



Birmingham Economic Review 2018

Chapter 5: Places

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Growth Company

Introduction

The annual Birmingham Economic Review is produced by the University of Birmingham's City-REDI and the Greater Birmingham Chambers of Commerce, with contributions from the West Midlands Growth Company. It is an in-depth exploration of the economy of England's second city and is a high-quality resource for organisations seeking to understand the city to inform research, policy or investment decisions. This year's Birmingham Economic Review has been organised according to the five foundations of the UK's Industrial Strategy, which aims to boost productivity and the earning power of the national economy. We hope this review will help to inform Birmingham's approach to the UK's Industrial Strategy and a more productive and inclusive local economy that draws on the strengths of the city and works across industry, academia and civil society.

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All Chapters of the *Birmingham Economic Review 2018* can be found online on the [Greater Birmingham Chambers of Commerce website](#) or via the contact details at the end of this document.

Places

Aim: “To have prosperous communities across the UK” **UK Industrial Strategy**

The Industrial Strategy states that regions across the UK need to realise their full potential and increase productivity by making the most of competitive strengths. This will include improving skills and infrastructure across the country and ensuring land is available for housing growth.

It will also involve strengthening cultural assets and supporting locally tailored interventions shaped by Local Industrial Strategies.

Local Industrial Strategies set out how areas across the UK are responding to the Industrial Strategy and the direction they believe their local economy should take. The West Midlands Combined Authority is a pilot area for Local Industrial Strategies and will be one of the first areas in the country to deliver one. An outline of what a Local Industrial Strategy might look like for the West Midlands, from the University of Birmingham and The What Works Centre, can be found in the concluding chapter of this Review.

Foreign direct investment (FDI) enables urban development and growth. Foreign capital and knowledge build productive capacity, and can bring jobs and skills, while contributing to infrastructure improvements and export capacity. FDI can also increase a region’s competitiveness.

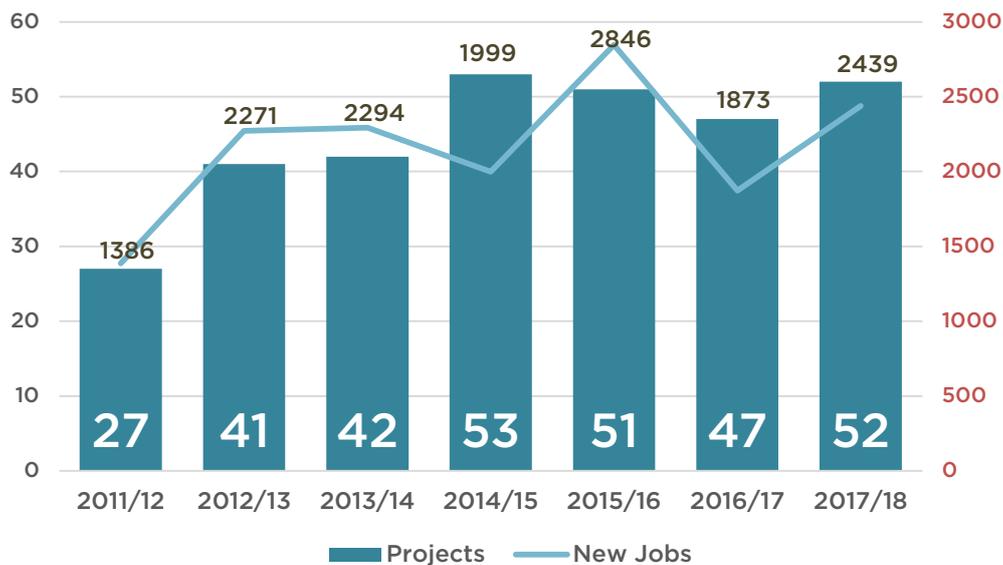
FDI Trends

In the last seven years, Birmingham has received 313 foreign direct investments which have created 15,108 new jobs. These investments came from 37 different countries and were in 54 different industry sectors, 128 of which were expansions of existing investors, 119 were new investments, 54 were acquisitions and 12 were other types of investment.

In 2017/18, there were 52 FDI investments into Birmingham creating 2,439 new jobs. This is a rise of 10.6% in projects and 30.0% in the number of jobs since 2016/17, and a rise of 92.0% in projects and 76.0% in jobs since 2011/12.

The 2017/18 results represent the second highest number of projects and the second highest number of jobs since 2011/12. These outputs are particularly impressive against the uncertainty seen in global investment markets, especially after the vote to leave the EU where the pipeline of prospects has fallen dramatically in many sectors.

Figure 1: FDI Projects and New Jobs in Birmingham, 2011/12 - 2017/18



Source: West Midlands Growth Company

On the whole, the trend for the number of FDI projects is up with an average annual growth rate of 12% (an average annual growth rate of 10% each year in terms on new job creation).

FDI Project Successes

Some major investments into the city in 2017/18 include:



Tony Brown, Managing Director at HydraForce, Europe, said:

“Headquartered in the US, HydraForce’s facility in the West Midlands has been the company’s single biggest investment to date. With the organisation creating an additional 216 local jobs and achieving a global turnover of \$378m in 2017, we’re undoubtedly reaping the rewards of this investment. Having access to a talent pool skilled in technical manufacturing is of central importance to us. Here in the West Midlands, we have essential strong links with local higher education institutions and well-established apprenticeships and undergraduate programmes”.



Paul Gibbs, Bechtel’s Managing Director of UK Infrastructure, said:

“The West Midlands is investing at an unprecedented level in its infrastructure, with major schemes such as HS2 underpinning the region’s growth potential. By locating here, we are ideally positioned to capitalise on these opportunities and pursue further projects across the region’s highways, rail and aviation markets, working with Highways England, Network

Rail and key infrastructure organisations. We were already working closely with HS2 Ltd at their Birmingham headquarters, so to have a physical presence nearby made complete sense.”



