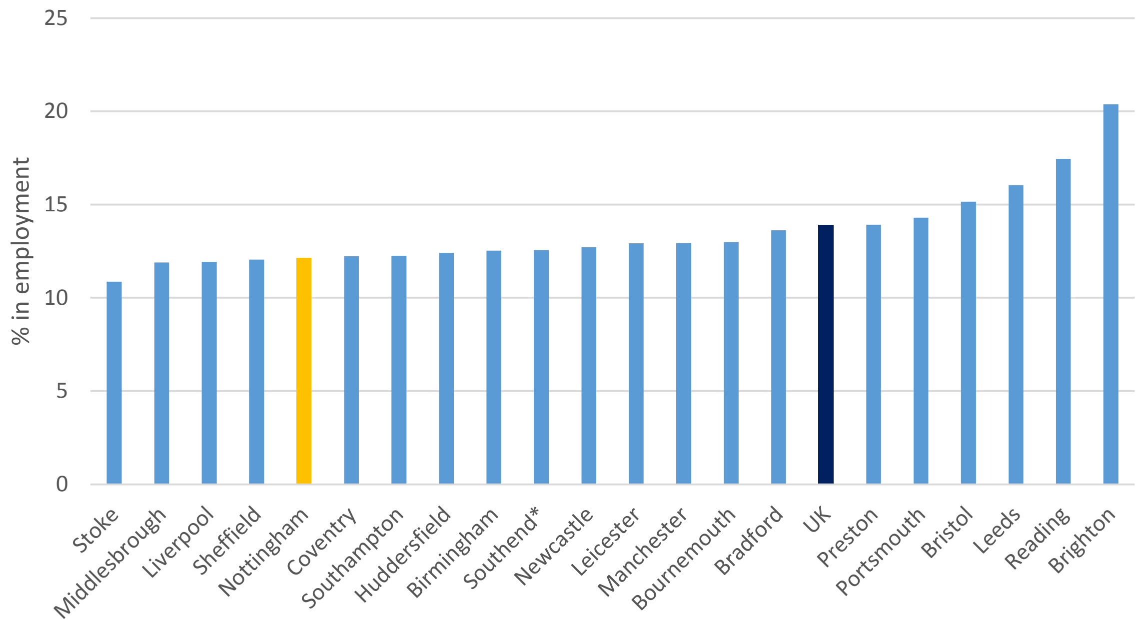


Source: ONS Crown Copyright, 2015. '*Annual Population Survey*', January-December 2014. From NOMIS [accessed 18th February 2016].

Chart 10 shows a somewhat different picture for SOC 2, Professionals, also highly skilled jobs associated with at least a first degree, including teachers, doctors, lawyers, academics and commercial scientists, engineers, etc.. In this case Nottingham has a significantly above average proportion of employment, at 23.2% compared to 19.8% in the UK. This is the fifth highest of the 21 large and medium PUAs shown in the chart, with the highest being Bristol at 25.4%. The proportion of residents working as Professionals in the Nottingham PUA is significantly higher than in Liverpool (19.5%), Newcastle (18.4%), and Birmingham (16.9%). This notably higher proportion of employment in SOC 2 in Nottingham is likely to be associated with the two universities and the Nottingham University Hospital Trust, as well as the presence of several national and international law firms and important head-offices for Boots UK, Capital One and Experian, which include national HR and legal functions.

Chart 11 shows that, although Nottingham has a higher proportion of residents working in Professional Occupations, those working in Technician and Associate Professional roles is lower than average. In 2014, 12.1% of employed residents in the Nottingham PUA were Technicians and Associate Professionals, compared to 13.9% in the UK. This is the fifth lowest of the 21 large and medium-sized PUAs in the sample. Leeds, Reading and Brighton all have notably higher proportions, at 16.1%, 17.4% and 20.4% respectively. In the case of Leeds, this could be related to the concentration of financial and business services and call centre operations in the city.

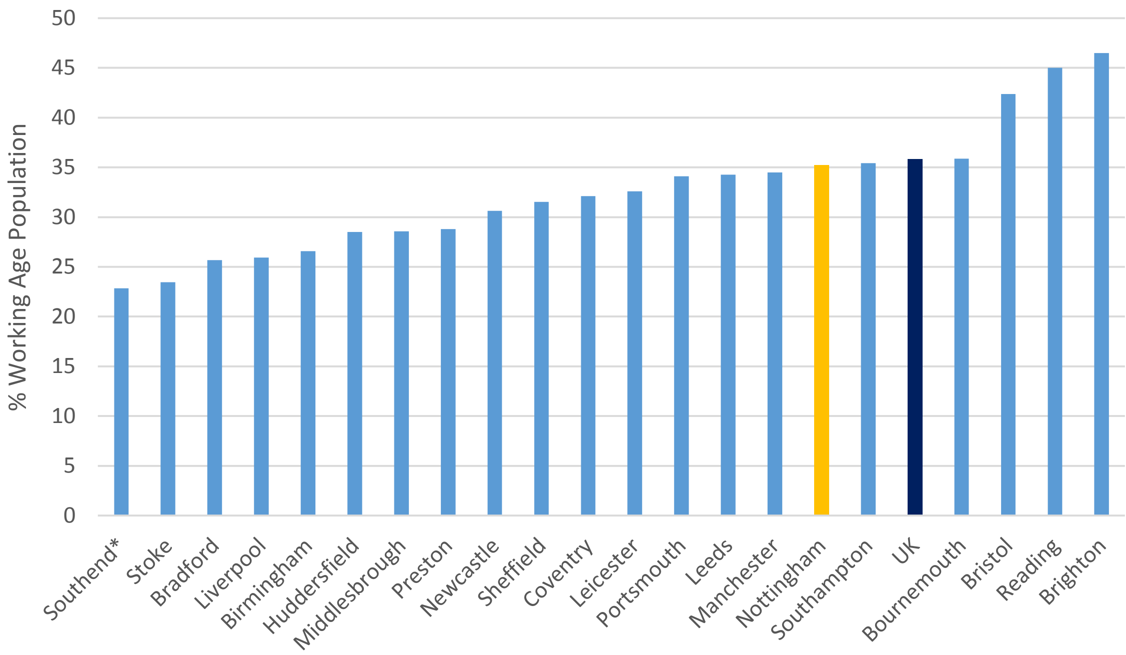
Chart 11: Employment as Technicians and Associate Professionals (SOC 3) (% of all employed residents), medium to large PUAs in England, January-December 2014



Source: ONS Crown Copyright, 2015. '*Annual Population Survey*', January-December 2014. From NOMIS [accessed 18th February 2016].

Chart 12 shows the proportion of residents qualified to at least a NVQ Level 4 (equivalent to at least a first degree), as a proxy measure for the concentration of graduates in the current working age population of each PUA. The chart shows that, although Nottingham has a very slightly lower proportion than average of residents qualified to a Level 4, at 35.2% compared to 35.8%, it is the 6th highest of the 21 PUAs shown. This exceeds Leicester (32.6%), Newcastle (30.6%), Birmingham (26.6%) and Liverpool (25.9%).

Chart 12: Qualifications to a Level 4 + (equivalent to at least a first degree) (% of all residents aged 16-64), medium to large PUAs in England, January-December 2014

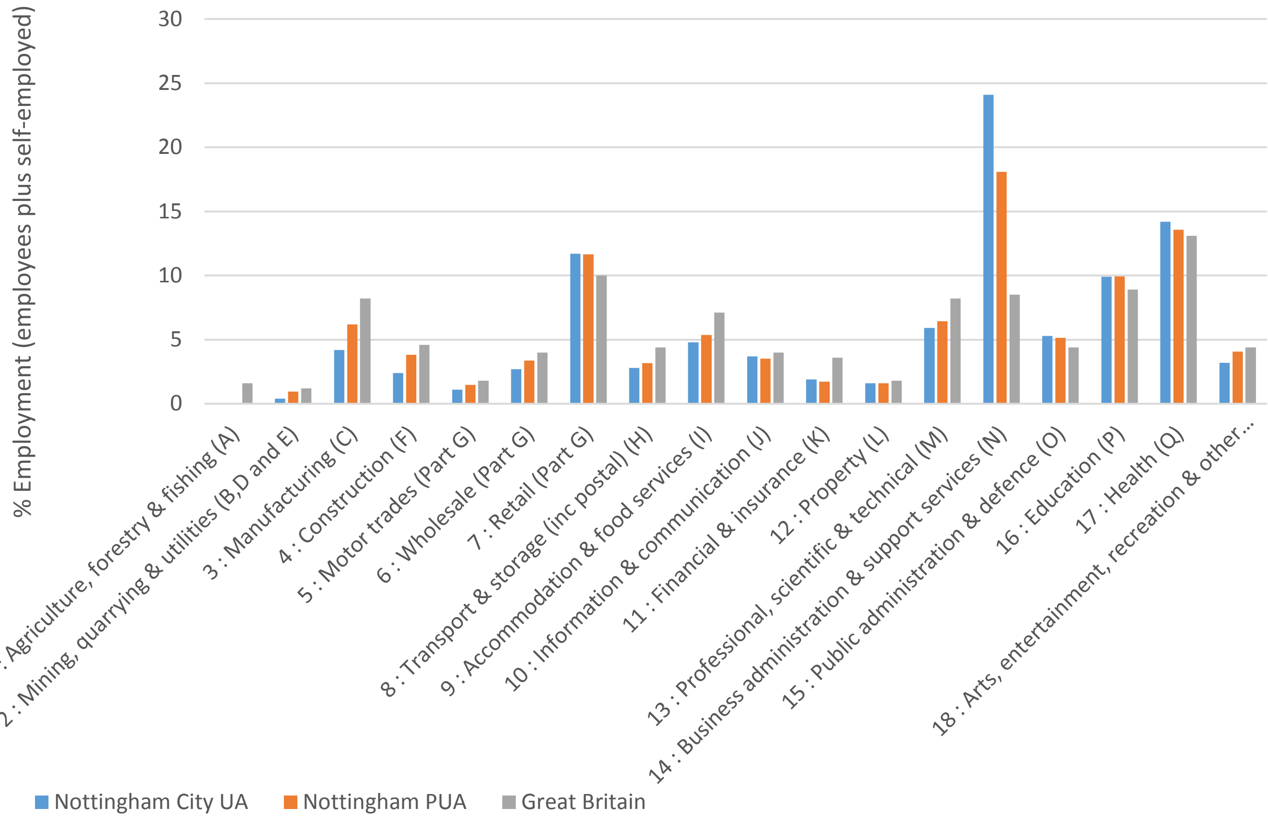


Source: ONS Crown Copyright, 2015. '*Annual Population Survey*', January-December 2014. From NOMIS [accessed 18th February 2016].

Finally, Chart 13 updates the analysis of employment by sectors in the 2014 '*Benchmarking…*' report with the latest data from the Business Register and Employment Survey (BRES), comparing Nottingham UA and the wider PUA (Nottingham UA plus Broxtowe, Rushcliffe and Gedling) with the UK average in 2014. This indicates that:

- Nottingham continues to have a significant over-representation of employment in Business Administration and Support Services. As in 2013, in 2014 this sector accounted for almost a quarter of employment in workplaces within Nottingham UA, and 18% in the wider PUA, which was 10 percentage points higher than the national average;
- Retail remains slightly over-represented, at just under 12% of employment in both the city UA and the PUA, 2 percentage points higher than the national average;
- The three public services (Public Administration, Education and Health) are together are also slightly more important in Nottingham than average, accounting for just over 29% of employment in the UA and just under 29% in the PUA, compared to 26% nationally. Health is the largest of these 3 sectors both in Nottingham and nationally; and
- Employment in Nottingham remains under-represented in two of the most productive service sectors of Finance & Insurance and Professional, Scientific & Technical in both the UA and the PUA – accounting for a share of employment that is 2 percentage points less than the national average in both cases. However, in the case of Information & Communication, Nottingham is more closely in line with the national average, where it accounts for just under 4% of employment in both the UA and PUA.

Chart 13: Employment (%) by Industry (Broad Industry Groups), 2014



Source: ONS Crown Copyright, 2015. 'Business Register and Employment Survey, 2014'. Accessed from NOMIS [7th April, 2016] and reproduced in accordance with Chancellors Notice NTC/BRES14-P0656.

Summary

- Out of the 55 English Primary Urban Areas (PUAs) outside London, Nottingham has the 8th largest population, and is twice the size of Coventry and Brighton. Birmingham and Manchester are significant outliers, with Birmingham almost 4 times the size of Nottingham.
- The eight largest PUAs (with the exception of Birmingham) all have higher proportions of population in the working age group. Nottingham stands out as having one of the highest proportions of residents aged between 18 and 24 and this population group has grown at a significantly above average rate over the last decade.
- Nottingham has a notable concentration of students. It had the fourth largest student population of the 55 PUAs, behind Birmingham, Manchester and Leeds, but the concentration of students (as a proportion of the working age population) in Nottingham was significantly higher than those three cities.
- The employment rate in Nottingham has recovered significantly since 2011, although it remains below the UK average.
- The structure of employment by occupation suggests significant demand for higher level skills in terms of Professional Occupations, in which Nottingham has a relatively high proportion of employment. However, Nottingham has lower proportions of residents

employed as Manager and Senior Officials and as Technicians and Associate Professionals. This occupational structure could reflect the importance of the public services for graduate employment in Nottingham.

- The proportion of residents with graduate level qualifications (equivalent to an NVQ Level 4 and above) in Nottingham is close to UK average and is significantly higher than in Leicester, Newcastle, Birmingham and Liverpool.
- Nottingham continues to have a significantly higher proportion of employment in the Business Administration and Support Services, which includes a significant amount of temporary agency activity (around three quarters of this sub-sector is accounted for by this and it does not include the most productive service sub-sectors).
- Retail and the three public service sectors together (Public Administration, Education and Health) are both slightly more important to employment in Nottingham compared to the national average.
- However, two of the most produce service sectors nationally, Finance & Insurance and Professional, Scientific & Technical, are slightly under-represented in employment in Nottingham.

1.4 Student and Alumni Perspectives

In the initial stakeholder meetings, colleagues from the University of Nottingham and NTU emphasised a wish to identify what other cities 'do right' to enhance students' experience during their study. Academic staff believe that students' personal experiences and the views of their peers have far greater impact on their perceptions of place than any information provided by their university or Place Marketing Organisations. Perceptions of the city as a place to live and work after graduation can be formed early in a student's studies, by the extent to which they feel included in the city's social and cultural life (with Durham given as an example of a strong 'town and gown' separation that contributes to lower retention compared to elsewhere in the North East). The analysis at the start of this report demonstrated that Nottingham city and its institutions are very successful at attracting students from other regions to study (particularly from London and the South East). The following analysis will explore students' experiences of Nottingham and their expectations post-graduation compared to other areas, drawing on two sources:

- Four Focus Groups convened for the purpose of this research project. These took place in parallel on the afternoon of the 24th February, 2016. Three of the groups were comprised of final year undergraduates from across NTU's campuses (City campus, Clifton and Brackenhurst), and one group comprised of NTU alumni in various stages of their career and based in various locations in the UK; and
- A brief summary of earlier research with students from both Nottingham universities undertaken by the Association of Graduate Careers Advisory Services (AGCAS).

The AGCAS research[15], undertaken in 2015 on behalf of Nottingham City Council and with the support of NTU and the University of Nottingham, comprised 6 Focus Groups with students across the two universities and an online survey of 615 current students and 273 recent graduates. Key findings included:

- Highly positive perceptions of Nottingham as a place to study. Students liked many aspects of Nottingham (84% of current students responding to the online survey were satisfied with their life in Nottingham). Their perception of Nottingham as a 'student city' was given as a key factor as to why they had enjoyed their time in the city. However, graduates suggested that this perception meant that they had wanted to leave as soon as possible after graduation. This was due to both a wish to 'move on' to the next stage of their life (with Nottingham closely associated with their student lives) and limited awareness of local job opportunities;
- Participants in the AGCAS Focus Groups frequently referred to a 'student bubble' as the reason for their limited awareness of local employment and limited interactions with entertainment and amenities not specifically targeted at students. Those with local social connections were more likely to want to remain in Nottingham;
- Where interactions with non-students and participation in non-student activities were low, participants were more likely to have negative perceptions of crime and safety and of local people in general, with some Focus Group participants going so far as to state that they avoided shopping at weekends or going out on non-student nights/'local nights';
- Job opportunities were a key factor in destination choice. Participants felt that there were probably plenty of job opportunities in Nottingham, but they had little information other than on part-time work undertaken during their study. Those students who had been on a placement with a local employer had a very different view, and were much more likely to have career plans that included a wish to remain in Nottingham;
- The key channel for accessing information was 'word-of-mouth', including through social media; and
- The report authors recommended a need to "match the positive student-focussed Nottingham identity with that of a graduate/professional identity" which could include increasing local placements and internships, increasing social/leisure interactions with non-students, and improving social media communication.

Although the balance of responses were more likely to be positive than negative, some stakeholders in the AGCAS research were surprised and disappointed over the high incidence of references to a 'student bubble'. Participants regarded the extent of services and activities aimed at students as a positive thing, that enhanced their overwhelmingly positive experience of the city as a place to study, but also clearly associated this with their lack of awareness and, in some cases, interest in Nottingham as a place to work as a young professional. Because of this strength of feeling, it was deemed important by stakeholders of the Great Nottingham Debate project to revisit student perceptions through a new programme of primary research. In order to try to avoid a small number of participants with negative perceptions 'leading' the new Focus Groups, care would be taken to ensure participants were prompted to discuss topics explicitly focussed on local job opportunities and their interactions

[15] Zhu, H., the Association of Graduate Careers Advisory Services (AGCAS) on behalf of Nottingham City Council, 2015. '*Understanding graduate employment and retention opportunities and challenges in the city of Nottingham*'.

with information and employability services, and would also be prompted to comment on their perception of ‘key assets’. The following discussion topics were provided:

- Your experience of Nottingham during your study, including awareness of and interactions with local employers.
- Your plans for employment post-graduation and broad motivations for geographical scope of job search/further study. If you are an alumni, we will ask you to reflect on your intentions prior to and after graduation and the information you had access to during this period.
- Your awareness and views of employment opportunities in Nottingham vis-a-vis other areas.
- The role of key ‘assets’ (cultural, sporting, heritage, business, infrastructural or municipal assets - e.g. Trent Bridge, The Contemporary, Biocity, etc.) in influencing these views.

A review of the four new Focus Groups undertaken for the Great Nottingham Debate is presented below. Although there were common themes, which are summarised at the end of this section, the four groups had different compositions and some very different views. The prevailing views of each group are likely to be influenced by their composition, but caution needs to be exercised. For example, NTU Undergraduate Focus Group 1, with a large proportion of students on vocationally- or professionally-orientated degrees and a large proportion of East Midlands domiciled students, had more positive views of Nottingham. Conversely, Focus Group 2 had a larger proportion of students from London and the South East and had fewer sandwich/placement students, and stood out in having more negative views of Nottingham.

It is more appropriate to review the four group discussions separately rather than drawing a series of generalised observations because Focus Group participants are self-selecting. Students for Focus Groups 1 and 2 were contacted from a database held by NTU Integrated Marketing, comprising students who had agreed to participate in earlier market research (including the AGCAS study). Focus Group 3 comprised students on the economics cohort invited to participate as part of their Final Year Leadership & Employability module, taught by members of the Research Team. Participation was entirely voluntary and could be withdrawn at any time.

The research methods literature indicates a risk that one or more participants with strong views can sometimes ‘lead’ their group, with other participants agreeing to statements that they may not have supported if interviewed individually. It is possible that this occurred in Focus Group 2, where one participant with strongly negative views led some of the discussions.

With these caveats in mind, the discussions within the four Focus Groups were as follows:

Final Year NTU Undergraduates Group 1 (NTU wide with professional/vocational courses and work placement/sandwich students)

<table>
<tr><td colspan="2">Group makeup: 12 participants (plus Facilitator), from City, Clifton and Brackenhurst campuses.

Degree courses included ‘vocational’ or ‘professionally-orientated’ subjects (with significant work-experience elements) such as Social Work; Education; Law (and Law joint honours with business, psychology, and education); Environmental Science (including with Conservation specialism); Product Design; and more academic subjects such as Maths and Psychology (single honours).

