

# State of the City Report 2019

A horizontal illustration featuring a diverse group of stylized characters. From left to right: a man in a white lab coat, a woman in a blue uniform with a headband, a man in a white lab coat with glasses, a woman in a blue hijab, a man in a blue uniform, a woman in a blue dress, a man in a blue t-shirt, a woman in a blue uniform with a headband, a man in a white t-shirt, a woman in a white t-shirt, a man in a white t-shirt with a headband, a woman in a white t-shirt, a man in a white t-shirt, a woman in a white t-shirt, a man in a white t-shirt, a woman in a white t-shirt, a man in a white t-shirt, a woman in a white t-shirt, a man in a white t-shirt, a woman in a white t-shirt. They are holding four large, light blue signs with white text. The signs read: 'We listen', 'We work together', 'We recognise strengths', and 'We build better lives'. The background is a solid light blue.



# The vision – Manchester 2025

Manchester will be in the top flight of world class cities

It will be a city:

- with a competitive, dynamic and sustainable economy that draws on its distinctive strengths in science, advanced manufacturing, 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.

Our Manchester

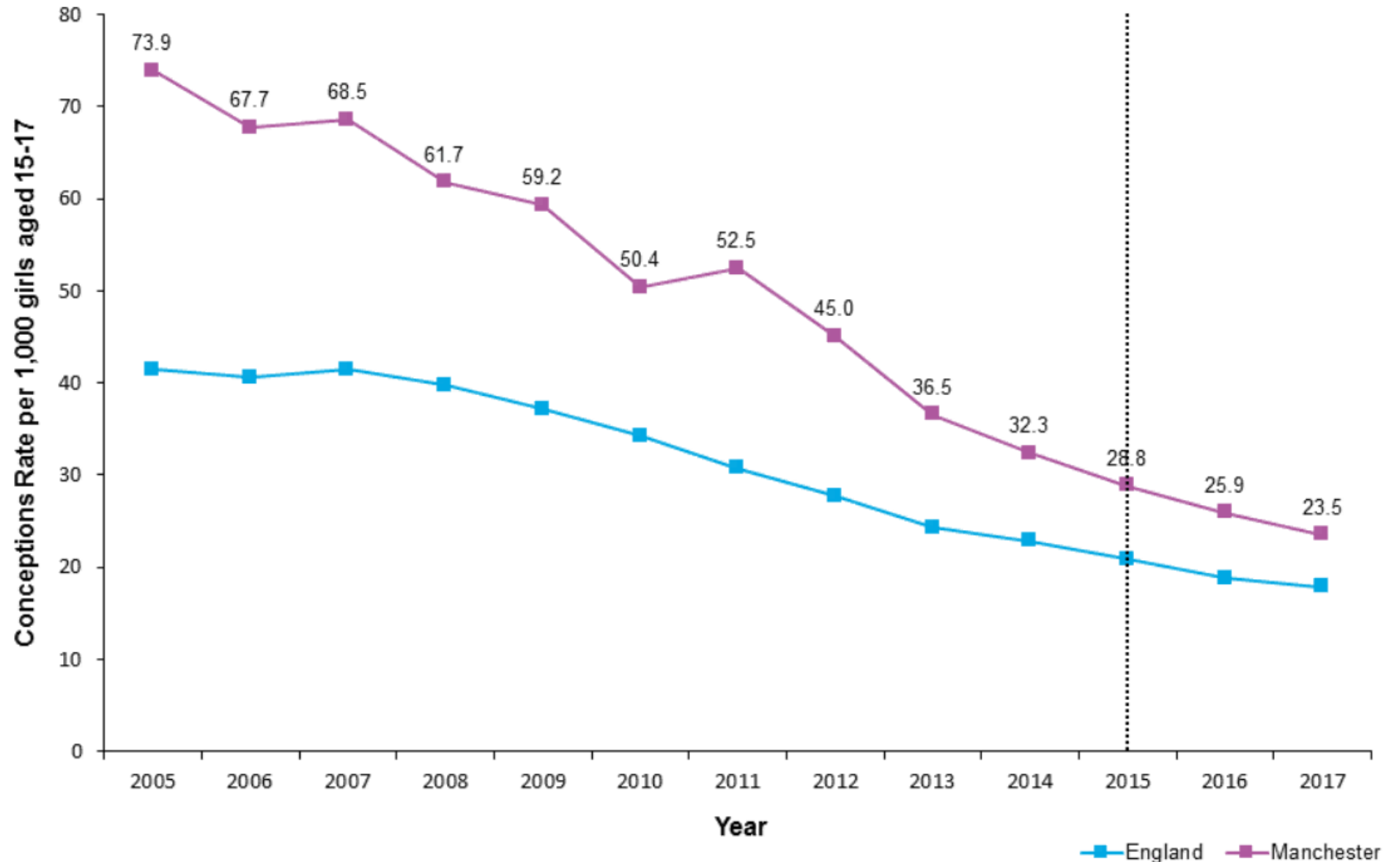
Our Manchester  
Strategy





## A health success of the last few years - fewer under-18 conceptions

The number of under-18 conceptions fell from 591 in 2005 to 185 in 2017.

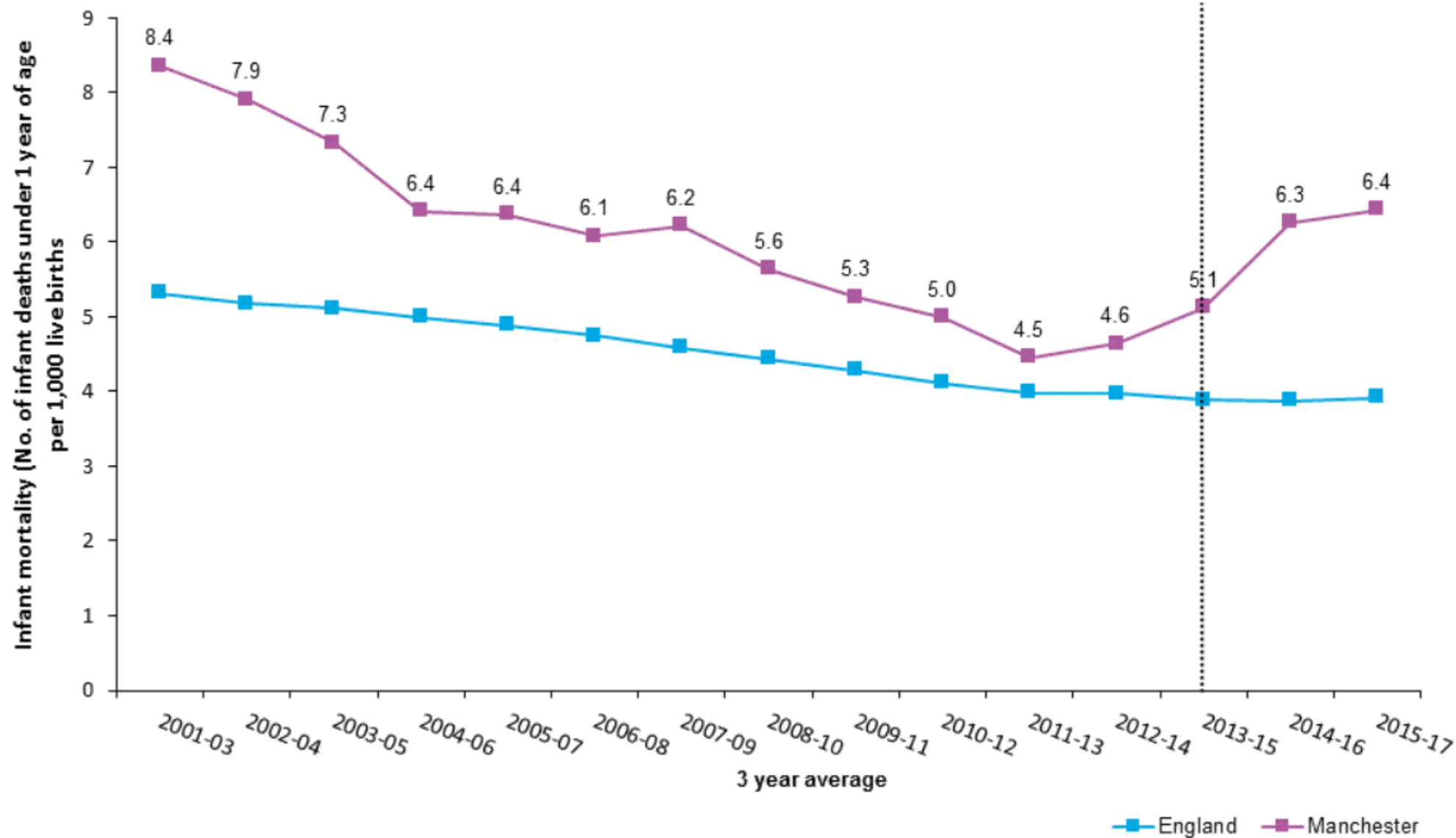


Source: Office for National Statistics © Crown Copyright 2019

## But a recent rise in Infant Mortality

Improvements in midwifery, neonatal care and general health care led to a fall of 32% between 1999-2001 and 2014-16.

2011-13 to 2014-16, the infant mortality rate rose by 39% whilst the number of live births has remained stable.



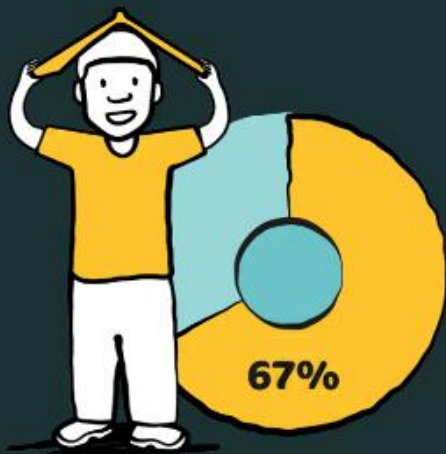
Source: Office for National Statistics © Crown Copyright 2018

## And challenges remain relating to childhood weight

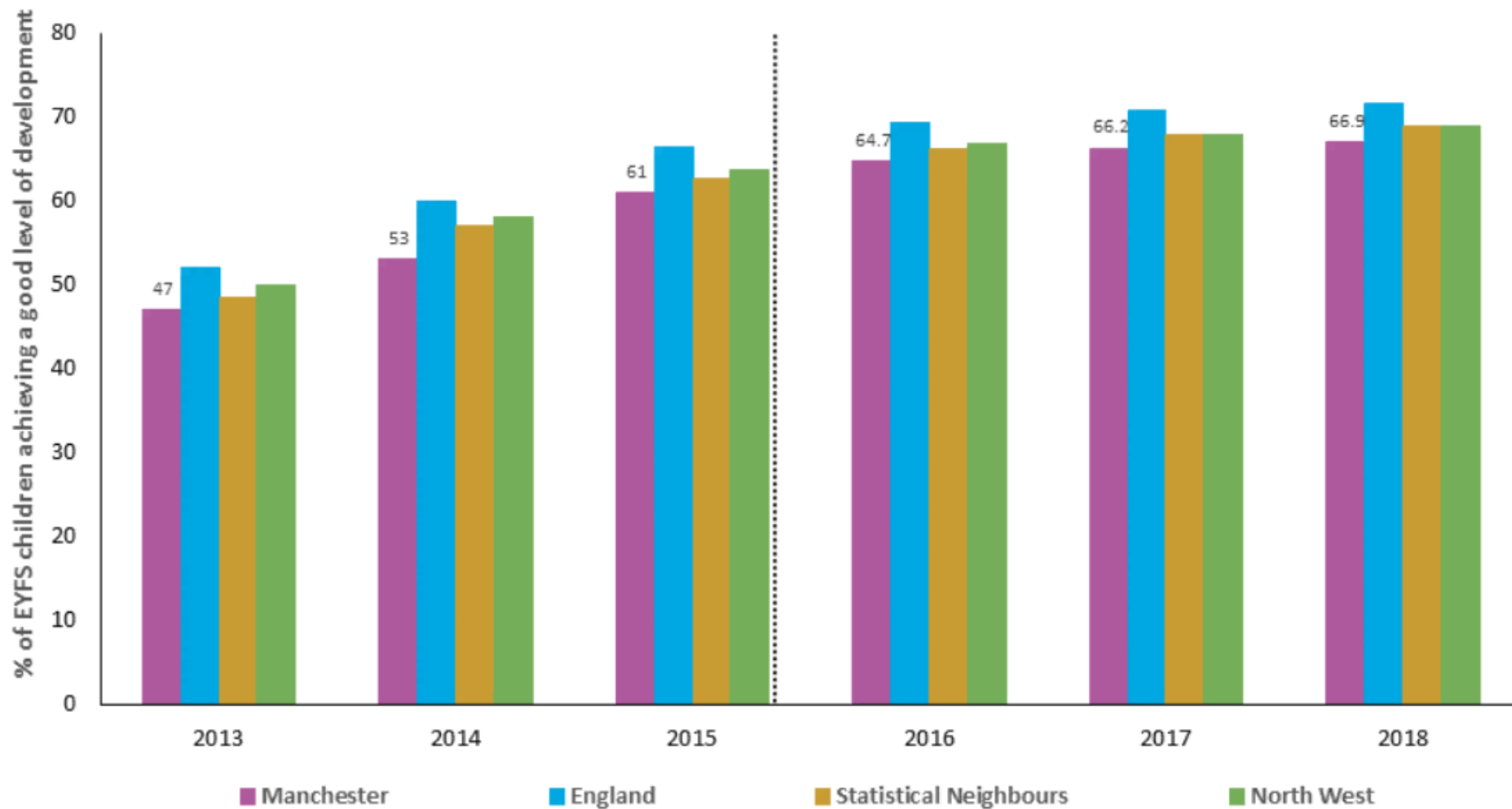
KPI	Period	Manchester	England	D.O.T
Proportion of children in Year 6 classified as overweight or obese	2017/18	40.8%	34.3%	Worsening

## 20% more children arriving at school 'ready to learn' compared to five years ago

But still lower than  
the national average  
(71.5%) and those of  
statistical  
neighbours and  
North West (68.9%).



School readiness



Source: Department for Education

Statistical neighbours: Birmingham, Bristol, Coventry, Greenwich, Liverpool, Middlesbrough, Newcastle upon Tyne, Nottingham, Salford and Southampton

45.4% of children in Manchester were living in poverty in 2017/18, the highest level of the UK Core Cities.

Rise of 2.4% since 2016/17, validating the increase predicted by the Institute of Fiscal Studies (IFS) in 2017.