Phil Cooper, vice president of operations, EMEA region at Allegis Global Solutions, commented:

“Birmingham was the obvious choice for us as we wanted to establish ourselves in a city with a highly educated – more than 120,000 university graduate students are in close proximity – and diverse demographic. This access to an incredible amount of high-quality candidates lends us the scalability we need as we grow. As a fast-expanding global company with more than 30 offices around the world, we wanted to make sure we positioned ourselves in a city with globally-minded, ambitious and linguistically diverse professionals. We’re excited about the opportunity to grow here in Birmingham.”



Matthew Wherry, head of corporate real estate at WSP, said:

“The Mailbox provides an exciting opportunity for us to create a great workspace for our employees. Its central location, superb local amenities and unique canalside setting, all serve to enhance our ability to recruit and retain the best people and continue to support our many clients in the Midlands”



Bruce Ronning, vice president and general manager, Tenneco Europe Aftermarket, said:

“Our aftermarket business in the UK and across Europe has experienced significant growth over the past year and we are confident we can continue to build on this momentum through our expanded footprint in Birmingham”



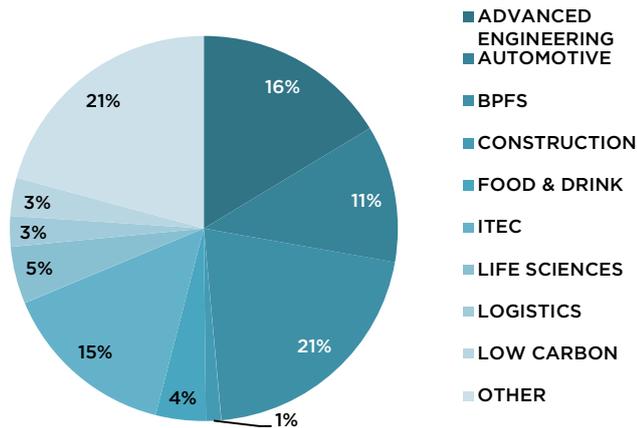
Hussain Hussain, vice president of global business development at Pervacio, said:

“We’re doing more and more business across Europe and our investment in a bigger and better resourced regional hub in the heart of the UK is an important step. It will enable us to satisfy the growing demands of current clients and capitalise on new market opportunities as we continue to build our reputation as a global specialist in the end-to-end management of mobile devices.”

FDI Projects by Sector

The foreign direct Investment that Birmingham receives covers a diverse array of industries. It is encouraging that the vast majority of these investments are in sectors that are actively promoted and pursued, including advanced engineering, automotive, business professional and financial services (BPFS), food and drink, information technology, electronics and communications (ITEC) and life sciences, with key local specialisms in construction and logistics also being attractive to a prospective investor.

Figure 2: FDI Projects by Sector, Birmingham, 2017/18

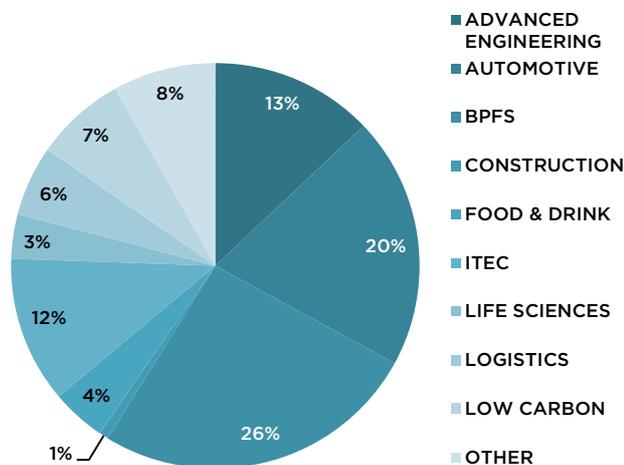


Source: West Midlands Growth Company

As can be seen above, the majority of investments were in BPFS (21%) which equalled the total of investments from all secondary sectors. Next was advanced engineering and ITEC at 16% and 15% respectively.

However, when we look at jobs created from FDI we see the majority being created in BPFS (26%) followed by automotive (20%), reflecting the strengths of these sectors in the city and the quality of the skills and accommodation on offer to potential investors.

Figure 3: FDI New Jobs by Sector, Birmingham, 2017/18

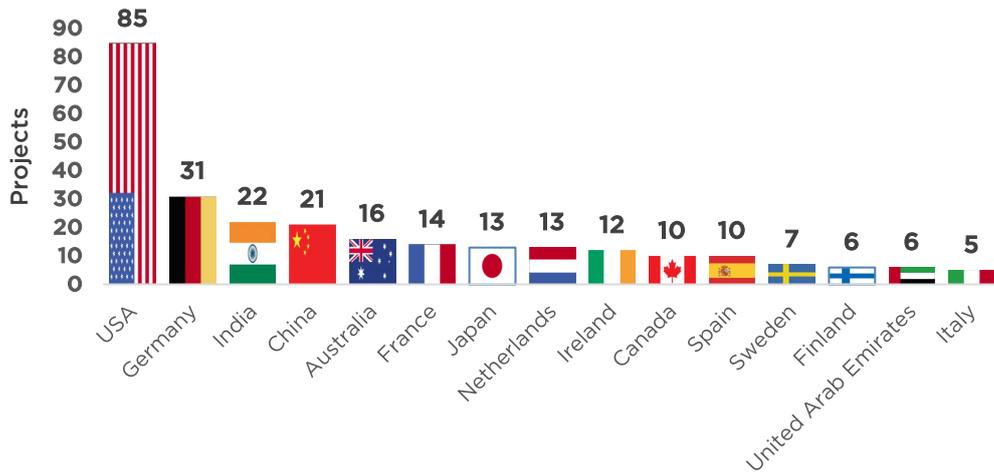


Source: West Midlands Growth Company

FDI Projects by Nation of Origin of Investor

In the last seven years, there have been foreign direct investment projects from 37 different countries into Birmingham with the United States the number one source providing over a quarter of all projects received (27%). This was more than double the number of the country with the second highest number of projects (Germany with 31) and almost four times that of India which provided 22.

