The Great British Brain Drain
An analysis of migration to and from Manchester

Rebecca McDonald
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The University of Manchester
Migration between Manchester and the rest of the North West region is very common. A third of those moving into the city came from the North West, and a third of those leaving Manchester stayed in the region. Overall, between 2009 and 2017 more people left the city to live elsewhere in the UK than moved in, leading to a net outflow of 31,620 people.

Young people migrate to the city for university and work, while older graduates move away. The city is an attractive place for both students and young professionals given its universities, job opportunities and amenities, but as workers age, they start to value more spacious homes. The city saw a net outflow of 31-to 45-year-old graduates between 2010 and 2011 but most stay close within a commutable distance to the city.

A third of Manchester’s university students grew up in the city, and one in five is an international student. The city’s universities also attract many students from London and Birmingham. But the make-up of students varies a lot by institution. The University of Manchester has a diverse group of students, with only 27 per cent from the North West while two-thirds of the University of Salford’s students are from the region.

Manchester has one of the highest retention rates of all UK cities. Over half of graduates stay to work in the city, compared with 29 per cent retention in Leeds and 31 per cent in Liverpool. The universities with the most local students had the highest retention rates.

Manchester gains more graduates than it loses. It has the largest gain in graduates of all UK cities except London. Interestingly though, many of Manchester’s university students are only in the city to study, they move in and then out again on graduation. The overall gain occurs despite these movements and shows the national and international educational role the city plays.

Manchester attracts graduates despite offering low wages. The average graduate salary is lower than in most UK cities, but this research shows that wages are not the major priority for graduates. They look for career progression opportunities when choosing where to work.
The economic performance of UK cities is increasingly dependent on the skills of their workforce. Cities across the UK face the challenge of both attracting and retaining high-skilled talent. The Great British Brain Drain\(^1\) investigates migration within the UK, specifically between cities. It finds that migrants tend to be younger and more highly-skilled than the population overall. Looking specifically at graduate migration, many university cities lose their graduates to London and this movement is especially strong for the highest performing graduates with 2.1 or 1st class degrees from Russell Group universities. Despite this, most university cities experience a ‘graduate gain’: they gain more graduates than they lose. This is because the majority of movements to and from cities consist of students moving to a new city for university, and then moving again for work, with over half of all graduates following this pattern.

This briefing is a complementary piece of analysis to the main report, in which we look in detail at the nature of migration and graduate mobility to and from Manchester. Firstly, it looks at overall migration patterns into and out of Manchester. Secondly, it looks at the movements of students and new graduates. Finally, it looks at the new graduate labour market in the city.

Centre for Cities uses the Primary Urban Area (PUA) definition of cities. For Manchester, this comprises of Manchester, Bolton, Bury, Oldham, Rochdale, Salford, Stockport, Tameside and Trafford. For more information visit: www.centreforcities.org/puas.

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02.
The nature of migration between Manchester and the rest of England and Wales

This section combines data on migration within the UK from the ONS and the 2011 Census to look at migration to and from Manchester by age and qualification. This data does not include international migration.

Manchester loses people to the rest of the North West

Between 2009 and 2017, 436,440 people moved into Manchester from elsewhere in England and Wales and 568,060 moved out, leading to a net outflow of 31,620 people from the city. This was the third largest net outflow from any English or Welsh city during the period. In comparison, London experienced a greater net outflow of 340,310 people while Bournemouth saw a net inflow of 15,090 people moving into the city.

Much of this migration was between Manchester and other parts of the North West. A third of those moving into Manchester came from elsewhere in the region, and a third of those leaving the city stayed within the North West. This resulted in an overall net outflow of 29,200 people to the region, as shown in Figure 1. There were also considerable net outflows from Manchester to London and the South West, 6,220 and 3,740 respectively. On the other hand, the city experienced net inflows from the North East, West Midlands, Yorkshire, South East and East, but these were small.
Looking specifically at cities, the greatest net outflow from Manchester was 5,850 people moving to London, as shown in Figure 2. The largest net inflows to the city were from Liverpool and Burnley, equivalent to 1,380 and 1,370 people respectively.
Manchester gains young people and loses older people

The pattern of migration varies significantly by age, with the movement of young people dominating flows, as Figure 3 shows. Those aged 16 to 21 accounted for a quarter of inward migration to Manchester and a fifth of outward migration, despite only representing 8 per cent of the city’s population. The 22-to-25 age group also contributed significantly to migration flows, although accounting for only 6 per cent of the population. In contrast, older residents were much less mobile. Those aged 46 to 64 only made up 7 per cent of inward and 10 per cent of outward migration despite being 23 per cent of the city’s population.

