

Our Manchester

State of the City Report 2021

Key messages



The vision – Manchester 2025

Manchester will be in the top flight of world-class cities

It will be a city:

- **with a competitive, dynamic, sustainable and fair economy that draws on its distinctive strengths in science, advanced manufacturing, and culture, creative and digital business to cultivate and encourage new ideas**
- **with highly skilled, enterprising and industrious people**
- **that is connected, internationally and within the UK**
- **that plays its full part in limiting the impacts of climate change**
- **where residents from all backgrounds feel safe, can aspire, succeed and live well**
- **that is clean, attractive, culturally rich, outward-looking and welcoming.**

Forward to 2025

Priorities for next five years have been reset to achieve vision

- **3,800 people responded to consultation – their priorities are at the heart of Our Manchester Strategy: Forward to 2025**
- **Priorities were reset in summer 2020, acknowledging – but looking beyond – current challenges**
- **Renewed focus on our young people, our economy, our health, our housing, our environment, our infrastructure**
- **Priorities ensure equality, inclusion and sustainability are at the heart of what we do.**

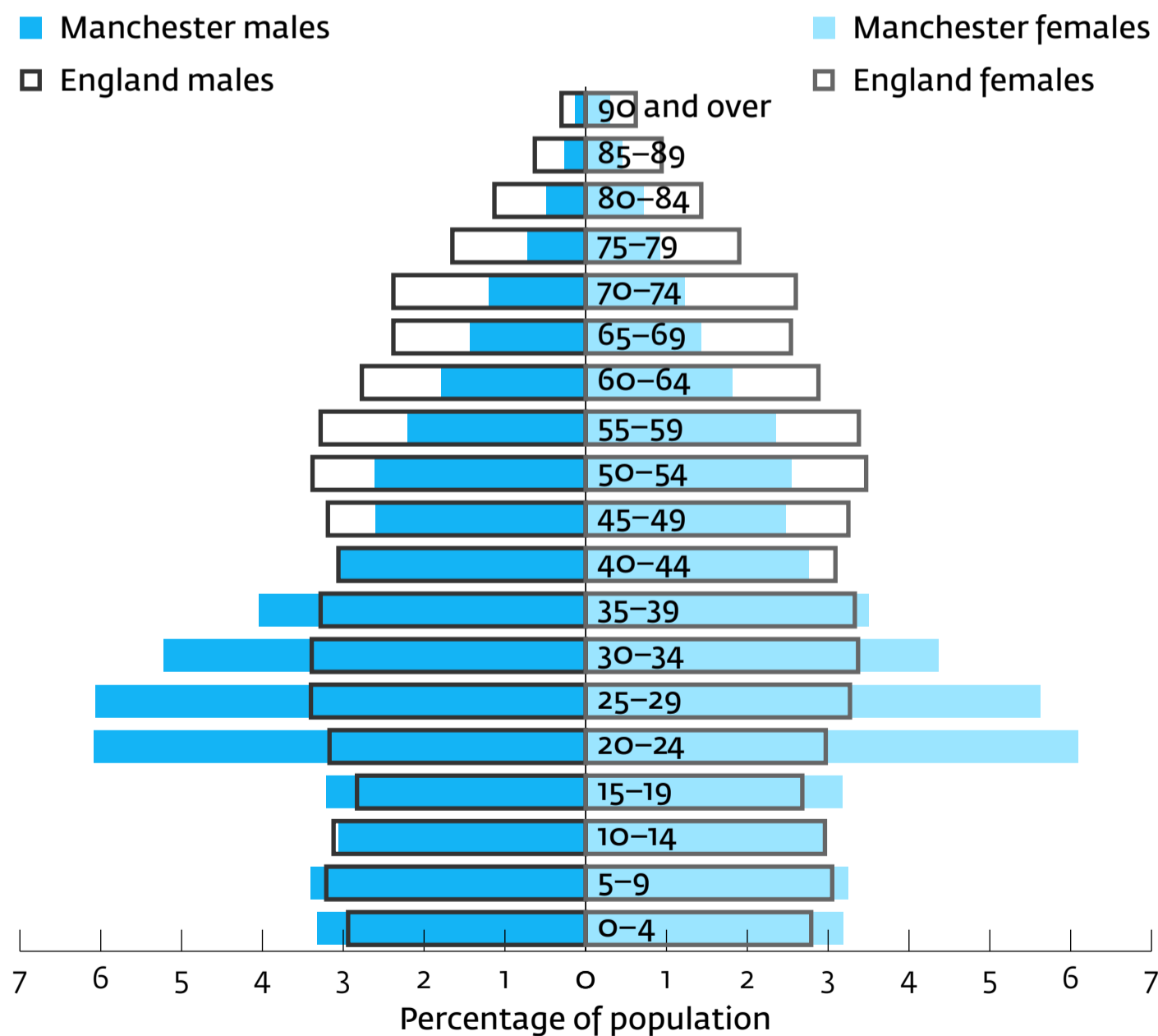
A thriving and sustainable city



Continuing population growth

Increasing number of residents aged 20–39

City has a much younger age-profile than England



- 31% growth in ONS mid-year population estimate since 2001, from 422,900 to 555,700 in 2020.
- MCCFM estimates 2020 population to be 579,400 with 627,000 forecast for 2025.
- International immigration is main driver of growth – impacted by COVID-19 travel restrictions. 18% of city’s residents were non-British in 2020.
- Census 2021 will be published in 2022.

Source: 2020 mid-year population estimate, ONS © Crown Copyright

Strong economic growth

However, COVID-19 has had a dramatic impact on economy

Pre-pandemic, employment continued to rise, from 357,000 in 2015 to 410,000 in 2019

21.2% of workforce employed in Financial, professional and scientific occupations

38% rise in active enterprises, from 17,045 in 2015 to 23,565 in 2021, increase of 715 in past year

- Pandemic disrupted many of our sectoral strengths, significantly impacting upon culture and retail.
- Cumulative total of 95,400 jobs supported since start of furlough scheme. 15,000 still supported July 2021.
- Job vacancies fluctuating but remain on an upwards trajectory, peaking at 7,900 week ending 18 Sept.
- Economic Recovery and Investment Plan sets out how Manchester will reinvigorate its economy.
- Our Manchester Industrial Strategy will ensure all our residents can benefit from economic growth.

Sources: Business Register and Employment Survey, ONS; UK Business activity, size and location, ONS © Crown Copyright

Continued development success

City continues to follow its pre-pandemic growth trajectory

Significant city centre development schemes:

- NOMA
- St Mary's Parsonage
- St John's
- Great Jackson Street

City centre schemes under development or in pipeline:

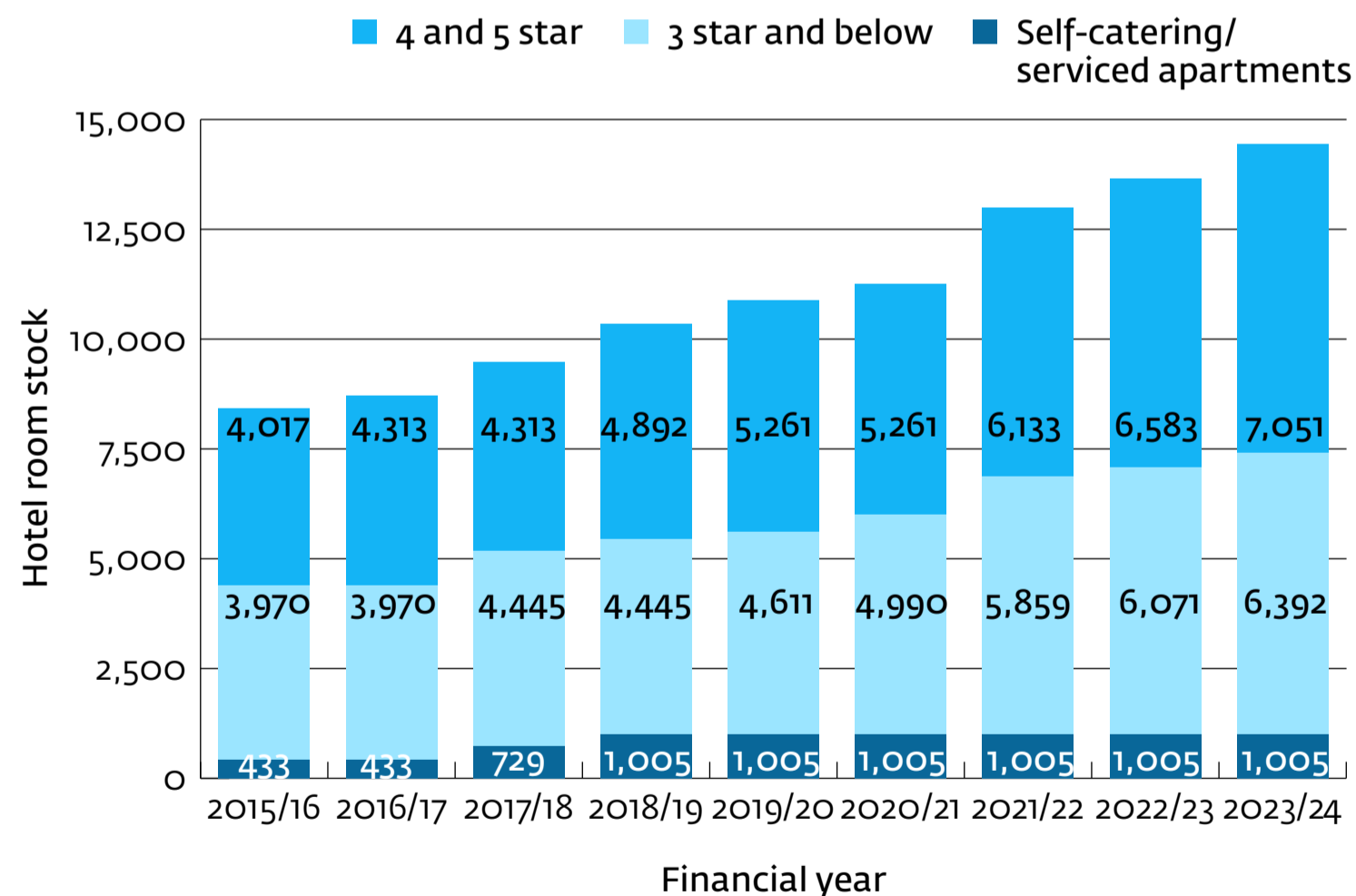
- Piccadilly, Mayfield, ID Manchester, Circle Square, St Michael's

- Following an initial slowdown in March 2020, construction activity continued at a rapid pace.
- Vibrant, mixed-use development has continued to transform the city's skyline.
- Further boost to Oxford Road Corridor innovation district with completion of Citylabs 2.0 and Citylabs 4.0 construction underway, due to complete 2022.
- Significant increase in brownfield land remediated under planning applications – 541 hectares in 2020.
- Large-scale multi-tenure developments planned across the city, including Victoria North.

COVID-19 stalled tourism sector

Significant confidence in hotel market despite recent challenges

Growth in city centre hotel room stock expected to continue until at least 2023



- Record high 81% hotel occupancy in 2019 – dropped to 36% in 2020, 73% in Sep-21.
- Previous five-year average 567 new rooms per year, 379 new rooms in 2020/21 due to construction delays.
- Projected 1,740 rooms will be added to total stock in 2021/22.
- Airport passengers reduced by 76% from 29.4million in 2019 to 7million in 2020.
- International inbound visits not expected to return to pre-pandemic levels until 2023/24.

Source: Manchester City Council Business Rates (existing room stock, 2015/16–2020/21), Manchester City Council Expected Commercial Completions List (expected growth, 2021/22–2023/24)

Inclusive growth

Social value can play an essential role in tackling poverty

23.8% of employees living in Manchester were paid less than the Real Living Wage in 2020

By the end of 2020, 37% of Universal Credit claimants were in work but eligible for benefits

90% rise in unemployed residents claiming benefits between March and May 2020

Sources: Annual Survey of Hours and Earnings, ONS; ONS claimant count (experimental statistics); ONS © Crown Copyright

- While inequality of wealth existed pre-COVID-19, the pandemic and related economic conditions have exacerbated the issue.
- Discussions taking place with partners to make Manchester a 'Living Wage Place'.
- Council reviewed and strengthened approach to social value – policy approved Mar-21. Social value is key objective of Our Town Hall Project.

Social value:

- Wider value to residents and communities that organisations can generate via their local spending power; additional value can be achieved in a number of ways, eg. via mandating for good employment conditions, including fair contracts and payment, and ensuring local jobs for residents.