The group included several students whose home region was the East Midlands.</td></tr>
<tr><td>Strengths for graduate employment in Nottingham</td><td>Weaknesses for graduate employment in Nottingham</td></tr>
<tr><td>
Well connected city with very good public transport links – important for more vocationally orientated degree courses. Train station is safe, clean and looks smart.
Closeness of amenities.
Activities for different groups, including family entertainment and activities for young adults that don’t necessarily involve alcohol.
For local students, support from family and familiarity of environment.
NTU employability service seen as good, but strong view that Graduate Schemes are prioritised to detriment of other options. Choosing other form of entry to work would “feel like swimming against the stream.” Students from Clifton and Brackenhurst campuses felt that the City campus was significantly better served by employability services, particularly Graduate Fairs.
The Future Hub[16] is good, but predominantly advertises vacancies from large companies and in London. Students noted difficulty in comparing locations on Future Hub.
Good networking opportunities with employers and alumni. The Law School is particularly good. The Law Graduate Fair includes lots of opportunities with local firms. Law students in this group felt there was “no need to go to a larger city or London” and that opportunities in
</td><td>
Lack of accommodation for young professionals. Participants would want to live centrally if staying in Nottingham after graduation, but that this might be prohibitively expensive.
Treatment of students in clubs and bars, including dress codes enforced by bouncers that could be discriminatory, excluding students from diverse backgrounds/diverse identities. This practice is ‘old fashioned’ compared to clubs in Manchester or London.
Poor standard of development of Broadmarsh Centre and surrounding area.
Experiences of crime and anti-social behaviour in areas where student rented accommodation is concentrated (shared houses in the private rented sector). Although this was to be expected in a big city, for students wishing to remain in Nottingham after graduation it was felt that accommodation in more deprived areas would be their only option – and their experiences of abusive and threatening behaviour made this unattractive.
Visible poverty and homelessness, including aggressive begging was felt to be more acute than elsewhere (e.g. compared to Manchester) and was felt to have worsened during the students’ time in Nottingham.
Limited social amenities for students at Brackenhurst. Poor transport links from/to
</td></tr>
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[16]The Future Hub is an online service provided by NTU Employability that includes Graduate Schemes and job vacancies, registration for employability events, and tools such as CV diagnostics etc.

<table>
<tr><td>surrounding areas were more “supportive” of their needs as young professionals.</td><td>the campus meant limited opportunities to form a view of life in Nottingham post-graduation.
• Limited and expensive parking a particular problem for students on vocationally oriented courses such as Social Work, who need a car both for their course and for future employment.</td></tr>
<tr><td colspan="2">Summary of intentions after graduation</td></tr>
<tr><td colspan="2">• Depends heavily on individual circumstances, particularly whether or not a graduate can finance a period of job searching in somewhere other than their home region.
• Strong wish to remain in Nottingham from a number of both local and non-local students. Exceptions included students on some professionally-orientated degrees (e.g. Conservation) that would require moving to where the project work was and a student from Manchester who felt opportunities would be better if they returned to home region.
• Perceived lack of graduate accommodation and living costs (compared to returning to parents’ houses) cited as the main barrier to staying in Nottingham.
• Significant anxiety around perceived dominance of Graduate Schemes, most of which were in London. No participant indicated a desire to enter employment through this route, but felt that “around 3 quarters” of opportunities advertised through Graduate Fairs and the NTU employability service were Graduate Schemes. One student noted that local employers at Graduate Fairs were more likely to know about both the students’ degree subjects and specific job vacancies in their establishment. Law and Social Work students reported good experiences of local employers.
• For Law, not as many opportunities compared to London, but Nottingham offer is more closely aligned to student needs. View Nottingham as “the capital of the East Midlands.”
• For Social Work, more likely to live/work in Nottinghamshire County for accessibility and car parking, and also positive experience of working with Nottinghamshire County Council.</td></tr>
<tr><td colspan="2">Nottingham’s key ‘assets’</td></tr>
<tr><td colspan="2">• Night life and music, across a range of genres. Very easy to see live music. Touring bands play in Nottingham rather than Derby or Leicester. Good awareness and positive perceptions of festivals such as Splendour and Everywhere, and of nights such as Detonate that are aimed at both students and non-students.
• Game City and gaming - though this could be built on and better advertised.
• A ‘sporty city’, including good supporter community for the Panthers at the Motorpoint Arena which students felt more able to engage in compared to more expensive and exclusive/tribal experience of football – football can bring local communities together, but this is dependent on where you’re from and can be prohibitively expensive for students.
• Excellent retail offer in terms of both size and a mix of high street and independent stores. Independent stores flourish in Nottingham – although can feel hidden to some students (whilst others noted enjoyment in discovering new stores).
• Proximity of assets, e.g. night life and retail assets a short walk from Old Market Square.
• Diversity of events, such as festivals and celebrations, including St Patrick’s Day, the Christmas Market, the ‘beech’ during summer, world food markets and other events like Light Night.
• Cleanliness of public realm.</td></tr>
<tr><td colspan="2">Messages for Place Marketing</td></tr>
<tr><td colspan="2">• Good assets in Nottingham, but not as ‘big’ as in cities like Manchester. Nottingham lacks the sense of strong, externally recognisable identity associated with Manchester. For example, the</td></tr>
</table>

accent is distinguishable, but depends on being relatively local to recognise. Students (including local students) stated that they didn't know that actors such as Joe Dempsie, Samantha Morton or Vicky McClure were from Nottingham. • Students felt that Nottingham is more known for historical/heritage assets – not just Robin Hood and Sherwood Forest, but also the Castle and Ye Olde Trip to Jerusalem as 'England's oldest pub'.

Final Year NTU Undergraduates Group 2 (NTU wide)

<table>
<tr><td colspan="2">Group makeup: 13 participants (plus Facilitator), from City and Clifton and campuses.

Degree courses a mix of both vocationally-orientated and more academic disciplines, including Fashion, Art & Design, Law, Bioscience, and Construction and Engineering.

Majority of participants from other regions including London, Wales, East of England (Norfolk) and Manchester.</td></tr>
<tr><td>Strengths for graduate employment in Nottingham</td><td>Weaknesses for graduate employment in Nottingham</td></tr>
<tr><td>• Very good city for students, principally due to the nightlife, but not for living and working compared to London. Described as "more of a student city."
• The large number of independent stores cited by one participant as "the only nice aspect of the city." Other participants disagreed, feeling Nottingham compared poorly to London in this respect and was not a "destination city" for retail.
• Both universities were seen as excellent, but this was seen as separate to Nottingham city. "Trent's an amazing Uni, but this is not due to [the city of] Nottingham."
• Good transport infrastructure – but students wouldn't choose to work in a city for this reason alone, based on the view that "anywhere has good transport links." When asked to elaborate, participants suggested that good transport should be a given in a UK city. Although the Nottingham tram network was seen as efficient and cheap to use, London and Birmingham have cheap internal transport networks.</td><td>• Nottingham is perceived as a small city (compared to London) – "I've seen it all"/ "bored" after 3 years.
• "Not enough cultural things to do…. Not any museums, art galleries." When prompted by the Facilitator on the Castle museum and gallery and the Nottingham Contemporary, the student admitted to not being aware of either. The student stated that "Nottingham is just the Market Square, the train station, and then it stops."
• Students studying degrees in the sciences felt that there were few job opportunities specific to the industry (bioscience) they wanted to work in. Felt to be "overwhelmingly retail".
• Students studying Fashion and Art & Design viewed London (and potentially Manchester) as the only viable options – for ease of getting a job in the industry (London) and for quality of life and cultural offer (Manchester).
• Participants in this Focus Group felt very strongly about Nottingham outside term time, and that this would affect employers: "[Nottingham is] too barren out of term time. People go home. This has to be a problem for companies retaining and attracting staff." This student also described Nottingham out of term time as a</td></tr>
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- “ghost town”, based on observations made during their placement year.
- Barriers observed between students and “locals.” Students from London and the South East and the East of England agreed that they found local people threatening or unfriendly, with one student stating “I completely avoid going out on a ‘local night.’” A participant from Manchester challenged this with the example of friendly bus drivers who verbally acknowledge and interact with passengers, comparing positively to public transport in London.

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<tr><td colspan="2">Summary of intentions after graduation</td></tr>
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- Participants feel that Nottingham is not promoted to them as somewhere to work after graduation. After exams “everything stops” and there is nothing to do except return to their home region because of a perceived lack of non-student life. A participant explained, “I can’t think of any area in Nottingham where young professionals live – I have never seen a street full of young professionals going out and socialising.” Although returning to their home region was not seen as desirable by a number of participants, due to limited job opportunities there (e.g. Norfolk, Swansea) and school friends having moved away, it was preferable to remaining in Nottingham.
- “Wouldn’t want to live here after graduation, but enjoyed being a student here.” This quote was supported by a number of participants.
- Another students stated that they would only stay in Nottingham if “they had a sure fire job offer, but it would have to be very good.”

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<tr><td colspan="2">Nottingham’s key ‘assets’</td></tr>
<tr><td colspan="2">

- Very little awareness of assets. Unable to identify either the Hockley/Lace Market area or Nottingham Contemporary even when prompted by the Facilitator.
- Students claimed that they would be “unable to list” many large employers around Nottingham, with the exception of “Mars, Boots and Biocity” as “the only three that we would know.” They knew this from “word of mouth” having had little interaction with NTU employability services.
- Far stronger emphasis than the other Focus Groups on Nottingham as exclusively a “student city.” When asked to elaborate, participants mentioned limited interaction with NTU employability services beyond attendance at Graduate Fairs, and limited engagement with local employers. One Law student gave strongly negative views of local employment opportunities contrasting with several positive views given by Law students in Focus Group 1.

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<tr><td colspan="2">Messages for Place Marketing</td></tr>
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- This group’s responses indicate challenges for information and communication (for both NTU employability services and place marketing in Nottingham). Highly consistent with AGCAS research, with participants having very limited information on Nottingham life outside of those amenities and activities explicitly aimed at students.
- Main experience of local employers drawn from part-time work in Retail and Hospitality sectors, including House of Fraser, Top Shop, New Look, Starbucks and TGI Fridays. Experiences generally negative, including high staff turnover and feeling of not been respected or valued by employers. Participants related their lack of experience of Nottingham outside Retail and Hospitality as due to the city being a “retail heavy place” and a “student city.” Participants felt that local employers

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targeted and even exploited students. Experiences of part-time jobs significantly influenced wider views of the city. • London was almost exclusively cited as the comparator to Nottingham in this Focus Group (with the exceptions of the student from Norfolk, who mentioned Norwich and Birmingham, where other students he knew were studying, and a student from Manchester). One student justified this in terms of wanting to work in a big city, and that – other than London – they would only class Liverpool, Birmingham and Manchester as big cities in the UK. These places were seen as offering graduates more opportunities as they were less student orientated, "I view Nottingham just as a student city." • Participants cited their experience of a "student bubble" as justification for views of Nottingham as "small" (including when prompted with statistics on relative size by the Facilitator) and were unable to imagine life in Nottingham after graduation as being different than the experiences/amenities for students. One participant argued that staying in Nottingham would be "depressing" after graduation and would make him "feel old" as he was not able to identify any areas of activities beyond the City and Clifton campuses and night life attractions specifically aimed at students (naming the two mid-week student nights at the Oceana nightclub and the Ocean "100% student only" nightclub – "I wouldn't want to be at Ocean on a Wednesday night when I'm 30"). • Participants felt that Nottingham lacked a "young professional scene or community." The Facilitator prompted participants to give their views of the Lace Market, Hockley and the wider Creative Quarter, but no member of this Focus Group was able to identify those areas or any of their assets. The Facilitator mentioned the Nottingham Contemporary in response to a student stating that the city "does not provide me with cultural stimulation further than that [drinking/going to student nightclubs]." • Participants were clear that their main source of information was other students and that they were unlikely to be influenced by information from either NTU or a Place Marketing Organisation, "All of us don't want to live in Nottingham, [and] this isn't going to change."

Final Year NTU Undergraduates Group 3 (Economics cohort)

Group makeup: 12 participants (plus Facilitator), from City campus. All participants in this Focus group were on Economics-related degree courses, including BA Economics, BA Business Economics, BA Economics, Finance & Banking and BA Business Management joint honours with Economics. Courses included full-time and sandwich (with work-placement, internship or study abroad elements). Mix of home regions, including the East Midlands (including Leicester, Derby, Nottingham and Lincolnshire), London and the South East, and two international students (from regions in China and Africa).	
Strengths for graduate employment in Nottingham	**Weaknesses for graduate employment in Nottingham**
• Good universities, with better reputations than comparable universities. NTU lecturers offered time and support for employability, and also provide Nottingham-based cases in coursework (e.g. Level 2 Economic Evaluation module on Nottingham's transport strategy).	• City feels smaller than expected, "not as much to offer" compared to larger cities such as Manchester and Birmingham. • Many participants felt that the "city vibe and nightlife" that attracted them as students will be different after graduation. Other than nightlife, "don't know what to

• Excellent retail offer, one of the key reasons to come to Nottingham and the city has lived up to expectations in this respect. • "The night life in Notts is great". The variety of bars makes if feel "quite dynamic." Compares favourably to similar sized cities like Liverpool, particularly with more small, independent bars in and around Hockley. "A more laid back version of London." With the Corner House, there are "different things to do for different people." Nottingham's offer includes 'quirky' entertainment such as Planet Jump. Places to eat that are not available in other cities, both independent and in areas like the new food court in Victoria Centre. • Accessibility and short commuting time means more time for leisure compared to London, where commuting makes living in the capital "just not worth it." A placement in London had taught one student to "value work life balance a lot" having experienced a long hours culture. If moving to London for career, the student would seek to move back to Nottingham after a few years – note that Nottingham was not the home region of this participant. • The Thinkubator[17] is a good opportunity to interact with local employers, but Graduate Careers Fairs were "very passive", students felt "talked at" rather than having the opportunity to develop "a bond with employers." • Experian and KPMG mentioned as the only local employers students knew who might employ economics graduates. • The Hive[18] provides good opportunities to work with local employers, but little exposure to it (introduced in first year as an option for second half of second year, and again at final year by Employability Team, but not involved in curricula other than this). A feeling that schemes such as	do in Nottingham… [the city has] good nightlife and that's it." • Students felt that this could be addressed by NTU, the Student Union and other city institutions promoting activities other than drinking, for example sports and other activities that included non-students. • Students in this Focus Group debated the relative 'busyness' of Nottingham compared to London, with some feeling less was going on, and others feeling this was positive for quality of life – "less congested." Nottingham was "much nicer to live in than London", although students expected to be earning enough in London to afford high quality accommodation. • More consistent investment needed in physical infrastructure. Students noted "a lot of run-down buildings" (for example, the burnt-down premises opposite the NTU Newton Building and by the entrance of the Rescue Rooms/Stealth night club). A local student felt that desirable property was very concentrated in a "few nice areas", with Hockley and the Lace Market "so nice, all the buildings are nice, great bars." • Abandoned or run-down buildings were associated with a lack of obvious accommodation for young professionals and office space, alongside too much student accommodation, "you need something different… more office space, rather than just student accommodation." • Students felt that they didn't know about many Nottingham-based firms, and that good experiences with local firms would help with retention. Students admitted to "not a massive" amount of interactions with employability services other than attending Careers Fairs. • Lack of free, public events compared to London. Concern that Nottingham is over-advertised as a student city, to the detriment of a young professional image.

[17] The 'Thinkubator' is a half-day event run by the Nottingham Business School in the autumn of 2014 and 2015, where local employers are invited to submit problems, and teams of students and staff work to solve them in series of seminar-style workshops. Reports on 'solutions' are then returned to employers by the end of the day.
[18] The Hive is NTU's enterprise support and incubation centre.

<table>
<tr><td>Enactus[19] were aimed more at students on BA Business degrees.
• Career was identified as the priority by most of this group's participants. If jobs were available/information on jobs were available in Nottingham, a number of participants would want to stay: "I feel comfortable here, I have ties… If offered identical jobs in Leeds and Nottingham, I'd choose Nottingham."</td><td>In London, there are lots of free events, such as 'pop-up' events, and an "exciting 'work hard/play hard' lifestyle" for young professionals that doesn't seem present in Nottingham. In London, you pay a premium for this lifestyle, although you know you could have a better standard of living in Nottingham.</td></tr>
<tr><td colspan="2">Summary of intentions after graduation</td></tr>
<tr><td colspan="2">• As in other groups, this was highly dependent on where students were from and what their main career objective were: "why I came as a student is a completely different reason as to why I'd stay." For students from other regions, it was "easier to find a job in London or easier to go back to what you know… to be unemployed at home more than in Nottingham."
• Students from the East Midlands were more likely to consider staying in Nottingham, but this was weighted against career considerations. Careers for economic graduates viewed mainly in terms of Finance and Business Services, and that there were "not enough jobs for economists" in Nottingham. A belief that specialist economic consultants at both Experian and KPMG would be based in London.
• Students with specific sectoral and occupational ambitions, including those formed from work-placement experience (e.g. as a Credit Risk Consultant) felt that London was the only choice. For other students with less specific career plans, London is seen as the main 'big city' alternative.
• For a student from the South East, their limited information of employment in Nottingham was a result of their own choices, "I haven't looked to be honest… I'm not really interested… I don't have the urge to find out about [Nottingham] city related stuff." Employment ambitions were focussed on London or another European capital.
• Demanding assessment schedules in their Final Year gave limited time to research employment opportunities. If information was not immediately available, students were unlikely to have time to find it – referring, as in other Focus Groups, to the dominance of Graduate Schemes, mainly in London, on Future Hub. "You have to do so much digging around [on jobs websites]" and not easy to compare location, including key factors like housing and living costs.
• The two international students in the group had very positive views of Nottingham. The participant from Africa felt that "Nottingham's great… everything's better here", but did not regard staying as realistic due to visa/immigration issues and financial concerns.
• Students felt they had no more information on working in Nottingham than any other city, such as Sheffield, Leeds or Nottingham, but should know more after 3 years studying in the city. Decisions based on assumptions and rule-of-thumb, "I assume if Nottingham has PwC, Manchester will also."
• A notably strong sentiment expressed by all participants against Graduate Schemes, which they felt were promoted to them despite "not being real jobs… not full time jobs… not the same security as a real job."</td></tr>
<tr><td colspan="2">Nottingham's key 'assets'</td></tr>
<tr><td colspan="2">• Students didn't recognise a list of 'assets' provided by the Facilitator with the exception of Trent Bridge and Hockley and the Lace Market (for bars and independent shops) but "don't know where the Contemporary art gallery is… it's poorly advertised." However, the Lace Market is "beautiful".</td></tr>
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[19] Enactus is an international programme, delivered at NTU, where students work in teams on socially responsible enterprise projects: http://enactusuk.org/

Messages for Place Marketing
• Information on both assets and employment opportunities were principally from word-of-mouth, "All these places, I only know from people who've gone to them" (local student from Nottingham, in reference to Hockley and Lace Market). Students admitted their views of employment opportunities were drawn more from the "rumours and perceptions" of other students. • Increased engagement with NTU alumni would help address views that the type of local jobs are "not want you want." One student stated, "I came to Nottingham and would like to stay, but [I am] looking at being an accountant [and] Nottingham does not offer a range of economics careers." Students gave the example of friends at universities holding alumni-student events in both the city where the institution was based and in London. • Participants were very positive about the potential of interacting with alumni, not just to improve their information on jobs available in Nottingham, but to address uncertainty and anxiety around career paths for graduates with an economics degree. A participant felt that alumni mentoring could help identify a route from "first, second to third job" including opportunities in Nottingham. • Alumni mentoring would help students understand what different jobs entailed, making local employment more attractive (in contrast to rumours/negative perceptions from peers). • For those students with a strong desire to work in London, at least in the short term, place marketing messages, however well developed, would not persuade them to stay in Nottingham: "Whatever you advertise to me, I won't want to stay here… I want a bigger city." • On a sense of identity projected through place marketing, students were critical. A student from the South East, "Nottingham is hard to compare to London. They [sic] need an identity – they only have Robin Hood – they need more." A local student added that secondary school experiences included projects on Robin Hood that were not well-received and that the Robin Hood legend was 'over-advertised', "Robin Hood doesn't really sell it for me… [It's] so boring. It gets pushed down your throat so much. [It's been] used for so long, it feels old and dated. It gives you an old and dated impression of the city." Another student noted that, for people in their 20s, Robin Hood references felt childish, but could see how they appealed to children and families. • If Nottingham wanted to keep more recent graduates, it should advertise the young professional lifestyle. A Nottingham local student who have worked for a year on placement in London said, "[in Nottingham there is] probably as much to do as in London, but you never hear people say anything about it." Nottingham is a middle-ranged city and shouldn't "try to be bigger" because of the quality of life benefits from being smaller than London and Manchester. • For those students who considered working in Nottingham after graduation, place making activities, particularly investment in accommodation for young professionals, were identified above place marketing activities. Students prioritised "standard of living and scenery" alongside job opportunities. For local students, relationships with families and with partners were "commitments that would keep [me] in the city."