Overall, the city gained 19,050 16-to 21-year-olds between 2009 and 2017 (see Figure 4). For all other age groups, the city saw a net outflow. The most significant were 14,310 lost 31-to 45-year-olds and 17,840 lost 46-to 64-year-olds.

Figure 3: Contribution of each age group to migration and to the city’s population, 2009-2017

![Figure 3: Contribution of each age group to migration and to the city’s population, 2009-2017](image)

Source: ONS internal migration data

Figure 4: Net inflow of people to Manchester by age, 2009-2017

![Figure 4: Net inflow of people to Manchester by age, 2009-2017](image)

Source: ONS internal migration data
Manchester gains young graduates but loses older ones to the rest of the region

While the ONS migration data does not provide information on the qualifications of migrants, the 2011 Census does for those who moved between 2010 and 2011. When the data is split into three age groups: 16-to 21, 22-to 30- and 31- to 45-year-olds, three distinct trends emerge.

Manchester saw a net inflow of 16- to 21-year-olds from all regions but one, as shown in Figure 5. The largest inflows were from the West Midlands, South East and London. These flows were dominated by those with A-level qualifications or equivalent, highlighting the pull of the city’s universities which will be discussed in greater detail in the next section. The exception was Yorkshire, to which there was a net outflow of young people driven by movements to Leeds and Sheffield.

The city also experienced net inflows of 22- to 30-year-olds from several regions, the most significant being from the North West and Yorkshire, as Figure 6 shows. But for this age group net inflows were dominated by degree holders. The city saw a large net outflow of graduates to London, with an overall loss of 1,730 to the capital between 2010 and 2011. So the city pulls in young graduates from across the North while also losing many to London.

Figure 5: Net inflows of 16-to 21-year-olds by region and qualification, 2010-2011

Source: ONS internal migration data
The pattern of graduate migration changed for those aged 31 to 45, with a net outflow of these residents to all regions except a small net inflow to Yorkshire (see Figure 7). So while graduates continued to move into the city up until their mid-30s, after 30 they were more likely to leave. But many stayed nearby, with the largest net outflows of this age group being to other parts of the North West. Those with lower skills were also more likely to leave than move to Manchester, with a net outflow of 420 of these residents to the rest of the region.

Looking again at the wider migration data for 2009 to 2017, from the ONS, allows us to see movements between local authorities and shows that the majority of people did not travel very far. Cheshire East and Warrington were the local authorities to which Manchester lost the greatest number of 31-to 45-year-olds, followed by Rossendale and High Peak. This means that many of these movers remained within commutable distances to Manchester even if they no longer lived in the city.
Summary

- Manchester experienced a net outflow of people between 2009 and 2017 from the city to other parts of England and Wales.

- However, there was a net inflow of 16-to 21-year-olds with A-levels to Manchester. Many of these are likely to have been students moving to the city for university, a pattern which is explored in the next section.

- The city saw a net inflow of graduates aged 22 to 25 from elsewhere in the North West, but a net outflow of these young degree holders from the city to London. Overall, there was a small net outflow.

- But this pattern changed for graduates aged 31 to 45 with the overwhelming trend being movement out of the city. Most of these older migrants stayed close to the city, moving within the North West staying a commutable distance to Manchester.

Source: ONS internal migration data

This trend in older degree holders leaving the city but staying within commutable distance is common to many UK cities. Previous work by Centre for Cities has shown that those aged between 35 and 54 tend to place more value on the size and type of their houses, and access to local schools, leading many to prefer living outside cities.  

The data above suggests that universities play a large role in the movements of people to and from Manchester. This section explores the migration of students and graduates into and out of the city using two data sets from the Higher Education Statistics Authority (HESA). The first looks at admissions (for all students at university in 2014/15), and the second is based on a survey of graduates six months after graduation (for leavers in 2013/14 and 2014/15). Unlike the ONS data used above, it covers the whole of the UK and includes international students.