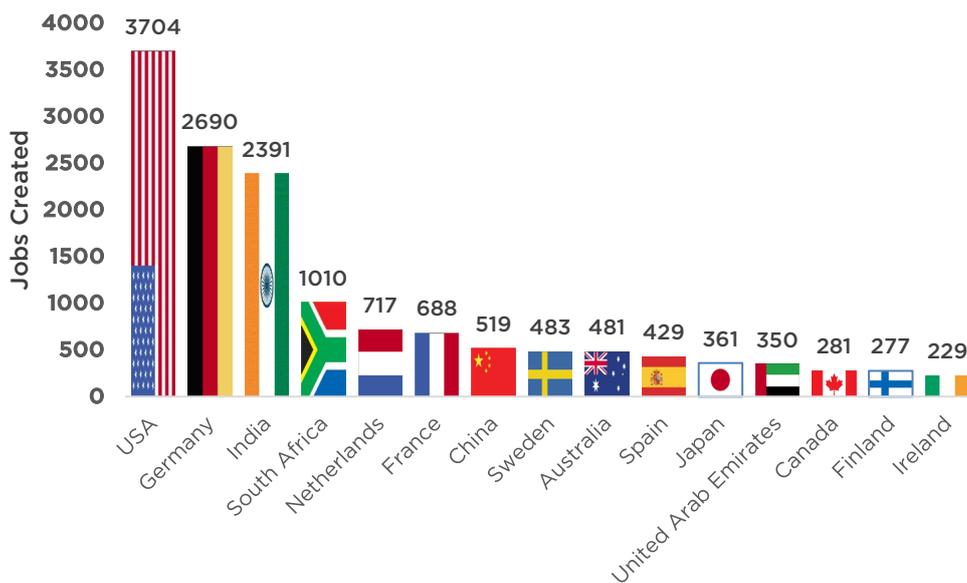
Figure 4: Top 15 Investing Countries by Projects in last 7 Years



Source: West Midlands Growth Company

However, in terms of jobs created it is a lot closer with the USA still providing the majority of jobs (3,704, nearly 25% of the total), Germany creating 2,690 (18%) and India creating 2,391 (16%). These three countries provided 58% of all jobs created from FDI in the last 7 years.

Figure 5: Top 15 Investing Countries by New Job Creation in last 7 Years



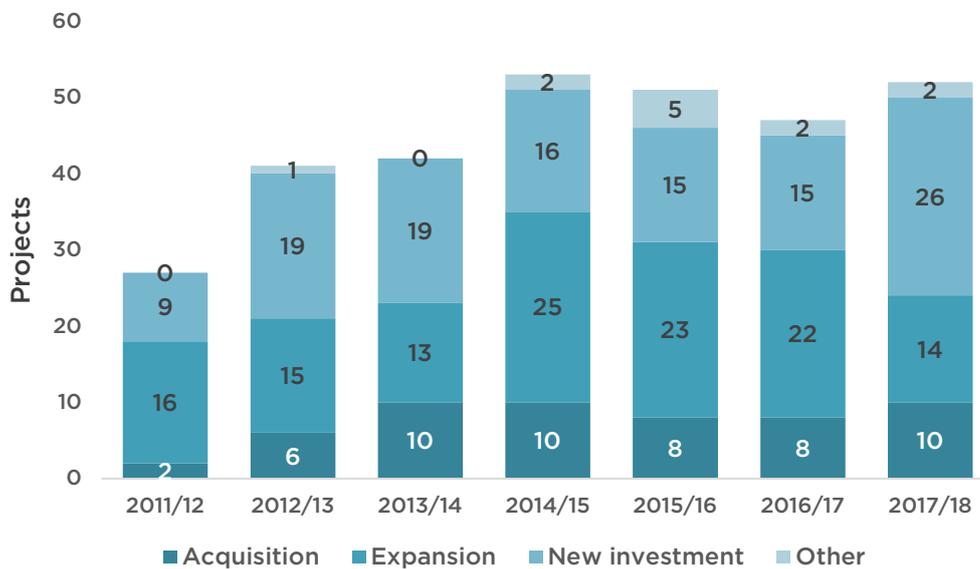
Source: West Midlands Growth Company

FDI by Type of Investment

In the last 7 years, expansion of existing investors has been responsible for the most FDI projects (128), whereas 119 were new investments, 54 were acquisitions and 12 were other types of investment.

Looking at the trend by type chart below, we see that Birmingham received most of its investments from new investors compared to any other type (acquisition/expansion/other) in 2017/18. This is the most of any year in the last seven years highlighting the excellent offer the city makes to potential investors in terms of location, access to suppliers, access to customers, skills, quality of life and educational attainment.

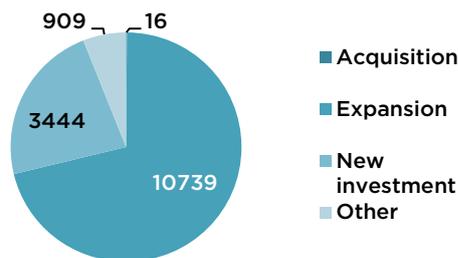
Figure 6: FDI into Birmingham by Type of Investment, 2011/12 - 2017/18



Source: West Midlands Growth Company

This attractiveness is very important (in fact Birmingham was ranked first in Europe for the mid-sized cities category by Colliers International in their Cities of Influence rankings Q1/2018), however the quality of the existing investors must also be supported, particularly when the vast majority of new jobs created were from expansions between 2011/12 and 2017/18 (10,739, 71% of the total).