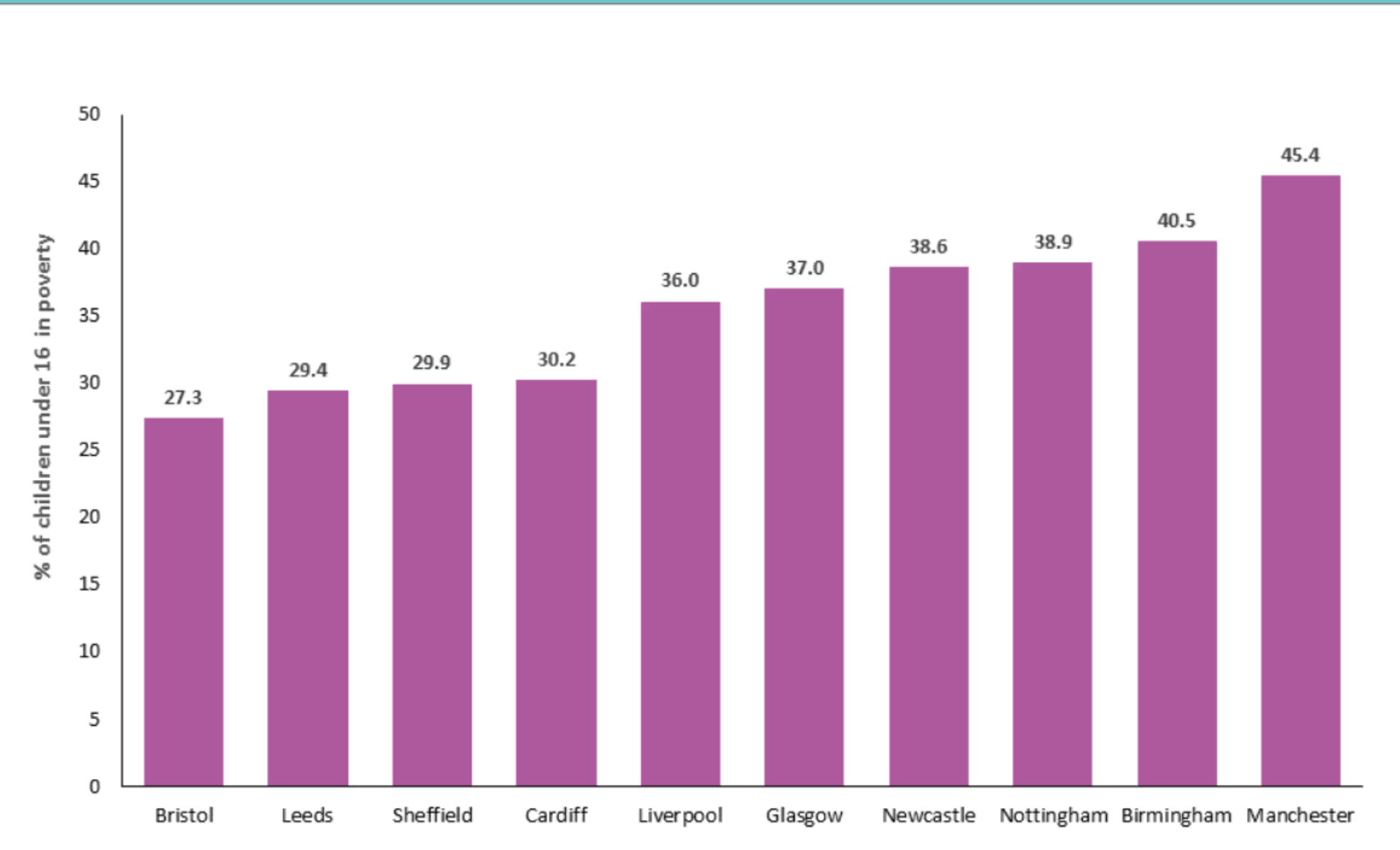
The Bread and Butter Thing



Manchester Poverty Truth Commission



# Highest Level of Family Poverty amongst Core Cities

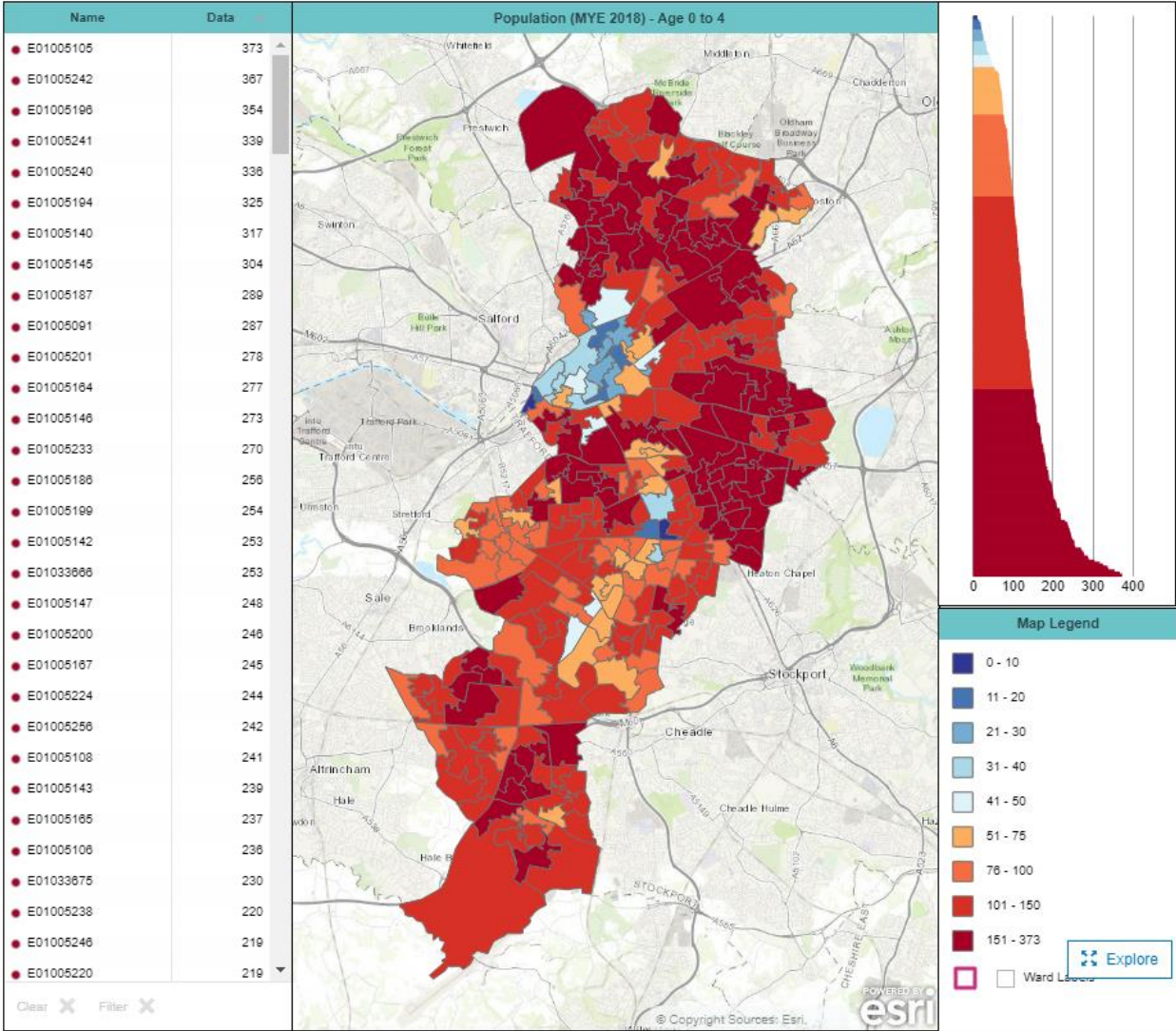
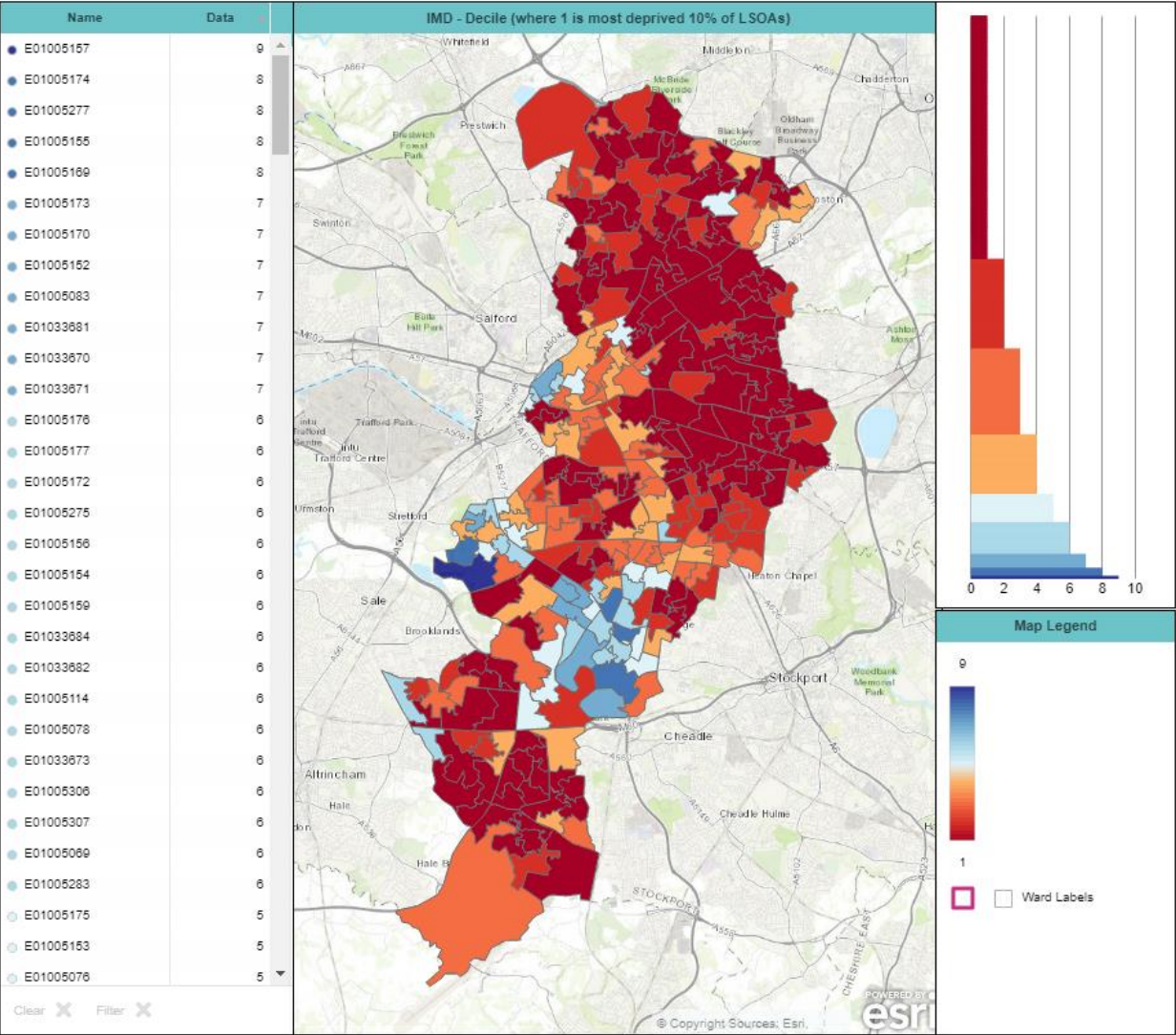


Source: End Child Poverty estimates, 2019



Deprivation 2019

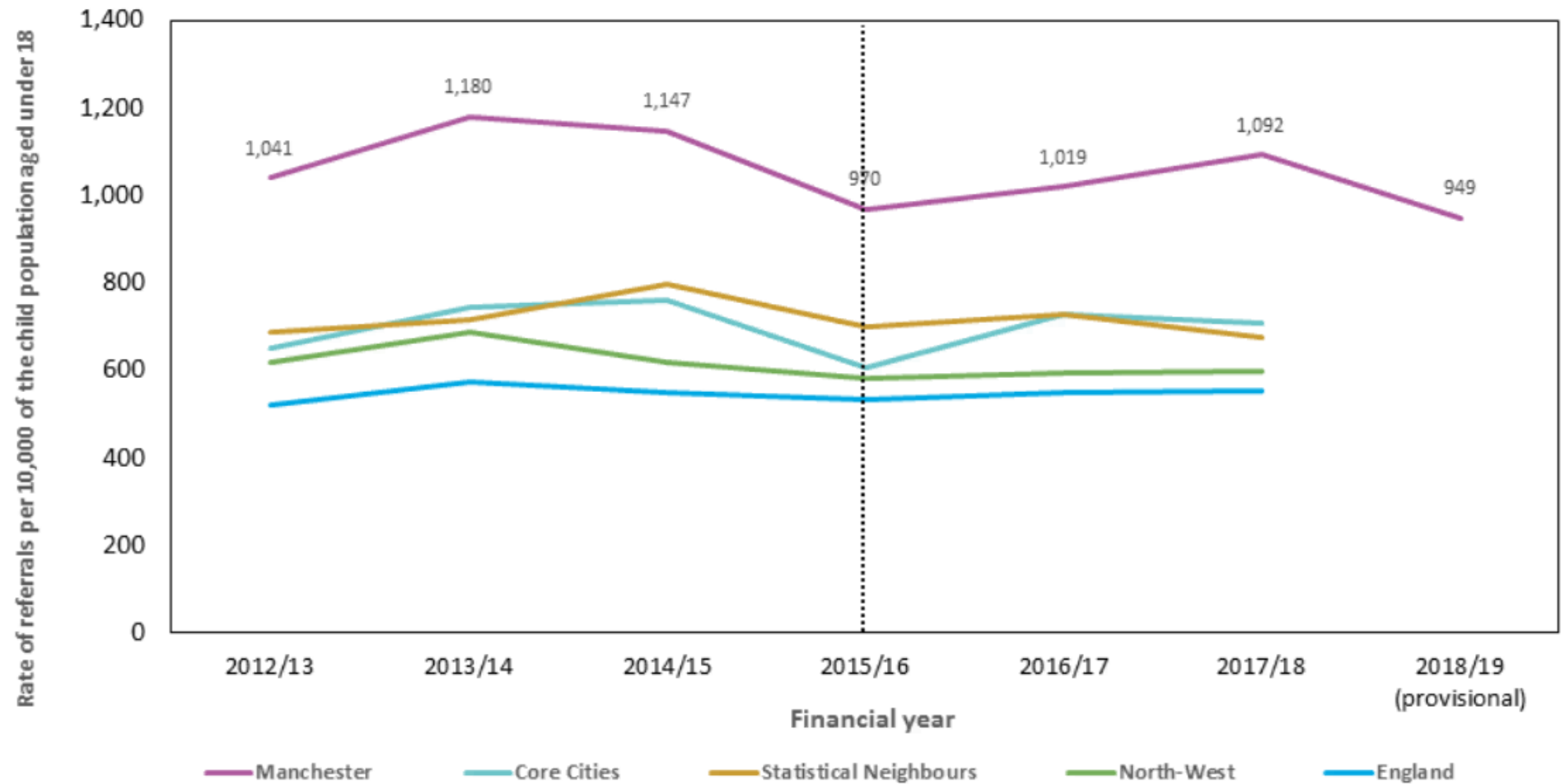
Explore levels of deprivation within smaller areas in Manchester



## Social Care Referrals Dipping Closer to Comparators

In 2018/19 provisional rate of referrals dipped below 1 in 10 for the first time since 2015/16.