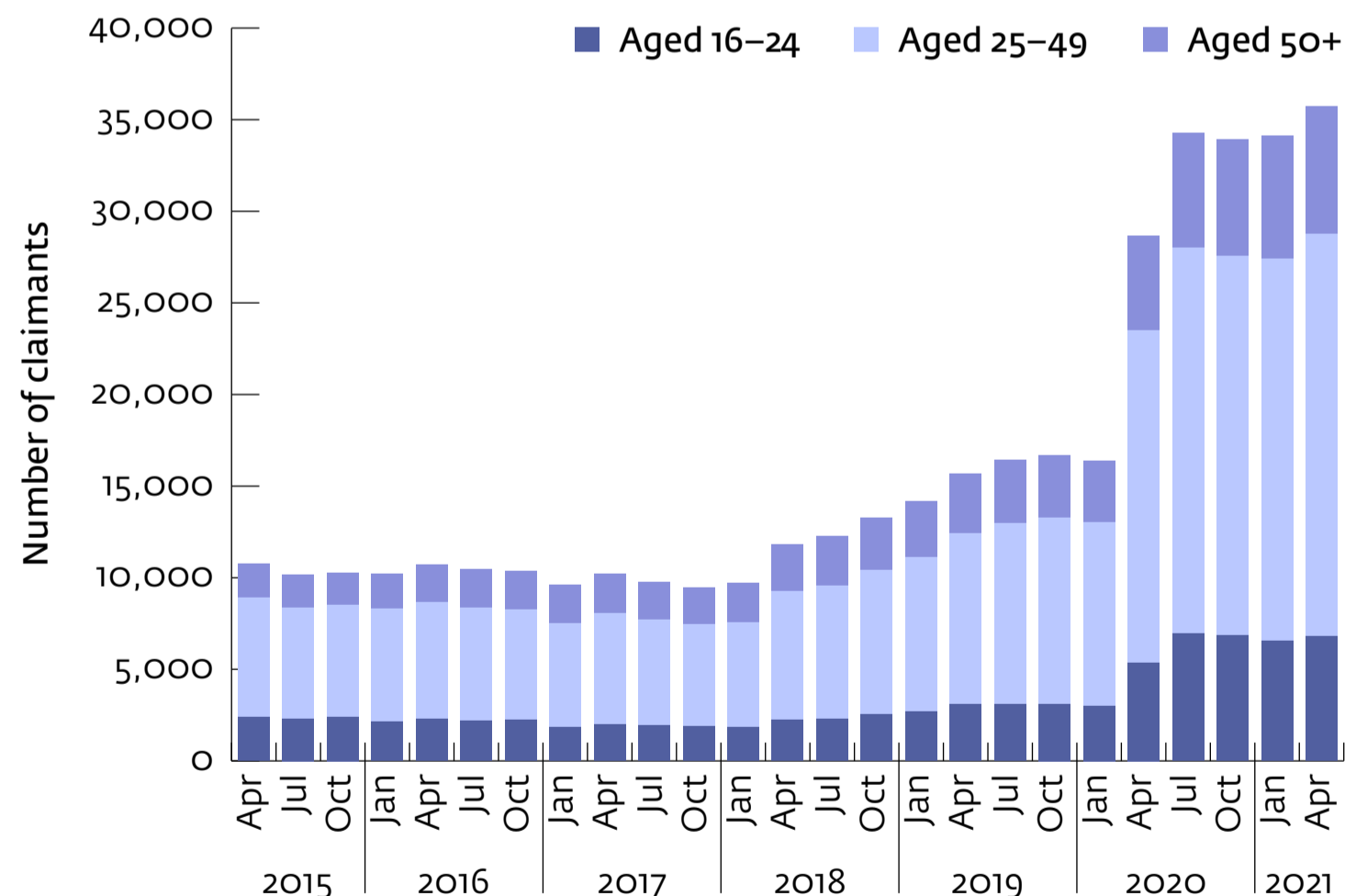
A highly skilled city



Rising unemployment levels

Rapid intervention required to get residents back to work

Claimant count doubled across all age groups between March 2020 and April 2021



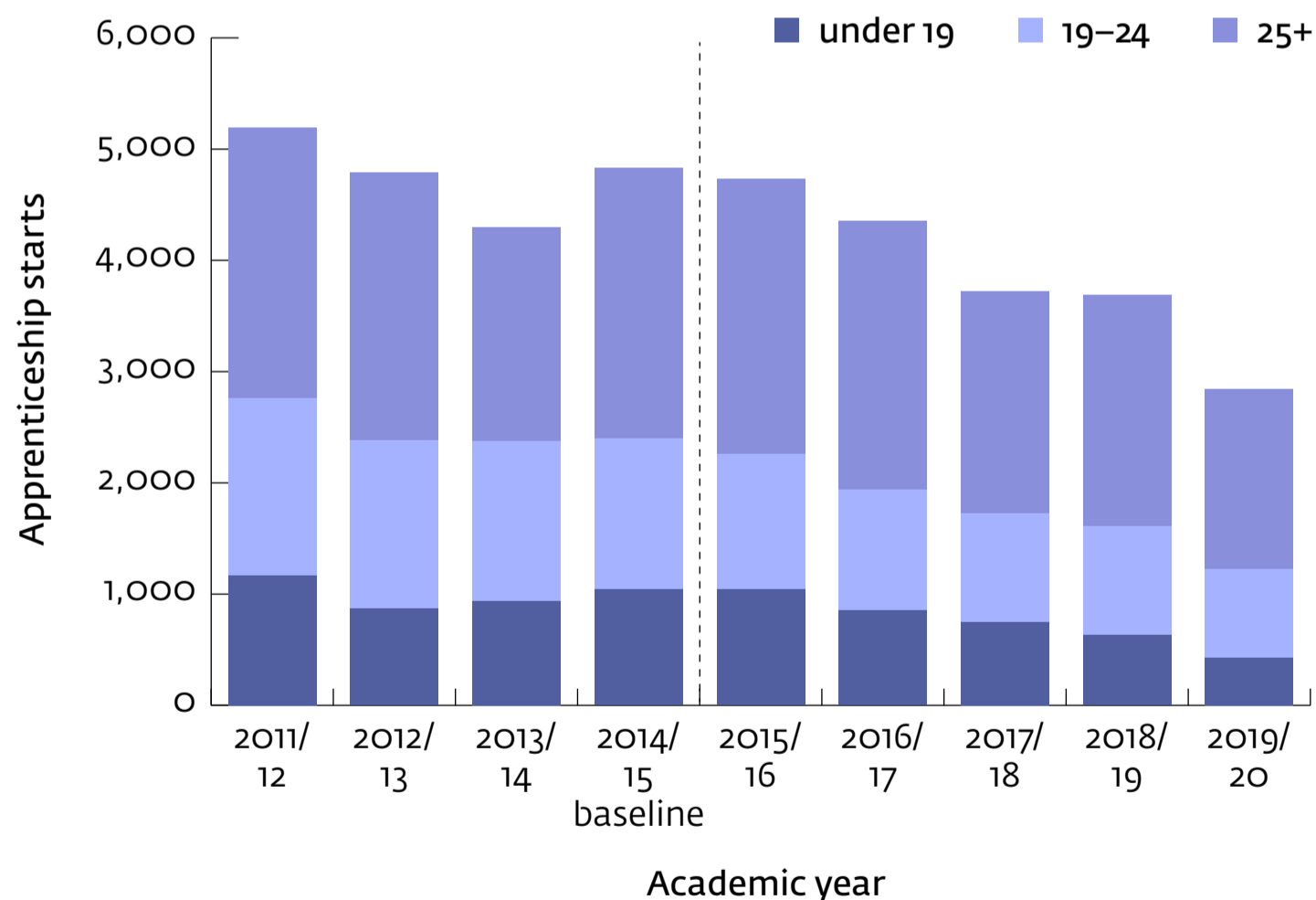
Source: ONS claimant count (experimental statistics). Number of people claiming benefits principally for the reason of being unemployed.

- Claimants increased from 17,740 in March 2020 to 35,755 in April 2021. April 2021 claimant rate 9.2% vs 6.5% nationally.
- Key groups of residents in unemployment – young people, graduates, older workers, ethnic minority groups (THINK report).
- Council continued to provide work-club activity online. In 2020/21, 4,543 residents engaged with a work club.
- Significant investment into welfare-to-work provision, such as Kickstart, the Job Entry Targeted Support programme and Restart.

Decline in apprenticeship starts

Employer focus shifted towards higher-level and older apprentices

Steady decline in starts across all ages since 2014/15 academic year



- 23% annual fall in apprenticeship starts vs 18% fall nationally in academic year 2019/20.
- Of the starts in 2019/20, 57% aged 25+, 27% aged 19-24, 15% aged under 19.
- 16% increase in higher-level apprenticeship starts in 2019/20, while other levels reduced.
- Flexi-apprenticeships should provide greater flexibility around working and learning choices.

Throughout COVID-19 we have continued to drive forward key projects to strengthen apprentice recruitment:

- Our Town Hall aims to create at least 100 apprenticeships at level 2 or 3, in addition to target of 50 higher-level apprentices
- In 2020/21 The Hut Group created 1,800 new apprenticeship roles across their north west sites, most at Airport City headquarters
- MIF is employing 65 new apprentices as part of social-value commitment.

Source: Skills and Education Funding Agency

Improving skill levels of residents

However, improvements have not reached all our communities

Increase in residents with higher-level qualifications, from 27.3% in 2004 to 47.7% in 2020, above national average of 42.8%.

Decline in residents with no qualifications, from 24.7% in 2004 to 7.8% in 2020, slightly above national average of 6.2%.

Low skill levels more prevalent in over-50s – 39.1% had low or no qualifications in 2020 vs 14% aged 16–49.

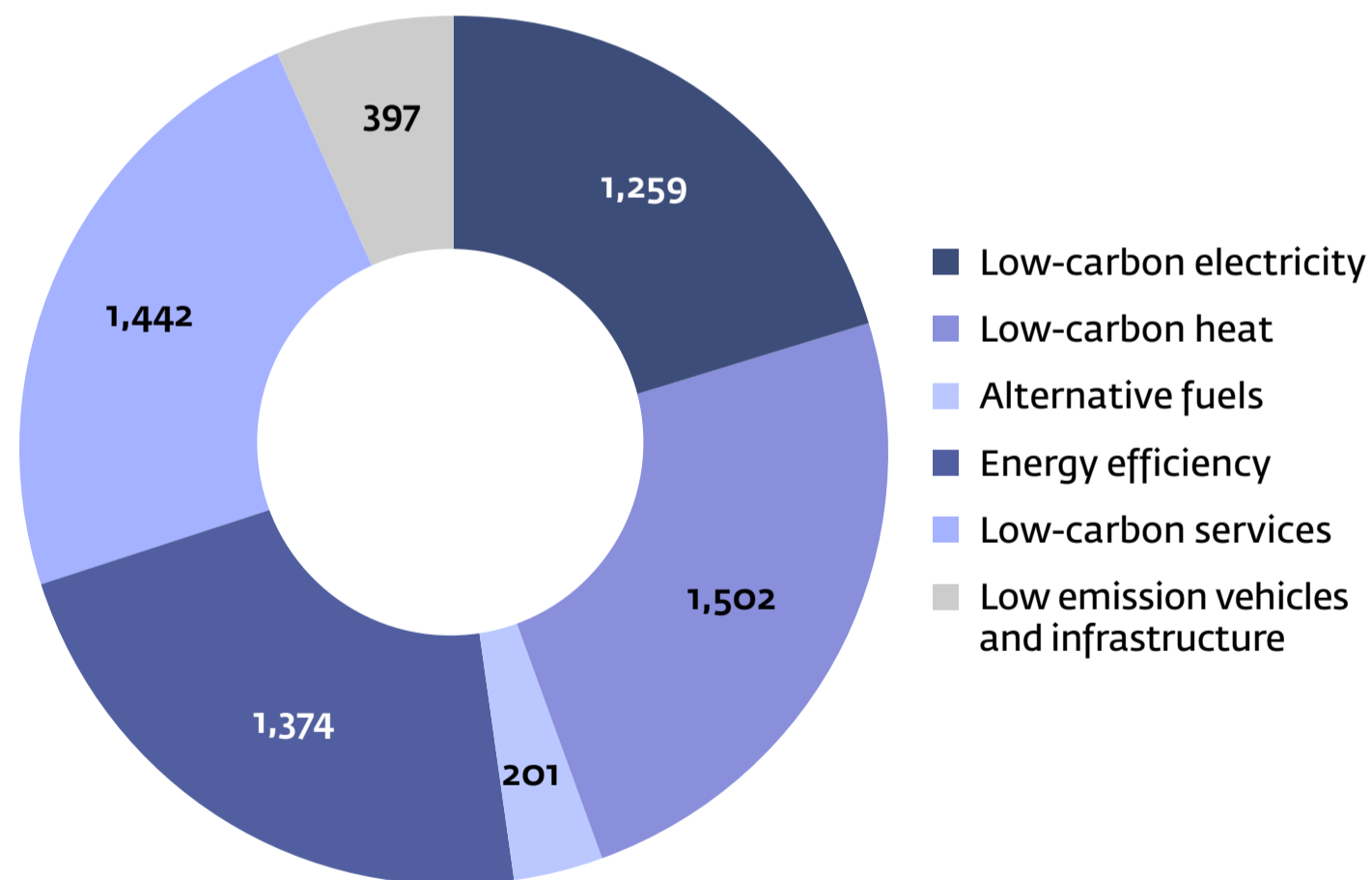
- Manchester University estimates that approximately 48% of its graduates express a desire to stay in city for work.
- Older residents, those for whom English is not their first language, disabled residents, and residents with a long-term illness are more likely to have low skill levels.
- Low-skilled more vulnerable to job losses. Over half of residents with low or no qualifications are unemployed.
- Adult learning will play an important role in a successful economic recovery.