NTU Alumni, Group 4

Group makeup: 4 NTU alumni (plus Facilitator) at different stages of career: **Participant 1**: graduated in last 2-3 years with an economics degree, works in London in financial services. **Participant 2:** studied at NTU as a post-graduate, did first degree at University of Nottingham. Works in the creative industries across the Midlands. Previously worked as a journalist. Engaged in local economic development policy including Leicester Growth Plan and Nottingham Creative Quarter. **Participant 3**: previously lived and worked in Nottingham, left 8 years ago to live in Yorkshire. Still visits Nottingham for job role in pharmaceutical retail sector and as an NTU Alumni Fellow. **Participant 4**: currently lives and works in Nottingham.

<table>
<tr><th>Strengths for graduate employment in Nottingham</th><th>Weaknesses for graduate employment in Nottingham</th></tr>
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Excellent offer for student life. Lots of facilities, including coffee shops, restaurants, bars and retail.
Participant 4: “Nottingham is a great town” due to proximity to some “fantastic” countryside within 5-10 miles of the city centre, good transport links (noting that the tram and bus links open up rapid access to the airport, and the A453 improvements potentially enable access to the centre within 30 minutes).
Sectoral and course subject specialisms are attractive, especially to mature students (Participant 1 and 2).

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Participants agree on the unappealing gateway to city (though train station much improved). Pedestrian route through Broadmarsh continues to “let Nottingham down.”
Participant 1: Nottingham is not a global financial centre. Interaction with local firms during study was not a priority, the “focus was to get a degree in economics and then go to London.”
Participant 3: Nottingham compares poorly to Birmingham in terms of public realm and the approach to the city centre. Participant chooses Birmingham above Nottingham for retail, with the shopping centres far more modern.
Reputation of crime still an issue for Participant 3, who feels unsafe around the train station by day and across most of the city at night. Crime was given as main reason for no longer living near Nottingham. Participants 2 and 4 disagreed, with Participant 4 feeling perfectly safe even in more deprived areas and arguing that these concerns apply to every city in the UK and that the situation is changing. In areas like Radford, a growing student population and international immigration is leading to an improved area, with increasing property prices, improving schools, and the Djanogly City Academy having “really upped the area.”

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<tr><th colspan="2">Nottingham’s key ‘assets’</th></tr>
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Participant 2, when studying an MA at NTU and then mentoring students, observes limited awareness amongst students of Nottingham’s assets beyond immediate student environment, “I find I have to defend Nottingham to a lot of students… I have to introduce people to what Nottingham can offer.”
Trent Bridge is a great asset, widely known internationally, a “fabulous resource.” Participant 1’s international colleagues working in London knew Nottingham for Trent Bridge.
Nottingham Contemporary is “an incredible place to have” but not yet marketed effectively within the wider Creative Quarter.
Sectoral assets are poorly communicated. Biocity was mentioned by Participant 4 as hosting some of the leading bioscience activities in the UK, but messages sent out internationally by Nottingham institutions were inconsistent, with assets like Biocity often under-emphasised. Other manufacturing and R&D assets overlooked completely, for example stories like the designer of Chris Hoy’s bike being from Nottingham not being widely known (or linked to the legacy of Raleigh and other historic manufacturing strengths). Participant 3 felt that a wider long-term industrial strategy was needed, noting historic strengths in wind turbine manufacturing and development (Siemens) and fashion (Jaeger and Courtaulds) moving production away whilst design functions have moved to London. With fashion and textiles, the skills are still in Nottingham, with the large

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population of fashion students alongside the reputation of Paul Smith. This could be built on through a high profile Nottingham Fashion Week.
Although pharmaceutical and medical R&D is not as established as it once was, achievements such as Boots and Nurofen and the invention by a University of Nottingham Professor (Sir Peter Mansfield) should be more widely celebrated as part of Nottingham’s industrial legacy.

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<tr><td>Messages for Place Marketing</td></tr>
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Integration is key for retaining students. This is affected by the large population of students, and the growth in this population, making it difficult to integrate with the community. Participant 1 was concerned that if Nottingham was marketed to new students as a “party town” this may have affected the decisions students made in choosing the university (choosing a city for the student lifestyle rather than prospects post-graduation) which in turn affected retention.
Strongly agree with article in Nottingham Post quoting Professor Peck (NTU Vice Chancellor) on the perceived over-supply of student accommodation and under-supply of housing for young professionals. Participant 2 stated that the “student accommodation is everywhere”
Coordination of communication could be hugely improved (Participants 2 and 4). Participant 2, with experience of Leicester’s Growth Plan, feels that Leicester achieve better external communication and joint working. Leicester was felt to have strong leadership and project the image of “a fantastically integrated multicultural city.” Nottingham had “done the obvious things” in improving transport and community safety, but now needed a coherent plan to build on strengths like the accessible and well connected NTU and University of Nottingham campuses and “buzzing student lifestyle.”
The international student population are an under-utilised opportunity, many of who are “happy to stay and want to stay” but aren’t always able to without the right employment. Nottingham needs to do more to “embrace the international community wishing to be part of Nottingham,” including the skills they have. UK home students are more difficult to retain, and they will move wherever they need to further their career.
Alumni could be much more widely used, including for strategic consultation. NTU and University of Nottingham’s alumni network provide a pool of expertise that can mentor students, input to policy and act as ambassadors for the city – whilst being separate to local politics. Alumni Fellows are feeding back knowledge and experience into student support and course development, “why can’t the same thing happen for Nottingham” with alumni with expertise in relevant areas (bioscience, fashion, art and design, etc.).
A ‘quick win’ would be alumni events of the kind put on by Oxford and Cambridge universities.
Retention and place marketing strategies cannot be one-size-fits-all if they are to be successful. Need to be sector and degree subject specific, aligning with Nottingham’s current and potential future strengths – including medical/bioscience and art, design and creative/cultural. Nottingham can’t retain every student. Opportunities in over-heating of London – creative areas in the capital can’t remain so when property prices are so high. Nottingham should harness a specialism like the creative industries, and build a reputation in that area alongside new facilities – enhanced by the affordable property and higher quality of life.
A coherent message is required on what Nottingham is good at, that does not try to be “a jack of all trades” and focuses on just one or two specialisms that can be combined with sector strength and academic specialisms.

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The following general observations can be drawn from the four Focus Groups:

In the context of the socio-economic data on the relative size of Nottingham, the high proportion of employment in Professional occupations and the views of employers (in Section 2 of this report), students' views of a lack of a 'young professional' lifestyle in Nottingham is based more on their lack of information than a lack of actual opportunities. Students lacked information on:

- Local employment opportunities;
- Lifestyle factors that appeal to young professionals; and
- An area where young professionals live and socialise.

This lack of information was reported by both local and non-local students. On the assets and general perception of place, there were contrasts between different Focus Groups – especially between Groups 1 and 2:

- For those originally from London and the South East and the East of England and/or on full-time degree courses without significant work experience, London is the main comparator to Nottingham, and views of the city as somewhere to work were more negative. However, it must be emphasised that almost all participants were highly positive about Nottingham as a place to study;
- Those students who had chosen to mainly socialise use amenities in facilities specifically targeted at students (e.g. 'student nights' at night-clubs, student-focussed bars etc.) had positive views of these experiences, but were less likely to have an awareness of Nottingham outside their self-described 'student bubble;'
- For students originally from the East Midlands in particular (and to a lesser extent from the North West and West Midlands) and/or those studying a professionally-orientated course or a course with a significant employment element, awareness of assets other than those explicitly targeted at students was much higher. Awareness of Hockley and the Lace Market was a major contrast, with students in Focus Groups 1 and 3 identifying the area as the most attractive asset in Nottingham in their view, and students in Focus Group 2 unaware of the area; and
- Students with a good awareness of the characteristics of Nottingham spoke highly of 'quality of life' benefits, including with positive comparisons to London.

Key assets in Nottingham identified in the 4 Focus Groups were:

- Night life, which was identified by all groups, although, for some participants, this was very much within a 'bubble' of establishments explicitly aimed at students. Some participants noted a risk in over-selling a student focussed offer to the detriment of night life for young professionals;
- Retail, including a mix between high quality high street and independent shops;
- Accessibility and good public transport links, with the caveats around expectations of a city in the UK (good public transport should be "a given" according to participants in Focus Group 2) and concern about parking amongst students on professionally-orientated degree courses (e.g. Social Work);
- Sport, with Trent Bridge and the Motorpoint Arena/Nottingham Ice Centre particular; and
- Hockley and the Lace Market. Where students were aware of this area, they were extremely positive, using terms such as "beautiful" and "vibrant" and recognising the mix of independent bars and shops and attractive built environment.

Employment plans after graduation were hugely influenced by home region and sector or degree specialism:

- Many students from regions other than the East Midlands indicated an intention to return home for financial reasons. For some students this was a difficult choice, with them preferring to stay in Nottingham if they had a job offer or felt able to finance themselves (with finance given as the key reason for feeling they had no choice but to return to their parents). For others, particularly students from London and from Manchester, this was a positive choice due to the perception of greater employment opportunities;
- The majority of participants strongly wanted to avoid Graduate Schemes, but felt pushed in this direction (e.g. other routes would be "swimming against the stream"; schemes are "shoved down our throat"). The view came from the majority of vacancies on Future Hub and interactions with graduate employers during Graduate Careers Fairs. Students were unhappy with Graduate Schemes, viewing them as less secure, where they would be less valued, and were they would have less control over the direction of their career;
- Students who identified themselves as highly career focussed stated that they would choose London over Nottingham for a combination of young professional lifestyle, greater availability of jobs, and specialist jobs that they felt were not available in Nottingham. Some students felt that they would want to return to Nottingham for quality of life reasons, others felt that the higher living costs in London were equivalent to a premium they were prepared to pay for a young professional lifestyle they believed to be lacking in Nottingham.

On actions to address these issues, across both the student and alumni Focus Groups, the following recommendations were made:

- Greater use of alumni, to mentor students, address anxiety and uncertainty around career routes (including local careers) and to champion opportunities in Nottingham;
- A dedicated Nottingham Careers Fair at one or both universities;
- More events and activities that both mirrored the 'young professional' lifestyle believed to be offered in London and Manchester and that encouraged students to interact with non-students. These could build on Nottingham's sector strengths and the subject specialisms of the two universities, including a Nottingham Fashion Week[20], a Nottingham Film Festival, creative and cultural 'pop up' events, and greater promotion of Biocity and careers in bioscience more widely. Institutions involved in this could include the two universities and the City Council, the Student Unions, and local cultural organisations like Left Lion magazine, as well as 'exemplar' companies like Boots, Paul Smith, Experian, etc.; and
- The perceived lack of a young professional lifestyle was accompanied by concerns around a lack of graduate accommodation across both the student and the alumni focus groups, alongside an over-supply of student accommodation. This was seen to present an image of the city as welcoming or promoted to students to the detriment of graduates.

[20] Note a Nottingham Fashion Week does take place, on 2016 it will be on the weekend of the 29-30th of April, and is a widely publicised event that will be hosted by BBC DJ and TV Presenter Alice Levine.

Section 2: Place Marketing

The research summarised in this report so far has identified a range of strengths for Nottingham, including a young, growing population alongside a high proportion of residents employed in Professional Occupations, which is a key indicator of demand for graduates and highly skilled workers more generally. However, the Focus Groups with NTU students, in addition to previous research, suggest that information and communication failures may mean some of the weaknesses relative to other cities (for example, a lower share of employment in sectors such as Finance & Business Services) have a disproportionate resonance amongst the student population. The Focus Groups and the earlier research by AGCAS suggest that many students have a very limited awareness of many of Nottingham's key assets and little appreciation of both graduate level employment opportunities and graduate life in Nottingham more generally.

This section explores activities around place marketing in order to identify lessons to help address this challenge.

The concept of 'place marketing' is distinct from 'place making', which describes the multi-agency planning, investment and development of infrastructure and public spaces (i.e. the enhancement of a place's 'offer'). Place making is an objective of local economic development (including physical regeneration and infrastructure, employment, skills, and business support policies). This aims to increase the attractiveness of the city to external investors and tourists and improves the quality of life of residents and workers.

'Place marketing' is the marketing of that 'offer' – including branding and sales strategies. This research aims to present findings useful to a future Place Marketing Organisation (PMO) in Nottingham. In turn, effective place marketing can also help place makers (for example, Nottingham City Council, Business Improvement District partnerships, and organisations like the Creative Quarter) to identify investment priorities to further develop the offer, based on market intelligence collected by the PMO (such as feedback from investors and visitors).

As important context for this research, place marketing activity in Nottingham is currently being significantly reviewed. A new organisation, currently known as Marketing Nottingham and Nottinghamshire (the title of the legal entity, a future brand name to be confirmed) has been created to oversee and develop:

- Destination marketing to increase the amount and duration of tourism visits (currently delivered by Experience Nottinghamshire);
- Inward investment aimed at increasing direct and indirect investment from foreign and UK-based firms and investor development and aftercare (encouraging the retention of inward investment successes, currently delivered by Invest in Nottingham); and
- Local business engagement (currently delivered by Nottingham Means Business).

The new organisation, which will be developing its strategy and organisational structure through the spring and summer of 2016, will prioritise the wider role of place marketing in addition to the above three functions. This incorporates building the reputation of the city and identifying wider target markets beyond the three inherited functions (which will continue to be delivered by the three existing brands whilst the new strategy is developed), including promotion to internal audiences. This is in recognition of the tendency for place marketing to prioritise external activity, under-focussing on current residents, students and workers – who, amongst other benefits, can be perceived as a potential sales force. The challenge for this organisation will be to develop a story of place that is coherent, and that builds on the right branding, people and processes, that can also be sufficiently flexible to meet the different needs and interests of the different audiences.

This section starts with a literature review on the academic and policy-based research on place marketing. Following this, findings from the 5 depth interviews with Nottingham-based employers will summarised. Finally, case studies are reviewed of existing place marketing activities to date in Nottingham, Birmingham, Manchester, Newcastle and Leicester and Leicestershire. This will then feed into the concluding section of this report. All parts of this section will incorporate feedback from meetings with key stakeholders undertaken at the start of this project, which included representatives of NTU, Nottingham City Council, the University of Nottingham, and the interim Chief Executive of Marketing Nottingham and Nottinghamshire.

2.1 Place Marketing – insights from the literature

Place marketing[21] employs marketing principles and techniques to advance the appeal and viability of a place (town, city, state, region, or nation) to tourists, businesses, investors, and residents. It is also often alternatively described as destination or city marketing. Although there are examples dating back to 1850, place marketing is a relatively new field of academic research. Gertner, in his meta-analysis of the 'place marketing' and 'place branding' literature[22] notes that, "the ever-growing number of journals publishing articles on 'place marketing' and 'place branding' seems to indicate the approaching maturity of the discipline." This view is supported by the development of dedicated journals (i.e. '*Place Branding and Public Diplomacy'* and the *'Journal of Place Management and Development'*) and the publication of related articles in both general marketing/management journals and in other disciplines such as geography and urban studies.

Like marketing in general, place marketing could be understood as, "*an organizational function and a set of processes for creating, communicating, and delivering value to customers and for managing customer relationships in ways that benefit the organization and its stakeholders*"[23] but with the focus on places. With the rising competition between cities to attract investors, companies, new citizens, qualified workers (talent) and tourists, many place marketing agencies repeatedly concentrate just on the promotional aspects of marketing and therefore often fail to extract the full potential of an integrated marketing strategy. As outlined in the introduction to this section, staff engaged in developing the new PMO for Nottingham are keenly aware of this risk. Zenker and Martin [24]highlight the role of all stakeholders, their behaviours and their culture, as well as avoiding too heavy a focus on external target groups in place branding.

[21] http://www.britannica.com/topic/place-marketing

[22] Gertner, D. (2011). 'A (tentative) meta-analysis of the 'place marketing' and 'place branding' literature', *Journal of Brand Management* Vol.19, pp.112-131.

[23] American Marketing Association (2009). '*Dictionary of Marketing Terms.'*

[24] Zenker, S. and Martin, N. (2011), "Measuring success in place marketing and branding", *Journal of Place Branding and Public Diplomacy*, Vol. 7 No. 1, pp. 32-41.

There is a view in the literature that applying classic marketing concepts to a place context is fraught with difficulty. This is especially true where branding is concerned. Nevertheless, it has suggested that place marketing practitioners often appear to believe that they can treat a place like a conventional product and a place name (a *toponym*).[25] Zenker and Braun[26] define a Place Brand as: "*a network of associations in the consumers' mind based on the visual, verbal, and behavioural expression of a place, which is embodied through the aims, communication, values, and the general culture of the place's stakeholders and the overall place design*." They also identify different target groups (see Fig 1) for place marketing, highlighting the disparate audiences which make place marketing so challenging. A place is by no means a conventional product. In their 2013 journal article[27], Warnaby and Medway caution that, "the danger for place marketers is that in commodifying a place as a product or brand to be promoted to selected audiences via a particular narrative, the essence of the place – its unique identity that distinguishes it from other places – gets lost."

The image of a place is often built through stereotypes and common sense narratives, and that investment in place branding is the most effective way of altering these if they are perceived negatively by potential or existing place users. Braun, Kavaratzis and Zenker [28] seek to examine the multifaceted role of residents in the place branding process and to explore the implications for place brand management. They identify three different roles played by the residents: as an integral part of the place brand through their characteristics and behaviour; as ambassadors for their place brand who grant credibility to any communicated message; and as citizens and voters who are vital for the political legitimization of place branding. These three roles make the residents a very significant target group of place branding.

As Kavaratzis explains, there is a significant challenge in that residents of places do not constitute a single coherent group but include, "a multiplicity of groups of people that are bound to have varying and conflicting preferences, desires, or, attitudes" and his views are echoed by Gertner who calls for any future research to delimit different competitive arenas, such as efforts to brand places for investors, residents, visitors, specialized workers, overseas students and other groups. The significant differences between the views of final year students explored earlier in this report and the (generally very positive) views of employers explored later illustrate this challenge.

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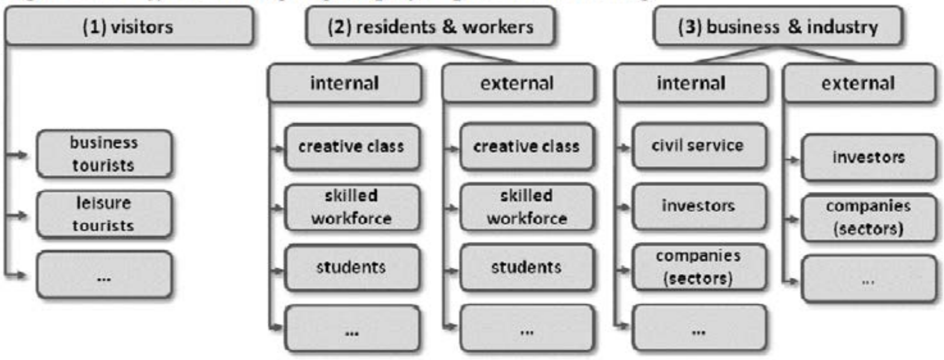
[25] Medway, D. , Swanson, K. , Delpy Neirotti, L. , Pasquinelli, C. and Zenker, S. (2015) 'Place branding: are we wasting our time? Report of an AMA special session', *Journal of Place Management and Development*, Vol. 8 Iss: 1, pp.63 – 68

[26] Zenker, S. and Braun, E. (2010). *Branding a City – A Conceptual Approach for Place Branding and Place Brand Management*. Paper presented at the 39th European Marketing Academy Conference, Copenhagen, Denmark.

[27] Warnaby G. and Medway D. (2013*).* 'What about the 'place' in place marketing?', *Marketing Theory,* 13 (3) pp. 345-363.