Reform to the 'front door' for accessing children's social care has brought referral numbers down even further in 2019/20.



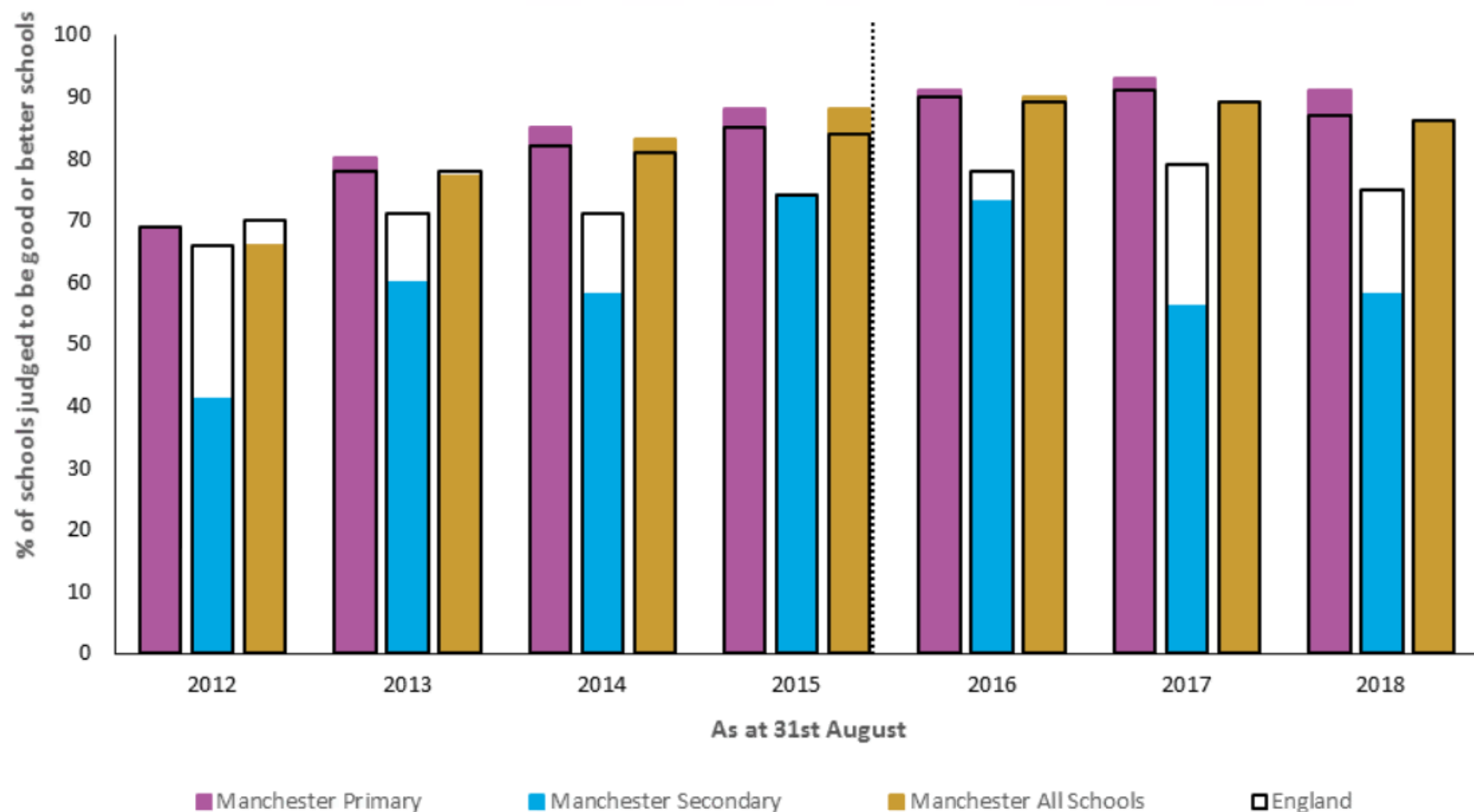
Source: Department for Education / MiCare

Statistical neighbours: Birmingham, Bristol, Coventry, Greenwich, Liverpool, Middlesbrough, Newcastle upon Tyne, Nottingham, Salford and Southampton

Core Cities: Birmingham, Bristol, Liverpool, Leeds, Manchester, Newcastle, Nottingham, Sheffield

## Ofsted school ratings - ahead of national average for primary, below for secondary

August 2018 - 91% of primary schools rated good or outstanding but only 58% of secondary schools.



Source: Ofsted

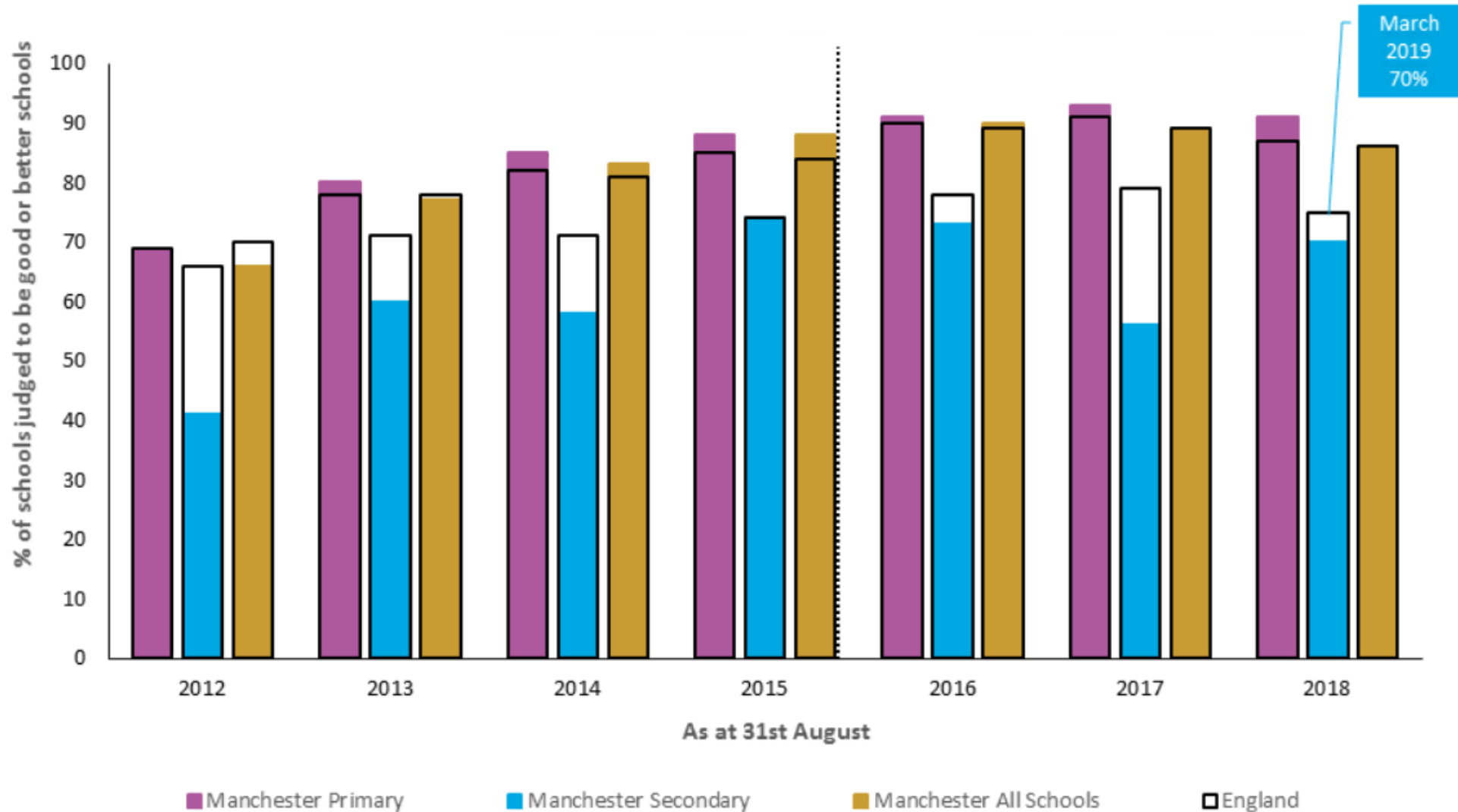




The proportion of secondary schools rated good or outstanding increased to 70% in March 2019 - following improved judgements at Burnage Academy for Boys, Loreto High and Co-op Academy North.

In addition, Manchester performs at national average on school attendance at primary and secondary level.

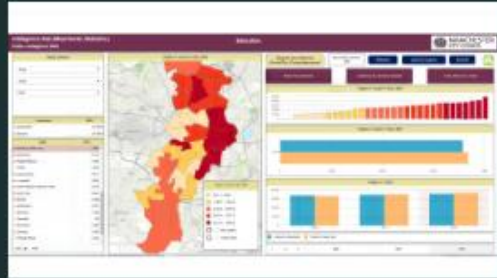
## Ofsted school ratings - ahead of national average for primary, below for secondary



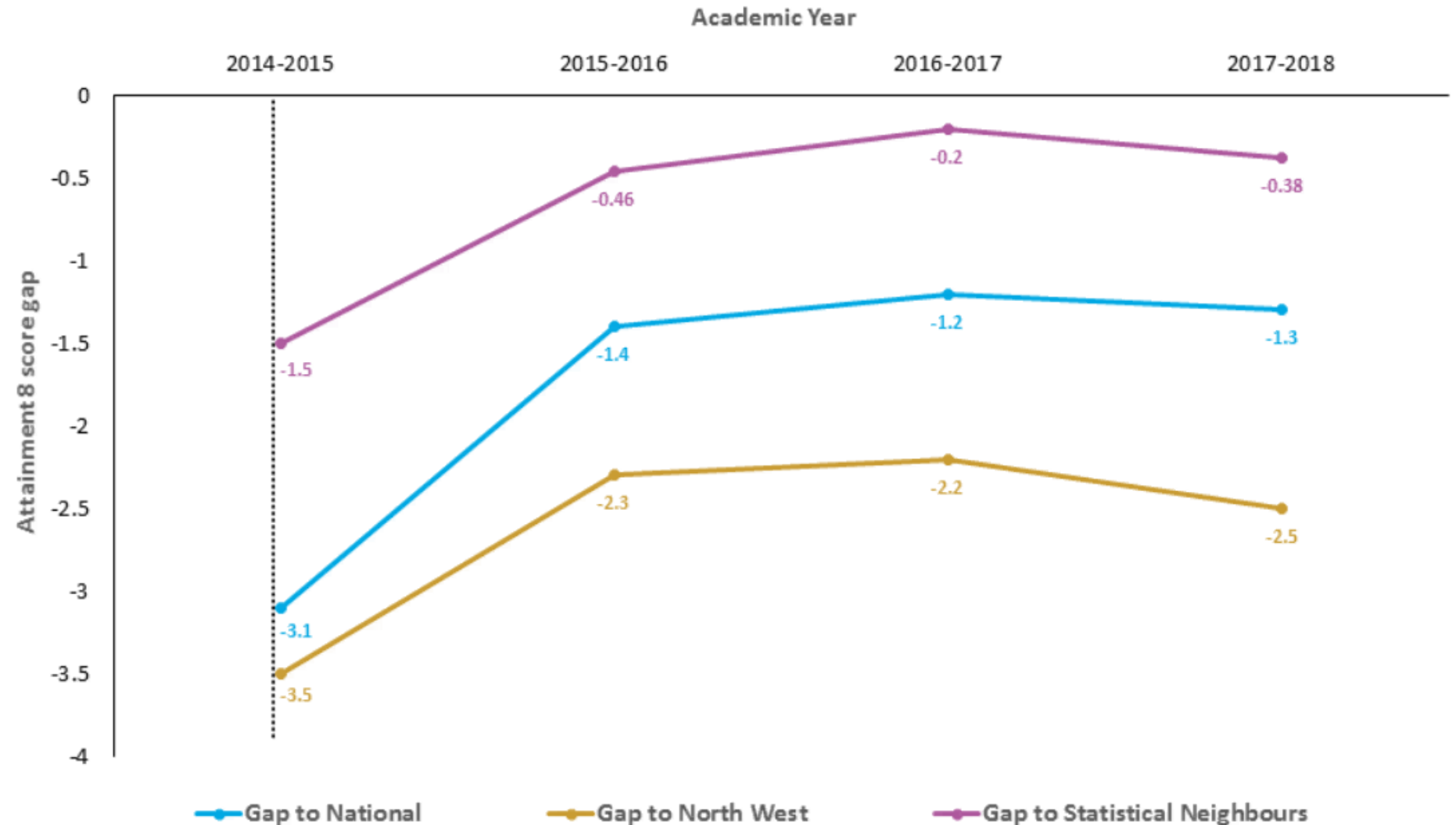
Source: Ofsted

## Key Stage 4: Despite this challenging context, Manchester has reduced the gap to National Average since 2015

### Education Dashboard



At 43.2, Manchester has a slightly lower Attainment 8 score than the national Attainment 8 score of 44.5.