Figure 7: New Jobs by Type of Investment, Birmingham, 2011/12 - 2017/18



Source: West Midlands Growth Company

Expert Comment

Professor Nigel Driffield, University of Warwick

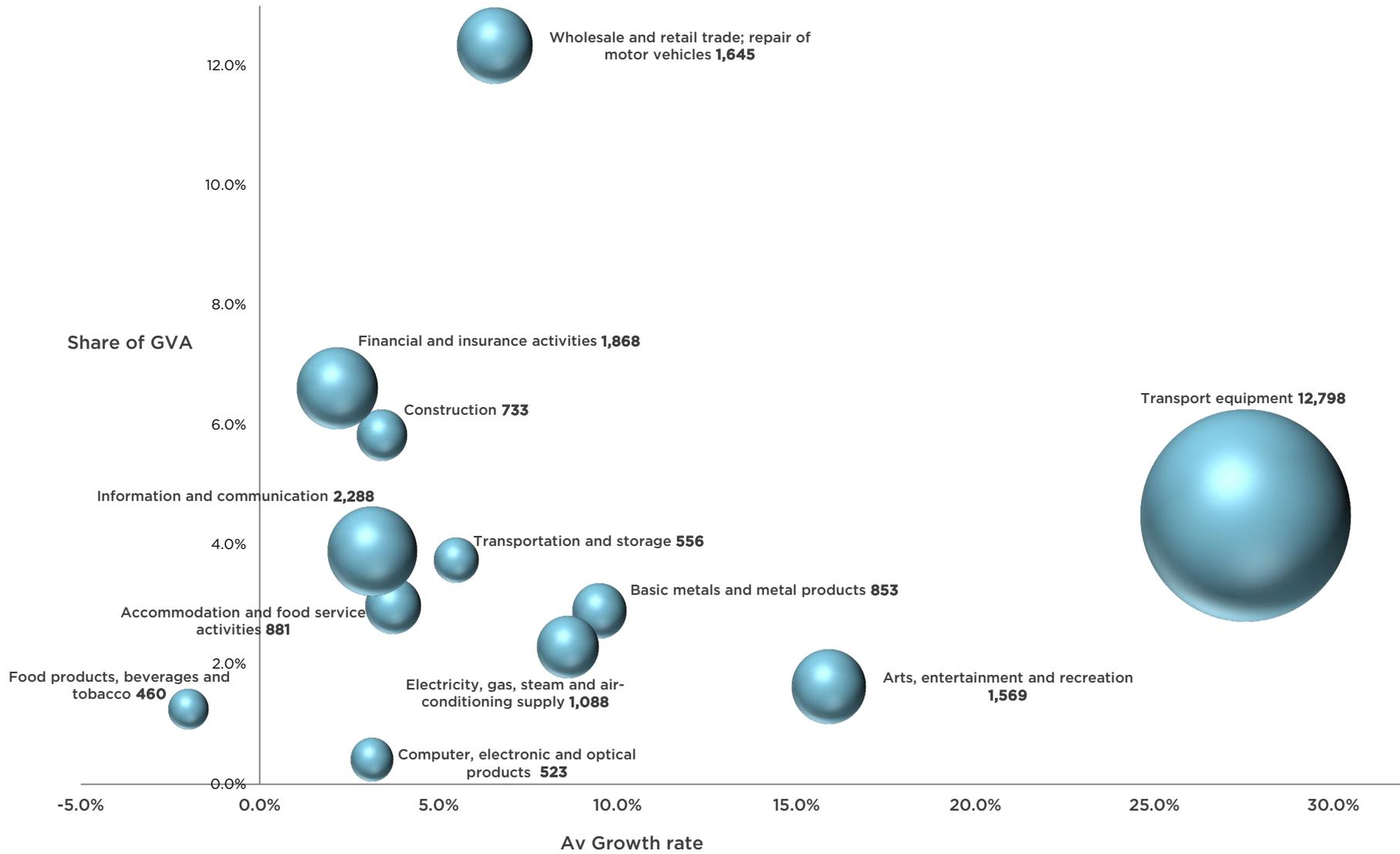


The Birmingham City region continues to do the best for inward investment outside London. This offers an interesting commentary on the contribution that inward investment makes to productivity locally. If one takes as a benchmark that foreign firms have on average 15-20% higher productivity than local firms, and that a high proportion of inward investment for the WMCA region is in sectors with above average productivity, then this indicates the

importance that attracting and retaining inward investment has for the local economy. Such sectors are also above average in terms of innovation, capital intensity and spending on R&D.

The figure below highlights the growth in employment of the sector, against the share of GVA of the sector, for the main FDI sectors. This indicates the relative importance of the sector to the WM economy, as well as giving an indication of relative performance. Clearly this highlights the importance of the transport sector, but it also for example illustrates that inward investment in food and drink contribute less to productivity – though of course these sectors provide employment for less skilled workers. Indeed this illustrates neatly a finding from the academic literature, which is that with only a few exceptions, inward investment contributes to productivity, OR it generates significant employment opportunities. It is clear that the transport sector does both, and to an extent so do financial services, but most other sectors fall into one category or the other.

Greater Birmingham & Solihull



What is therefore required at a local level in terms of an inward investment strategy is a mix of these sectors. The high value-added investment brings new technology, potentially spillovers, and develops knowledge transfer and training into supply chains and related sectors. However, in order for this to work effectively, there needs to be an emphasis on developing both delivery capacity and absorptive capacity in these related sectors.

1. Develop an inward investment strategy through greater understanding of why firms seek to invest in the region. High value-added FDI adds significantly to the underlying technological base of the economy, but creates fewer jobs, while FDI that generates large scale employment is typically (though not always) associated with less cutting edge technology. So our strategy needs to communicate which sectors will be able to attract inward investment of what type, and where this most likely to be sourced. This emphasises not 'sectors' as such, but value chains, where activity within the region is positioned within an international setting, and the vulnerabilities of value chains to global changes, or to macroeconomic factors such as exchange rate changes or changing terms of trade.