[28] Braun, E., Kavaratzis, M. and Zenker, S. (2013). 'My City – My Brand: The Role of Residents in Place Branding', *Journal of Place Management and Development,* 6 (1), 18-28.

Figure 1: *Different target groups for place marketing*



Source: Zenker, S., & Braun, E. (2010). *Branding a City – A Conceptual Approach for Place Branding and Place Brand Management*. Paper presented at the 39th European Marketing Academy Conference, Copenhagen, Denmark.

In Europe, there are more than 500 regions and 100,000 different kinds of communities competing individually for the same jobs, investments and talented experts.[29] Competition for tourists, investors, companies, new citizens and most of all qualified workforce has risen strongly in the past decades (Zenker *et al.*2013). The fact that place marketers increasingly try to establish places as brands, and use brand positioning practices to help promote their place to its different target groups, was proposed as a logical outcome of this competitive place environment.

As Medway and Warnaby [30] suggest, "in truth, places typically remain much more disordered in the way they serve the needs of their consumers, in essence performing the oft-cited "place marketing" role of being multi-sold at one and the same time to multiple audiences." Finally, Robert Aitken and Adriana Campelo[31] identify what they describe as 'the four Rs of place branding' – rights, roles, responsibilities, and relationships, that have emerged from the social capital or communal practices of the place that are re- and co-created through community engagement.

2.2 Employer Perspectives on Attraction, Retention and Place Marketing

To inform recommendations for place marketing from an employer perspective, and to contextualise both the socio-economic data and the student perspectives, 5 in-depth, semi-structured face-to-face interviews were carried out with employers. The interviewees were identified and contacted by the Nottingham Post. Interviews were conducted by the report authors (Lawton, C. in all 5 cases) against the following topic guide, which was provided advance along with participant information and consent sheets. The topic guide prompted employers to discuss the following:

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[29] Moilanen, T. and Rainisto, S. (2009). *How to Brand Nations, Cities and Destinations: A Planning Book for Place Branding*, Palgrave Macmillan: Basingstoke.

[30] Medway, D. and Warnaby, G. (2014). 'What's in a name? Place branding and toponymic commodification', *Environment & Planning*, Vol. 46 p.164.

[31] Aitken, R. and Campelo, A. (2011). 'The four Rs of place branding', *Journal of Marketing Management,* Vol. 27, Nos. 9–10, pp 913–933.

- An overall, qualitative view of the extent and nature of your recruitment activities and any general issues pertaining to the recruitment and retention of skilled staff.
- Your interactions with the two local universities, the University of Nottingham and Nottingham Trent University, and your views on the work-readiness of graduates.
- Your views of the role of the city of Nottingham as a barrier or enabler for recruitment and retention, thinking about size, location, connectivity, local workforce skills issues, the size and structure of the local business population, and more subjective issues such as identity or reputation.
- The role of key 'assets' (cultural, sporting, heritage or municipal assets – e.g. Trent Bridge, The Contemporary, etc.) in enabling recruitment and retention of skilled staff.
- Any views of the quality and nature of place marketing activities in Nottingham to date, and any comparative insight regarding other towns, cities or counties in the UK.

The interviews were with:

1. A talent manager specialising in early careers at Boots UK;
2. A surveyor within the commercial property agent Innes England, based in Nottingham;
3. The Director of HR Resources at the drug discovery firm Sygnature Discovery, based in Biocity;
4. The Managing Director of the specialist legal recruitment company Bygott Biggs, based in Nottingham; and
5. Three participants from Pricewaterhouse Coopers' (PwC) East Midlands offices, including a Partner and colleagues involved in graduate and student recruitment and management of specialist teams.

The interview participants' perspectives on each of these topics were as follows:

2.2.1 Overall recruitment activity

The first topic explored trends in the extent of total recruitment and staff retention and mobility.

The market for graduate recruitment is buoyant in 2016

The employers described the current recruitment market as buoyant, especially compared to the significantly reduced demand following the recession that started in 2008. PwC and Bygott Biggs noted a particularly strong recovery in demand in their respective sectors:

- For PwC, filling vacancies is not a problem at a national level due to high numbers of applicants (approximately 45,000 applications to 1,500 graduate vacancies annually across the UK business). However, some local offices, particularly in London, fill vacancies very quickly, whilst others can take much longer to recruit. This isn't a particular problem for Nottingham, but it can be for offices such as Milton Keynes, where recruits may strongly favour working in relatively nearby London offices. Staff retention was very high during the period of recession, although it's important to emphasise that a level of mobility is desirable for career progression and talent management. In the last 18 months, staff mobility has returned to pre-2008 levels. The pull tends to be to larger employers, for example Boots in the Nottingham area. For the

Midlands regional offices, mobility tends to be within the Midlands rather than an outflow to London; and

- For Bygott Biggs, recruitment for legal professionals has been affected by both supply and demand factors. After the onset of the recession until as late as 2013, firms were not recruiting at anywhere like the rates prior to 2008, if at all. This meant that lawyers were not being brought in at any level and being trained, with as much as a five year period when far fewer lawyers were qualifying into the profession. In the last 2-3 years, demand has recovered very strongly whilst supply remains constrained, affecting legal recruiters across the UK.

All 5 employers recruit both locally and nationally, with strategies differing depending on the vacancies. A high proportion of 'Early Careers' roles in Boots UK are recruited locally. This strand covers part-time roles and work experience for students and graduate recruitment. Graduate recruitment is undertaken through assessment centres across the UK, including for roles in finance, supply chain, IT and HR. These require different skillsets but not necessarily a specialist degree. Some roles are more difficult to recruit and retain, notably finance and IT because graduates aspiring to such roles can feel a particularly strong pull to London. There is a perception of faster career progression and more specialist roles being London-based (a perception held by a number of participants in the NTU student Focus Groups, with many candidates aspiring to work in investment banks and the Big 4 accountancy firms). Other roles are easier to attract and retain in Nottingham, such as commercial marketing roles, as the brand power of Boots in the health and beauty retail sector makes it a career destination of choice.

In selecting candidates for graduate roles in Boots, attitude and behaviours are prioritised above degree subject, including characteristics that may indicate the potential to be a future leader in the business. However, in its 'Experienced Hire' strand (management and senior management positions), Boots recruits on an international basis where specialist experience and a track record are prioritised.

In Sygnature Discovery's recruitment to specialist scientific roles, they note a similarly international view, with a large proportion of their recruitment being for highly skilled scientific roles. Around 80% of their current workforce are educated to PhD level. The organisation has been expanding significantly since the beginning of 2011 and in 2017 they will be moving to a new, purpose built premises adjacent to their current premises in Biocity. This will allow them to expand their head count to upwards of 200 staff. They are currently recruiting, primarily for scientists with specialisms in various chemistry and bioscience disciplines, which are vacancies that may be filled through international and well as national and local recruitment. The current scientific staff group includes employees from across most of Europe, as well as from further afield, such as Asia and America.

London exerts a significant draw in early careers

With reference to the draw of London and its impact on recruitment and retention, PwC, Bygott Biggs and Innes England all noted similar issues related to lower awareness of local and regional opportunities for career advancement and quality of life benefits.

For graduate surveyors, Innes England noted a draw to "the shining lights of London." The currently buoyant labour market favours candidates over recruiters, with graduate surveyors tending to be "on the ball" in pursuing their priorities much faster than recruiters in the regions are able to react. They have a clear idea of how they want their career to play out, and this, “invariably entails working for a large real estate firm - almost always based in London or another large city such as Manchester.” This is a challenge for SMEs across industries, and isn’t particular to the property sector.

For legal professionals recruited by Bygott Biggs, this preference is mainly an early career phenomena, where the “tide of movement” corresponds with candidates’ life stages. At more junior levels, lawyers are drawn to London, but later in their career, other considerations become more important, including affordable housing, quality schools, and a better work/life balance. This is where cities like Nottingham have a strong offer. Bygott Biggs’ experience is that a buoyant market tends to favour candidates over recruiters, when the draw of bigger cities, higher salaries, higher long-term earning potential, and the perceived attractiveness of large legal practices mean that recruiters in smaller cities have challenges in finding suitable candidates. When the economy is less buoyant, and candidates have less choice, recruiters in areas like Nottingham are more able to attract and retain candidates.

Potential recruits lack awareness of local opportunities

The employers all put considerable emphasis on candidates’ stated preferences for roles in London being driven by perception rather than an informed view. From talking to team members who expressed a wish to move on to opportunities outside their regional office, PwC described a common perception that “London is where the action is.” In practice however, individual promotability is at least equal to, if not greater to London in a regional office. In London offices, graduates may be working in very large teams, may work with just one client for a year or more, and have limited facetime with senior staff and potentially slower rates of progression. In a regional office, they will work in smaller teams, spend more time with senior colleagues, and have more responsibility for a diverse portfolio of clients across multiple industries. For those colleagues who choose to move from a regional office to London, this can feel like a ‘step back’.

In order to provide information on career routes that best support graduates’ skills and potential, PwC dedicates time to exploring the reasons behind stated preference for London, ensuring recruits are aware of opportunities across the firm, including the specialist activities and leading experts based in regional offices (PwC’s head of Intellectual Property, for example). Strategies to increase awareness of regional opportunities include secondments with clients and cycles of experience in other parts of the firm in the Midlands. This enables PwC to understand what drives preferences for London: whether it is a perception of career opportunities or a combination of cultural and lifestyle factors. PwC has no intention of constraining careers within a given region, but wants to encourage recruits to gain different experiences whilst being able to return to an area if they have ties to it.

Similarly, Bygott Biggs strive to ensure candidates are aware that, in terms of the quality of legal work and the opportunities for progression, Nottingham compares well to bigger cities including London. This includes the presence of international and national law firms (such as Eversheds, Freeths, Geldards, Browne Jacobson, Gateley, Shakespeare Martineau and Shoosmiths), multinational companies with large in-house legal teams (such as Capital One and Experian), and a high quality of case work.

Alongside the quality of work, affordability and accessibility were emphasised as assets in Nottingham's recruitment offer. PwC felt that affordability is an increasingly important factor for the current generation of university students and recent graduates. For those drawn to London, the vast majority will be housed in the private rented sector with limited hope of buying their own homes. Nottingham can potentially be marketed as a place where young people can live affordably *and* have a good career.

A number of the interviewees felt that too little was made of this in available place marketing. In Sygnature Discovery's case, they have to compete against the life-science hubs of Cambridge and the South-East. One of their solutions has been to produce a 'Flyer' for potential recruits that details facts and figures about living and working in the Nottingham area, including information on the cost of living, transport links, and housing costs. This flyer has been taken to the major international scientific conferences that the company attend in order to compete for new business and potential recruits. The firm found it difficult to access all of the required information from local place marketing sources, and instead had to dedicate significant time to producing this themselves. Positive messages such as the affordability of housing in Nottingham, needs to be more widely available within the scientific community, as other established clusters of scientific activity, notably around Cambridge and the Thames Valley, suffer from prohibitive housing costs and commuting issues. The 'big sell' for life sciences around Nottingham is the higher standard of living – although very great care needs to be taken to strike a balance, emphasising affordability rather than the counter-productive emphases on 'cheap labour costs' often found in inward investment promotional materials. A narrative around lower wages is not useful when competing for highly skilled knowledge workers.

Travel was seen as an increasingly negative factor for working in London. This was recognised by some NTU students in the Focus Groups. Employers felt that the contrasting experience in Nottingham could also be better promoted, but also felt that this required further place making as well as place marketing measures. Innes England, based in the NG2 business park, spoke positively of the extended tram network, but for other employers it has made less of an impact. For PwC, near to East Midlands Airport and M1 Junction 24, the tram does not serve many of the areas where staff live and car travel remains the main form of transport. A number of the employers, again in line with NTU students and the alumni Focus Groups, noted that Nottingham could be perceived as a 'car unfriendly' city, particularly compared to Birmingham

2.2.3 Interactions with Universities and graduate work-readiness

Employers interact with universities in order to expedite graduate recruitment, improve the work-readiness of those recruits, and build links in innovation, knowledge transfer and entrepreneurship (including university incubation and spin-outs) as well as it being socially responsible. The gap between perceptions (as expressed in the NTU student Focus Groups) and actual opportunities (as expressed by employers) is a concern that motivates employers to interact with universities to increase graduate awareness of opportunities in the local labour market.

Employers want to improve graduate Work Readiness and Recruitment Readiness

For Boots, recruitment and retention is a key reason for co-delivering the #Grads4Nottm[32] programme with NTU. Other initiatives include Boots open days to showcase the business and workplace requirements, and the Nottingham Advantage Award Scheme with the University of Nottingham, which is a commercial programme where students design a branded product and present to a commercial audience.

Bygott Biggs also have strong ties with the two universities, for both recruitment and work-readiness reasons. This includes delivering mentoring programmes across the NTU undergraduate population, not just to law students. Mentoring includes one-to-one interactions and group development activities, assisting students to become work ready and to be better prepared for recruitment (Including CV writing, interview skills etc.). Not all graduates are work-ready, and although law firms invest in intensive induction processes (including an increasing adoption of Apprenticeship schemes and graduate training schemes through Paralegal roles), graduate recruits can lack more general office skills (telephone and IT skills) and more specific skills such as case management.

Innes England noted a similar weakness in transferable 'office skills' (for example, knowing how to deal with Frank Mail) and issues with client handling skills that, "you don't get taught… because they're not integral to your career, but you're expected to know about." Innes England, Bygott Biggs and PwC all emphasised the importance of students undertaking some form of work experience prior to graduation.

PwC and Bygott Biggs identified the need to increase recruitment readiness as much as work-readiness. The large number of applicants and rigorous selection processes ensured those graduates recruited by PwC had the aptitudes required to enable rapid knowledge acquisition, but preparedness for the recruitment process itself – including both online aptitude testing and assessment centres - was often limited. In the case of verbal and numerical aptitude tests, "with a "little bit of research and practice, students could be a lot more successful." But the success of projects to address this depends heavily on student engagement. In a recent session PwC ran with NTU, 9 students were registered but only 6 attended. Where support is offered by both employers and universities, students need to engage with this, especially as final year students can express significant anxiety when invited to attend assessment centres or to undergo online testing.

Work Experience is of key importance in developing graduates' skills and aspirations

PwC illustrated how work experience with local employers can aid both retention and work-readiness. The combination of the University of Nottingham and NTU "has been one of the largest sources of graduates for PwC for the last 15 years", with the firm typically recruiting between 70 and 100 graduates annually from these two institutions to roles across their UK business. With the University of Nottingham, PwC run a four year sponsored 'Flying Start' degree and with NTU it runs the PwC 'Step into Business' programme.

[32] #Grads4Nottm is a placement week launched by NTU and Boots UK in 2014. Students attend a skills session hosted by Boots UK and then spend 3 days working with a local business on a challenge, which they then present back to NTU at the end of the week.

For PwC, universities in the Midlands are amongst their top institutions for graduate recruitment, with the current top 4 being the Universities of Warwick, Nottingham, Durham and Birmingham. However, despite the importance of Nottingham institutions to PwC's annual intake of graduate recruits, they noted a low number of work placement students from NTU (with Aston and Loughborough Universities accounting for the majority of their placements). This could be an important issue for NTU to address, given that placements can be seen as a "one year interview". Placements and other work experience programmes are examples of 'alternative methods' to increase graduate retention that can complement place marketing but is, "probably [something that] Nottingham needs to major on a bit more, because a couple of cities have gone a bit further."

PwC placed an important social emphasis on their engagement with schools and universities, as "the right thing to do" in addition to the business benefits of widening the talent pool across diverse groups. Experience from projects delivered in schools suggests that aspirations and attitudes to work need to be reinforced early, potentially as young as 11 or 12. For this reason, PwC run the 'Imagine Working Here' programme with schools in Derby, which particularly targeted schools in more deprived areas and engaged year 5 student (10 years old) in a 'day in a life at PwC', aiming to be fun but to also instil at a young age that such careers were attainable. A later concern is the slow speed at which graduates become involved in business development and entrepreneurship (with sources such as the GEM survey suggesting the majority of entrepreneurs are aged between 35 and 45). The PwC 'Acorns Programme' engages graduates with companies in the Nottingham Creative Quarter. Many of these firms are run by former students from the two Nottingham universities. Although these firms are in the digital sectors prioritised by the Nottingham Growth Plan and are highly attractive to young people, they report significant challenges recruiting and retaining staff - potentially due to low awareness of these opportunities across the student and graduate populations.

In parallel to this research for the Great Nottingham Debate, the market research firm ICM had also been appointed by Nottingham City Council and NTU to investigate employers' views (particularly SMEs) on graduate retention and work-readiness. This comprised 10 face-to-face interviews and 15 telephone interviews, with a majority of respondents identifying themselves as businesses who wanted to hire graduates but encountered recruitment barriers. When asked about Nottingham's lower graduate retention rates compared to other cities, these employers were, "surprised" and "concerned" - as they recognised the potential of the large number of students in the city, but worried the attraction of student life may be "outpacing the draw to work in the city." The employers interviewed by ICM, including those within priority or growth sectors and those based in the Creative Quarter, felt that they lacked information on support services for engaging with students and graduates, but placed a significant emphasis on the benefits of work experience. Internships and placements reduced risk for smaller employers as they could "try before you buy", with the likelihood of offering permanent jobs to good placement students after graduation – which would "provide a 'hook' for graduates to stay in Nottingham."[33]

[33] ICM Unlimited, on behalf of NTU and Nottingham City Council, April 2015. '*The Early Bird Catches the Worm: Graduate Employment Research*.' [Full report commercially confidential: for research purposes only].

Only strategies that actively engage students and graduates will change perceptions
The Focus Groups with NTU students suggested that their main information source was word-of-mouth, both face-to-face and virtually through social media. This presents challenges for traditional communication methods (e.g. information packs, 'speaker' events and conferences). PwC strongly believe that successful communication of local opportunities have to come from within the student body, and cited a recent event in the Creative Quarter that included expert speakers describing their careers in the local area, but was organised by a sixth form student. The Focus Groups indicated support for significantly greater use of alumni within both universities and in Nottingham's development more widely. PwC's activities suggest that retention can be increased through raising aspirations as well as awareness of local opportunities. Alumni can help local young people and students see that they can go on and excel within their career.

Sygnature Discovery has strong links with both universities. The CEO studied at the University of Nottingham and the company employs a number of other former students. It also has a well-regarded and successful Industrial Placement scheme which has supported students from both the University of Nottingham and NTU. For the next academic year, 4 placements are planned, two of which will be with students at Nottingham institutions. Sygnature have also supported a number of undergraduate schemes to help students become 'lab ready' for scientific careers post-graduation. Over the years it has established commercially focussed research and development collaborations with academics from universities in Nottingham and Leicester, including co-hosted conferences with the University of Nottingham. This has helped to enhance the status of the region as a place where cutting edge science is successfully undertaken and careers can be built, and again emphasises the fact that businesses work and collaborate beyond their immediate city boundaries.

Sygnature Discovery's activities complement feedback from both the NTU alumni Focus Group and the interviews with Boots and Innes England, which recommended a need for Nottingham to clearly communicate a small number of specialisms that combined local sector strengths with academic excellence, with healthcare/bioscience and creative/cultural being the two most frequently referenced areas of complementary strength.

2.2.3 Nottingham as a 'barrier' or 'enabler' of recruitment and key 'assets'

A number of the employers identified the universities themselves as significant assets for talent attraction and retention.

Nottingham's Higher Education Institutions are regarded as Key Assets
For Innes England, the Real Estate MSc at NTU (alongside other postgraduate courses in Property, including MSc Building Surveying, MSc Planning and Development and MSc International Real Estate Investment and Finance) represents a "national institution on the doorstep feeding into industry" and has encouraged the organisation to take on placement students.

Pwc describe how the "student buzz and scene" contributes to a lively city centre, which is a key asset for staff as well as a draw for potential students. In line with the views of a significant number of NTU student Focus Group participants, they do recognise a 'student bubble' with students less aware of local employment opportunities through lack of interaction with the wider city. However, PwC noted that this was in common with many campus-based university populations, such as Coventry and Stoke.