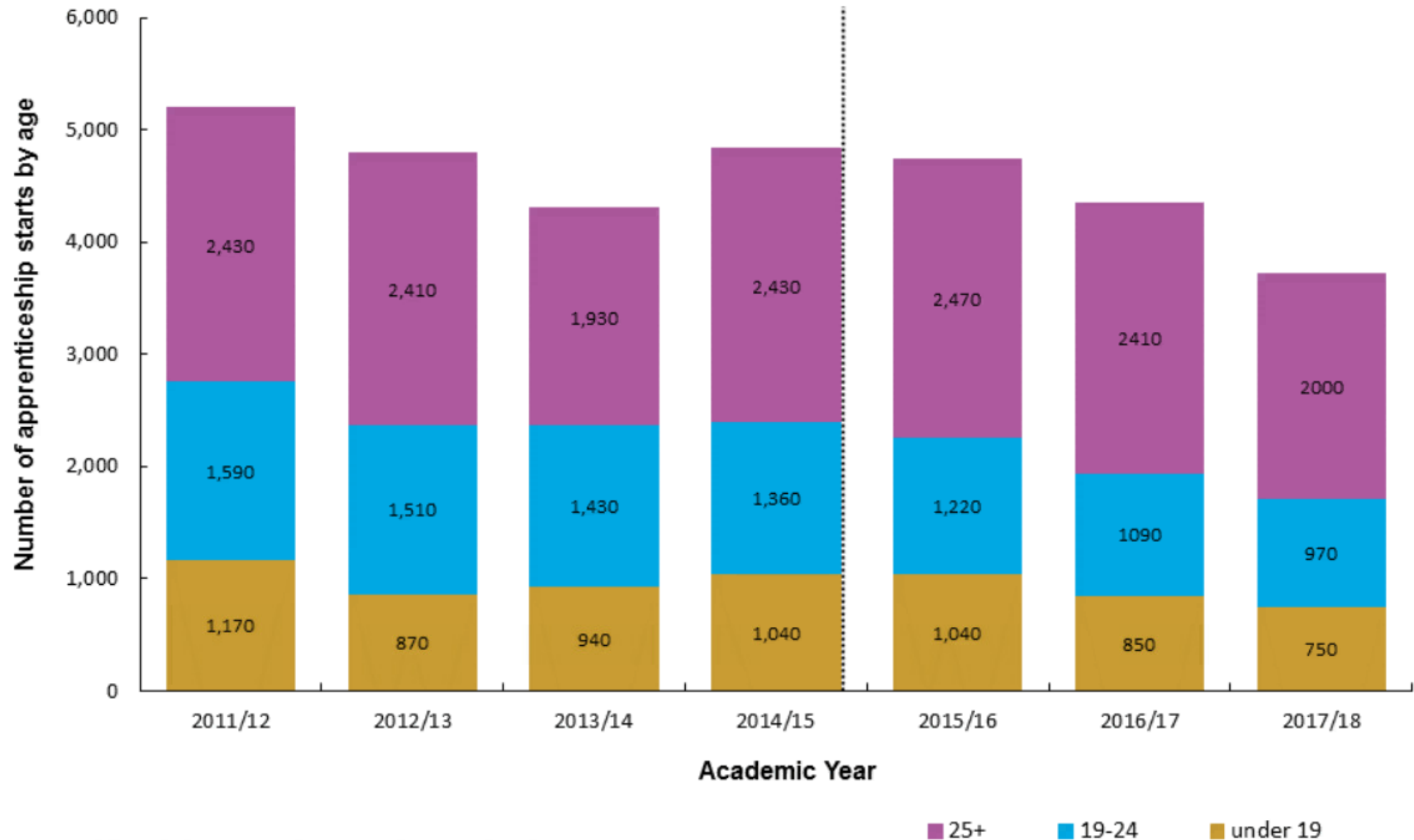
Source: Department for Education

Statistical neighbours: Birmingham, Bristol, Coventry, Greenwich, Liverpool, Middlesbrough, Newcastle upon Tyne, Nottingham, Salford and Southampton



## Apprenticeship numbers down as SMEs struggle to get to grips with the levy

Apprenticeship starts in Manchester and in England have both fallen by 28% from 2011/12.

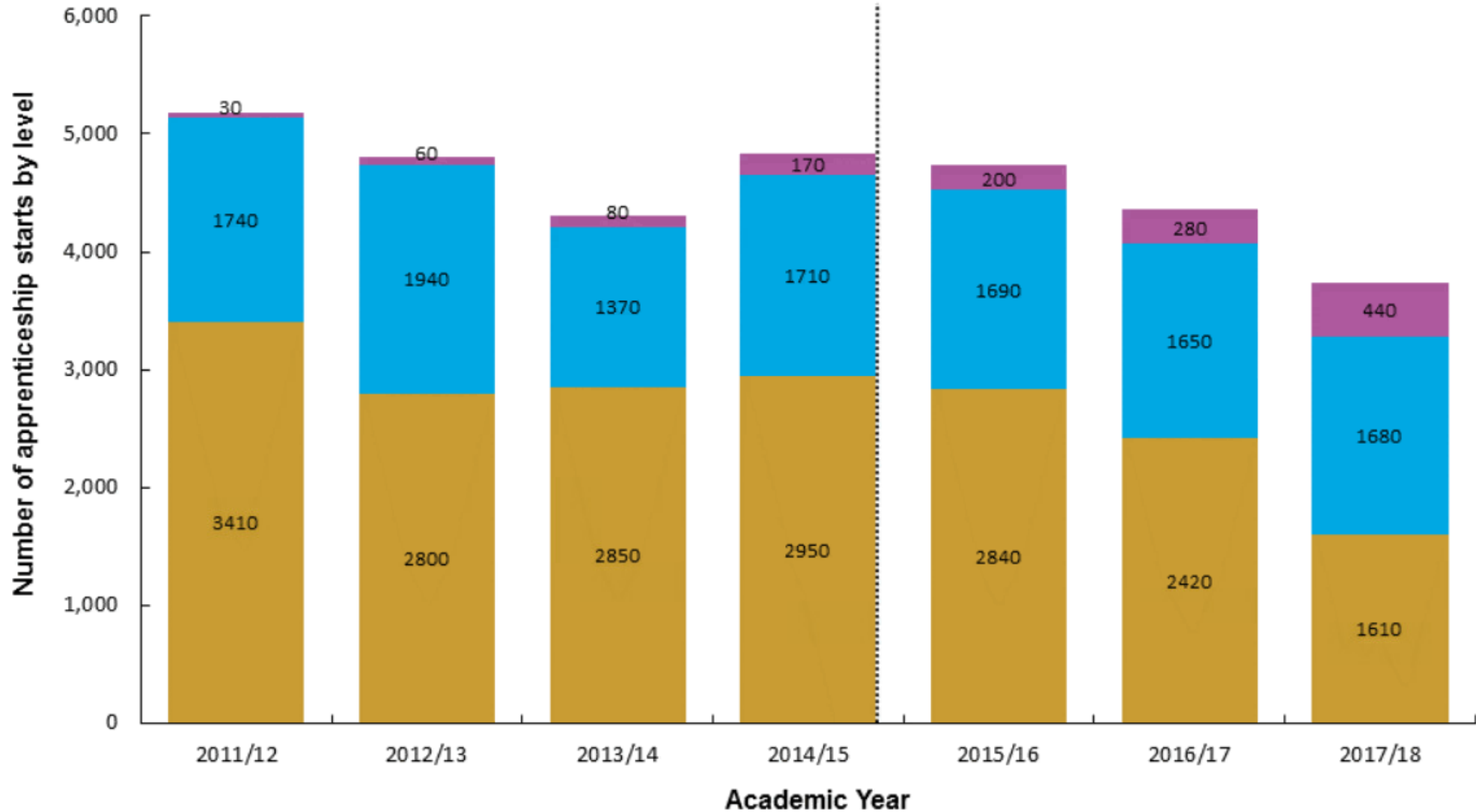


Source: Skills and Education Funding Agency (FE Data Library)

## Apprenticeship numbers down as SMEs struggle to get to grips with the levy

Higher level apprenticeship starts have more than doubled from 170 in 2014/15 to 440 in 2017/18.

Apprenticeship starts at intermediate and advanced level have either declined or remained the same since 2014/15.

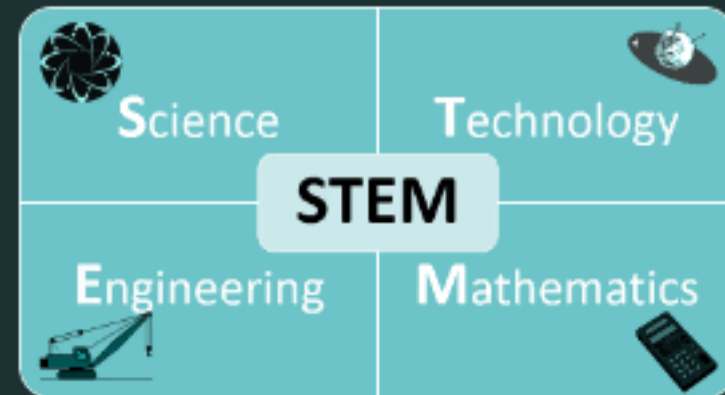


Source: Skills and Education Funding Agency (FE Data Library)

Higher Advanced Intermediate

**Over 8,300 A Level students, 5,000 16 to 18-year-olds enrolled in vocational education.**

**Over the past seven years the number of A level entries in STEM subjects has risen from 1,800 to 3,000, a proportionately higher growth than that for all A Levels.**

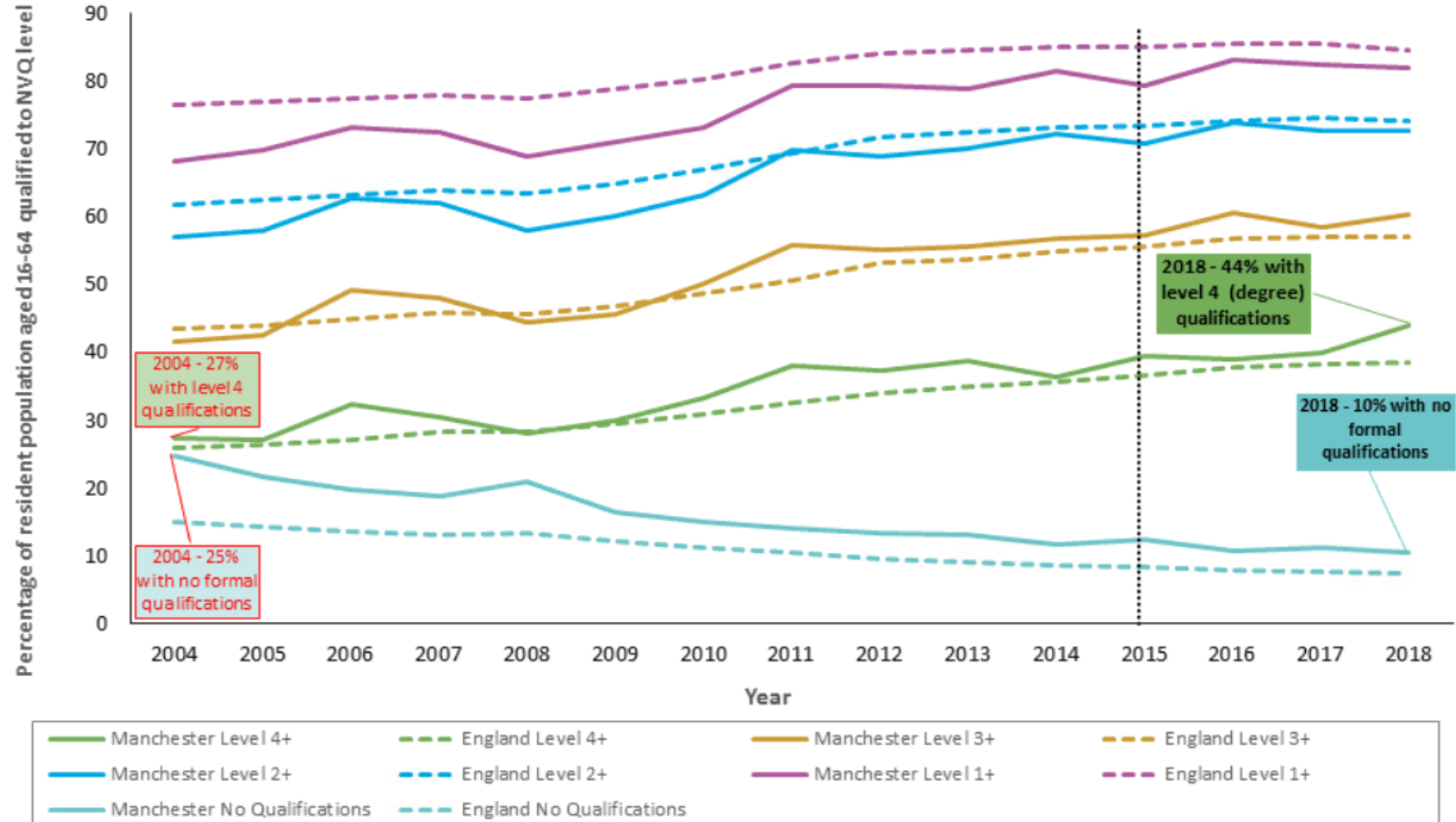


**Stem subjects**

## But Skill levels Continue to Improve

A high proportion of working-age residents are qualified to degree level or above, however, 1 in 10 still have no qualifications at all.

In January 2019, over 73,000 students enrolled at Manchester's two universities. Graduate retention amongst students from Manchester has varied between 36% and 42% over the last five years. In 2010 it was 27%.





• **Developing well** •





over  
**65,000**

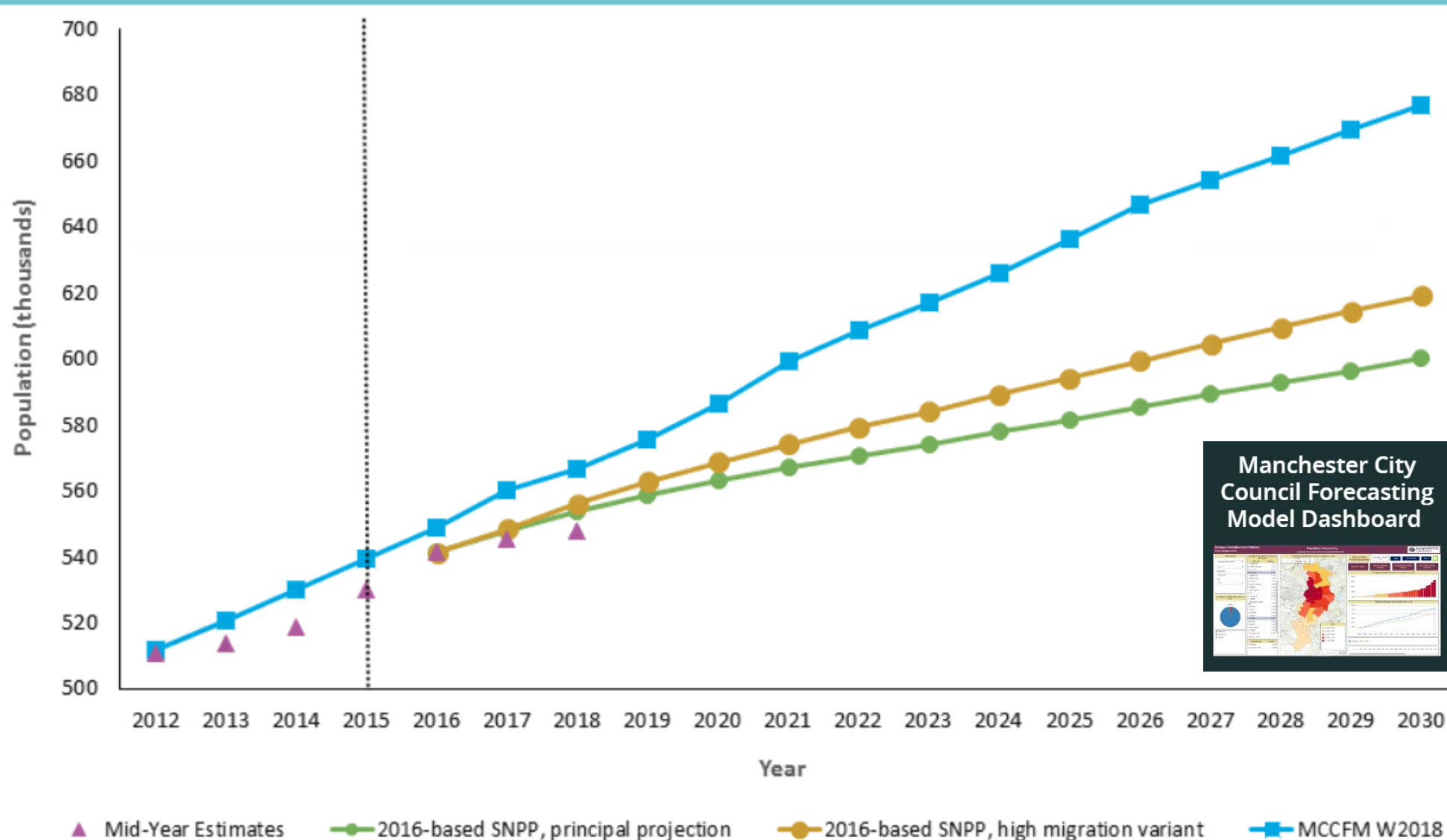


residents expected  
by mid-2019

Manchester's wider city-centre is expected to house 65,200 residents by mid-2019, 5,000 more than a year earlier. In 2004, the city centre population [what is now Deansgate and Piccadilly wards] was 10,315, now it's 29,400.