Source: Annual Population Survey, ONS © Crown Copyright

Skills for zero-carbon economy

Crucial city has workforce in place to deliver changes needed

6,175 additional jobs in low-carbon and renewable-energy sector required by 2030



Source: Ecuity Consultants and Local Government Association, 2021

- Manchester committed to a green, zero-carbon and climate-resilient recovery.
- New employability programmes will prioritise green economy skills.
- Zero-carbon skills framework in development.
- Important to understand emerging skills gaps and capitalise on opportunities for reskilling workforce.
- Clear emerging opportunity is domestic retrofit and retrofitting of Council estates and buildings.

COVID-19 education impact

Good-quality remote learning and supporting most vulnerable

- During pandemic, most schools remained open to vulnerable pupils, those with special educational needs, and children of key workers. All schools provided a remote learning and an extended curriculum offer, developing bespoke solutions to needs of their pupils.
- Council provided advice and direct support for individual schools, distributed PPE, and allocated over 3,000 laptops to support vulnerable and disadvantaged children.
- Post-16 providers successfully switched between a remote, blended and face-to-face offer – overall attendance and engagement levels of most learners remained high.
- Long-term plan to address impact of the pandemic on our children and young people's education will be developed with Early Years providers, schools and post-16 providers.

Steps taken to ensure good-quality remote learning:

- Loaning of IT resources to pupils or paper-based approach to learning;
- assessments used to identify gaps in curriculum;
- training for school staff to deliver remote learning offer;
- use of a blend of online platforms and online resources;
- teachers retaining significant contact with pupils;
- targeting support for high school pupils less engaged in learning;
- successfully providing live high school lessons;
- special schools providing some therapy sessions online.

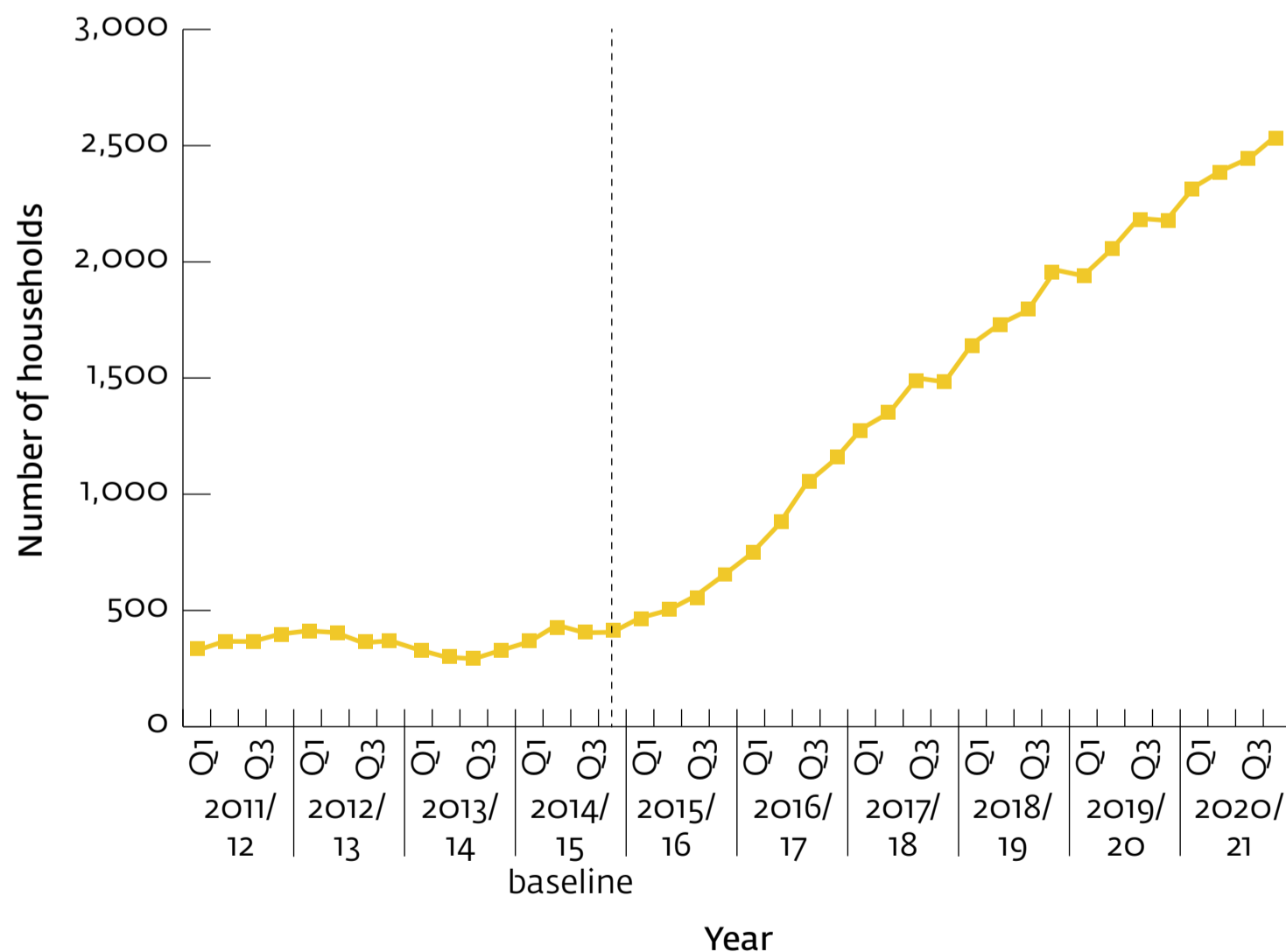
A progressive and equitable city



Rising temporary accommodation use

Significant pressures on homelessness prevention services

17% increase in use of temporary accommodation in past year



- ‘EveryoneIn’ initiative led to greater engagement with statutory and support services.
- In 2020/21, 9,608 people presented as homeless (3% decrease) and 789 successfully prevented from becoming homeless by Housing Solutions Service. PRS/Move-on teams moved 1,080 households into private-rented sector properties.

Tackling rough sleeping in 2020/21:

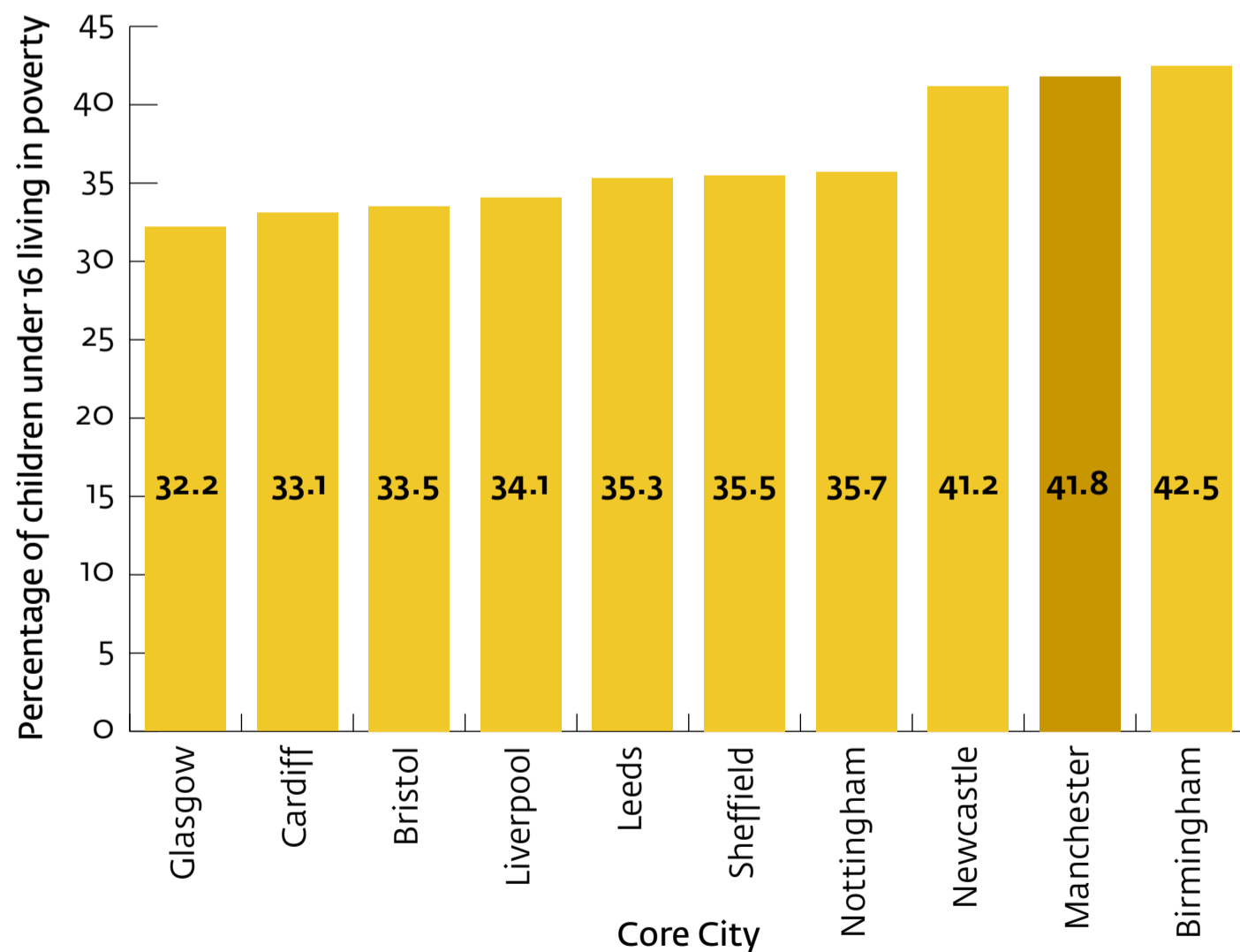
- Housing First service accommodated 88 with intensive wrap-around support;
- 710 relieved and 439 prevented from rough sleeping through Rough Sleeper initiative;
- 512 cold weather placements;
- Over 420 accommodated through A Bed Every Night scheme – 230 residents had a positive move-on into supported housing.

Source: Ministry of Housing, Communities and Local Government (P1e and H-CLIC statutory return)

Family poverty significant issue

COVID-19 has plunged many more families into poverty

Manchester's rate significantly higher than 31% UK average



- Estimated 46,700 children living in poverty in March 2020, 1,550 more than March 2019.
- 23% increase in in-work poverty since 2017.
- Free-school meals eligibility increased from 31.5% in Jan-20 to 37.8% in Jan-21.
- 50% rise in demand for food banks and pantries and over 110,000 food parcels delivered to residents in 2020/21.
- Family Poverty Strategy Reprioritisation.
- Manchester Poverty Truth Commission Key Findings and Impact Report 2019-21.

Source: Research by the Centre for Research in Social Policy at Loughborough University for the End Child Poverty Coalition, 2020

Recent health successes

Infant mortality rate reduced from 6.4 (2016–18) to 6.1 per 1,000 live births (2017–19). England rate remains at 3.9.

Source: Office for National Statistics, three-year averages reported

9.6% of mothers smoking during pregnancy in 2019/20, below national average of 10.4%. Fallen from peak of 14.8% in 2011/12.

Source: NHS Digital

Under-18 conception rate (per 1,000) fallen from peak of 73.9 in 2005 to 20.2 in 2019, but still higher than 15.7 England rate.

Source: Office for National Statistics

Children aged 0–5 admitted to hospital for tooth decay (per 100,000) fallen from 709.3 (2013/14–2015/16) to 529.1 (2017/18–2019/20).

Source: Hospital Episode Statistics, re-used with permission of Health and Social Care Information Centre, three-year averages reported

Significant reduction in rate of suicides (per 100,000), from 16.7 (2009–11) to 9.3 (2018–20), remaining below England rate of 10.4.

Source: Public Health England (based on ONS source data), three-year averages reported

Healthy life expectancy at age 65 improved, particularly for women, from 6.7 years (2013–15) to 9.4 years (2017–19).

Source: Office for National Statistics, three-year averages reported

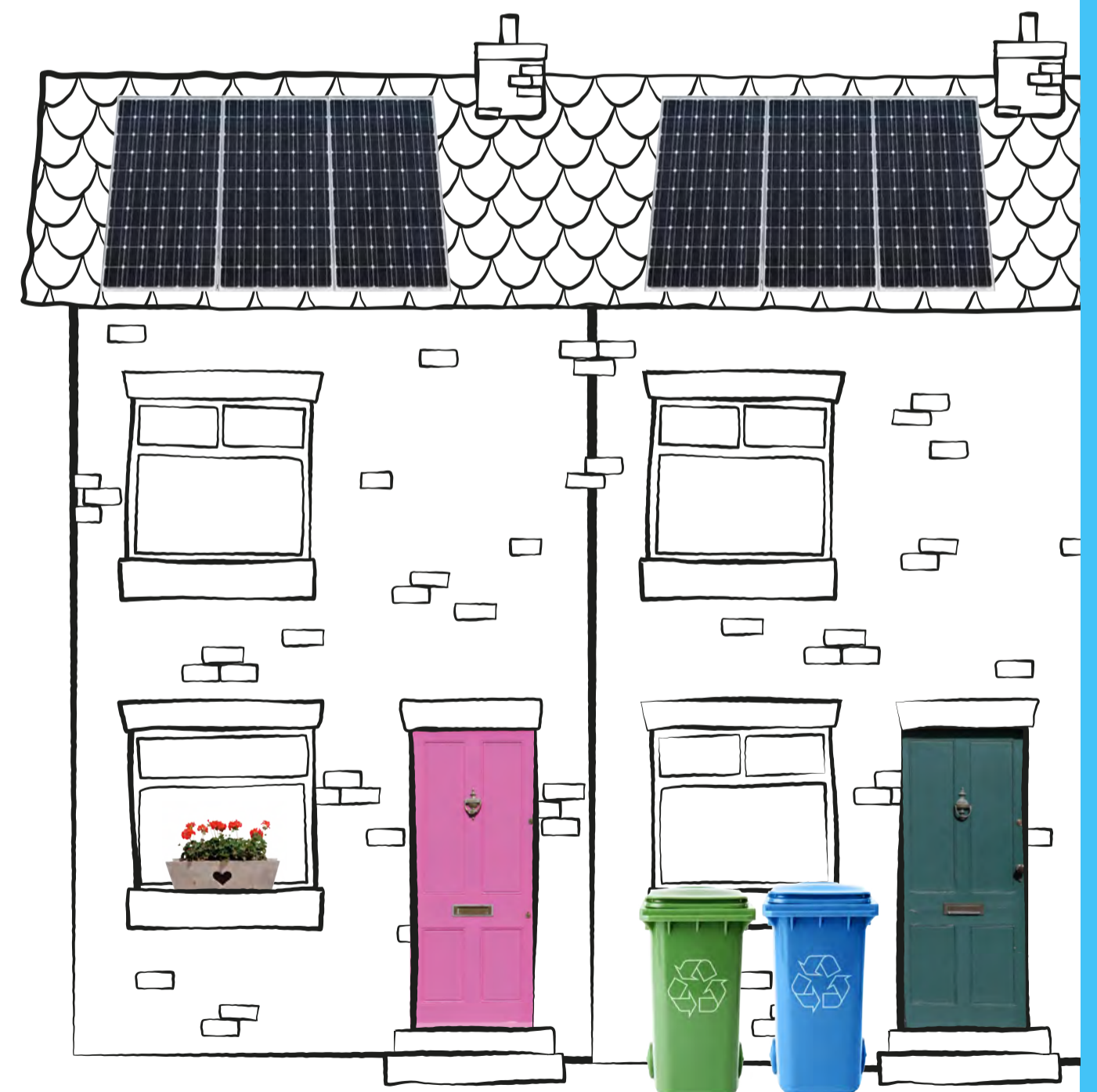
COVID-19 health impact

- Life expectancy at birth for Manchester residents fell by an estimated 3.1 years for men and 1.9 years for women in 2020, compared to England fall of 1.3 years for men and 0.9 years for women. Life expectancy fell more in the most deprived areas of England.
- Of 738 excess deaths registered between 20/03/20 and 01/01/21, 95% involved COVID-19.
- Over 73,000 fewer presentations to GP practices throughout 2020 leading to significant drop in suspected cancer referrals. Decrease in breast (-4.1%) and cervical cancer (-3.4%) screening uptake. Delays in cancer diagnosis and treatment scheduling.
- Decreasing activity levels from 66% to 62%, inactive adults rose from 23% to 27% in latest Sport England Active Adult Lives Survey covering period mid-Nov 2019 to mid-Nov 2020.
- Nationally, adults experiencing some form of depression has almost doubled, and one in eight adults developed moderate to severe depressive symptoms during pandemic.