2. Focus inward investment efforts on sectors where free trade with the EU is less important. This means seeking to maximise the benefits of large scale investments in infrastructure (in the context of the Midlands, HS2); recognising the need for example to support skills in jobs around project management and professional services associated with infrastructure projects; and building robust supply chains to support infrastructure development.

3. Maximise the returns on inward investment. This again requires an understanding of the benefits of inward investment, for example of the benefits to supply chains or through knowledge transfer from inward investors into local firms. In order to understand how policy levers in this space can be applied, one has to understand the motivation and financing of FDI. For example, in the years prior to the financial crisis, a high proportion of global FDI was funded by debt, that has since not been available. One response therefore needs to seek FDI which is genuinely exogenous to the UK, that is, it is funded, not by loans financing raised from UK capital markets, but from the home country. This varies by country. Much Asian FDI for example is now funded by cash flow generated in the home country, compared with US, EU and Japanese investment which is typically debt financed. A country strategy is required therefore for investment promotion agencies as well as a sectoral strategy.

4. When selecting key sectors for inward investment, focus on job creation as well as value added. The WM Growth Company, previously Marketing Birmingham have been very successful in attracting inward investment into the region. It should be recognised that they have a wider remit than simply generating productivity growth, in that they have to undertake a matching exercise between the regions value proposition, and the type of investment that they can attract. It should be recognised that, given the nature of the skill distribution across the

region, that from an employment and productivity position, all investment is good investment. While obviously high skill, high value-added jobs will increase productivity the most, generating employment for less skilled people may well increase aggregate value added by more. Equally, lower value-added jobs tend to fill from the local labour market, rather than attracting people in from outside.

5. Focus on job quality rather than just the number of jobs created

In terms of the wider remit of WMCA and of this commission, it is also clear that social inclusion and skill development are important drivers of productivity. In terms of the contribution that the region's inward investment strategy can make to this, the nature of jobs created is also important. The skills analysis conducted as part of this commission rightly focuses on the supply side in terms of skill creation, but it is important to recognise the role that inward investment can play in the demand for skills. It should be recognised here that often inward investment, and their accompany supply chains have a disproportional influence with policymakers, as the current Brexit debates are illustrating. Often inward investors can influence skills strategies in terms of filling skills gaps in ways that local firms often find challenging. Regions can then use the needs to service inward investors as part of their ask of government around (devolution of) education and training.

Business Insight

Brian Hall, Chief Commercial Officer, BHSF

Historic Birmingham business puts the focus on productivity

BHSF's roots are firmly based in Birmingham. The organisation can trace its history back to 1873 where, as a charity, it was founded to support the health of the people of our city.



The organisation may have evolved dramatically over the last 145 years, becoming a nationwide provider of health and wellbeing, but its origins as a supporter of the people remain at the heart of the business. Simply put, without the need to support the people of Birmingham, BHSF would not exist as it does today.

Created in Birmingham, for the people of the region

BHSF began life as the 'Birmingham Hospital Saturday Fund'. It was founded by Birmingham surgeon, Joseph Sampson Gamgee, who came to realise that if the working people of Birmingham could access free medical care it could make a huge difference to them and their families.

So was born the idea that labourers would work an extra Saturday once a year, and employers would pay the extra wages into a fund that provided medical care for those who needed it. For workers in Birmingham in the late 1800s and early 1900s, this could mean the difference between life and death.

This practice continued until the NHS was founded in 1948. No longer needing to donate funds to support the hospitals of Birmingham, the organisation evolved, but ensured that the everyday man and woman's health and wellbeing remained at its focus.

Shaped by the philanthropic Gamgee, and thanks to the not-for-profit model the organisation is based on, BHSF is able to invest in services and innovation, listening to its customers and developing products to meet their needs. Importantly, this allows BHSF to help employers create a resilient, happy and productive workforce.

BHSF's vision for the future is equally ambitious, as it continues to make the customer its focus, while embracing more modern technology and breaking down the barriers between BHSF and its customers and the community.

The challenges ahead

Today, BHSF's challenges are very different from those it faced over 100 years ago. Brexit looms on the horizon, creating uncertainty for organisations. Add to

that the productivity crisis currently facing the UK, and now more than ever BHSF is needed to provide support for businesses and workers, and drive home the message of focusing on employee health and wellbeing for a stronger future together.

Worrying about Brexit will do no good

For the SMEs and micro businesses of Birmingham, BHSF included, there won't be a seat at the top table when it comes to Brexit negotiations. While the region's largest employers may be able to influence Brexit to some degree, for the rest of us, Brexit is going to happen much like the weather – like it or not. Businesses across the region will have to deal with what it brings, and focus on ensuring the economic wellbeing of the region.

In my opinion, the West Midlands' productivity is more important than the impending implications of Brexit. As a region we face a colossal challenge. We are lagging behind other areas of the country, and the productivity of Britain as a whole slipped backwards in the first three months of this year.

If we sharpened our productivity by even a few percentage points, this gained productivity would surely far out way any impact Brexit might have.

The key driver for this is re-skilling our workforce. To take an example, if autonomous vehicles mean we will no longer need bus drivers, what are we going to teach the bus drivers to do next?

We need to think about how the young person living in inner-city Birmingham can become part of the powerhouse that is the Snow Hill redevelopment, or the new Curzon Street Station, or Digbeth regeneration. We must empower the people of our region, and ensure their health and wellbeing is a priority, in the same way BHSF did back in 1873.