Expected new apartment-led residential development will lead to 100,000 residents by 2025.

## Manchester population forecast to breach 600,000 in two years



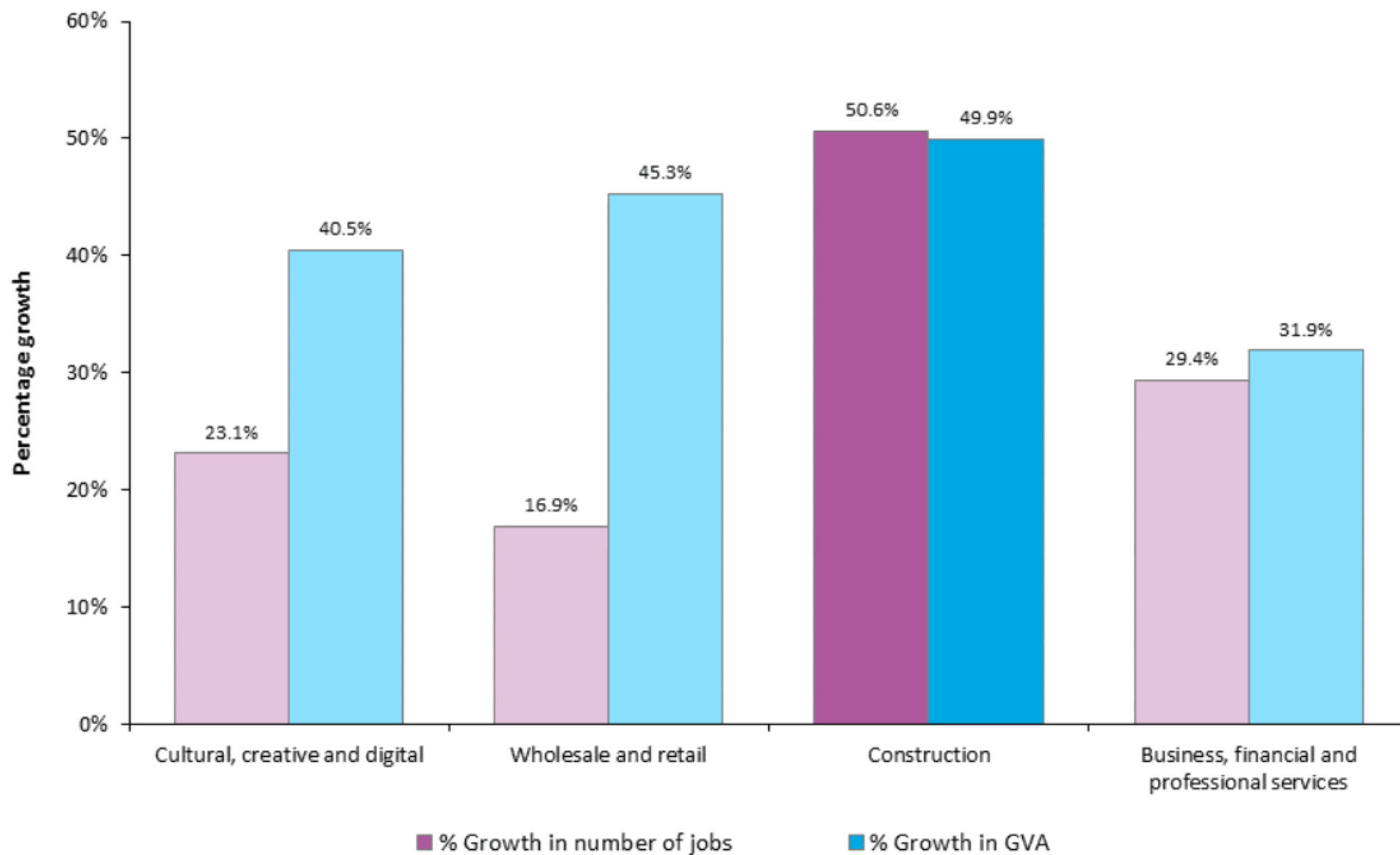
Sources: Mid Year Estimates (MYE) of population and Subnational Population Projections (SNPP), ONS © Crown Copyright; MCCFM W2018, Manchester City Council (PRI)

# 15-50% jobs growth projected by 2025 amongst high-growth sectors



Jobs growth

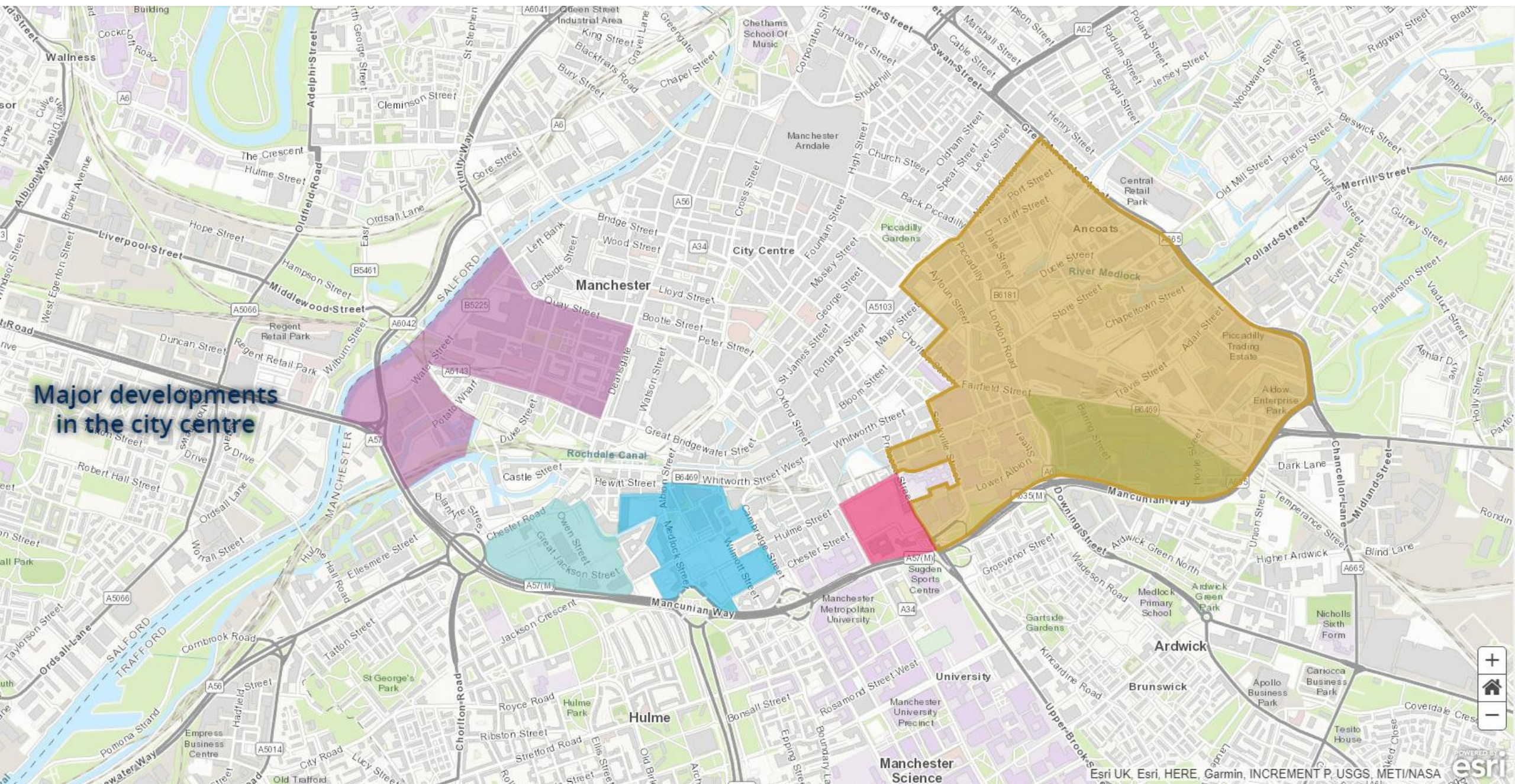
Construction in particular is now projected to grow at a significant rate, driven by some of the major developments including Mayfield, Piccadilly, St John's and Great Jackson Street.



Source: Greater Manchester Forecasting Model (2018), Oxford Economics



## Major developments in the city centre

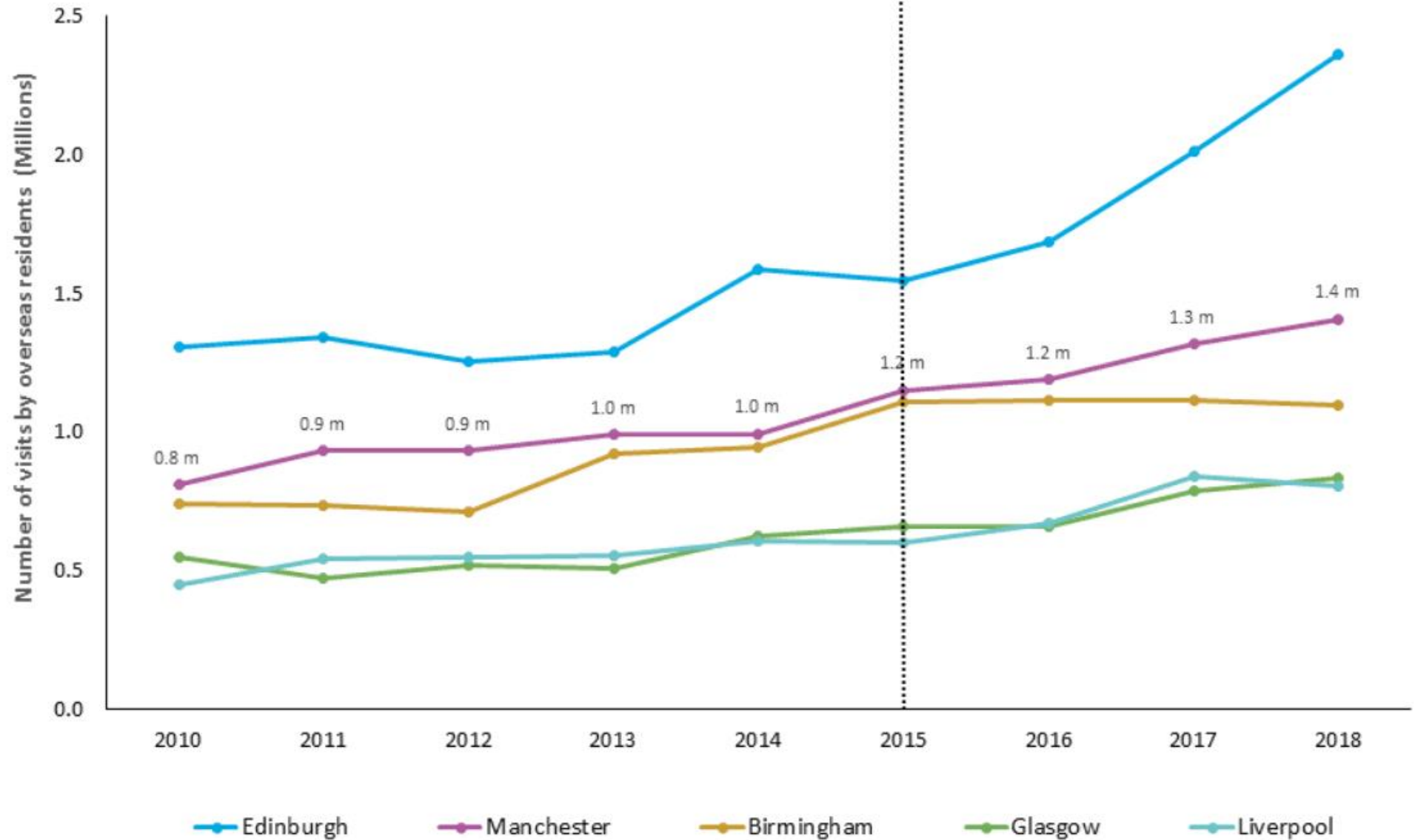




## Total number of international visits to Manchester increased by 74% since 2010

Third-most visited UK destination by international visitors after London and Edinburgh, with 1.4 million visitors in 2018.

The Irish Republic, Germany and the USA continue to generate the highest volume of international leisure visits, followed by The Netherlands, Spain and China.