Box 1: Higher education institutions in Manchester

This analysis covers the five universities with campuses in Manchester: Royal Northern College of Music (RNCM), University of Bolton, Manchester Metropolitan University, University of Salford and the University of Manchester. In the academic year 2014/15 there were 93,060 students enrolled at these universities in Manchester: 1 per cent at RNCM, 7 per cent at the University of Bolton, 30 per cent at Manchester Metropolitan University, 20 per cent at the University of Salford and 42 per cent of the University of Manchester.
Movements of students to university

Almost a third of Manchester’s students were from the city itself

Overall, the student population has a strong local focus, with 31 per cent of students in 2014/15 originally from Manchester and 16 per cent from elsewhere in the North West, as shown in Figure 8. There were also a significant number of international students, accounting for 19 per cent of university students. Of those moving from other regions, Yorkshire and the West Midlands were the most popular origins.

Looking specifically at cities, Figure 9 shows the share of students moving to Manchester from each UK city. London was the most popular city to move from, making up 7 per cent of all students moving to Manchester for university. This was followed by Wigan and Birmingham, where 3 and 2 per cent of students move from respectively.

Figure 8: Origins of Manchester’s university students, 2014/15

Source: HESA admissions data
However, these patterns vary significantly by institution. Both the University of Manchester and RNCM have a diverse student base. A third of the former’s students were from outside the UK, 27 per cent were from the North West and 8 per cent were from London (see Figure 10). At RNCM, 26 per cent of students were international, 19 per cent were from the North West, 5 per cent from Scotland and 7 per cent from the South East (see Figure 12).

In contrast, the University of Salford, Manchester Metropolitan University and the University of Bolton have much more of a local focus. At the University of Bolton, more than three-quarters of students were from the North West. The second largest origin was outside the UK and 5 per cent of students came from Yorkshire (see Figure 14). The University of Salford was similar (see Figure 13), but had a larger share of international students (17 per cent) and a slightly smaller share of regional students (66 per cent).

At Manchester Metropolitan University, half of the student base was from the North West but the other half was a diverse mix of international and domestic...
students. One in 10 students was from Yorkshire, 8 per cent from the West Midlands, 5 per cent from the East Midlands and 7 per cent were international (see Figure 11).

**Figure 10: Origin of students at The University of Manchester, 2014/15**

Source: HESA admissions data

**Figure 11: Origin of students at Manchester Metropolitan University, 2014/15**

Source: HESA admissions data
**Figure 12:** Origin of students at the Royal Northern College of Music, 2014/15

Source: HESA admissions data

**Figure 13:** Origin of students at the University of Salford, 2014/15

Source: HESA admissions data
More than half of Manchester’s students move away from the city for university

Of the 63,620 students originally from Manchester who went to university, 56 per cent studied away from their home city. A third of leavers stayed within the North West and 28 per cent went to university in Yorkshire, equivalent to 11,510 and 9,600 students respectively, as shown in Figure 15. The cities drawing most students from Manchester were Leeds (which attracted 10 per cent of students leaving Manchester), Preston (9 per cent) and Liverpool (8 per cent). As Figure 16 shows, the capital was also a popular destination with 5 per cent of Manchester’s students moving there for university.
Figure 15: Destination regions of those moving away from Manchester for university, 2014/15

Source: HESA admissions data
Reflecting the movement of young people seen in the previous section, many more students moved into Manchester for university than left to study elsewhere. In 2014/15 the net inflow of students to the city was 10,580; 45,910 students were from outside the city while 35,330 students at other UK universities were originally from Manchester. Despite this significant gain, many more university cities saw larger net inflows. In the same year Leeds gained 32,820 students overall, Nottingham gained 32,020 and Sheffield gained 28,010.
Movements of new graduates post-university

Manchester has a high retention rate compared with other UK cities

Manchester had the second highest retention rate of all university cities in 2013/14 – 2014/15, second only to London (see Figure 17): after graduation, 51 per cent of the city’s university students stayed for work.