In order to support both business and economic growth across the region as a whole, I would urge business leaders to take matters into their own hands and ensure they take a proactive approach to worker wellbeing to further support productivity. There is much more that can be done to influence productivity – and employee wellbeing should also be at the top of the list.

The wellbeing and productivity equation

There is strong evidence to support the correlation between productivity and wellbeing. If workers are unwell, either mentally or physically, they will be less productive, and if left unsupported this can lead to presenteeism, and even an increase in sick leave.

Employee wellbeing is vital for both business success and for the region's economy to thrive. Essentially, if employees are healthy, happy and engaged, they perform better, are more focused and efficient, and reduce costs and risk for organisations. Brexit may be a worrisome cloud on the horizon, but if we could all take a more proactive approach to the physical and mental health and wellbeing of those in our region, so much could be gained.

I would urge business leaders across Birmingham and beyond to take a proactive approach to productivity now, by taking simple steps to improve the overall wellbeing of their own employees, if the productivity crisis is to be overcome.

Visitor Economy

In Birmingham, year-on-year increases in foreign direct investment reflect the city's competitive strengths, and a steadily growing visitor economy can be attributed to attractive cultural assets and the ongoing resurgence of the city. With the upcoming Commonwealth Games in 2022, Birmingham is gearing up to cement its place on the world stage as a thriving hub worth visiting.

The NEC Group - the UK's leading live events business - plays an important role in attracting visitors to the city. The group receives over 7 million visitors to its over 750 events every year.

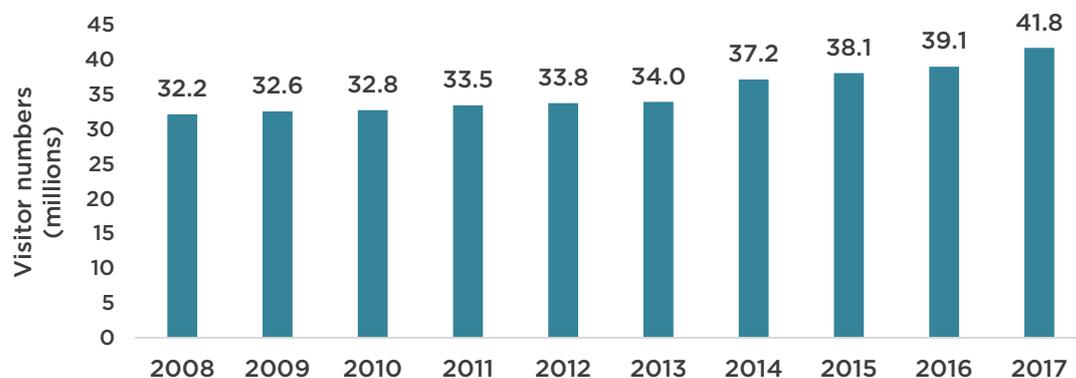
Cultural assets in the city include Birmingham Museum and Art Gallery, which holds the world's largest collection of pre-Raphaelite works of art, the Ikon Gallery, an internationally acclaimed contemporary art venue, and the Barber Institute of Fine Arts. The Birmingham Hippodrome - home of the Birmingham Royal Ballet and the country's busiest theatre outside London, welcomes over half a million people annually as is another key cultural asset in the city.

Further, Birmingham boasts the world class City of Birmingham Symphony Orchestra, Symphony Hall Birmingham, one of the world's best concert halls, and the oldest working cinema in the UK, The Electric Cinema. It houses four Michelin starred restaurants, Simpsons, Carters of Moseley, Adam's and Purnell's, with several more a few hours' drive away.

Birmingham's visitor economy continues to grow, having attracted a record 41.8 million visitors in 2017 - an increase of 2.7 million visitors to the city in 2016. This represents a 6.9% increase over the last 12 months and a 29.7% increase over the last 10 years.

Further analysis shows the number of visitors to family attractions and galleries has risen by 2.5% and 3.4% respectively compared with 2016. Heritage sites saw the biggest growth of 11.9%. Museums, on the other hand, suffered a 16.5% drop in visitor numbers over the same period.

Figure 8: Visitor Numbers to Birmingham over the past 10 years (2008-2017)

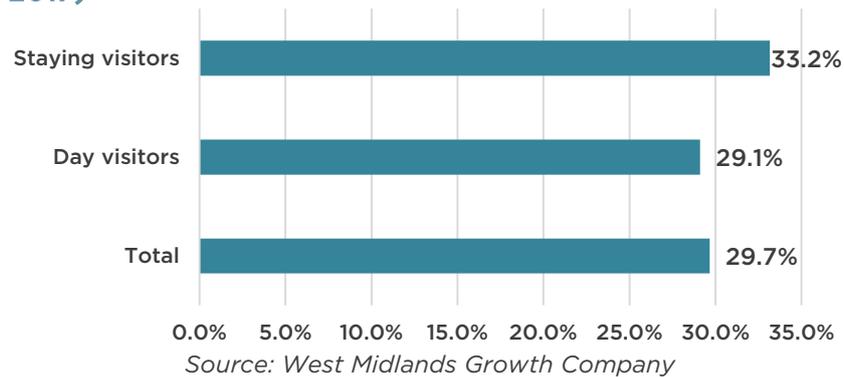


Source: West Midlands Growth Company

Strong growth in the number of overnight visitors to Birmingham

Over the last 10 years, Birmingham has attracted growing numbers of overnight visitors. The total number of overnight visitors has increased by a third (1.2 million) since 2008. The additional overnight stays have helped to boost occupancy and increase total revenue for local businesses. This growth demonstrates that Birmingham is enhancing its tourism offerings and strengthening its role as a leisure and business tourism destination.