Source: International Passenger Survey, Visit Britain / ONS

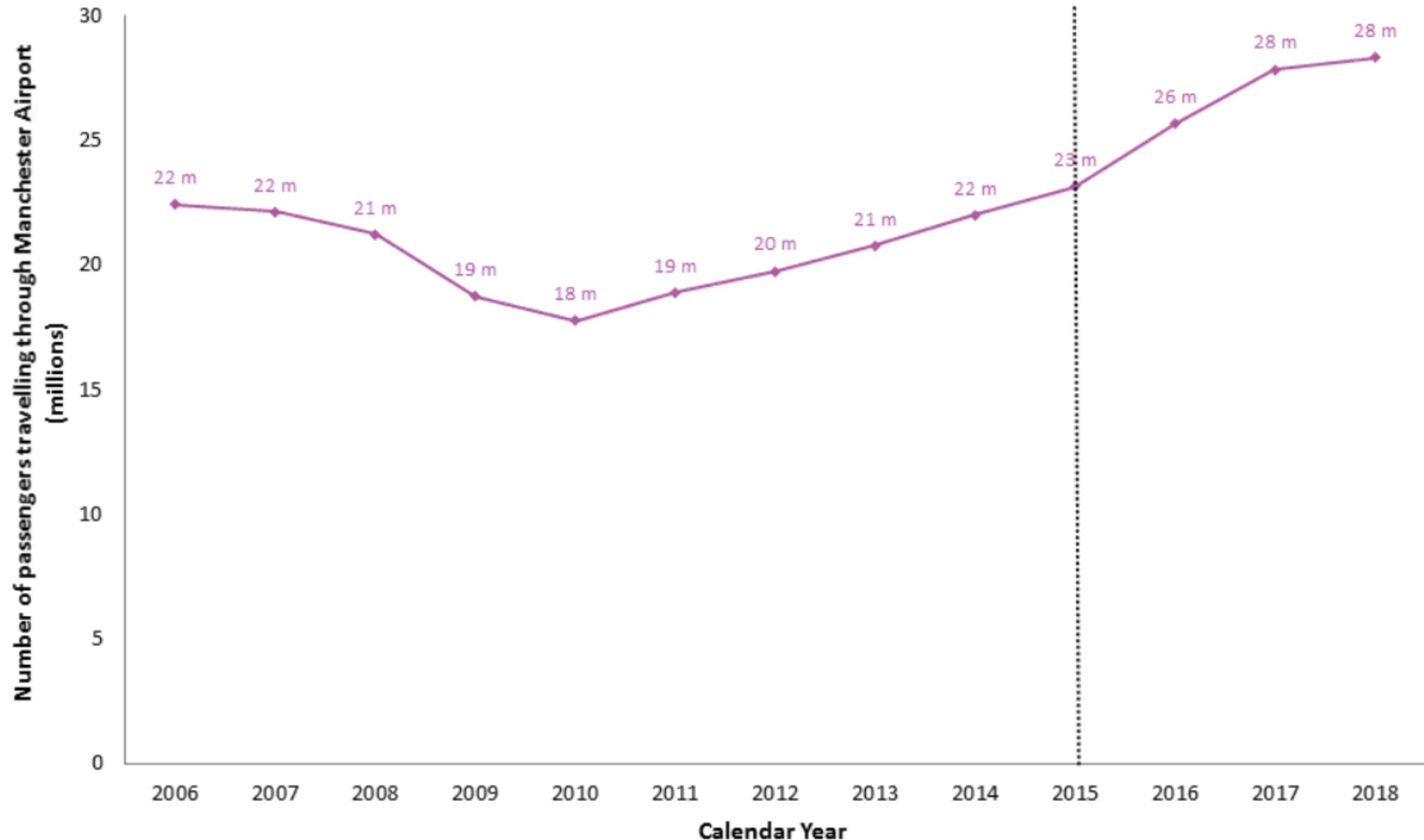
# Airport Passenger Numbers Growth Trajectory Increasing



Airport

Rise of 5.2 million passengers since 2015, to 28.3 million passengers in 2018.

£1billion transformation programme due to be completed in 2024, maximising the capacity of the Airport to be able to carry 55 million passengers a year.



Source: Civil Aviation Authority © Crown Copyright 2018



## The cultural offer in the city centre is also a big draw with its top 10 venues each attracting more than 100,000 visits

Type	Location	2015	2016	2017	2018	Admittance (2018)
1	Museum of Science and Industry	695,275	651,473	663,923	704,732	Free*
2	Manchester Art Gallery	593,169	593,168	641,045	655,490	Free
3	HOME (Greater Manchester Arts Centre Ltd) **	619,658	837,621	680,000	650,731	Free*
4	National Football Museum	411,991	481,541	468,129	523,366	Free
5	Manchester Museum	453,970	406,997	521,209	476,759	Free*
6	The Whitworth **	400,257	321,269	314,884	359,380	Free*
7	The John Rylands Library	178,453	242,892	284,435	308,820	Free
8	Runway Visitor Park Manchester Airport	360,500	338,450	305,000	307,450	Free
9	Manchester Cathedral	153,209	176,704	179,673	173,011	Free
10	The People's History Museum	86,595	93,404	104,827	127,800	Free

\* An entrance fee may be charged to specific exhibitions, performances and activities held within the venue, while other spaces are free admittance.

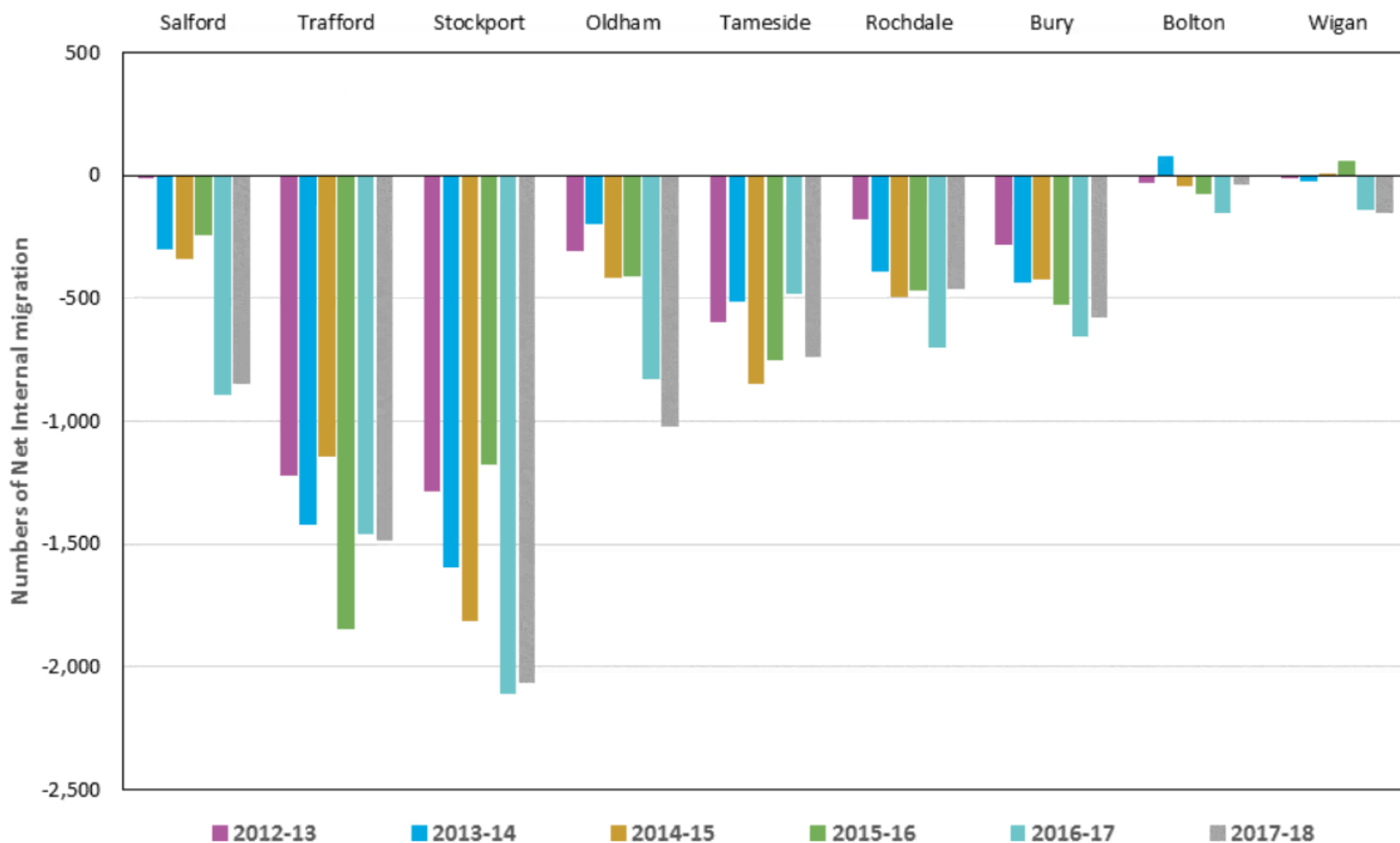
\*\* HOME opened in April 2015 and The Whitworth reopened in February 2015, so the totals do not reflect a full calendar year

Source: STEAM

*Top visitor attractions in Greater Manchester that are located in Manchester*

## The City is an attractive place to work, study, live and visit ... but still loses younger high-skilled families to Stockport and Trafford

Emigration from Manchester to other GM districts continues to outstrip immigration, particularly to the more affluent areas of Stockport and Trafford.

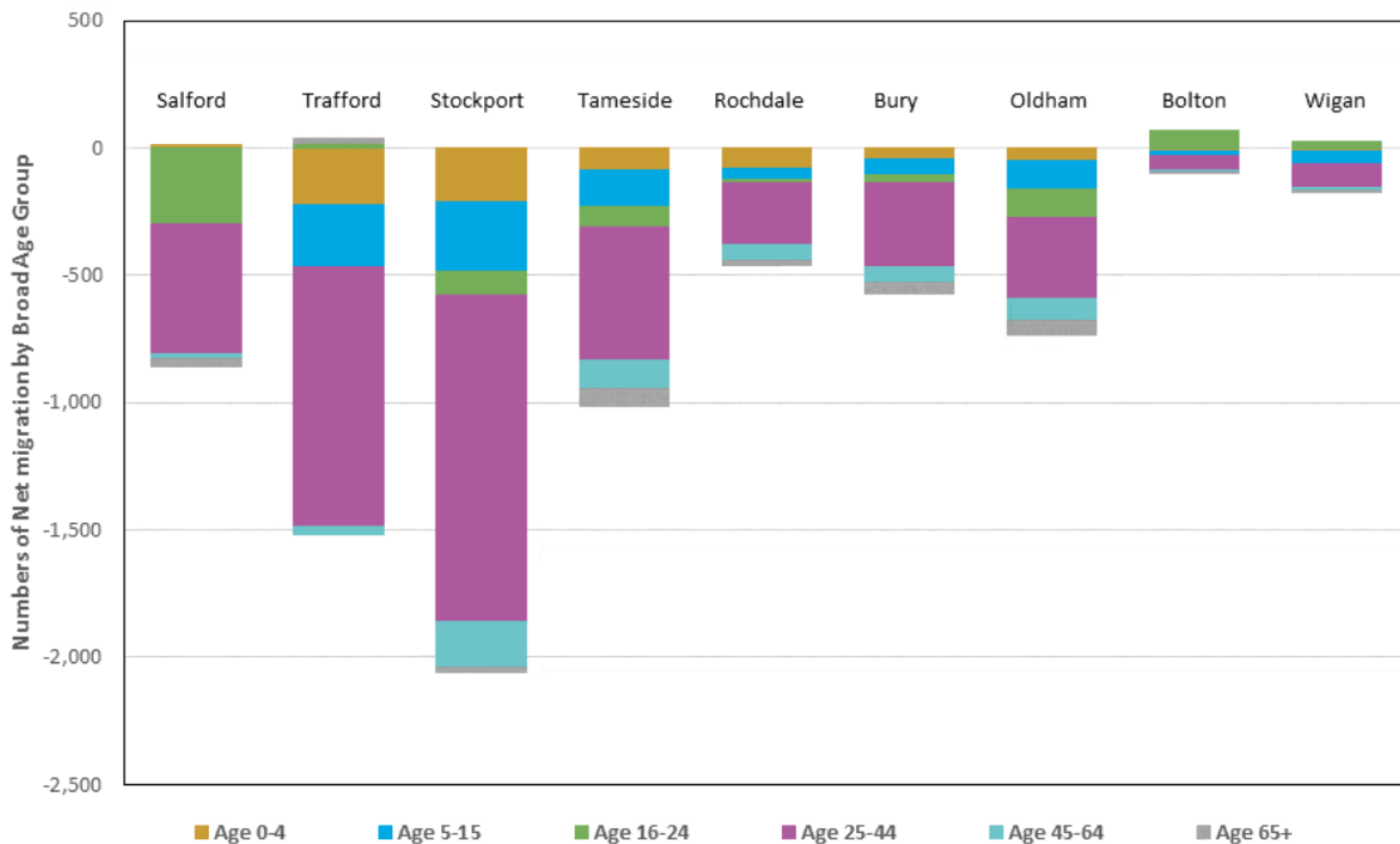


Source: ONS LA square matrices 2018

## The City is an attractive place to work, study, live and visit ... but still loses younger high-skilled families to Stockport and Trafford

Between mid-2017 and mid-2018, 7,361 more people moved away to other GM districts than moved in, a similar number to the previous year.

Manchester has lost families with children to Stockport and Trafford over the last five years, continuing into 2018.



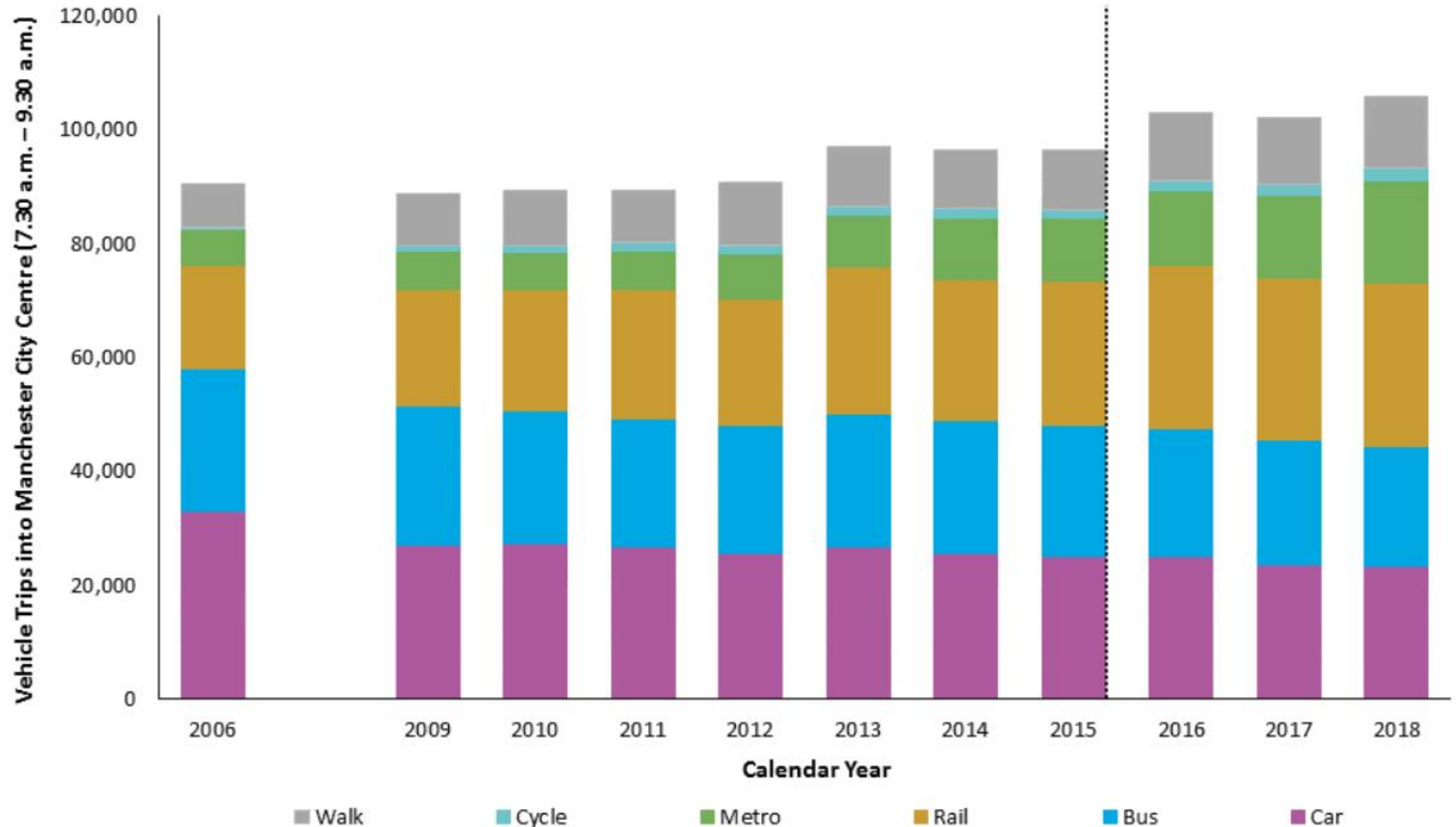
Source: ONS LA square matrices 2018

## Car travel has declined by 6% since 2015 and its share of city centre trips has fallen from 26% to 22%



Trips into Manchester City Centre

Walking and cycling have increased by 19% and 29% respectively. Walking has increased its share of trips from 11% to 12%, with cycling remaining at a 2% share.