However, the retention rate varies significantly depending on which institution the student studied at, as Figure 18 shows. Those who attended the University of Bolton were most likely to stay after graduation, with 68 per cent retained. The University of Salford and Manchester Metropolitan University also had high retention rates, of 61 and 53 per cent respectively. RNCM and the University of Manchester had the lowest shares of students staying in the city for work.
Figure 17: Retention rates of each UK city, 2013/14 - 2014/15

Source: HESA destination of leavers survey
Figure 18: Percentage of graduates retained in Manchester post-graduation, 2013/14 – 2014/15

<table>
<thead>
<tr>
<th>Institution</th>
<th>Retention Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Royal Northern College of Music</td>
<td>45%</td>
</tr>
<tr>
<td>University of Bolton</td>
<td>68%</td>
</tr>
<tr>
<td>Manchester Metropolitan University</td>
<td>53%</td>
</tr>
<tr>
<td>University of Salford</td>
<td>61%</td>
</tr>
<tr>
<td>University of Manchester</td>
<td>40%</td>
</tr>
</tbody>
</table>

Source: HESA destination of leavers survey

Further nuance can be seen by splitting those who remained in Manchester into two groups: those who grew up, studied and worked in Manchester, and those who came in to study and stayed for work.

This shows that, for the universities with higher retention rates, the majority of students retained were originally from the city. Of those who stayed after studying at the University of Bolton, 83 per cent came from Manchester (see Figure 19) and, for the University of Salford, this figure was 70 per cent. In contrast, the majority of retained students from the University of Manchester and RNCM moved to the city for university.

So the universities with the highest retention rates both had a more locally-focused student base and relied on these home-grown students to achieve the higher levels of retention. This suggests that high retention rates are driven by the regional pull of a university, and by implication explains how the broader national and international pull of the University of Manchester and RNCM contribute to fewer students staying in the city.
Retention rates also vary by subject studied, as Figure 20 shows. In Manchester, two-thirds of those studying Education stayed to work in the city compared with only 34 per cent of Medicine and Dentistry graduates. Other subjects with high retention rates were Law (57 per cent), Computer Science (57 per cent) and Social Studies (54 per cent).
Figure 20: Retention rate of students studying each subject, 2013/14 – 2014/15

Source: HESA destination of leavers’ survey

The most popular employment destination for graduates leaving Manchester is London

In 2013/14 – 2014/15, 21 per cent of Manchester graduates who moved away from the city for work chose to locate in London, as shown in Figure 21. The next most popular city destination was Liverpool, but only 4 per cent of graduates moved there for work, highlighting the dominance of the capital in graduate migration patterns. Many graduates stayed close to Manchester, with Wigan, Preston and Warrington each receiving 3 per cent of moving graduates.
The majority of those who left Manchester to study elsewhere return on graduation

Manchester is very successful at attracting its home-grown students back for work. In 2013/14 – 2014/15, the city has the second highest return rate of all UK cities, only lower than London. Of those who left to study elsewhere, 57 per cent returned to Manchester for work. London saw 74 per cent of leavers come back, Belfast 57 per cent and Birmingham 53 per cent. In contrast, only 28 per cent of leavers returned to Mansfield on graduation and, in Aldershot, the figure was lower at 25 per cent.
Manchester gains graduates overall

Despite the outflow of graduates to other parts of the UK at the end of the university cycle, the number of non-local graduates working in Manchester outweighed the number of local graduates who left to work elsewhere. So, overall Manchester gained graduates.

As Figure 22 shows, there were 5,590 surveyed graduates who grew up in Manchester but left to study or work elsewhere. The city gained 10,250 of those surveyed from other parts of the UK, either when they moved into the city to study (and subsequently stayed for work), or when they moved into the city for the first time after university. This resulted in a gain of 4,660 of the graduates surveyed.

This was the largest gain of any UK city except London, which gained 42,070 graduates. Other cities similar to Manchester were Leeds and Bristol, which gained 3,690 and 3,190 surveyed graduates respectively.