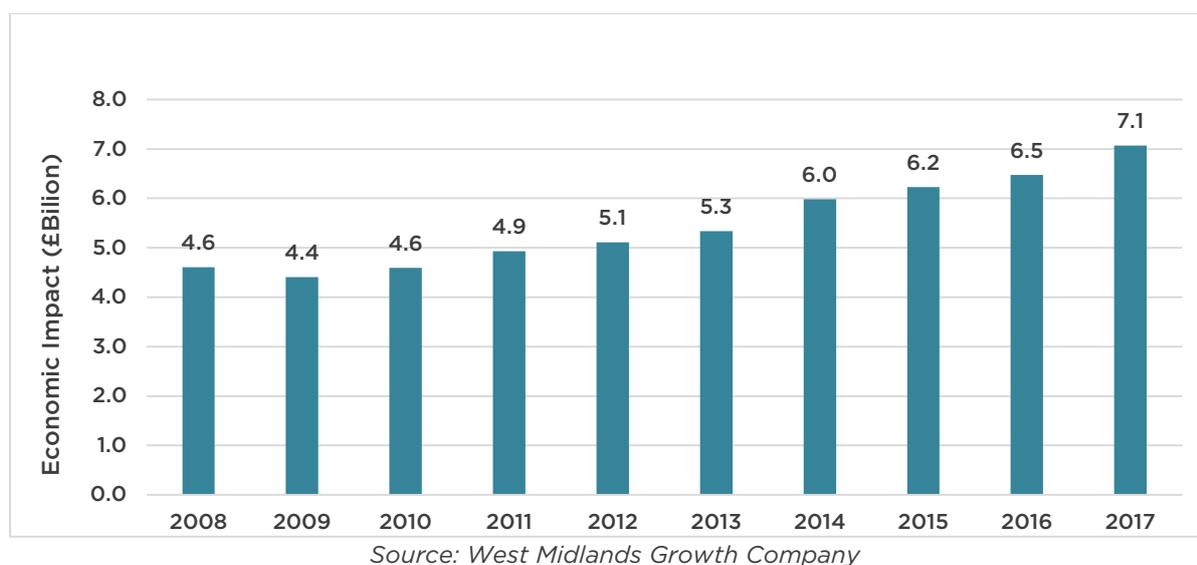
Figure 9: Percentage Growth in the Types of Visitors to Birmingham over the past 10 years (2008-2017)



Birmingham's visitor economy generates record high economic impact

Birmingham's visitor economy was worth a record £7.1 billion in 2017, up 9.2% on the previous record set in 2016. The sector has benefitted greatly from increasing numbers of visitors to the city, resulting in significant year-on-year growth. Over the past 10 years, economic impact has increased by 53.4% - an increase of £2.5 billion.

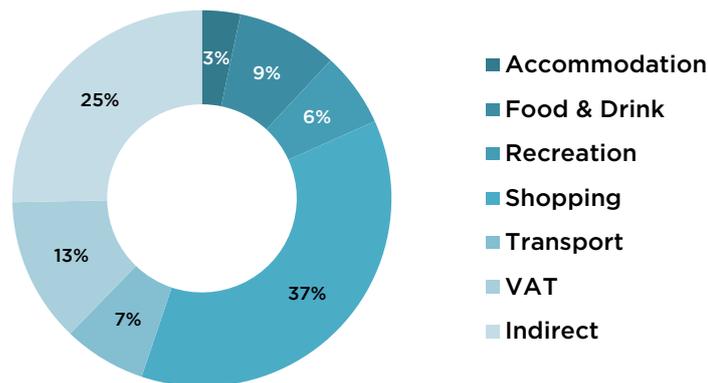
Figure 10: Economic Impact of Birmingham's Visitor Economy over the past 10 years (2008-2017)



Visitors spend more on shopping than other activities

The breakdown by category of expenditure highlights the wider impact of the visitor economy on the city's economy. Over a third (37%) of spending was on shopping, 9% on food and drink, 7% on transport, 6% on recreation activities, 3% on accommodation, 13% on other activities and a further 25% was attributable to indirect expenditure on bought-in goods and services.

Figure 11: Breakdown of Economic Impact by Category of Expenditure, 2017

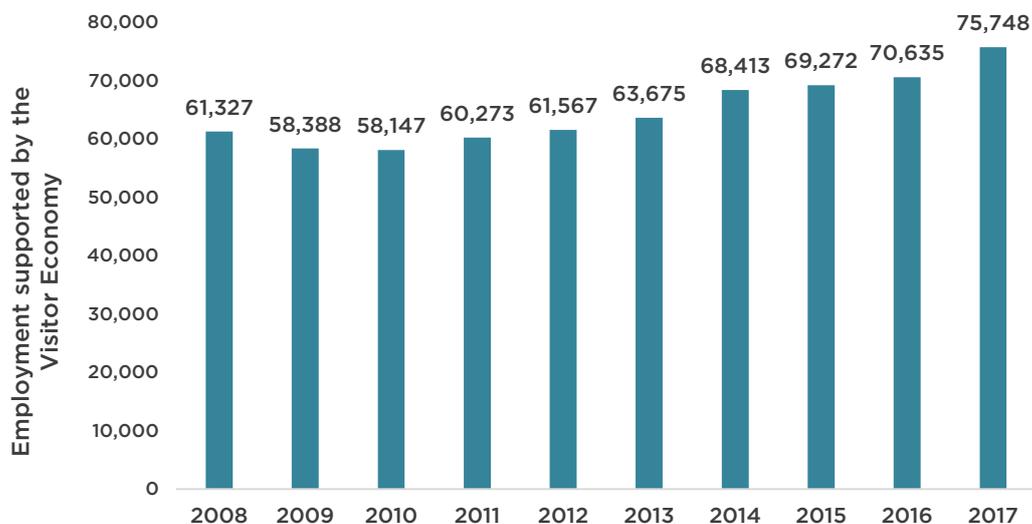


Source: West Midlands Growth Company

Growing number of jobs supported by the city's visitor economy

The number of full-time equivalent jobs supported by tourist activities rose by 7.2% between 2016 and 2017, from 70,635 to 75,748. Trend analysis shows that the number of full-time equivalent jobs supported by the city's visitor economy has increased by 23.5% over the past 10 years – an increase of over 14,421 jobs.