Source: Manchester city centre cordon count, TfGM © Crown Copyright 2018

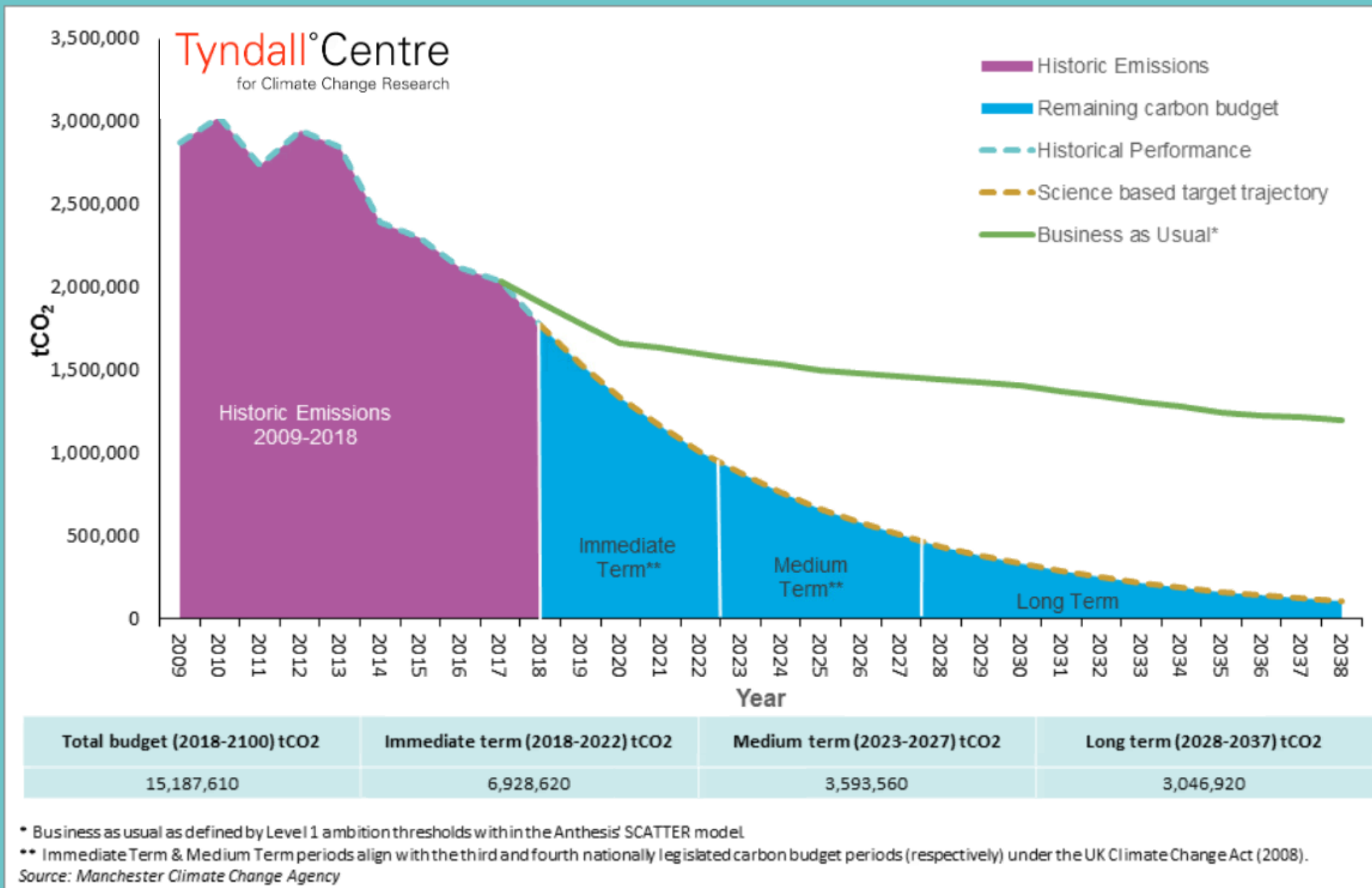
Note: No data is available for 2007 and 2008.

# Manchester on track to reduce CO<sub>2</sub> by 41% from 2005 baseline by 2020 hitting its target... but BAU will not deliver zero carbon by 2038

Manchester is one of the first cities in the world to establish science-based carbon reduction targets.

The Tyndall Centre for Climate Change Research calculated Manchester's Paris aligned carbon budget as 15 million tonnes (MtCO<sub>2</sub>) for the period 2018 to 2100.

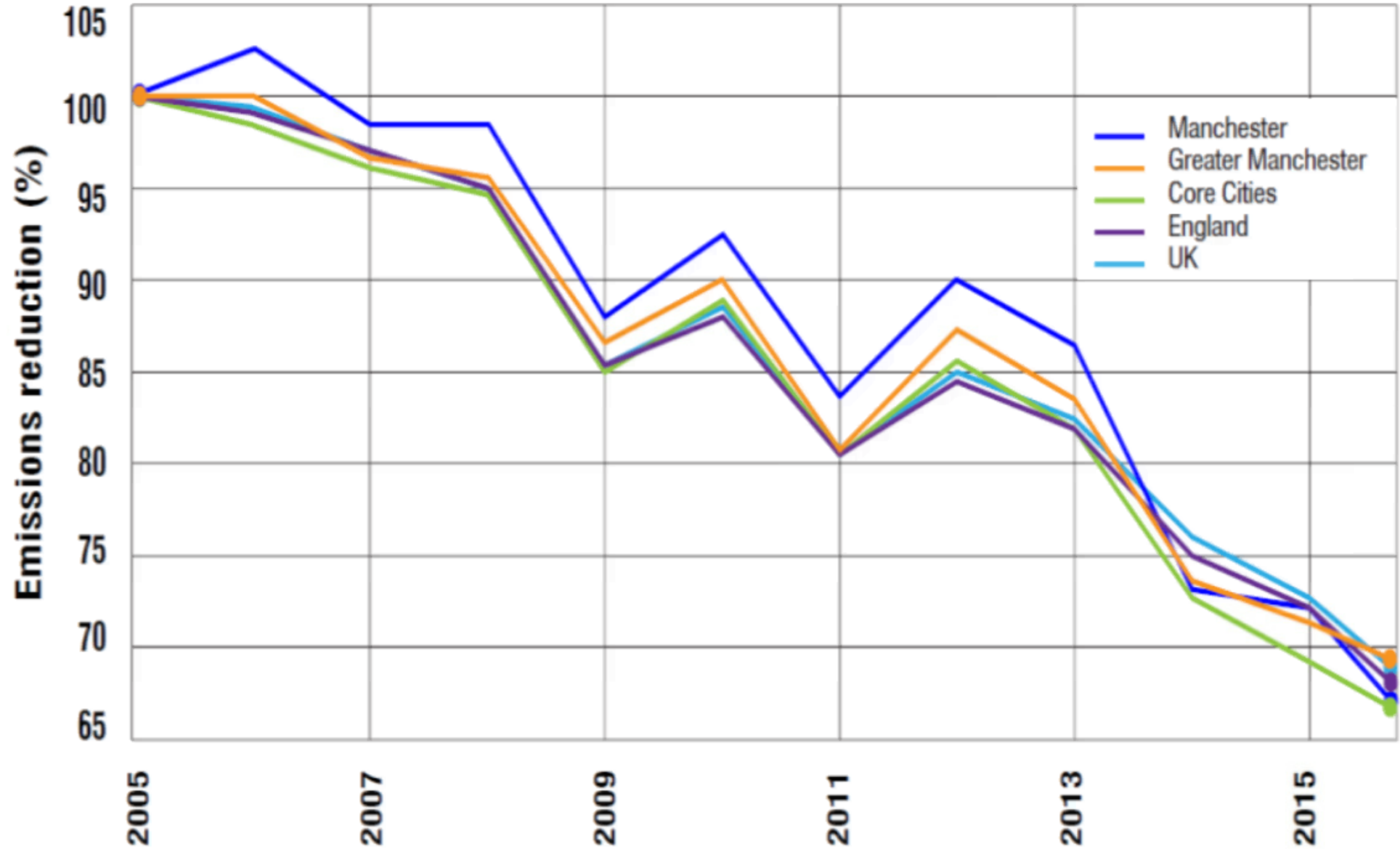
To stay within the budget the city must reduce its carbon emissions by at least 13% every year which means roughly halving emissions every 5 years, and become zero carbon no later than 2038.





Manchester on track to reduce CO<sub>2</sub> by 41% from 2005 baseline by 2020  
hitting its target... but BAU will not deliver zero carbon by 2038

However comparatively higher emissions reduction from the business sector have put Manchester ahead of Core Cities and GM in terms of emission reductions since 2005.



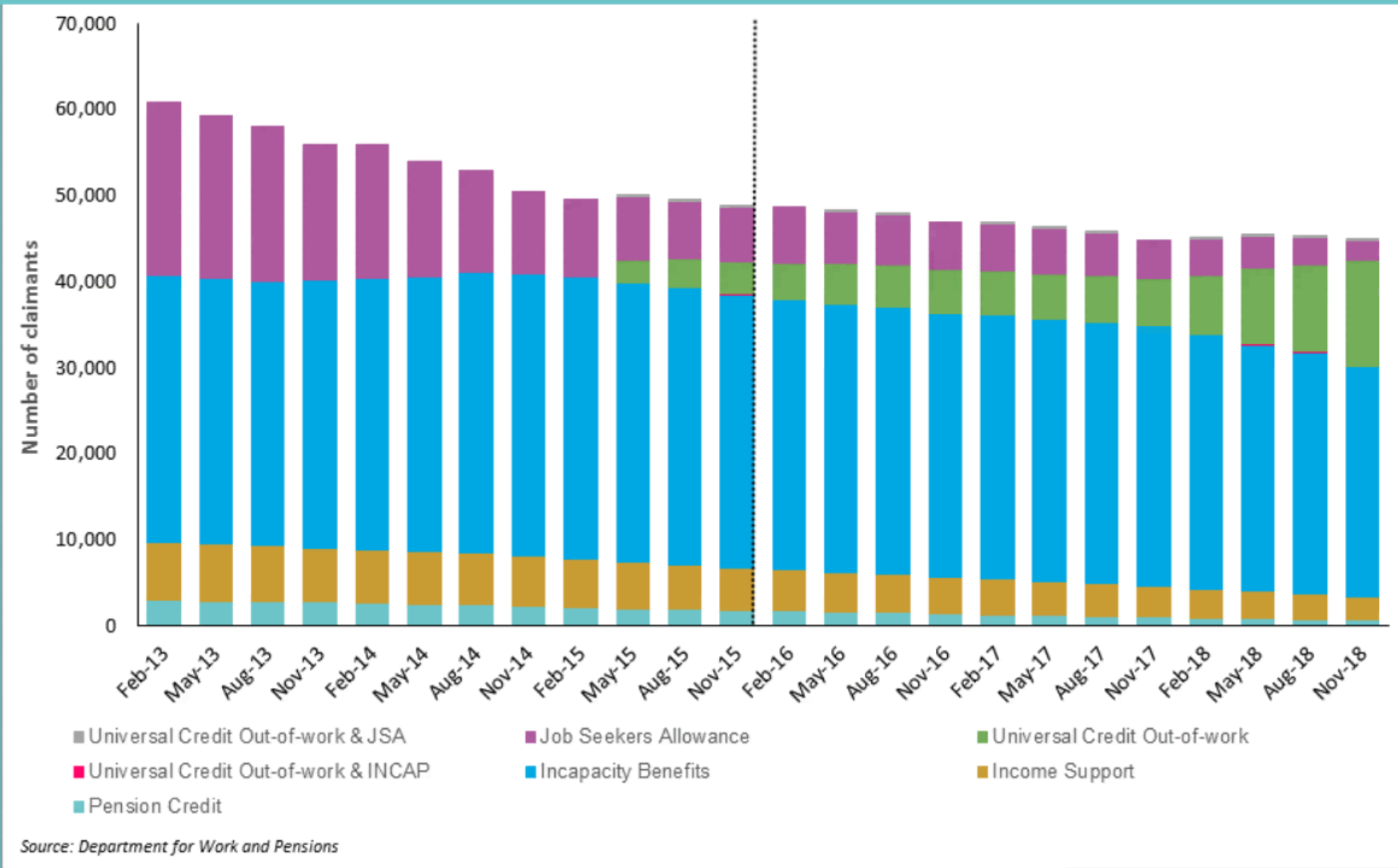
Source: Manchester Climate Change Agency & Department for Business, Energy and Industrial Strategy (Graph)

At 11.6% in November 2018, the out-of-work benefits claimant rate for those aged 16 and over in Manchester remains higher than the Great Britain rate of 8.4%.

However, between November 2015 and November 2018 the gap to national average closed 0.7 percentage points.

In work poverty remains a significant issue - a large proportion of Manchester residents rely on in-work benefits to top up their income.