Figure 22: Comparing students lost and graduates gained by Manchester, 2013/14 – 2014/15

Source: HESA destination of leavers’ survey

This graduate gain may seem to contradict the earlier finding that there was a net outflow of young graduates from the city (see Figure 6) but this is because there is an additional cohort of students to consider. A significant number of Manchester’s students were ‘bouncers’, who were only temporarily in the city whilst at university. These students moved to Manchester for university but left straight after graduation to work elsewhere, and they are driving the outflow observed in the section above.

Of those who moved to Manchester for university, 67 per cent left became ‘bouncers’ by leaving after graduation. Figure 23 illustrates the size of this group: 9,840 surveyed graduates were ‘bouncers’ (shown by the ark green bar). This was a much larger number of graduates than those gained (shown by the light green bar), and so hides the fact that some students do stay on in the city to work.

Despite this large figure, Manchester has one of the lowest shares of ‘bouncers’ of all UK university cities. Rather than indicating an unattractive graduate job market, this figure instead highlights the national role the city’s universities play in educating graduates for work in many parts of the UK.
Figure 23: The ‘bouncers’ and the graduate gain, 2013/14 – 2014/15

Source: HESA destination of leavers survey
This section explores the cohort of graduates who were working in Manchester six months after graduating in 2014 and 2015.

**The majority of new graduates working in the city grew up in Manchester**

Figure 24 brings together all new graduates working in Manchester to provide an overview of the nature of the graduate workforce in the city. It shows that 31 per cent of new graduates were originally from Manchester and had studied in the city and a quarter left to study elsewhere but returned for work. Combined, this means that the majority of graduates were originally from the city. One in five graduate workers first moved to Manchester to study, and stayed on graduation, while the final quarter of graduates moved to the city for the first time to work.

Manchester has the seventh highest shares of home-grown graduates (who grew up, studied and worked in the city), similar to both Sheffield and London. Interestingly, the share of graduates who first moved to the city for work is low relative to other cities. For example, in Bristol, 40 per cent of the workforce are in this category, and in Oxford, this figure rises to 47 per cent.

**Figure 24: The components of the new graduate workforce, 2013/14 – 2014/15**

Source: HESA destination of leavers survey
The distribution of degree classes for graduates working in Manchester is representative of the UK graduate population as a whole, as Figure 25 shows. Just over half the graduate workforce had first-or-second class degrees from a non-Russell Group university, with 23 per cent achieving a lower class degree. Russell Group graduates made up 23 per cent of the workforce, the majority with a first- or second-class degree.

**Figure 25: Share of working new graduates by class of degree, 2013/14-2014/15**

Graduate wages are very low in Manchester

The average wage of a new graduate working in Manchester was £20,870, which was one of the lowest wages of all UK cities and below the mean UK graduate wage of £23,100. Cities offering similar wages were Sheffield, Bradford and Cardiff.
But the wages of Manchester graduates varied significantly by both institution and location of employment. The University of Manchester had the best-paid graduates, averaging £22,700, but those who moved away from Manchester earned much more than those who stayed in the city. This was also the case for graduates of the University of Salford and Manchester Metropolitan University.
where wages increased significantly if the graduates chose to work elsewhere. Graduates of RNCM had the lowest average wages of £16,600, but, interestingly, those who chose to stay in the city had much higher wages on average than those who moved away. This is likely to reflect the concentration of cultural and arts jobs in the city compared with other parts of the UK.

Figure 27: Mean graduate wages by institution and location of employment, 2013/14 – 2014/15

<table>
<thead>
<tr>
<th>University</th>
<th>Average salary of graduate</th>
<th>Average salary of a graduate employed in Manchester</th>
<th>Average salary of a graduate employed elsewhere</th>
</tr>
</thead>
<tbody>
<tr>
<td>Royal Northern College of Music</td>
<td>£16,600</td>
<td>£19,400</td>
<td>£4,900</td>
</tr>
<tr>
<td>University of Bolton</td>
<td>£21,900</td>
<td>£22,300</td>
<td>£21,200</td>
</tr>
<tr>
<td>Manchester Metropolitan University</td>
<td>£21,600</td>
<td>£20,600</td>
<td>£22,500</td>
</tr>
<tr>
<td>University of Salford</td>
<td>£21,300</td>
<td>£20,100</td>
<td>£22,600</td>
</tr>
<tr>
<td>University of Manchester</td>
<td>£22,700</td>
<td>£21,200</td>
<td>£23,600</td>
</tr>
</tbody>
</table>

Source: HESA destination of leavers survey

This, however, shouldn’t be of particular concern to the city. Analysis of UK graduates finds that graduate wages were not the main reason for graduates choosing their employment location. Other factors such as the type of jobs available in that city and the opportunities for career progression are more important.