COVID-19 impact on communities

- **Health:** Black, Asian and minority ethnic people, people with disabilities and people in poverty more likely to contract COVID-19 and have poorer mortality outcomes. Over-50s experienced physical deconditioning, mental health decline, increased loneliness and social isolation.
- **Economy:** Over-50s; younger workers; Black, Asian and minority ethnic workers; and women have been disproportionately impacted by unemployment. Employees in the gig economy or self-employed exposed to greater levels of risk. Black, Asian and minority ethnic workers four times more likely to work in 'shut down' industries during lockdown.
- **Skills:** Children and young people's education disrupted, with greatest impact on those who are disadvantaged. Business inactivity, furlough and redundancies disrupted apprenticeships. Low-skilled workers more vulnerable to job losses – over-50s, those for whom English is not their first language, disabled, and those with long-term illness more likely to have low skill levels.
- **Digital:** Over-50s have low levels of digital access. Digital exclusion more likely in neighbourhoods with communities that have English as a second language and/or low skills. Residents with no fit-for-purpose internet access at home eligible for donated internet device if either disabled, had a long-term health condition, over 65, or on low income.

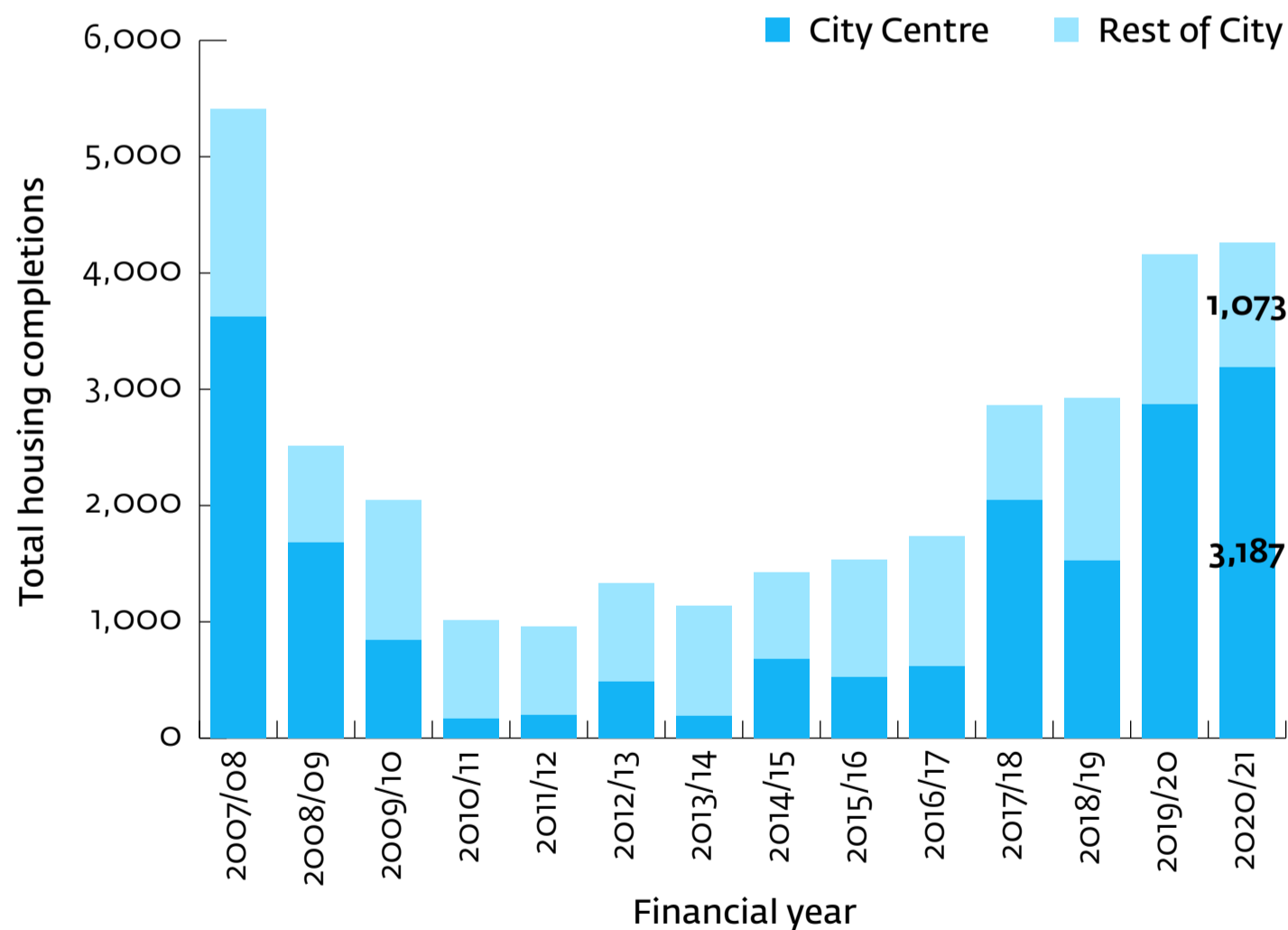
A liveable and zero-carbon city



Housing demand growing

Residential pipeline continuing to deliver large number of homes

4,260 new homes completed in 2020/21



Source: Manchester City Council Tax records (2007/08–2013/14), Manchester City Council Residential Development Tracker (2014/15–2020/21)

- 17,499 new homes built since April 2015, of which 1,927 were affordable.
- During 2020/21, construction began on some 2,000 new homes across city, of which 844 are affordable. Planning applications submitted for 9,400 new homes in 2020.
- Pace of delivery needs to increase to meet Residential Growth Strategy targets (32,000 homes, of which 6,400 affordable by 2025).
- Eastern Gateway key opportunity to increase delivery of affordable homes in city centre.

Transition to zero-carbon

City is not yet decarbonising at the required pace

City's emissions fell by 2% in 2018, 3% in 2019 and 11% in 2020, against 13% target. Reduction of 16% per year now required.

Source: Manchester Climate Change Agency. 2020 figure assumes Manchester will follow the national trend in CO₂ emissions

Council on track to becoming zero-carbon by 2038. Emissions fell by 21% in 2018/19, 13% in 2019/20 and 21% in 2020/21.