Figure 12: Number of Full-time Employees Supported by the Visitor Economy over the last 5 Years, 2013-2017



Source: West Midlands Growth Company

Birmingham Hotel Market Data¹

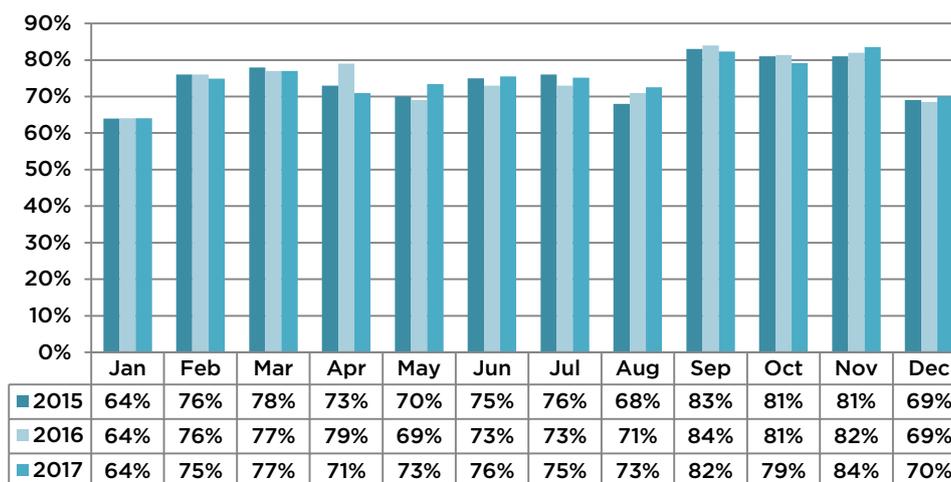
- Average occupancy is 75%, matching the previous record set in 2016
- The average room rate is £69, up £2 on the previous record
- Revenue per available room is the best it has ever been at £51, up £1 on the previous year

Table 1: Hotel Market Data

Average	2016	2017
Occupancy rate	75%	75%
Average room rate	£67	£69
Revenue per available room	£50	£51

Source: West Midlands Growth Company

Figure 13: Birmingham Hotel Occupancy Rates



Source: West Midlands Growth Company

Attracting in-bound tourists, who tend to stay longer and spend more, is a key priority for Birmingham. In 2017, Birmingham was in the 4th most visited UK destination behind London, Edinburgh and Manchester.

Table 2: Overseas visits - top 10 UK destinations, 2017

	Visits (1000s)	Nights (1000s)	Spend (£mil)
London	19,828	114,016	13,546
Edinburgh	2,015	11,240	1,019
Manchester	1,319	8,230	668

¹ Source: STR global

Birmingham	1,117	5,300	349
Liverpool	839	3,658	358
Glasgow	787	4,006	319
Bristol	602	3,842	200
Oxford	536	3,243	268
Cambridge	519	3,098	212
Brighton / Hove	491	3,407	214

Source: West Midlands Growth Company

Business Insight

John Crabtree OBE, Lord Lieutenant for the County of the West Midlands and Chair of the 2022 Commonwealth Games Organising Committee



I am only a few weeks into the role of Chair of the Organising Committee and it will no doubt be some time before I can hope to write authoritatively on all aspects of the Games, but it is not difficult to see what a terrific opportunity this is for our great city and region.

My career started in the early 1970s in Temple Row and little did I know, as a naïve and rather underwhelming law graduate, that this heralded 40 years of year on year economic decline in Birmingham, the consequences of which have left us with appalling levels of social exclusion and deprivation, poverty, skills shortages and some of the poorest wards in the country.

And of course this era left us with more than just those severe economic consequences. Somewhere along the way, we lost our confidence, our swagger. The 'city of 1000 trades', the engine room to the empire, the cradle of local government, the self determination and the great sense of common purpose and co-operation between public and private sector leadership, all went missing. In turn, we lost the confidence of Westminster and Whitehall.

But although at times this decline seemed to be inexorable, we have recently seen a levelling out and increasing signs of a sustainable uplift. The Games provide us with the opportunity not just to show the world what we can do, but perhaps more importantly the opportunity to rediscover that pride, energy and unity.

With that loss of confidence, we have allowed others to write our story, often being referred to at best as the 'modest Midlands'. Little do they know how much we have to offer and what a Games we are capable of delivering! Above all, it will be the warmth of our welcome – the open city which offered a home to the non-conformists 200 years ago, most notably the Cadburys, still has that warmth in its DNA. We are not only demographically the youngest city in Europe, but also one of the richest and most diverse. The many new citizens we have welcomed have had much to do with our improving economic fortunes. We have all the ingredients necessary to become the exemplar of the modern global city.

There is a lot to do if we are to reach this aspiration and, of course, although I have been asked to write under the heading "What the Games Mean for Birmingham", if we do our job properly, we will have 24 months to secure lasting legacies for the entire Midlands with the City of Culture stewarded from Coventry and then the Commonwealth Games headlined in Birmingham.

The Games themselves are a massive logistical exercise and we have been left with very little time to prepare. Beyond that, we have to engage with the region as a whole – Coventry, Solihull and Sandwell are directly involved and there are possibilities of reaching across the whole of the Midlands. Perhaps we can see the region finally coming together with one single purpose. The challenge is daunting

- supporting the neighbourhoods who will bear the brunt of the activities through to mobilising an army of volunteers, securing benefits for our businesses and industry and identifying and securing the necessary vision and leadership now. As my kids would say, "Birmingham 2022, bring it on!". Of course, we will make the most of these wonderful opportunities.

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