Nottingham's investment in sport and transport project a positive image of growth
For Boots, the investment in transport infrastructure, as well as improving accessibility, has helped create an impression of growth and opportunity, but this story is not necessarily understood by people who live and work elsewhere. This may be because of the diversity of assets. In sport, a number of employers identified Trent Bridge as the most notable, externally recognised asset. Boots expanded this to argue that the portfolio of sporting assets – including Trent Bridge, the Nottingham Tennis Centre and the two football clubs, was more diverse than other cities, as it also included water sports and ice hockey. Manchester may be "bigger" in terms of its external reputation, but arguably Nottingham's assets appeal to a wider audience. But this diversity is challenging for Place Marketing as it is difficult to express in a coherent story.

Boots should be seen as both a heritage asset and a contemporary 'Brand Ambassador'
Boots should be viewed as a key current asset for place marketing and an important part of Nottingham's heritage. The legacy of Jesse and John Boot affects many aspects of Nottingham's history, including historic buildings within the University of Nottingham Park campus. In contemporary terms, Boots is a key part of Nottingham's claim to world leading innovation in healthcare, with the invention of ibuprofen and its site is part of the Nottingham Enterprise Zone, through which it hopes to become a centre of gravity for the health, beauty and wellness businesses. As a local employer, Boots is both significant and intergenerational, with whole families working for the firm. A large firm that has remained in the city for 165 years provides a sense of stability and resilience to the local community, whilst also saying "a lot about the city" and its characteristics that have enabled Boots to retain a very significant presence.

Sygnature Discovery regard Boots and Biocity (part of which had formerly been a Boots laboratory) as interconnected "anchor points" for Nottingham's industrial specialism. Although Boots UK is now more recognisable as a high street retailer, its legacy in UK pharmaceuticals is huge. In place marketing, more can be made of it through "updating that link" with Nottingham's identity and firms like Sygnature Discovery, who have grown from the Biocity incubator to become a major employer in their own right.

Nottingham's assets are well known locally, but less so externally
In addition to the universities, sport and accessibility, the interviewees recognised a strong creative offer - but, again, one that was more recognisable to people living and working in the city. Innes England felt that recruits from other areas are unlikely to have positively selected Nottingham as a desirable place to live and work until starting their jobs there, but are then, "quietly impressed with the results." They may then regard Nottingham as a "progressive city", with a lot of arts and culture, which then become important factors that encourage them to stay. The Nottingham Contemporary Gallery in particular is an asset that many similar sized cities do not have, putting Nottingham above a number of cities in its size range.

When meeting candidates for recruitment, Bygott Biggs talk to them about the range of good schools, the attractive areas to live, and the cultural and leisure attractions including the city centre and nightlife. Specific assets that interest candidates include the Contemporary, the Playhouse and Theatre Royal, and Trent Bridge - which proves a strong attraction for both recruits and law firms, who sponsor cricket matches and frequently use Trent Bridge for corporate events. However, the key attraction for legal professionals is the “quality of work”, although it helped to “put this into the context that Nottingham is a vibrant city.”

PwC noted that the “huge” music scene, with upcoming acts supported by organisations like Confetti, Nusic and Left Lion, means that, “outside of London, Nottingham has one of the best cultural support systems.” The Playhouse and Broadway cinema are assets supportive of independent and locally-based performing arts and film. But, for student experiences of this, PwC suggested that: “the culture’s there, but perhaps as a student you only see certain elements of it.” As “university students do tend to live in a bit of a bubble,” collective efforts from local media could help link this cultural offer to the wider quality of live in Nottingham to ensure students recognise that they “I can live *and* make my career here.”

Boots, PwC and Innes England described an offer that “you know about if you know about” (Boots), with colleagues from outside Nottingham not necessarily aware of assets like the Contemporary.

The interviewees from Boots and Innes England were both strongly in agreement on the strengths of place marketing in Nottingham in comparison to other cities, which was the success of communication with local residents and workers - a gap identified in many other cities in the literature reviewed at the start of this section. Innes England cited the examples of well-advertised events locally like the Splendour Festival and the wicker flower displays around the shopping areas that promote events and achievements of local people. These “extra things that help create a sense of place” have done a lot “to help foster a sense of identity for the city” that fundamentally support the objective of “keeping people in Nottingham” - retaining talent, rather than necessarily attracting people from other areas.

Nottingham’s property and retail offer are Key Assets

This creative offer is enhanced with the Lace Market and Hockley, in common with the view of a number of local students in the NTU Focus Groups. Innes England regard the area as the prime asset in the city’s property offer, due to the stock of attractive old buildings, closeness to the city centre, and mix of independent shops, bars and restaurants. More generally, the property offer is positive and varied, with a combination of modern offices (although high specification office space is constrained) and classical industrial warehouses, with a potentially strong aesthetic appeal when they are sympathetically developed. Commercial property in Nottingham is generally well priced and accessible.

The city’s retail offer was recognised by all interviewees as one of the most significant assets. Sygnature Discovery described Nottingham’s concentration of independent retailers as indicative of “a regional hub for specialist retailers and other businesses,” differentiating it from nearby centres. Innes England described “a great spread of retail”, ranging from the Victoria Centre, as a modern shopping centre with high quality large chains, to the independent offer in Hockley. This compares very positively to Derby and Leicester, which are more dominated by the Westfield and Highcross shopping centres respectively. However, all the employers interviewed noted the urgent need for the redevelopment of the Broadmarsh shopping centre, not least because of its position in the approach to the centre from the train station (in which respect, Nottingham compared less favourably to cities like Leicester, Birmingham and Sheffield), and welcomed announcements that work was due to start imminently.

2.2.4 Perceptions of Place Marketing in Nottingham and other cities

When thinking about other cities, Innes England felt that Manchester is regarded as an exemplar in promoting a sense of place, but that any comparison is problematic. Cities like Nottingham and Sheffield may aim to present similarly attractive "underdog and grassroots cultural renaissance" stories, but it is unlikely that they can do this as coherently as Manchester. In Nottingham's case, this is principally because of the diversity of the offer. For example, Nottingham's sectoral heritage presents an opportunity for a place marketing story, from lace and bicycles to healthcare and pharmaceuticals, but this is not a "neat package" in contemporary terms. However, this is a wider challenge for the Midlands. Regional identity is not as strong and recognisable as in the North whilst also lacking the long-running preferential access to resources as in London and the South.

Nottingham's strengths can be more effectively marketed in the context of the Midlands

An important observation made throughout the interviews was the emphasis on a 'Midlands' labour market rather than an exclusive focus on Nottingham. Sygnature Discovery noted the potentially large market associated with the three East Midlands cities combined, and thus the need for far closer partnership working between institutions in those cities.

PwC emphasised the need to promote the city within a wider Midlands and UK context. In this, its accessibility is key: "you can go and see show in London and be back on the same night, can fly to a European City, within easy driving distance of Peak District, the coast, or drive to Birmingham if you want a change," Nottingham should be marketed as, "a place for people to base themselves and do a wide variety of things that whilst they would involve Nottingham are not exclusively in Nottingham."

The diversity of Nottingham's offer is a challenge for place marketing

Innes England advised against a place marketing strategy that relied on an overarching narrative because there is, "so much to tell, it's very difficult to put in a neat package". Boots and Innes England both felt the opportunity for place marketing lay in exploring and exploiting the relationship between people and local businesses: by highlighting the strengths of the city to residents and workers, businesses will flourish by retaining skilled people. This can include a combination of 'harder' interventions (local finance and taxation strategies to support and encourage local businesses) and 'softer' approaches, such as raising awareness through 'brand ambassadors', such as Boots. Sheffield has steel, Manchester has fashion, sport and textiles, and Nottingham has Boots as both a historic and contemporary element of its identity.

Reactions to Robin Hood demonstrate the need for different messages for different audiences

Within this strategy, Innes England felt that Robin Hood is problematic in any "neat identity", as the legend is intangible and highly contested (for example with Lincoln, where Robin of Loxley was imprisoned, and Yorkshire, with Little John's grave in Hathersage). In common with the local student in NTU Focus Group 3, Innes England warned against over-use of the legend in place marketing, "Robin Hood for Nottingham is relatively well marketed already." A heritage-based Robin Hood story is not necessarily relevant from a business perspective.

However, when recruiting internationally, Sygnature Discovery felt that the Robin Hood legend was frequently the only prior knowledge candidates had of Nottingham. The city otherwise has a "fairly low key identity" in the international recruitment market. For scientists recruited into the UK, Nottingham may have a similar international profile to cities like Sheffield or Bristol with the important exception that neither of those cities have a figure that is quite as widely recognised as Robin Hood

This is indicative of the challenge recognised in the place marketing literature. Due to the different needs of different audiences: what works for attracting and retaining businesses is different to what attracts tourists, students, or international recruits.

Place marketing needs to promote Nottingham's 'Young Professional' lifestyle

The employers felt that there were significant opportunities for a 'young professional' career and lifestyle in Nottingham, but there were barriers for communication and gaps in information provision. For example, graduates from Nottingham recently recruited to PwC had fed back on difficulties identifying local employment opportunities in their interactions with careers services (which could be related to NTU student Focus Groups participants' inability to filter job searches on the basis of location on Futurehub). A Nottingham or Midlands-specific careers fair may improve awareness, but there was some scepticism about the impact of traditional, non-interactive events with 'expert speakers', compared to strong support for more interactive events engaging recent alumni who are able to speak across the different aspects of young professional life.

On the views expressed by the NTU Focus Groups that students weren't aware of a 'young professional community', PwC noted that graduate employers like themselves, Innes England and Experian have offices in business parks some way out of the city centre (in the case of PwC, Castle Donington). This meant that there were barriers for young professionals working in these offices in accessing city centre nightlife and cultural amenities. However, there are a number of very active young professional networks meeting regularly in the city centre, such as a drop-in Wednesday evening events at Confetti, and 'Contact', which organises nights for young professionals working in firms across Nottingham. However, awareness may be limited to those actively engaged in these networks – particularly by students who have access to dedicated, student-focussed social amenities and networks (and would thus be unlikely to look until after graduation). These networks could be involved in a careers fair that also had wider objectives to showcase the professional lifestyle in Nottingham.

Boots were aware of activities to promote the city to students, including brochures aimed at students and discussion in the N2 (Nottingham and Nottinghamshire) partnership on graduate retention strategies, which has included plans to develop #Grads4Nottm into an internship programme. PwC felt that they were "very tuned in" to current place marketing activities, particularly Nottingham Means Business, of which they were an active member. Looking across other cities, however, PwC were not sure that there were any particular examples of better place marketing practice to learn from, they were "not aware of any one area doing it better than another."

Sygnature Discovery linked increased awareness of a young professional lifestyle back to the important role of work experiences. As a large proportion of their workforce were in their late 20s and early 30s, the "very vibrant, buzzing" social scene was a key attraction, including in the outlying suburbs such as West Bridgford, but awareness of these assets primarily came from experience of living and working in Nottingham as a young professional. As student life could be a "bubble" in both NTU and the University of Nottingham, many students' awareness of the lifestyle was likely to be poor. Graduates from Nottingham universities recruited to Sygnature Discovery have expressed surprise once starting work in the city and becoming aware of the many vibrant, interesting things that they had never encountered during their studies.

Bygott Biggs felt that opportunities for young professional careers in Nottingham could be better communicated if there was closer interaction between place marketing organisations and recruitment agencies, particularly agencies such as themselves who work within professional and technical fields that target graduates. Although they have been established in Nottingham for over 22 years, they are not aware of any attempts by place marketing organisations in the city to utilise their expertise or networks. They have been involved in recent projects to increase graduate and young professional retention, such as recent work with Ropewalk Chambers,[34] but this have been undertaken by the recruiters on their own impetus.

The employers interviewed by ICM on behalf of Nottingham City Council and NTU felt that support for SMEs' to engage with universities, Local Government and specialist graduate recruiters could be improved, in order to address disadvantages SMEs experience competing with large employers and multi-nationals - both in filling skilled vacancies and in attracting work placement students. In order to increase the profile of work placements and future graduate employment with local SMEs, it would be important to engage students at the start of their second year, as this is the time when placement decisions are being made and when students begin forming longer-term employment plans. In the third year, it may be too late for local SMEs, as students returning from work placement may have secured employment with their placement employers post-graduation.[35]

Place marketing and place making: more accommodation needed for Young Professionals

In common with participants in the NTU student and alumni Focus Groups, a number of employers stated that there was an imbalance in the accommodation stock in Nottingham, with a very noticeable oversupply of student accommodation. Bygott Biggs noted that lawyers who have recently relocated to Nottingham, or are considering moving to the city, commented on the visible investment in student houses - principally modern apartments aimed at students - to the detriment of housing for young professionals.

This issue has been raised in the local press and in recent events. At an event hosted by Innes England (and reported in the Nottingham Post), NTU Vice Chancellor Professor Edward Peck identified a potential lack of accommodation for graduates and other young professionals as a barrier to attracting and retaining talent. A place on the property ladder is a concern for professionals across the UK, and Nottingham could position itself more favourably relative to other areas by addressing it: "We have 10,000 students coming out of NTU every year. That's potentially quite a big market of people who would benefit the city by staying here, and benefit the people who would have shared equity in that scheme with the students." Lower retention of graduates, "does leave us behind major cities such as Leeds and Manchester in retaining what are the most talented people in their generation in this city. If we lose those people from the city that gives us problems for our skills base in the future. It seems

[34] Ropewalk Chambers, 2015. '*How to attract law graduates to the East Midlands during the early stages of their career – either as a solicitor or barrister.*'

[35] ICM Unlimited, on behalf of NTU and Nottingham City Council, April 2015. '*The Early Bird Catches the Worm: Graduate Employment Research*.' [Full report commercially confidential: for research purposes only].

to me that we need to look at getting across to students when they arrive that Nottingham is not just a student city, it's a city for their first job and their first house. We have to do more to integrate them in the city during their time here."[36] This concern was raised in the stakeholder meetings for this project with both universities, with NTU working closely with Nottingham City Council with the aim of identifying if excess student accommodation (in the current stock or being brought forwards through the planning system) could be reallocated to affordable accommodation for young people in their 1st job or for key workers. To attract key workers, anchor institutions like the universities and the City Council could investigate schemes such as contributing to professional training costs and shared housing equity.

Summary

- The current market for recruitment is buoyant. When demand is high, skilled candidates have more choice of employment location, which can be a challenge for recruiters in areas outside London.
- Preferences for London are often an early career phenomenon. Employers invest significantly in ensuring young recruits are fully informed of local and regional opportunities. Affordable housing and short commuting times are key assets alongside good career opportunities in Nottingham and the Midlands.
- Graduate recruitment is local, national and international. Graduates in highly specialised fields are recruited from all over the world. Recruits who have not lived or worked in Nottingham can have very limited information on the city.
- The quality of professional work in Nottingham is at least comparable, if not better than, London and other larger cities. Benefits compared to London include working in smaller teams on more diverse projects and clients, greater promotability and closer contact with senior staff and leading specialists.
- With the relative affordability of housing, Nottingham can potentially be marketed as a place where young people can live affordably *and* have a good career.
- Employers recognise that there is a 'student bubble' in Nottingham, which can be common for cities with campus-based universities. Recruits from Nottingham universities working locally can be surprised by the young professional lifestyle available to them, having experienced very little of this whilst studying.
- Work placements are strongly favoured by employers, for recruitment as a "one year interview", to improve work-readiness, and as one of the most effective methods of enabling students to experience young professional life in Nottingham.
- Making students aware of local career opportunities is one reason for employer interactions with universities. Other reasons include increasing work- and recruitment-readiness, R&D collaboration, and the socially responsible objective of raising aspirations to work with top tier recruiters.
- To successfully inform students and graduates on the young professional opportunities, lifestyle and community in Nottingham, communication has to be interactive and led by

[36] Professor Edward Peck, quoted by Gemma Toulson, Business Editor, the Nottingham Post, 3rd February, 2016. '*Homes for Graduates Could Help to Keep Young Talent in Nottingham*', URL: http://www.nottinghampost.com/Homes-graduates-help-young-talent-nottingham/story-28666105-detail/story.html#ixzz45FE9d99V

students and graduates, including alumni - who can mentor students and act as ambassadors for working in Nottingham.

- Place marketing in Nottingham has been very effective in communicating information on assets and activities to local workers and residents.
- Recruiters would benefit from more accessible information on living and housing costs and other assets for professional careers in Nottingham.
- When talking to recruitment candidates and new starters, employers emphasise key assets in Nottingham including: the retail offer; good schools and attractive areas to live; sporting facilities - particularly Trent Bridge; the nightlife; and the creative and cultural offer.
- Assets that differentiate Nottingham from similar sized cities include: the Nottingham Contemporary Gallery; the Playhouse; the live music scene; and the mix of both large high street and independent and specialist retailers (Nottingham as a "regional hub" for retail).
- Boots is an important asset in Nottingham's heritage, a major local employer and, interlinked with Biocity, an "anchor point" for Nottingham's industrial specialisms in health care and the life sciences.
- The diversity of Nottingham's offer is a challenge for place marketing when compared to cities like Manchester, that have developed a coherent narrative over a long period of time.
- Nottingham should clearly communicate a small number of specialisms that combine local sector strengths with academic excellence. Healthcare/bioscience and creative/cultural were the two most frequently referenced areas of complementary strength.
- Employers and recent recruits observed an over-supply of student accommodation to the detriment of housing for young professionals.

2.3 Case Studies of Place Marketing Activities

2.3.1 Nottingham

The following case study of activities to date has been compiled in the context of the current developments for a new PMO for Nottingham, summarised in the introduction to this section. Recent articles in the Nottingham Post highlighted some of the objectives and challenges identified so far. These include increasing the input businesses have on how Nottingham is marketed with the incorporation of the networking group Nottingham Means Business (NMB) alongside the destination marketing and inward investment organisations: "Tourism organisation **Experience Nottinghamshire**, the city council's inward investment department **Invest in Nottingham** and **Nottingham Means Business (NMB)** will all come under the new PMO, which currently has the working title of Marketing Nottingham and Nottinghamshire… Bringing together the business and staff of Experience Nottinghamshire, Invest in Nottingham, and Nottingham Means Business will enable us to get more bang for our buck by using our limited resources more efficiently, and will enable us to identify and develop a balanced and better coordinated offer and a shared narrative, aligning our local marketing campaigns effectively, and in partnership with other organisations around the County."[37] The article

[37] Nottingham Post, 23 February 2016, URL: http://www.nottinghampost.com/New-marketing-strategy-puts-Nottinghamshire-map/story-28784683-detail/story.html

goes on to recognise the need to maintain activity widely seen as successful, with Experience Nottinghamshire in particular regarded as an exemplar by place marketing organisations across the UK.

Experience Nottinghamshire draws on the contributions of more than 500 member organisations and has consistently reported high numbers of tourism visits whilst being part of successful bids for EU (ERDF) funding to develop conferencing capacity, Arts Council funding for cultural tourism, and major Heritage Lottery Funding to redevelop Nottingham Castle. Recent data on the Visitor Economy for Nottingham and Nottinghamshire indicate a total value of £1.557 billion in 2013, an 8% increase from 2011. In addition, there has been an increase of 4% in the number of overnight visitors between 2011 and 2013 with 3.42 million overnight visitors in 2013.[38]

Whilst recognising the need to preserve skills, experience and brand reputation, Interim Chair of Marketing Nottingham and Nottinghamshire, Paul Southby, highlighted the important opportunity to simplify audience experiences of place marketing messages and the organisational bodies behind them: "I also hope that the sometimes complicated landscape of organisations charged with some part of the effort to sell our City and County will simplify even further, and that in time others will commission services from our place marketing organisation to further ensure consistency and excellence in our dealings with our customers.' [39]

With this in mind, relevant strategies and priorities to date include:

Tourism: *"One Day in Notts is Never Enough"* **Experience Nottinghamshire[40]**

Experience Nottinghamshire is the Destination Marketing Organisation (DMO) for Nottinghamshire. Nottingham and Sherwood Forest are identified as one of 14 leading attraction brands by VisitEngland.

The DMO receives local funding from Nottinghamshire County Council, Nottingham City Council and Newark and Sherwood District Council, and works closely with local tourism businesses via their Nottinghamshire Membership scheme.