Nearly half of Manchester’s new graduates work in the public sector

The types of jobs available to graduates in each location are a major determinant of where they choose to work. The sectors in which Manchester’s new graduate cohort work are representative of the total population of new graduates across the UK, as Figure 28 shows. Almost half (47 per cent) of the new graduates work in the public sector, which is very similar to the share of UK graduates overall working in this sector.

Looking next at the private sector, 16 per cent of graduates are employed in knowledge-intensive business services firms (KIBS) and 30 per cent in other private services sectors. Although this is similar to the share of all UK graduates working in the sector, it lags behind other strong city economies such as Edinburgh, Reading and London, where roughly a quarter of graduates work in KIBS.

Looking at a finer industrial breakdown shows that almost a quarter (23 per

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of the new graduate cohort worked in the education sector and one in five in healthcare. In the KIBS sector, 4 per cent of the city’s new graduates were working in financial services and 5 per cent in law. Manchester’s retail sector employed 8 per cent of graduates.

The city’s private sector graduate jobs tend to be located in the city centre. In 2014/15, 30 per cent of the new graduate cohort was employed within M1, M2 and M3 postcodes. This figure was even higher for the KIBS sector, with 45 per cent of graduates working in this sector located in the three central postcodes.

Figure 28: Share of graduates in Manchester working in each sector, 2013/14 – 2014/15

Source: HESA destination of leavers survey

Figure 29: Share of UK graduates working in each sector, 2013/14 – 2014/15

Source: HESA destination of leavers survey
Like other large cities, Manchester’s migration patterns are dominated by movements of university students and graduates. The city experienced a large net inflow of young people between 2009 and 2017, many of whom were likely to be moving to the city for university. Graduates also contribute significantly to migration patterns, with many young graduates being attracted into the city while older graduates tend to move out to other parts of the North West.

Overall, there is a brain gain for Manchester. A net inflow of 16-to 21-year-olds is followed a net outflow of 22-to 30-year-old graduates. However, many of those who enter the city between 16- and 21 study there and stay after graduation. In addition, Manchester attracts in a significant number of new graduates for work who have not lived in the city before. Therefore, overall, the city sees a net gain in graduates. In 2013/14 – 2014/15, Manchester’s gain was the second highest of all UK cities, second only to London.

More than half of the city’s university students stay for work on graduation. This is one of the highest retention rates of all UK cities. They are joined by graduates from other universities, both those who grew up in Manchester, moved away to study and have returned, and those who moved in for the first time to work.

Manchester’s universities play different roles: some mainly educate local students while others teach a diverse student base. The make-up of the student base at each university varies greatly, from very diverse at the RNCM and University of Manchester, to predominately home-grown students at the University of Bolton and University of Salford. As a result, retention rates differ, with the University of Manchester keeping 35 per cent of its graduates in the city while the University of Bolton retains more than two-thirds.

Any policies designed to increase retention should keep in mind these different roles. Universities with lower retention rates tend to have these because of their role in educating national and international students, not necessarily because they are less successful at retaining their students. Therefore, instead of focusing on increasing the retention rates of these
universities, policy should instead focus on continuing to improve the economy. It is the jobs available to a graduate which determine whether or not they work in that city.

Employment of Manchester’s graduate workforce is very similar to the national picture. Almost half of the city’s new graduates work in the public sector but only 16 per cent work in KIBS firms. This means the city lags behind other strong city economies such as Edinburgh, Reading and London, where roughly a quarter of graduates work in KIBS.

To increase the number of graduates working in Manchester, be they from Manchester’s universities or from elsewhere, the city should focus on expanding job opportunities. A particular focus should be on generating KIBS jobs, as these offer the opportunity for future wage increases and fast career progression, both of which are qualities highly valued by graduates. This should be complemented by improvements in transport, and where necessary, housing, to ensure the city remains an attractive place to live and work.