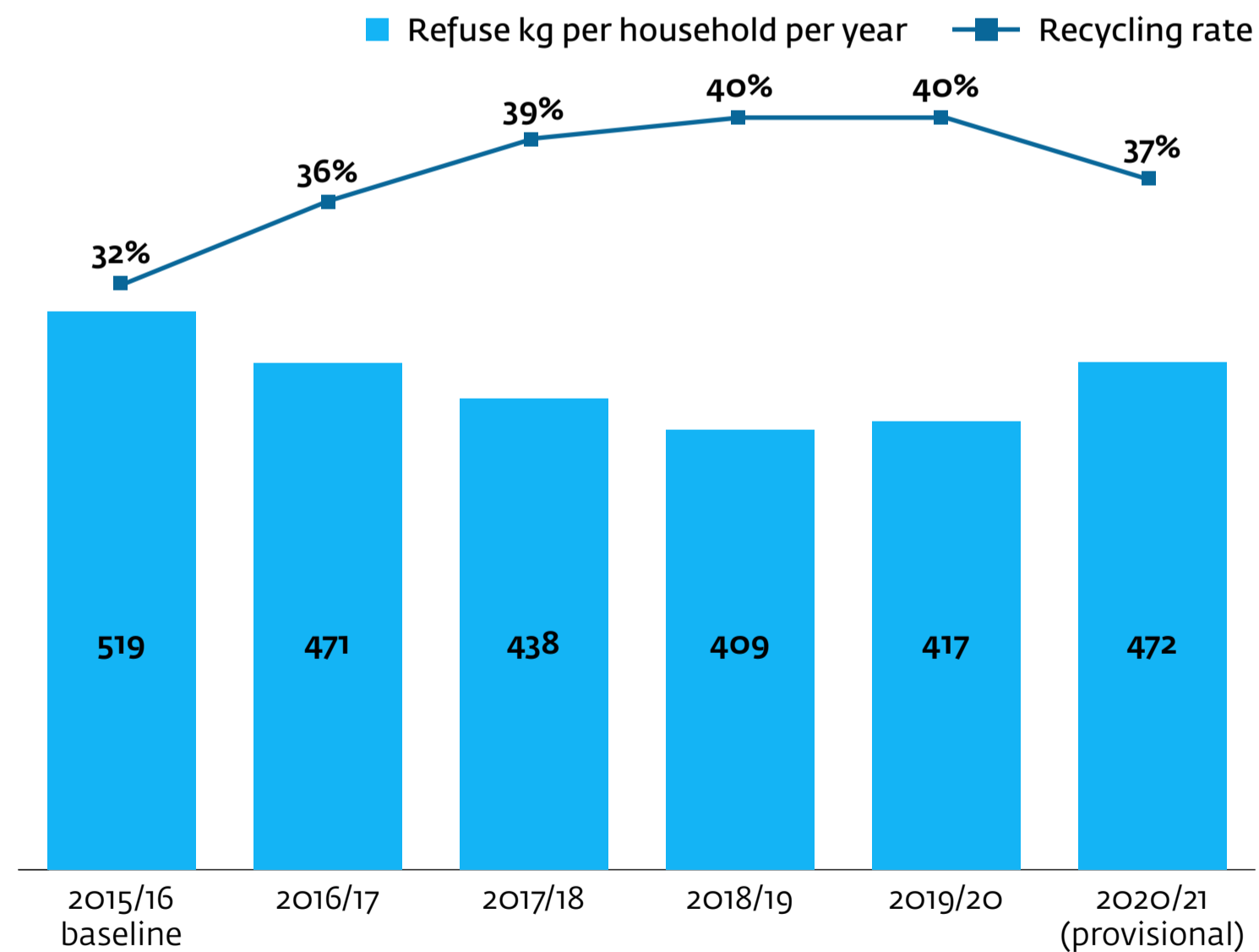
Source: Manchester City Council

- Civic Quarter Heat Network – Tower of Light and 2km of district heat transmission network installed.
- £7.8million secured to retrofit hard-to-treat concrete construction homes in Beswick.
- 74 market traders and 21 parks caterers committed to reduce and eliminate single-use plastics.
- Over 1,000 trees, 1,100 small hedges and four community orchards planted during 2020/21.
- West Gorton 'sponge park' showcases nature-based solutions to climate change adaptation.
- 300 residents attended climate action community events and 41 climate-action projects supported.

Waste collection challenges

Residents produce more waste while spending more time at home

13% increase in household refuse since 2019/20



Source: Waste Data Flow

- Significant increase in amount of recycling rejected at tips, from 286 tonnes in 2019/20 to 3,403 tonnes in 2020/21.
- Fly-tipping tonnages increased from an average 259 tonnes per month in 2019/20 to 326 tonnes per month in 2020/21.
- ‘Manchester’s Litter Army’ – huge surge in involvement in tackling litter as people spend more time in communities.
- Council will refresh waste strategy in 2022. Projects will be implemented to educate residents on recycling.

Domestic violence and abuse

Increased demand for support and services during pandemic

- **Child to Parent Violence and Abuse support:** Talk Listen Change programme will work with 150 young people over a two-year period, and provide 750 professionals with training.
- **Drive:** Key element of two-year pilot programme is behaviour change. Anticipated that 150 perpetrators will be subject to intervention in 2021/22, victims will receive specialist support.
- **Priority Move-on Project:** Delivered moves into safe, affordable and appropriate accommodation for 106 victims and 65 children in 2020/21, more than double previous year.
- **Communications and engagement:** Social media messaging and broadcasts on local community radio; more than fifty pharmacies given information about local domestic-abuse services; Training colleagues undertaking neighbourhood response work and Test and Trace programme, enabling them to promote availability of support and services.
- **Refreshed Domestic Violence and Abuse Strategy** launched autumn 2021.

Libraries and parks

Became increasingly more important to our communities

Libraries:

- Since July 2020, over 25% of visits have been to access the free internet.
- 89% increase in electronic resources use.
- 26,000 books and 5,000 magazines gifted through foodbanks and Sure Start centres.
- 16,000 children given automatic membership to 2021 Summer Reading Challenge as well as a library card.
- Now offering a blended programme of virtual and physical events and activities.

Parks:

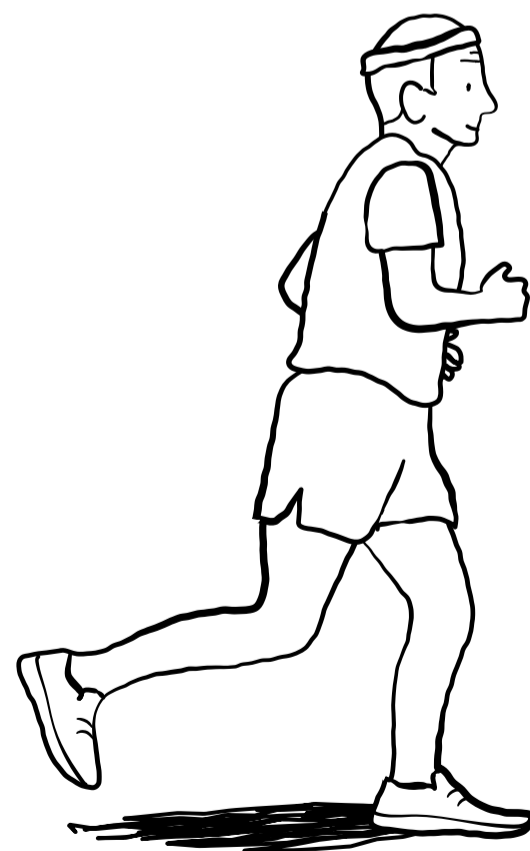
- More than 30% rise in park visits.
- Over 11,600 young people engaged in park activities throughout summer, including 200 children with special educational needs.
- More than 25,000 tennis court bookings – almost a fourfold increase on previous year.
- Love Exploring App digital experience attracted 9,500 users walking 12,350km.
- 4,500 completed Wythenshawe Park Halloween trail. Over 115,000 visits to Lightopia in Heaton Park.

Voluntary, Community and Social Enterprise (VCSE) sector integral to city's response to pandemic

- Manchester's VCSE sector comprises 3,871 voluntary organisations, community groups and social enterprises; this number increased sharply in response to the pandemic. VCSE services and initiatives are delivered by some 162,000 volunteers giving around 481,000 hours each week, valued at £242million per annum.
- During 2020/21, Manchester VCSE organisations received over 7,000 volunteer applications via Volunteer Centre Manchester. Over 2,500 registrations of support were received as marshals for vaccination sites, and 300 to support surge-testing efforts.
- COVID-19 Impact Fund distributed £745,000 to support mental health and wellbeing of priority resident groups and £50,000 to support victims of domestic violence and abuse.
- Over £1million invested in COVID-19 recovery fund, to support voluntary and community sector organisations to work together to strengthen their support for Manchester residents.