The Media Pack[41] on Experience Nottinghamshire website includes the following narrative*:*
"Known around the world as the home of Robin Hood, Nottinghamshire is a diverse county full of tales to tell. From idyllic rural countryside and gentle rolling hills, to the mighty River Trent and ancient oak forests, our landscapes are just waiting to be explored, whatever the season. Discover a county rich in legend and stories, which has inspired storytellers for centuries, including rebellious writers DH Lawrence, Alan Sillitoe and Lord Byron. From its bloody history as the start and end

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[38] Nottinghamshire County Council, 8 September 2015. *'Report to the Economic Development Committee: Agenda Item 9 - Report of the Group Manager Corporate strategy Marketing Nottingham and Nottinghamshire, Funding'.*
[39] *Extracts from an article by the new Chair of Marketing Nottingham and Nottinghamshire and published in the 'Nottingham Post' on 9 February 2016* http://www.nottinghampost.com/Making-plan-sticking/story-28693211-detail/story.html
[40] http://www.experiencenottinghamshire.com/
[41] http://news.experiencenottinghamshire.com/wp-content/uploads/2014/12/Media-pack-20151.pdf

point for the English Civil War, to being crowned the lace capital of the world during the Industrial Revolution, you'll be enthralled by heritage of our great county.

Located in the heart of England, you'll find the thriving city of Nottingham in the south of the county, and grand Ducal estates and rural countryside in the north. New attractions include the National Civil War Centre in Newark and the National Videogame Arcade in Nottingham – both are the first of their kind, and a great reason to visit. Plans are also underway for major additions to Nottingham Castle, with funding secured for a new visitor centre celebrating Nottinghamshire's history of rebellion and our most famous son, Robin Hood. You'll find Robin lives on across the county, from the ancient oaks at Sherwood Forest, to exhibitions and walking tours celebrating his legend in Nottingham city centre."

The Nottinghamshire Destination Management Plan (DMP) (draft for consultation)

The Nottinghamshire Destination Management Plan (DMP)[42] was a consultation paper, published in June 2014 for discussion but not adopted due to the subsequent changes in local place marketing architecture. This document contains a range of useful priorities and arguments relevant to the development of a place marketing strategy for Marketing Nottingham and Nottinghamshire. The draft DMP also identifies priorities for place-making (i.e. investment priorities) to enhance the offer being marketed. It identifies the potential role of different stakeholders, clear actions that they could take and the apportionment of resources. This document was produced after extensive consultation with stakeholders from across the City and County.

This consultation draft DMP identified current Nottingham/Nottinghamshire strengths (assets) as:

- Central location, accessible, excellent transport connections and infrastructure
  - 2 hour drive to large percentage of the population and proximity to London
  - Airport, Motorways, Park and Ride, Tram, Bus, Train and expanding tram system
- Excellent meeting location for national business and capacity for large conferences
- International appeal of Nottingham and awareness through product, icons (Robin Hood and Sherwood Forest, Byron, D H Lawrence, Sillitoe, Brian Clough, Paul Smith) and heritage (Lace, Goose Fair)
- Sporting heritage – national and international
- All-weather destination
- Excellent concert venue/Indoor and Outdoor music and performance venues that attract international acts
- Retail and leisure offer
- Diversity: Heritage, sport, culture, literature, shopping, countryside, great outdoors, towns, city
- Places of scientific interest: Crags and Attenborough and research/science credentials of County/2 universities
- Strong cultural offer: galleries, museums, heritage, arts, theatres, music
- Historical Interest: Castle, Galleries, Caves, Trip to Jerusalem, Wollaton Hall, Civil War.

[42] http://www.experiencenottinghamshire.com/dbimgs/DMP%20updated%20version%206%2023062014.pdf

It also identified key opportunities for current and future place making/investment:

Access

- Public Transport Strategy to address public transport gaps across the county and actions including extending the NET tram route from EMA to the City Centre and development of the HS2 East Midlands Hub
- Brown (tourist) signage strategy across the county (also to consider temporary event signage)
- Tourist bus tours/sightseeing tours and car parking promotions and offers for visitors

Attractions

- Exploit and develop opportunities for visitors to engage with 'Robin Hood experiences'
- Improve the existing Robin Hood Attraction and Sherwood Forest (support current scheme and provide assistance to identify alternative viable schemes)
- Tools to better interpret the Robin Hood theme around the county (apps, panels, leaflets, use of existing attractions for promotion, expand Robin Hood festival)
- Strategy to consider the future sustainability of heritage attractions, which would link to the emerging Heritage Strategy being developed by Nottingham City Council
- Develop an action plan to connect the Civil War Centre to the wider visitor offer
- Maximise the potential of the county's waterways through the development of water-based trails, holidays and experiences, encourage boat hire operators to invest, improve promotion
- Develop explicit interpretation of the industrial heritage of the city – enhanced and new displays in existing buildings, apps, interpretation on significant buildings/sites, trails, events programme
- Commission a feasibility study to further exploit the Pilgrim Fathers theme. Consider apps, interpretation boards and in partner venues, promotion (prior to anniversary in 2020)
- Support a feasibility study into future use/potential uses of Clipstone Colliery
- Consider a multi-sport visitor attraction to celebrate the county's strengths in sport in general

Accommodation

- Commission an accommodation strategy for Nottinghamshire – to identify demand/supply, potential sites, expansion/refurbishment opportunities, opportunities for higher rated/boutique hotels, address quality and make recommendations for improvements

Conferences and Exhibitions

- Commission a feasibility study to assess the demand for a dedicated convention centre for Nottingham

Destinations and Hubs

- Ensure an on-going dialogue in terms of the implementation of Nottingham City Council's Time and Space plan as this will have a positive impact on the visitor experience (Retail

core, independent shopping, Creative Quarter, Castle Quarter, Royal Quarter, Canal Quarter)
- Maximise development opportunities to benefit the visitor economy, such as walking routes, public transport, cycle hire, developing the evening/night time economy, street animation, Wifi connectivity, city heritage
- Development of destination strategies for Southwell, Retford, Worksop, Mansfield and West Bridgford, similar to the destination strategy for Newark.
- Develop a project fund to develop specific initiatives linking businesses and attractions/events.
- Raise the profile of the Dukeries, via a brand and logo to be used by all businesses in the area alongside their own, road signage, staff training, website and app
- Commission a research study into how visitors 'use' the region, which would provide insight into how visitors use destinations (hubs) and the different types of visitors which favour different destinations in the county

Entertainment and the Arts

- Establish a forum supported by culture/arts organisations to develop cross promotion, shared intelligence and event co-ordination

Festivals and Events

- Expand the role of the (Experience Nottinghamshire) Conference and Events bidding unit to include bidding for major sporting and other leisure events
- Research and test schemes to develop a new events fund
- Develop an anniversary event to celebrate the 400th anniversary of the Pilgrim Fathers departure to the New World.
- Raise the profile of Nottinghamshire Food and Drink by linking the food and drink events which take place to form a county wide festival

Night Time Economy

- Deliver the actions outlined in Nottingham City Council's Time and Place plan which relate to the night time economy and connect the night time economy to the proposed destination strategies

Activities and Sports

- Feasibility study to assess the potential of major venues (following the development of Trent Bridge, which illustrated the value which can be delivered when grounds are upgraded to international standard)

Retail

- Support implementation of the actions contained within Nottingham's retail strategy, particularly around public realm, late night shopping, mobile software, joint retail/leisure events, access and transport. Ensure involvement with the Business Improvement Districts (BIDs) where the footprint allows

- Promote the various markets across the county, as these provide local character and colour and are popular with visitors and commission a countywide independent retail strategy

Food and Drink

- Develop initiatives which support local suppliers.
- Local supply chains, training, food and drink festivals, SME support programme, increased promotion
- Develop initiatives which real ale pubs and microbreweries, including training, food and drink festivals, SME support programme, increased promotion

Visitor Experience

- Update the existing Visitor Information Strategy as part of a national review. Work with VisitEngland and the DMO Forum to look at new models
- Review of skills and identify gaps within tourism businesses

Skills and Business Support

- Build capacity within EN to support delivery of skills and training initiatives and to join up opportunities with businesses in the sector
- Establish a mentoring and ambassadorial programme for SME's, and pre-employment training to address sector specific needs
- Increase take up of higher level qualifications and access to apprenticeships
- Deliver sector specific careers and recruitment events to promote employment in the hospitality sector and wider visitor economy

Inward Investment: Invest in Nottingham[43]

The Invest in Nottingham website highlights the advantages that Nottingham can offer inward investors:[44]

- Support for access to finance and recruitment, from 1.1 million people in a wider recruitment area, plus two world-leading universities with a large student population;
- A large economy in terms of GVA, making Nottingham "the economic capital of the East Midlands";
- High levels of recent investment in infrastructure, with £1bn currently being spent in the city and county on transport and business infrastructure;
- Central location and strong links by road, rail and air;

[43] http://www.investinnottingham.com/
[44] https://investinnottingham.wordpress.com/why-nottingham/

- A cost-competitive location with salary and office costs between 5%-7% lower than the UK average; and
- Quality of life aspects including international sport, top-class retail, a strong cultural offer, vibrant towns and cities and tranquil countryside, at a fraction of the cost of living in London.

Note that this covers a range of information identified as lacking by the employers interviewed in this project, which motivated 2 of the 5 employers to invest time and resources in compiling and presenting their own information for potential candidates. As the information on the Invest in Nottingham website is targeted at an external Inward Investor audience, it may be that businesses currently located in Nottingham were not aware/did not feel that this applied to them. This is therefore a potential 'quick win' in bringing the range of organisations and information offers within one body - as identified by Interim Chair Paul Southby with reference to "the sometimes complicated landscape of organisations charged with some part of the effort to sell our City and County."

Business: Nottingham Means Business[45]

Nottingham Means Business is a business-led membership organisation with representation from across Nottingham and Nottinghamshire businesses that promote collaboration and networking to build on opportunities and address issues related to the economy and labour market of Nottingham. NMB works closely with Invest in Nottingham to support and advise local organisations making investment decisions.

In terms of building on this activity through a new PMO, input from stakeholders gathered during the Great Debate project suggests that:

- Place marketing activities, either through the three existing organisations separately or under the auspices of an over-arching PMO, will not achieve significant impacts if there is not a clear place marketing strategy. The work done by Experience Nottinghamshire on the draft Destination Management Plan provides a starting point. An updated and expanded strategy will need full buy-in from stakeholders across both Nottingham City and Nottinghamshire County more widely (and the wider Midlands in the view of several employers interviewed) in order to achieve maximum impact;
- In the views of the research participants and the project stakeholders, the creative/cultural sector must have a major role to play, both to increase tourism visits and also to attract and retain employers, students and graduates. From the above review of existing place marketing activity, this does not appear to be sufficiently emphasised. Nottingham City Council coordinates the Strategic Cultural Partnership (currently chaired by Paul Ross of Dance4), which could play a key role in securing stakeholder input to inform the position of creative/cultural assets in a new place marketing strategy. At a national level, the Arts Council have recognised Nottingham's strong offer in this respect, and have invested in projects such

[45] http://www.nottinghammeansbusiness.com/

as 'The Grand Tour' with VisitEngland. The Department of Culture, Media and Sport have expressed a desire to see closer working between local and regional groups on this agenda; and

- The case studies of other cities set out below demonstrate that, where place marketing has been successful, this has been through effective, fully joined-up partnership working. Duplicate or conflicting place marketing messages not only waste resources, but mean that multi-agency information campaigns (as required in Nottingham from the review of student and graduate perceptions) will be far less effective.

2.3.2 Birmingham

Birmingham is frequently presented in the literature as an exemplar for place marketing and place making, and was independently identified as an example of good practice by several of the employers interviewed and the NTU alumni Focus Group, although the data analysis in Section 1 of this report makes it very clear that Birmingham is unlike any other of the 55 English PUAs outside London, with almost 2.5 million residents, and only Manchester comes close (and is still smaller, with 1.9 million residents). The population of Birmingham is almost 4 times that of Nottingham. Nottingham Means Business have highlighted the advantages associated with Birmingham's offer for Place Marketing: "Birmingham is one of the top cities in the world; attracting over 34million visitors a year, voted the most popular destination for meetings, conferences & events and named the UK's most entrepreneurial city, outside of London."[46]

Birmingham has undergone significant change in its place marketing architecture, with a singular organisation formed in 2009 to address disconnects between tourism (Marketing Birmingham) and inward investment activities (Locate in Birmingham). The two bodies came together within a reconfigured **Marketing Birmingham**[47], as the city's strategic marketing partnership and the driving force behind its growing reputation as a place to visit, meet and invest. The company is funded by the public and private sectors, including Birmingham City Council, European Regional Development Fund and some 400 local companies.

They operate across three programme areas – the city's two leisure and business tourism programmes (Visit and Meet Birmingham) as well as inward investment programme (Business Birmingham**)**

The objectives of Marketing Birmingham are to:

- Attract investment into Birmingham, the Black Country and Solihull, helping to create jobs and growth in the area;
- Increase the value and volume of the visitor economy by helping to diversify and promote its offer;
- Deliver significant economic impact by attracting major events and conferences to the area, in line with sectors being targeted for inward investment; and
- Strengthen the image and profile of Birmingham as an investment and visitor destination.

[46] http://birminghamtoolkit.com/birmingham-facts
[47] http://www.marketingbirmingham.com/

Their vision for the future is one where Birmingham is, "*a thriving economic hub and a pleasure to visit time and again. A city that's proud of its story and confident of its future.*"

They also use several different descriptors pertaining to the city's identity or offer across their website site, addressing different audiences:

- *The UK's most energetic city*
- *A city that works together*
- *A city fuelled by young talent*
- *A city that brings great minds together*
- *A city of independent culture and fusion*
- *A city with an appetite for change*

The region is building a reputation as a leading leisure destination, with Birmingham's visitor numbers at a record high of 33.8 million. Its visitor economy received a further boost in September with a fourth Birmingham restaurant earning a coveted Michelin star. The city also unveiled its new £189 million Library of Birmingham during 2015. This is Europe's largest public library, offering a range of flexible, purpose-built meeting and conference facilities as well as a study centre, music library, archives and the historic Shakespeare Memorial Room.[48]

Marketing Birmingham are currently in the process of a strategic review/competitive positioning process that particularly focusses on brand planning, which aims to be finalised in mid-2016 and to be implemented by the end of the year.

Information products as made available by Marketing Birmingham, targeted at different audience groups, with examples as follows:

The Birmingham Toolkit
An online hub of information and resources[49] promoting the UK's second city - to ensure their target audience has all the information you need to support, sell and share Birmingham with colleagues, customers, partners, audiences and much more. It includes a comprehensive resources section - a range of marketing materials (downloads, copyright and cost free images, films, maps and publications) set out as 'facts' to help promote the city. For example:

'Meet in Birmingham' Facts[50]

- Birmingham has been voted the most popular destination outside London for meetings, conferences and events for six successive years by the annual British Meetings & Events Industry Survey (BMEIS)
- Birmingham attracted more international visits last year than ever before according to the latest figures from the Office for National Statistics (ONS). There were almost one million international visits to the city last year (944,000) - making us the UK's 4th most visited city
- There are more than 36,000 bed spaces available for delegates in Birmingham, Solihull and the Black Country. 6,200 hotel bedrooms are within a 20 minute walk of The International Convention Centre (ICC)

[48] http://www.marketingbirmingham.com/about-us/annual-corporate-review/
[49] http://birminghamtoolkit.com/introduction
[50] http://birminghamtoolkit.com/birmingham-facts/meet-facts

- The National Exhibition Centre (NEC) and International Convention Centre (ICC) host over 850 events per year
- Birmingham attracted a record 37.2 million visitors last year, according to new figures released by Marketing Birmingham's research arm the Regional Observatory and tourism research body, Global Tourism Solutions
- Since 2006, the number of people visiting Birmingham has increased by 12% (3.6 million), with the value of the city's visitor economy also increasing by 12% (£550 million)
- Over 90% of the UK market – consumer and business – are within a four hour travel time from Birmingham
- Birmingham has a strategic location at the centre of the national motorway network (M5, M6, M40 and M42) and at the heart of the UK rail network and air, road and rail connections provide access to 400 million people across Europe
- Birmingham Airport is the UK's third largest airport outside London and the UK's 7th largest overall. It currently serves 143 direct scheduled & charter routes, including cities in Europe, North America and Asia, and 279 possible connections worldwide

Business Facts

'Well connected and centrally located, Birmingham is the second largest city in the UK with one of the youngest, most diverse populations in the country. With more than one million residents, Birmingham is the largest of the British core cities, with the widest-reaching, all-purpose local authority in Europe. Together with the Greater Birmingham region, the city makes a significant contribution to the UK's economy, providing a strong barometer for the country's economic recovery and growth':[51]

- A leading European business hub
- A natural meeting place
- A strong and growing talent pool
- Attracting inward investment
- Connected City
- Big ideas for the future

Ten things you may not have known about Birmingham

- Birmingham is the youngest city in Europe, with under 25's accounting for nearly 40% of its population.
- Thanks to its innovative 18th century Industrialists building a canal network to aid trading networks, the city has more miles of canals than Venice with 56 kilometres of waterways.
- Nearly a third of Birmingham's residents are of minority ethnic origin, bringing a rich cultural mix to the city.
- With over 8,000 acres of parks and open space, Birmingham is one of the greenest cities in the UK.

[51] http://birminghamtoolkit.com/birmingham-facts/business-facts

- Balti cuisine is synonymous with Birmingham - over 100 balti houses, many of which can be found in the city's famous Balti Triangle, attract over 20,000 visitors each week.
- Birmingham Hippodrome is the busiest and most popular theatre in the UK with over 520,000 visitors taking their seats at performances every year.
- Over 36,000 people watch inspirational and varied musical performances by the world famous City of Birmingham Symphony Orchestra (CBSO) every year. That's more than any other UK orchestra.
- Birmingham has more Michelin-starred restaurants than any other UK city outside London, with local stars Glynn Purnell, Luke Tipping and Richard Turner flying the flag for the city's fine dining, which has been lauded by many national and international publications.
- For over 250 years Birmingham's Jewellery Quarter has been a national epicentre for jewellery design – producing an estimated 40% of the UK's jewellery.

'More Birmingham' campaign

In May 2014 Marketing Birmingham released a list of '15 in 15', a compilation of the 'top' significant events taking place in the City during 2015. As there were far more than '15' landmark events taking place in the city during 2015, subsequent sessions with stakeholders and organisations across the city led to the 'Welcome to More Birmingham' campaign.

The city-wide campaign was designed to make sure that the events of 2015 were given as much coverage as possible. Profiles of over 15 organisations were developed, covering organisations ranging from Birmingham Royal Ballet and Aston Villa FC, to Moseley Folk Festival and Resorts World Birmingham.

The 'Welcome to More Birmingham' campaign achieved impressive results, bringing thousands of additional visitors to the campaign landing pages, as part of a total reach of around 22 million. During peak campaign periods, web traffic increased by 54%. Marketing Birmingham suggest that this programme will continue into 2016.

Inward Investment: Business Birmingham[52]

An inward investment team funded by Birmingham City Council and delivered through Marketing Birmingham from 2011. The team is relatively small, but is well represented internationally, with agents in the US, Germany, India, China and Australia. The website is visually engaging to local and external businesses, and includes a series of short videos where senior representatives from a range of organisations in the key sectors talk positively about why they have located, relocated or expanded in the city and the benefits of doing business in Birmingham.

[52] http://businessbirmingham.com/

2.3.3 Manchester

Manchester was identified in the student NTU Focus Groups as having a strong identify and graduate employment offer, with sector strengths including arts and design, fashion and finance and business services. Students also spoke positively about their perception of a vibrant graduate lifestyle, combining relative affordability and good transport links with some of the factors they would 'pay a premium for' in London (free public events, cultural fulfilment, retail and nightlife).

Place marketing in Manchester is undertaken alongside place making through the 'Manchester Family' of organisations, covering economic development and regeneration, R&D and knowledge transfer, inward investment, business support and tourism.

The Manchester Growth Company [53] leads on economic development, research and intelligence against the priorities set out in the Greater Manchester Strategy. Providing the research and analysis to drive policy and delivery, raising Manchester's profile, attracting investment, helping businesses grow and providing individuals with new skills and employment opportunities. It is accountable to the Greater Manchester Combined Authority and to the Greater Manchester LEP and its aims are:

- Develop the Manchester brand through promotion of the City to focus on the contemporary and traditional strengths of the city-region's culture;
- Increase the interest in, and visitors to, the City, through the creation of a world-class events programme that builds on and strengthens the Manchester brand;
- Position Manchester as a vibrant international destination, which also acts as a gateway to the Northwest and represents an alternative gateway to Britain;
- Ensure that Manchester is further established as one of Europe's leading business destinations; and
- Support the enhancement of the tourism product in Greater Manchester through the development of tourism infrastructure.