Sources: State of the Manchester VCSE Sector report, 2021; Manchester Community Central

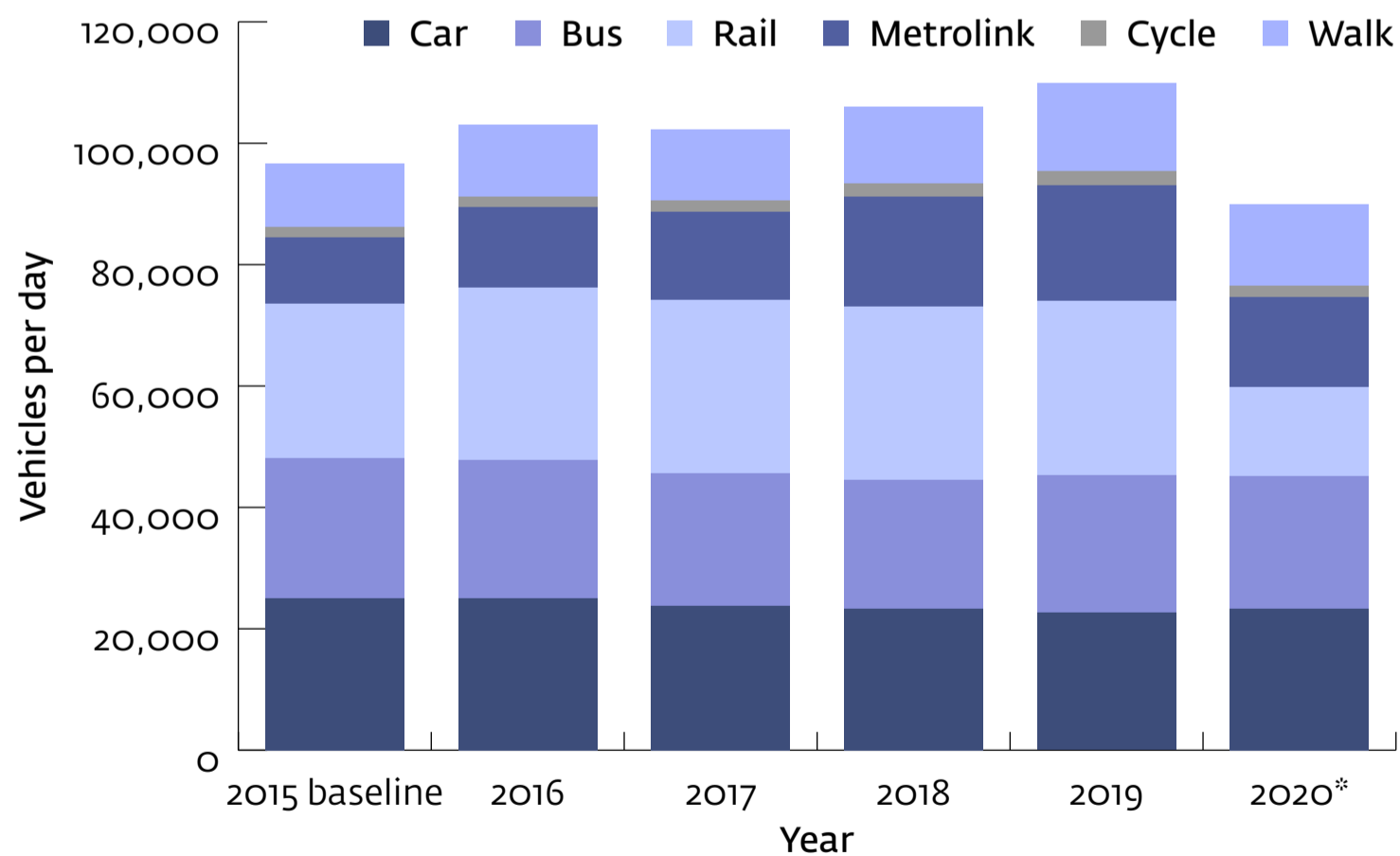
A connected city



Bus, rail and tram need to recover post-pandemic

Growing travel demand to and from city centre pre-pandemic

Morning-peak trips increased by 14% (2015–2019), 18% decrease 2019–2020



- Share of non-car trips increased from 74% in 2015 to 79% in 2019, back to 74% in 2020.
- Walking and cycling trips increased by 27% and 19% respectively (2015–2020).
- GM travel demand trending upwards but public transport patronage still below pre-pandemic levels.
- Refreshed City Centre Transport Strategy adopted in March 2021 prioritises walking as the main way of moving around city centre.

Source: Manchester city centre cordon count (7:30–9:30am), TfGM © Crown Copyright 2021. *Rail surveys in March 2020 impacted by COVID-19 lockdown

Highways network investment

**£66.1million invested since 2017,
of which £18.8million in 2020**

Work to improve Manchester's roads, footways and drainage has reduced proportion of road network rated as in poor condition, from 25% in 2017 to 18% in 2020. Resident satisfaction with highways conditions is 52%, same as national average.

More than £79million of projects in Mayor's Challenge Fund programme to implement and develop the Bee Network. Nine schemes including Chorlton Cycleway, Princess Road/Mancunian Way roundabout and Northern and Eastern Gateway connectivity.

Milestones achieved in 2020:

- **Medlock Street roundabout congestion reduction scheme**
- **Hyde Road road-widening and pedestrian-improvement**
- **Great Ancoats Street project, better access across busy road for pedestrians and cyclists**
- **77 school-crossing improvements**
- **A6 Stockport Road bus-layby widening**
- **Airport City Green Bridge Scheme over M56**
- **First phase of Chorlton walking and cycling scheme, including first UK CYCLOPS junction**

Need to sustain air quality improvements

COVID-19 local and national lockdowns affected local air quality

During 2020, Manchester met the 40µg/m³ national legal limit for all its air pollutants

Year	Manchester Oxford Road NO ₂ (µg/m ³)	Manchester Oxford Road PM ₁₀ (µg/m ³)	Manchester Piccadilly NO ₂ (µg/m ³)	Manchester Piccadilly PM ₁₀ (µg/m ³)
2015	66	28	39	20
2016	66	27	40	20
2017	65	27	36	20
2018	62	30	35	21
2019	59	26	36	20
2020	36	18	27	15

Source: Concentrations of nitrogen dioxide and particulate matter, Air Quality England

- Domestic stoves and fireplaces campaign launched autumn 2020.
- GM Clean Air Plan approved July 2021. From May 2022 HGVs and buses will pay daily charge to enter Clean Air Zone. LGVs, coaches, taxis and private-hire vehicles included from May 2023.
- Only 0.5% of cars and LGVs are electric, below 1% UK average. Be.Ev GM charging network will be expanded to support shift to electric vehicles.
- Work with schools over sustainable travel, school street closures and green infrastructure initiatives.

Need to maximise take-up of ever-faster broadband to secure city's status as leading digital city

Superfast broadband (>30Mbit/s)
UK: 96% coverage vs 57% take-up
Manchester: 94% coverage vs 74% take-up

Source: Ofcom Connected Nations report

Ultrafast broadband (>300Mbit/s)
UK: 59% coverage vs 3% take-up
Manchester: 68% coverage vs 3% take-up

Source: Ofcom Connected Nations report

- Strong and resilient digital sector, acknowledged as 'the UK's second technology city'.
- Despite challenges of COVID-19, rapid progress made on Virgin Media Business Local Full Fibre Network Programme serving 1,700 sites across city region. Estimated work in first year delivered a local economic benefit of £11.8million and supported local employment.
- It is of fundamental importance to our future success that everyone in Manchester is equipped with the skills and technology to make the most of our rapidly digitising world.
- Digital Strategy in development, based around four pillars – smart people, digital places, future prosperity and sustainable resilience.

Digital inclusion action plan

Delivers diverse programme of activity to drive digital inclusion

- More than 70 members of cross-sectoral Digital Inclusion Working Group collaborating to gain a better understanding of resident barriers and improve access to provision.
- Manchester Digital Exclusion Index tool provides a digital-exclusion score for each ward and LSOA. 25% of Manchester LSOAs are scored with a very high risk of being digitally excluded. Strong link between digital exclusion and neighbourhoods with communities that have English as a second language and/or low skills.
- Digital support telephone support service supported over 900 residents without skills and/or confidence to use internet effectively.
- To increase home access to the internet for priority residents, over 1,000 internet-connected devices donated and over 2,000 residents supported to access data and/or Wi-Fi.

Summary

- Resilience of Manchester's economy has been tested throughout economic closures, downturn and seismic shift in travel following COVID-19. There are now signs of the economic recovery picking up. Recovery from the pandemic must work towards a more inclusive economy, ensuring that residents from all parts of the city can benefit from high-quality jobs with fair pay and conditions, and opportunities for progression. Central to this is tackling the digital-exclusion challenge to ensure that all our residents can benefit from the opportunities digital brings.
- Pandemic has deepened existing inequalities in city, particularly for our more deprived communities, ethnic minorities, women, migrants, those living in poverty, and older people, meaning our focus on reducing inequalities is more important than ever.
- Climate crisis remains a key priority for Manchester and a range of projects and initiatives has been delivered to progress our zero-carbon ambitions. The Council's direct carbon emissions have significantly reduced in recent years, but the city is not yet decarbonising at the required pace and collective and urgent action is now required.
- A key part of the city's recovery from the pandemic will be the continued increasing delivery of housing – particularly affordable housing. Demand for housing from our most vulnerable residents has become more acute, with growing numbers on the housing register and in temporary housing.