Marketing Manchester is a public sector controlled company, a subsidiary of The Manchester Growth Company, and its remit is to increase the interest in, and visitors to Manchester, by positioning the city-region as a vibrant international destination, which acts as a gateway to the UK. Together with **MIDAS** (inward investment agency), it promotes Manchester as one of Europe's leading business destinations, whilst also supporting the enhancement of the tourism product in Greater Manchester through the development of its tourism infrastructure.

Marketing Manchester has its own Board led by a private sector Chair and including prominent public, private and cultural sector directors. It is a membership body with over 400 paying members.

Marketing Manchester facilitates two Ambassador Programmes in support of its strategic priorities to promote the city region on a national and international stage:

- The Global Ambassador Programme aims to support Greater Manchester's strategy for encouraging inward investment, stimulating local pride, attracting and retaining talent, all with the aim of developing the local economy. Global Ambassadors are well connected

[53] http://www.marketingmanchester.com

leaders in target sectors and international markets who promote positive national and international perceptions of Manchester and support aspirations to attract talent and investment; and

- The Conference Ambassador Programme offers the partnerships and support necessary to inspire and enable individuals to host prestigious national and international conferences in Manchester. Ambassador-led conferences generate substantial economic impact for the city and raise the profile of Manchester's institutions and research areas. The Programme is operated by a partnership comprising Marketing Manchester, The University of Manchester, Manchester Metropolitan University, University of Salford and Manchester Central. The team can provide ambassadors with a full range of conference support services including bid production, venue finding, accommodation booking and conference delivery services

Visit Manchester [54] is the tourist board for Greater Manchester and is a division of Marketing Manchester.

The Greater Manchester strategy [55] vision is that 'By 2020 the Manchester city-region will have pioneered a new model for sustainable economic growth based around a more connected, talented and greener city region where all our residents are able to contribute to and benefit from sustained prosperity.' This strategy for the visitor economy will help to deliver those aspirations for sustainable growth, by helping to create a distinctive sense of place, by maintaining and increasing our competitive advantage, by creating employment opportunities and by raising the global profile of Manchester as a place to live, invest and visit.

In 2008 Manchester set out what it meant to be '**Original modern'** – a clear conceptualisation of the city's identity as projected through its place marketing activities:

- Original Modern explains the essence of Manchester, two simple words that define what sets Manchester apart from cities across the globe;
- Original Modern is what Manchester gives to the world;
- It explains Manchester's spirit, its indefatigable energy for progress and change, that 'do something' attitude, that desire to be different that always has and always will exist within the City. Original Modern is what runs through Manchester's blood and it's detectable in the best of what we do;
- And for Manchester to continue to manifest these values, Original Modern also has to be an aspiration; an aspiration for all individuals, decision makers, groups, communities, organisations and businesses that live, work and engage with Manchester; and
- Original Modern is a way of valuing what we do in Manchester and is a declaration for Manchester's future.

"Original Modern is a summation of Manchester's identity, of the essence of the place. It reflects the best of what we are and outlines the way in which we say and do things, as much as what we say. Manchester is the brand, and its values remain the same as they were when the industrial revolution

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[54] http://www.marketingmanchester.com/#who-we-are/visit-manchester

[55] http://www.marketingmanchester.com/media/91664/gm%20visitor%20economy%20strategy%202014_20v2.pdf

changed the world; when the ship canal was built and the world's first ever art exhibition held; when the atom was split and the suffragette movement formed; when graphene was isolated and the Manchester International Festival created. Manchester is not original and modern because we've told it to be – original modern makes sense because that's what Manchester is."

2.3.4 Newcastle

Newcastle is notable for having the 3rd highest rate of graduate retention after Manchester and Birmingham, despite being a significantly smaller PUA. NewcastleGateshead Initiative is the destination marketing organisation for the Newcastle city region. It was established in 2000 by Newcastle City Council and Gateshead Council to market the area on a national and international stage, and is supported by over 170 private sector partner organisations across North East England. Its mission statement is to inspire people to visit, learn, work and invest there.

The focus of all their activity is economic growth; the organisation works to change perceptions and create positive profile in order to attract visitors, major conferences and events, students, new investment and jobs. Over the past decade, the organisation has established a strong track record of successful delivery and as a result has grown both its partnership base and portfolio of work – all with the aim of creating a supportive environment for wider economic development.[56]

Key areas of activity include their **marketing and communications team** that promotes and positions NewcastleGateshead as a vibrant destination, through targeted campaigns nationally and internationally which help to attract leisure and business visitors and new investment to the area.[57] In describing this activity, they state that: "in all of our marketing and PR activity we aim to improve the reputation and change negative perceptions." The organisation identifies a number of different audiences, which are:

- Young professionals aged 25 to 35, to persuade them to come and visit, stay overnight and spend their money on weekend breaks;
- National and international conference organisers: to convince them to bring their event, and delegates, to the region; and
- Local residents: to help keep them informed and tell them what's going on in our twin-city, so they don't miss out on any of our fantastic festivals and events.

This focus on attracting younger professionals, and communicating to local residents, with the explicit aim of challenging negative perceptions, is of interest with the issues identified in this research – given the resonance of negative, inaccurate or dated perceptions across the NTU Focus Groups alongside limited information on young professional life in Nottingham (and potentially stronger positive perceptions of young professional life in Birmingham, Manchester and London).

NewcastleGateshead's **inward investment team** helps businesses locate, expand and flourish, providing a range of services to attract and secure new investment and jobs for the city. Their **convention bureau** provides a 'one stop shop' offering free, impartial and unbiased advice and

[56] http://www.newcastlegateshead.net/corporate/home
[57] http://www.newcastlegateshead.com/

unrivalled local knowledge; it's the 'official' point of contact for all conference organisers. Their **culture team** works with partners across the destination to bring together NewcastleGateshead's cultural offer and deliver some of our most popular festivals and events, including EAT! NewcastleGateshead and Juice Festival. Finally, their **visitor information service** provides information where and when it is most needed; well informed visitors spend more, stay longer and are more likely to return.

2.3.5 Leicester and Leicestershire

Leicester was identified by a number of employers interviewed and by the NTU alumni Focus Group has having achieved notable recent progress in both place making (the impact of recent regeneration on example visitor experiences of entering the city from the train station) and place marketing.

Leicester Shire Promotions Ltd (LPL) is the Destination Management Organisation responsible for promoting Leicester and Leicestershire to tourism visitors. It was formed in July 2003 as a private, not-for-profit company. The company works in partnership with Leicester City Council, Leicestershire County Council, Leicester and Leicestershire LEP, VisitEngland and the local tourism industry to deliver campaigns and services to attract more visitors to the city and county. The organisation's activities are based on a co-ordinated place marketing strategy.

This focuses on:

- Destination leadership and coordination
- Attracting visitors
- Developing services for visitors
- Providing services to the tourism industry

Their website[58] reported that the value of tourism to Leicester and Leicestershire increased to £1.481 billion in 2013, up by 6% on the previous year and that the economic impact of tourism in Leicester in 2013 was £512 million, up from £482 million in the previous year. For Leicestershire, the economic impact value was £969 million in 2013, compared to £913 million in 2012. Over 29 million people visited Leicester and Leicestershire in 2013 and jobs supported by tourism grew to 20,485 across the city and county.

In November 2015, Blue Sail[59] - a destination management consultancy - were commissioned to evaluate the effectiveness of current tourism support arrangements and to explore and make recommendations on future governance, management and delivery options. The review came after the city, county and district councils submitted a bid for Government approval to set up a combined authority, to guide key decisions on transport, planning, skills and other key issues, which could include tourism and place marketing. If approved, the combined authority will be set up later in 2016. Leicestershire County Council annual budget provides £175,000 per annum in 2016/17 and 2017/18 for tourism support. From 2018/19 this reduces to zero as part of budget savings. The requirement to meet these savings has been a key driver for this review.

[58] http://www.leicestershirepromotions.co.uk/
[59] http://bluesail.com/

The feedback from key stakeholders gathered by Blue Sail included the fact that LPL was perceived as not to be 'at the top table' where policy and decisions are made, and the scope of its work has narrowed and is restricted by its contract (which ends in June 2016). It was no longer tasked with the place marketing it once undertook. Stakeholders believed that the destination lacked a strong and clear brand and narrative to underpin collaborative promotion. In response to this, the consultant's report[60] included some useful insights and recommendations, including:

- There needs to be clear leadership for tourism to match the ambition for the destination;
- Marketing is working well for some but the brand and narrative is not compelling enough or clear enough for the majority of stakeholders;
- Multiple online destination tools indicate a lack of joined up approach; and
- LPL can learn from a number of examples of DMOs that have been integrated into, or become, wider place-marketing organisations, such as Marketing Manchester, Marketing Birmingham and Make it York. All these organisations have successfully aligned tourism marketing with the profiling needs of the local authorities and LEP, companies, universities and colleges in a collaborative and cost-effective way.

A key conclusion, reflecting much of the academic literature summarised above, was: "The qualities that make a place attractive to a visitor or conference organiser often convince those making decisions about study, business expansion, relocation or inward investment. *The underlying narrative of a place has to be coherent and consistent whether for a leisure break or a business investment, albeit with different emphases and highlights. Both are part of the public face and brand-building for the place."*

Overall they found the destination recognised a need for change and that there was a strong sense that more was needed to be done. There was support for an effective destination management, development and marketing body that was better connected with strategic decision-making, especially with the Leicester and Leicestershire Enterprise Partnership (LLEP) and the City and County Councils

In February 2016[61] City Mayor Peter Soulsby announced: "It's vital that we build on the momentum that began with the discovery of King Richard lll and is gathering pace thanks to the success of Leicester City Football Club. Both have opened up the city and county to a global audience, and we must make the most of the opportunities this gives us."

A report[62] was discussed at the county council's cabinet meeting in early March 2016, who agreed that:

- The preferred option for the strategic governance of tourism is that it should be led by the Leicester and Leicestershire Combined Authority,
- The preferred option for the strategic management of tourism is that it should be managed by one or both of the lead local authorities (Leicester City and Leicestershire County Councils) on behalf of the Combined Authority;

[60] http://politics.leics.gov.uk/documents/s116973/Appendix%20Review%20of%20Tourism%20Structures%20amended.pdf
[61] http://www.goleicestershire.com/news/ProposalsToBoostTourismUnveiled.aspx
[62] http://politics.leics.gov.uk/ieListDocuments.aspx?CId=135&MId=4600

- That a Tourism Advisory Board be established to provide business insight and guidance from the sector to the Combined Authority; and
- Officers should explore the option of setting up a trading organisation, which could undertake commercial or bidding activity in the future.

The Leicestershire County Council meeting minutes justified these recommendations as follows: "the proposals would provide a coordinated approach with aligned resources across the city, county, and districts and the Leicester and Leicestershire Enterprise Partnership. Private sector partners would be engaged and contribute via the proposed Tourism Advisory Board, and the approach would enable alignment with other place-marketing activity such as Inward Investment." The councils will now begin a six-week consultation with key stakeholders on the options. The Results of the consultation will be considered before a final decision will be made by the City Mayor and the county council's cabinet, in June 2016.

Summary

- Applying classic marketing concepts to place is difficult. This is especially true where branding is concerned. A place is not a conventional product. Promoting to selected target audiences via a particular narrative based on assumptions of their priorities can lose the sense of unique identity that differentiates one place from another.
- Place marketing often focuses just on promotional aspects of marketing and can fail to use the potential of an integrated marketing strategy.
- For future place marketing in Nottingham and Nottinghamshire to be successful, there needs to be an over-arching strategy that has stakeholder buy-in across both the city and county. From the research findings in this project, Nottingham's creative and cultural offer should have a key place within this – and this should draw on collaborative input of local and national organisations working across the visual and performing arts, music, festivals and events, and sports.
- Residents should be a significant target group of all place branding activity, but many Destination Marketing Organisations (DMOs) can focus exclusively on external target groups (tourists, inward investors). The employer interviews conducted as part of this project suggest a level of success in Nottingham in communicating key messages to local employers and residents (although markedly less success in communicating to students).
- To be successful, information campaigns must be undertaken through multi-agency partnership. Duplicate or inconsistent messages not only waste resources, but can result in little or no impact.
- From the case studies of DMOs in English cities, it appears that most adopt one of the three following models:
  - Public Private Partnership - an independent body, but with close relationships with the local authorities, acting as a partner and not just a contractor for service;
  - Public sector led (a destination management function within a local authority department) with an Advisory Board to including senior non-public members; or

- Public sector led (a local authority controlled company) with a Board of Directors appointed by the local authority including representatives from across the sector as well as the local authorities.

- There are several different models of DMO membership, including tiered schemes with benefits relating to size of business and investment. However, a balance needs to be struck between the advantages of operating a membership scheme and the time and cost involved in engaging with the businesses.
- There are a number of outstanding examples of DMOs that have developed into wider place-marketing organisations, in particular Marketing Manchester and Marketing Birmingham, through aligning tourism marketing with the strategic priorities of the local authorities businesses, universities and LEP's in a collaborative and cost-effective way.

Section 3: Concluding Observations

This research has identified a range of strengths for Nottingham, including a young, growing population and a high rate of employment in Professional Occupations, a key indicator of demand for graduates and highly skilled workers more generally. Employers, including those recruiting specialised, highly skilled candidates in an international market, believe that professional work in Nottingham compares well to London and other large cities, with favourable opportunities for promotion, the ability to work in small teams with diverse clients and more frequent contact with senior and specialist colleagues. They emphasise Nottingham's high quality transport links (and much reduced commuting times compared to London) and affordable housing, alongside a rich variety of lifestyle assets, including the diverse retail offer, a vibrant nightlife, and creative, cultural and sporting assets that differentiate Nottingham from similar sized cities.

However, the NTU Focus Groups and the earlier AGCAS research suggest that some students perceive Nottingham from within a self-described 'student bubble', have limited awareness of Nottingham's key assets and can have little appreciation of both graduate level employment and 'young professional life' in Nottingham more widely. Employers who interact with and have recruited graduates from the two universities confirm this.

No city can retain all its graduates. Employers like PwC emphasise that a level of mobility is necessary for individuals to gain experience and for employers' talent management and succession planning. The lower level of graduate retention in Nottingham also needs to be interpreted in the context of Nottingham's universities' success in recruiting students from other regions, particularly London and the South East. This is one of the reasons why London and the South East are the employment destinations for the largest share of graduates from Nottingham's universities. Alongside the positive experience that students have of Nottingham as a place to study, a better awareness of the opportunities for a professional career and lifestyle will increase retention and also the likelihood of graduates returning to Nottingham later in their career. Stakeholders felt that, if individuals are attracted to or retained in Nottingham by their late 20s and early 30s, they would be likely to remain, due to strengthening ties with the city through relationships, housing and family.

Interactive experiences, rather than traditional information methods, are much more likely to influence students and graduates - whose main sources of information are experience and word-of-mouth. The two most favoured approaches were increased work placements with local employers and better use of alumni. Only by interacting with other young professionals would students develop a deep appreciation of the quality of working life in Nottingham. Work placements were seen by employers as a low-risk recruitment method, enabling them to 'try before you buy', and as a way of improving graduates' work- and recruitment-readiness. Alumni were identified as an under-utilised resource for student mentoring and as ambassadors for Nottingham more widely. Alumni expressed enthusiasm to be involved more widely as 'expert ambassadors' for Nottingham. Students felt that alumni mentors could enable them to plan their career through to their 2nd and 3rd job, viewing them as credible experts who could influence their perceptions more effectively than traditional promotional materials.

Place marketing organisations could work with the universities to deliver locally-focussed careers events. To be successful, these should be as interactive and as student and alumni-led as possible.

Many students participating in the NTU Focus Groups expressed a strong preference for permanent jobs over Graduate Schemes, and felt that there was an over-emphasis on London-based Graduate Schemes in their interactions with careers services.

Many of the elements of Nottingham's 'place offer' were felt to be well developed, including its transport links, attractive public realm, and high value cultural and sporting assets - most notably the Nottingham Contemporary Art Gallery, the Hockley and Lace Market area, and the Trent Bridge cricket ground, described as a "jewel in the crown" by one alumni Focus Group participant. However, the perceived imbalance towards student accommodation to the detriment of young professional housing was regarded as a significant weakness by students, alumni and employers.

To market this offer, stakeholders emphasised the important of co-ordination between organisations, to avoid message fragmentation (for example, multiple Twitter handles, and a vast array of LinkedIn groups). The idea that a destination is stronger by working together is now widely accepted, but outstanding leadership is also required to inspire the many different stakeholders to work together and support the development and promotion of tourism, inward investment and talent retention and attraction. Furthermore, employers made it very clear that business was 'blind' to administrative boundaries, whether regional, city or local authority level, and in some cases viewed recruitment and retention on a Midlands-wide level.

The employers interviewed, together with the case studies of other cities, suggest that there is no one optimum model for place marketing. However, employers strongly advised against attempts to develop overarching narratives, for example any attempt to replicate Manchester's 'Original Modern' narrative. Instead, Nottingham should promote one or two clear sector strengths - what Nottingham is 'good at'. The consensus was that these should be:

- **Healthcare and biotechnology**: with Boots as a 'brand ambassador', part of Nottingham's history and a major contemporary employer. This is linked to the asset of Biocity, where new companies are incubated and grow to become significant employers and international recruiters themselves; and
- **The cultural offer**: a key asset to attract tourists and inward investors, whilst providing a rich cultural life to attract and retain talent. The Creative Quarter includes a range of innovative new businesses with a support network of anchor institutions. Student engagement and awareness could be improved, as demonstrated by PwC's recent project with entrepreneurs in the Creative Quarter. Stakeholders felt very strongly that the creative and cultural offer should be a key part of any future place marketing strategy.

Finally, employers were keen to emphasise Nottingham's success in communicating to local residents and workers, in contrast to the gap frequently identified in the literature. Residents could play the role of ambassadors and a place marketing 'sales force'. A range of current activities, from well promoted music festivals like Splendour to the World War I Centenary events were identified as highly successful in promoting a strong sense of local identity. The challenge is to maintain the positive image that residents "know about if they know about" whilst raising Nottingham's external profile, including to potential recruits nationally and internationally, as well as to current and future students.

Annex 1: Primary Urban Areas – 21 largest UK Cities and Towns (PUAs based on Centre for Cities/ONS definition)

	2014 Population			% 2004-2014 Population Growth					
PUA	**All Ages**	**Aged 16 to 64**	**Aged 18 to 24**	**All Ages**	**Aged 16 to 64**	**Aged 18 to 24**	**% of Nottingham Population (Nottingham=100)**	**Number of HE Students (HESA 2013/14)**	**Students/Working Age Pop**
UK	**64596752**	**41036530**	**5885491**	**7.8**	**6.1**	**9.2**		**2299355**	**5.6**
England	**54316618**	**34475354**	**4922047**	**8.2**	**6.4**	**9.6**		**1875020**	**5.4**
Birmingham	2470928	1551109	251787	7.6	7.2	9.7	377	92850	6.0
Manchester	1918478	1246093	200513	8.2	7.8	6.2	293	89360	7.2
Newcastle	841824	548196	95747	4.9	5.7	11.5	128	49975	9.1
Sheffield	823819	531111	102675	6.8	6.2	20.1	126	59700	11.2
Liverpool	796668	527958	95320	3.1	4.5	5.1	122	49620	9.4
Leeds	766399	505207	101052	6.0	5.2	5.2	117	60340	11.9
Bristol	714030	472627	83134	10.4	9.4	12.4	109	47220	10.0
Nottingham	**655356**	**431338**	**89973**	**8.0**	**6.8**	**14.8**	**100**	**60115**	**13.9**
Portsmouth	529913	335082	56697	6.5	4.4	10.8	81	21900	6.5
Bradford	528155	328547	47244	9.0	7.7	-3.0	81	12505	3.8
Leicester	489432	319344	60945	10.7	10.6	10.4	75	36395	11.4
Middlesbrough	468280	294124	44684	1.2	-0.7	2.9	71	18065	6.1
Reading	437947	285507	38715	8.7	4.4	-6.7	67	13595	4.8
Huddersfield	431020	271899	40365	8.4	6.4	9.6	66	19175	7.1
Bournemouth	390394	243348	37276	12.0	12.5	13.1	60	20675	8.5
Stoke	377079	239742	39194	3.5	1.6	1.4	58	30125	12.6
Southampton	374167	249828	51508	9.8	8.4	7.2	57	35765	14.3
Preston	361136	230722	35485	5.4	2.3	3.0	55	26585	11.5
Southend*	351614	214325	27555	6.9	4.7	16.8	54		0.0
Brighton	344252	235295	44400	11.1	14.0	31.5	53	34335	14.6
Coventry	337428	222094	47461	13.2	15.0	29.5	51	50880	22.9

Annex 2: Higher Education Institutions by Primary Urban Area (location of main campus/campuses), HESA 2013-14

PUA	Higher Education Institutions (HESA 2013-14)	% of Nottingham Total Resident Population (Nottingham=100)	Number of HE Students (HESA 2013/14)	Students/Total Working Age Pop
Birmingham	Aston University; Birmingham City University; The University of Birmingham; University College Birmingham; Newman University; The University of Wolverhampton	377	92850	6.0
Manchester	The Manchester Metropolitan University; The University of Manchester; The University of Salford; Royal Northern College of Music	293	89360	7.2
Newcastle	University of Newcastle-upon-Tyne; University of Northumbria at Newcastle	128	49975	9.1
Sheffield	Sheffield Hallam University; The University of Sheffield	126	59700	11.2
Liverpool	Liverpool Hope University; Liverpool John Moore's University; The Liverpool Institute for Performing Arts; The University of Liverpool	122	49620	9.4
Leeds	Leeds College of Art; Leeds Beckett University; The University of Leeds; Leeds Trinity University	117	60340	11.9
Bristol	The University of Bristol; University of the West of England, Bristol	109	47220	10.0
Nottingham	**University of Nottingham; The Nottingham Trent University**	**100**	**60115**	**13.9**
Portsmouth	The University of Portsmouth	81	21900	6.5
Bradford	The University of Bradford	81	12505	3.8
Leicester	De Montfort University; The University of Leicester	75	36395	11.4
Middlesbrough	Teesside University	71	18065	6.1
Reading	The University of Reading	67	13595	4.8
Huddersfield	The University of Huddersfield	66	19175	7.1

Bournemouth	The Arts University Bournemouth; Bournemouth University	60	20675	8.5
Stoke	The University of Keele; Staffordshire University	58	30125	12.6
Southampton	Southampton Solent University; The University of Southampton	57	35765	14.3
Preston	The University of Central Lancashire	55	26585	11.5
Southend*	* Southend campus of University of Essex	54		0.0
Brighton	The University of Sussex; The University of Brighton	53	34335	14.6
Coventry	Coventry University; The University of Warwick	51	50880	22.9

*The PUA of Southend does not cover a single Higher Education Institution – instead it includes the Southend Campus of the University of Essex. Published HESA data does not enable the student population of this campus to be disaggregated.

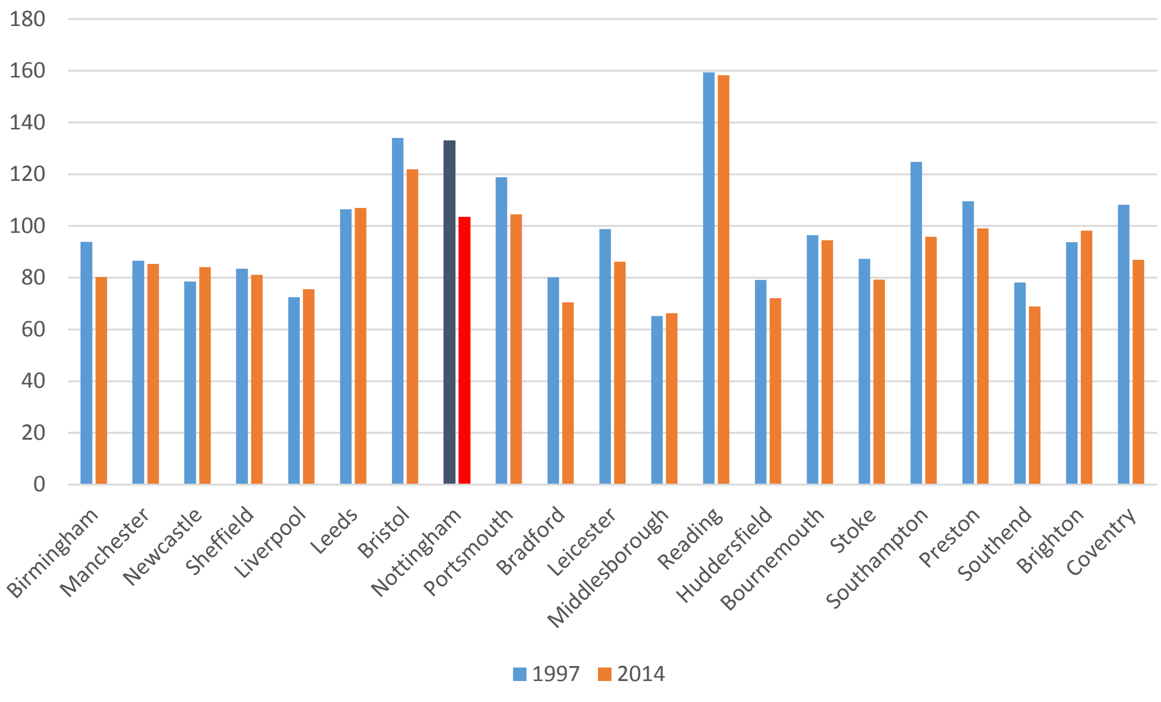
Sources: ONS Crown Copyright, 2015. '*Mid -ear Population Estimates, 2004 and 2014*', from NOMIS [accessed 18th February, 2016].
HESA, 2015. '*Table 1: HE students by HE provider, level of study, mode of study and domicile 2013/14*'. Sum of total HE students by PUA by location of main campus/campuses.

Annex 3: Updated Economic Context and Business Structure of Nottingham

This Annex updates some of the wider economic and business data summarised in the 2014 '*Benchmarking…*' report, as context for the expanded demographic and labour market analysis in this report.

Nottingham, like many other cities in the UK, has experienced a significant decline in its economic position as a result of the Great Recession and subsequent modest recovery. While gross value added (GVA) per head remains slightly above the UK average there has been a marked decline since 1997 (see Chart A1). This is by no means unique to Nottingham. Since 1997 fifteen of the twenty largest PUAs in England have experienced a relative decline in GVA per head compared to the UK average. However the decline in Nottingham, of around 30 points from 32.9% above the UK average to just 3.5% above the UK average, is much larger than that experienced elsewhere (with the exception of Southampton which experienced a similar decline). Newcastle, Liverpool, Leeds, Middlesbrough and Brighton have all improved their position relative to the UK average (though only marginally in the case of Leeds and Middlesbrough).

Chart A1: Gross value added per head 1997 and 2014 (UK=100)

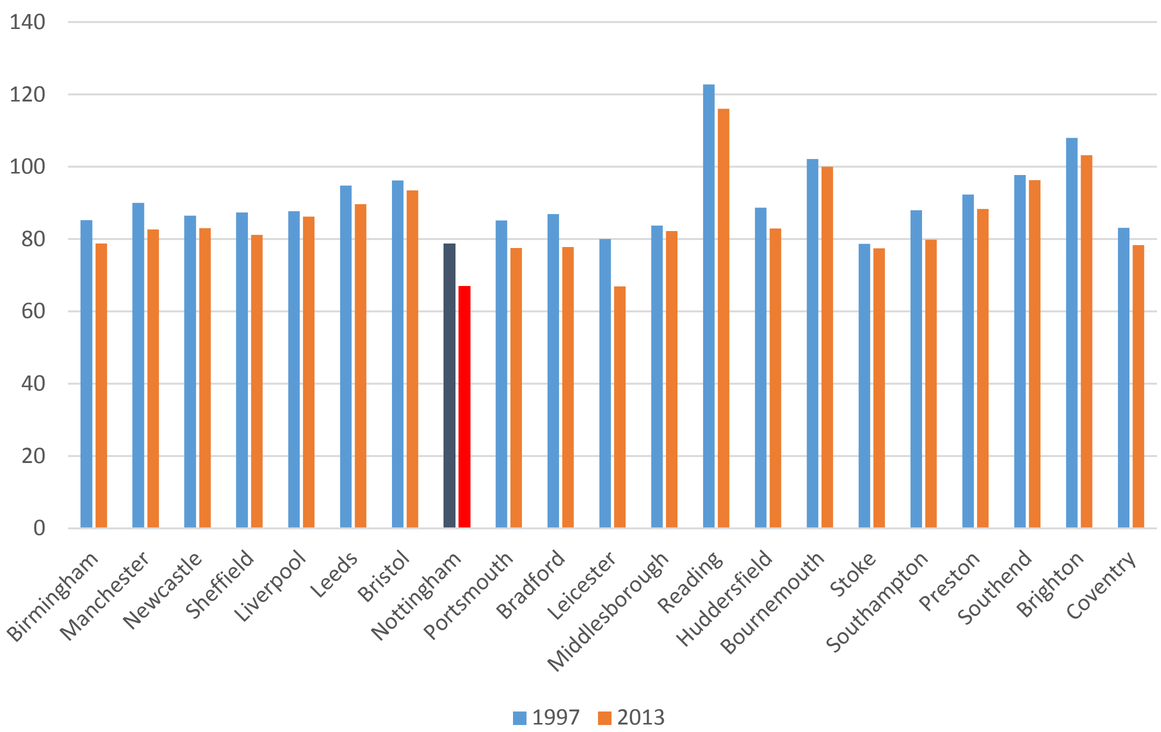


Source: ONS Crown Copyright, 2015. *'Regional Gross Value Added (Income Approach) 1997-2014'*. Note: these data are a 'best fit' of NUTS3 areas to the definition of principal urban areas (PUAs) used elsewhere in this report.

While GVA provides a measure of what the economy produces in a given period of time it is, at best, a partial indicator of the standard of living. This is partly due to what it includes (for example defensive expenditures such as police and crime prevention) and what is does not include (the value of work in the home for example). In addition, at local level the influence of commuting can overstate (or understate) levels of economic activity. The figures are workplace based which means that for an in-commuter for example, the output produced by that worker is included in the area where he works but the worker is included in the area in which he lives. This has an impact on interpreting the data for many of the cities in Chart A1, including Nottingham which has one of the highest proportions of in-commuters in its workforce of any city in the country.

An alternative perspective is provided by an examination of data on gross disposable household income (GDHI), which is a residence based measure of the amount of money that all of the individuals in the household sector have available for spending or saving after income distribution measures (such as taxes, social contributions and benefits) have taken effect. This has the advantage of providing a measure of living standards within an area that is not impacted by commuter flows. As with GVA, between 1997 and 2013 there has been a decline in GDHI per head across all of the biggest PUAs relative to the national average, with the largest declines experienced in Leicester and Nottingham (see Chart A2). In Nottingham GDHI per head fell from 78.8% of the UK average in 1997 to 67% of the UK average in 2013. On this measure Nottingham is ranked 20th out of the 21 largest PUAs in England shown in Chart A2.

Chart A2: Gross disposable household income per head 1997 and 2013 (UK=100)



Source: ONS Crown Copyright, May 2015. '*Regional Gross Disposable Household Income 1997-2013*'.

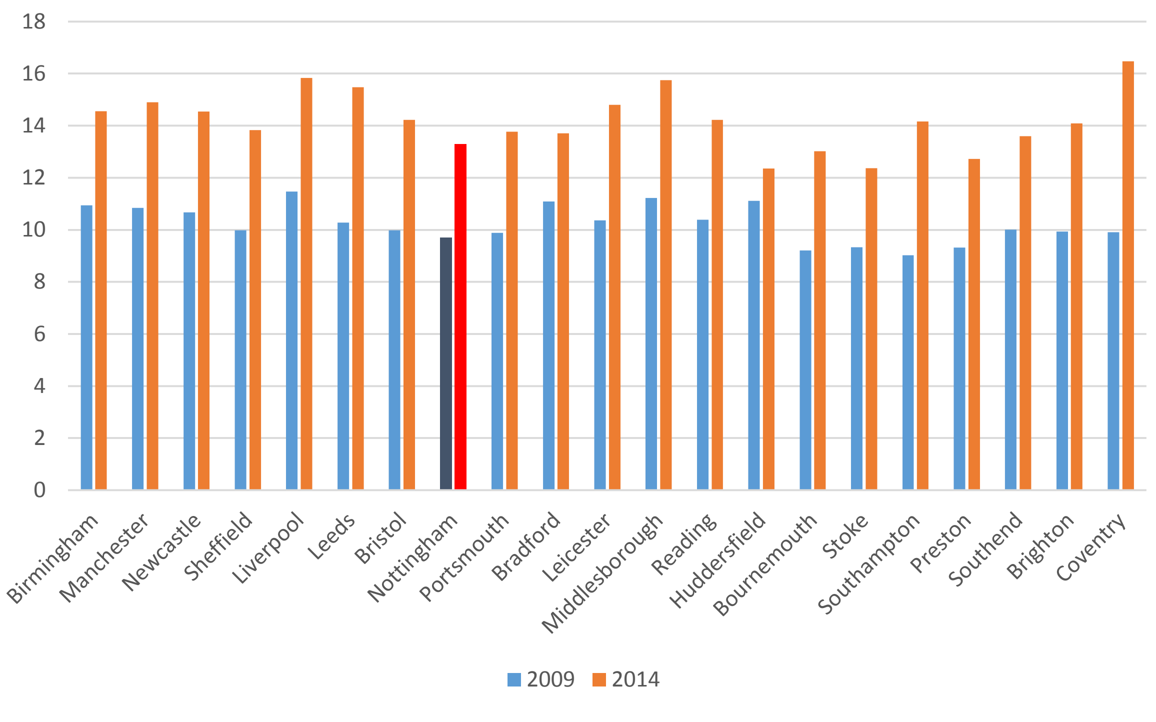
The Great Recession and its aftermath have also had a significant impact on the business demography of the country. It should be noted that a much shorter series of business demography data is available compared to the GVA and GDHI data presented above. For many of the largest PUAs in England, including Nottingham, the available data show that the total number of active enterprises reached a low point in 2012 before starting to recover. By 2014 the business stock in each of the largest PUAs had surpassed the level of 2009.

It is also important to examine enterprise birth and death rates. It is argued that a high level of both (churn) is an indicator of an economy that is working to re-allocate resources from less to more productive activities. This is a story where new ideas and technologies spur new business creation that challenges incumbents and delivers better products and services to consumers. Charts A3 and A4 illustrate enterprise birth and death rates for the largest PUAs in England.

There is clearly a degree of variation across these areas. In 2014 Coventry had the highest enterprise birth rate among this group, at 16.5%. This is 4.1 percentage points higher than Huddersfield and Stoke, the areas with the lowest enterprise birth rates among this group. Nottingham had an enterprise birth rate of 13.3%. The UK average was 13.7% and 14 of the largest PUAs had an enterprise birth rate higher than this- an indication of the important role that cities play as business incubators. It is also clear that across the PUAs the enterprise birth rate has increased since the end of the Great Recession.

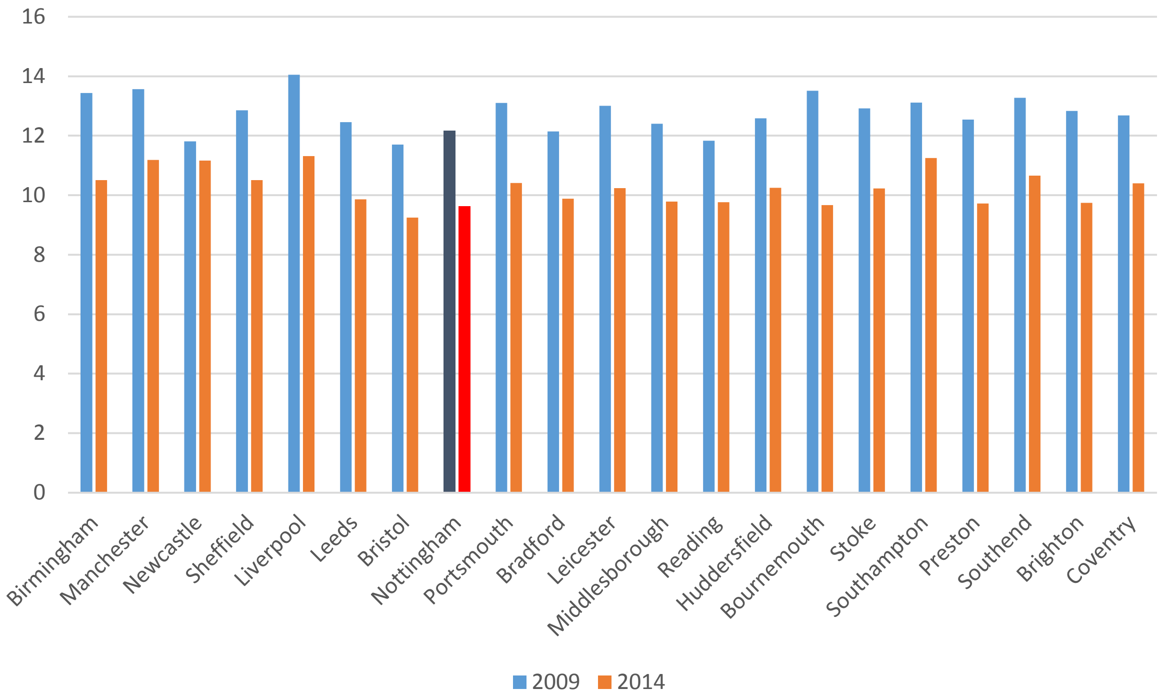
Chart A4 shows that there is similar variation in business death rates, though the gap between the highest and lowest is not as wide- just 2.1 percentage points between Liverpool and Southampton (11.3%) and Bristol (9.2%) in 2014. In Nottingham the business death rate was 9.6%, in line with the national average. It is notable that 19 of these areas have a business death rate that is higher than the UK average- reinforcing the point about the role of cities in generating churn and re-allocating resources.

Chart A3: Enterprise birth rates 2009 and 2014 (%)



Source: ONS Crown Copyright, November 2015. *'Business Demography 2014'.*

Chart A4: Enterprise death rates 2009 and 2014 (%)



Source: ONS Crown Copyright, November 2015. *'Business Demography 2014'.*

Table A1: Key Economic and Enterprise Data for 21 Large and Medium PUAs

PUA	GVA per head 2014 (UK=100)	GDHI per head 2013 (UK=100)	Active Enterprises 2014	Enterprise Birth Rate 2014	Enterprise Death Rate 2014
Birmingham	80.3	78.8	75,400	14.6	10.5
Manchester	85.3	82.7	72,265	14.9	11.2
Newcastle	84.1	83.0	22,305	14.5	11.2
Sheffield	81.1	81.2	23,220	13.8	10.5
Liverpool	75.6	86.2	20,995	15.8	11.3
Leeds	107.0	89.7	27,625	15.5	9.9
Bristol	121.9	93.5	28,120	14.2	9.2
Nottingham	**103.5**	**67.0**	**20,555**	**13.3**	**9.6**
Portsmouth	104.5	77.5	16,815	13.8	10.4
Bradford	70.5	77.8	15,690	13.7	9.9
Leicester	86.2	66.9	17,100	14.8	10.2
Middlesborough	66.3	82.2	12,160	15.7	9.8
Reading	158.3	116.0	20,490	14.2	9.8
Huddersfield	72.1	82.9	14,930	12.4	10.2
Bournemouth	94.5	100.0	15,250	13.0	9.7
Stoke	79.3	77.4	9,870	12.4	10.2
Southampton	95.8	79.8	12,220	14.2	11.3
Preston	99.1	88.3	13,365	12.7	9.7
Southend	68.9	96.3	14,455	13.6	10.7
Brighton	98.2	103.2	16,430	14.1	9.7
Coventry	86.9	78.3	9,805	16.5	10.4

Source: Regional Gross Value Added (Income Approach) 1997-2014, Office for National Statistics, December 2015; Regional Gross Disposable Household Income 1997-2013, Office for National Statistics, May 2015; Business Demography 2014, Office for National Statistics, November 2015.