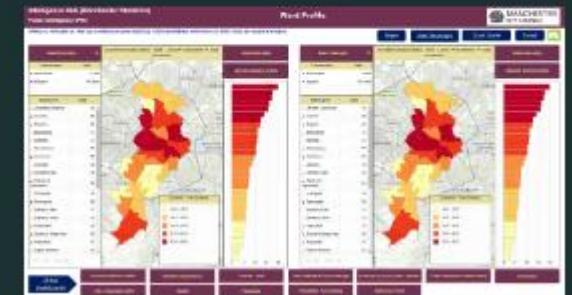
And inclusivity in our economic growth is a challenge, evidenced by the proportion of residents earning less than the Real Living Wage and the Out of Work Benefits claimant rate





**Disparity between Manchester resident employees (28%) and Manchester workforce employees (18%) earning less than the Real Living Wage stands at 10% and is the highest amongst core cities (2018 - £8.75/hr).**

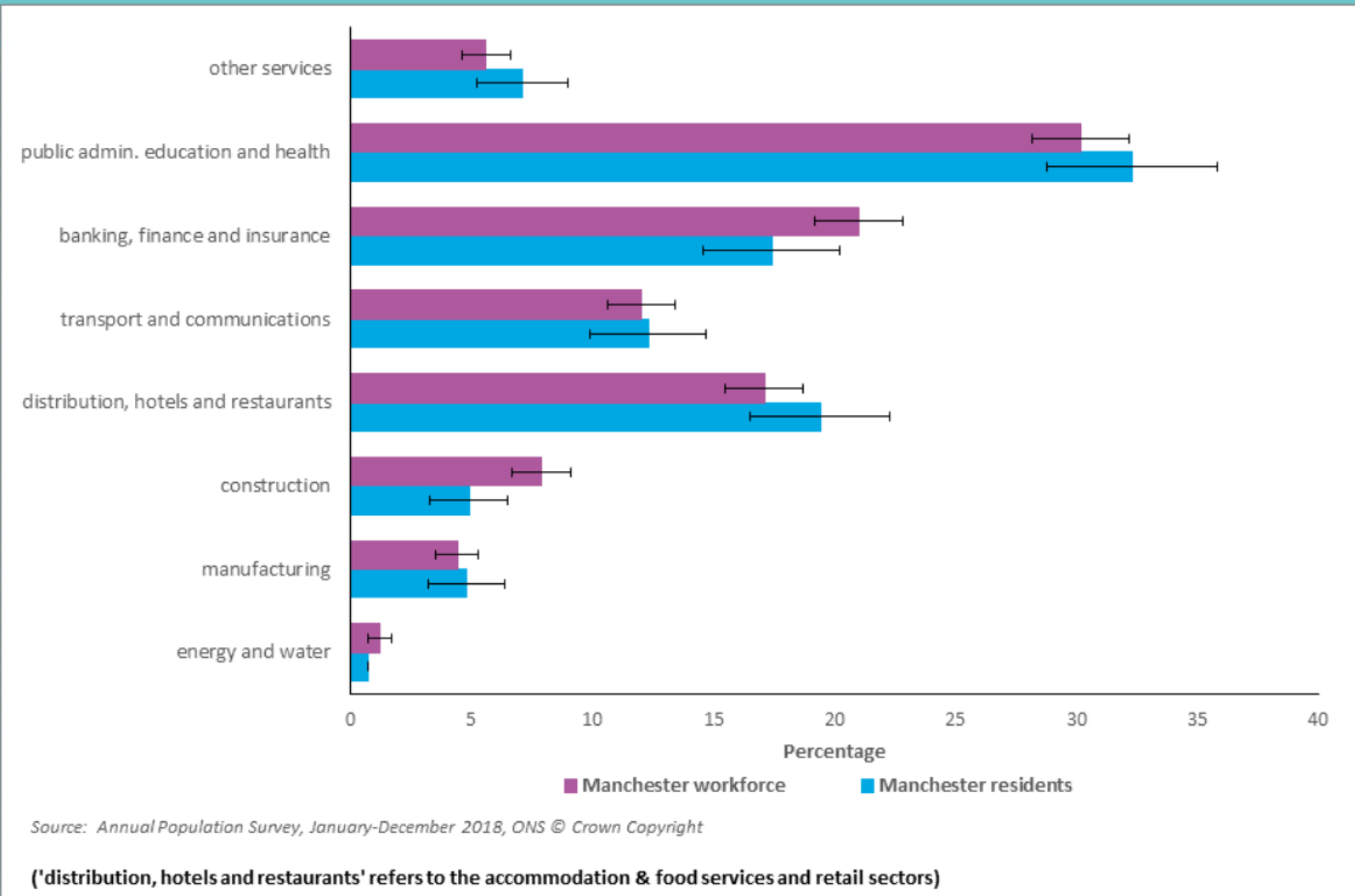
### Intelligence Hub - Ward Profile



**Low-level earnings for Manchester residents come as a result of them being concentrated in lower-skilled occupations: 39% of residents work in low-skilled roles compared with 29% of those who work in the city but live outside it.**

*(Source: Ekosgen Research into Adult Skills for Manchester City Council, 2019)*

**Manchester residents less likely to work in banking, finance & insurance, and more likely to work in accommodation & food services and retail.**



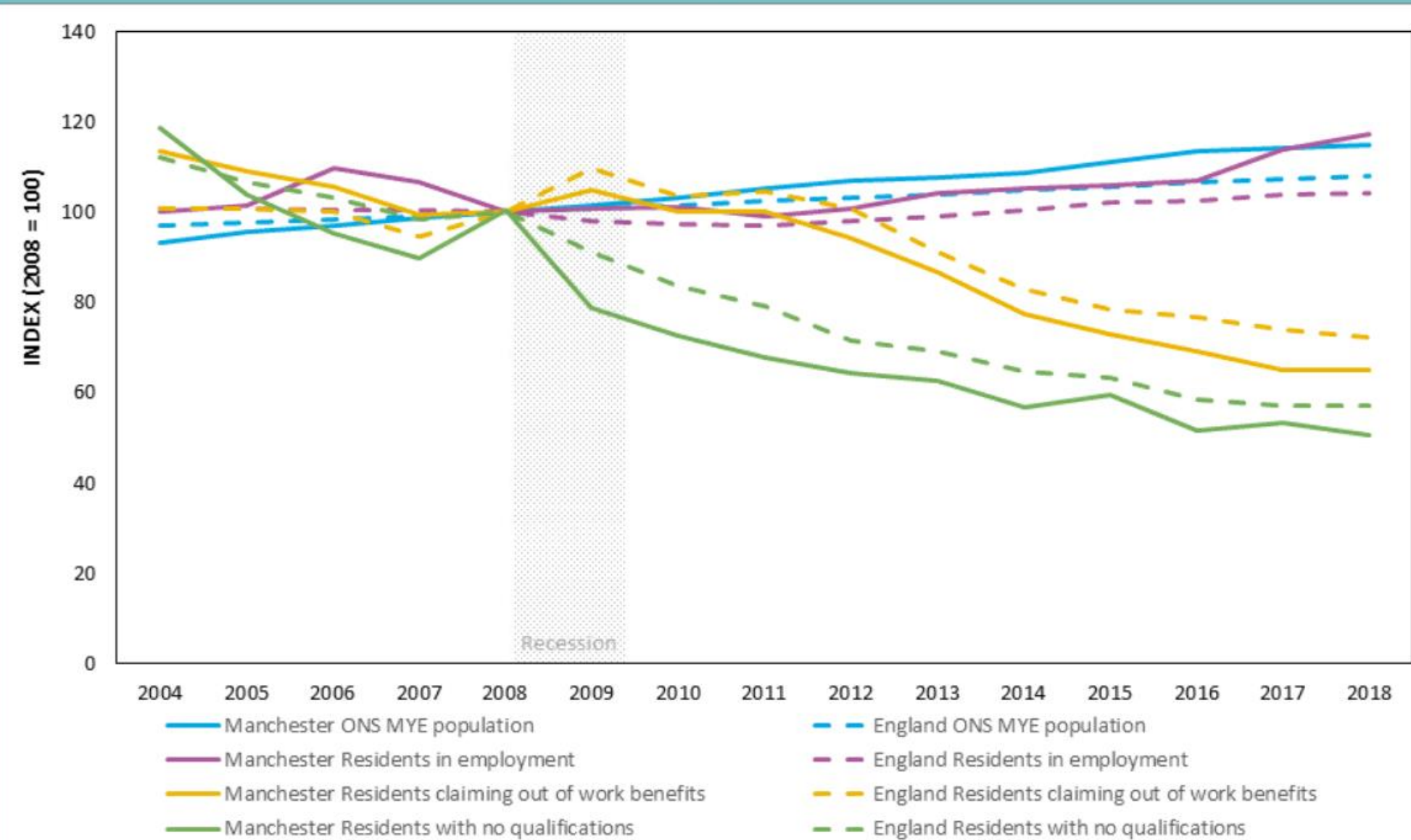


Employment and population growing more rapidly than the England rate.

Recession halted progress in reducing OOWB until 2011, but significant progress since.

Significant progress in supporting people to develop skills during the recession, % of population with no formal qualifications is now half 2008 level.

# Significant economic progress since the 2008 recession, particularly for skills



Sources: Employment/Unemployment/Qualifications - Annual population Survey (January-December); Out of work benefits (November snapshot) - DWP; Mid-year estimate population - ONS; Residential sales - HM Land Registry





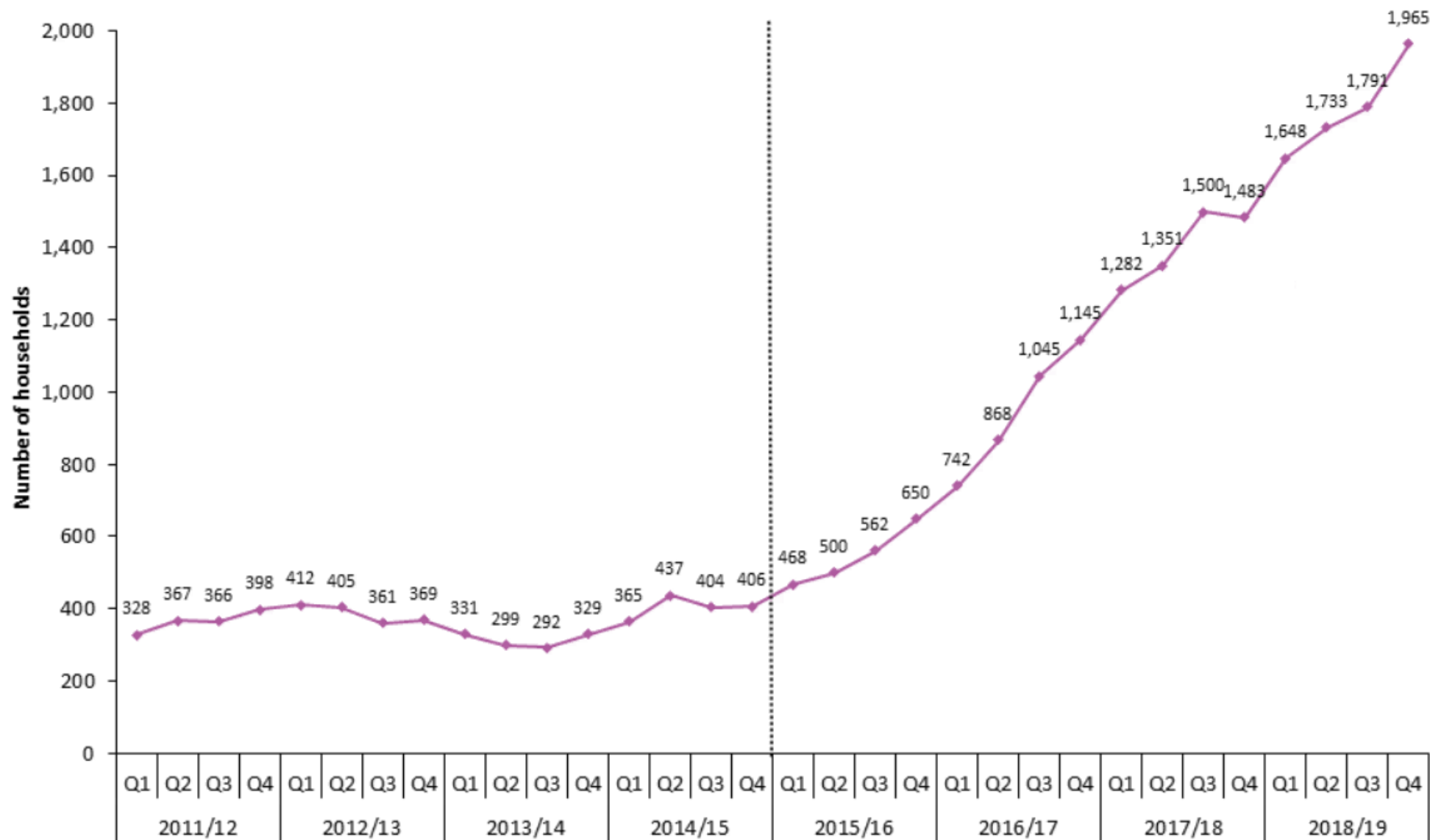
Rough sleepers in Manchester City  
Centre in 2018

The number of households presenting to the Homelessness service increased 33% in 2018/19 from the number presenting in 2017/18.

Rough Sleeping rates rose in 2018 to 5.7 people per 10,000 households almost three times the England rate.

New Homelessness Strategy launched in 2018 aiming to make Homelessness a rare occurrence, as brief as possible and to be a one-off occurrence.

## Homelessness levels rising dramatically related to Welfare Reform and the new Homelessness Reduction Act



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

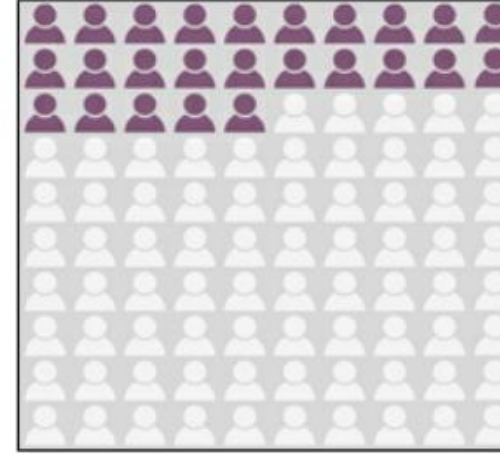
# Inclusive growth particularly a challenge amongst people over 50

As we drew attention to in State of the City 2018, Manchester is an outlier for skills, out of work benefits and healthy life expectancy amongst the city's population aged 50 - 67

People aged 50-65  
with no  
formal qualifications



People aged 50-65  
on out of work  
benefits (majority IB)



Healthy Life Expectancy  
at birth

54.5  
yrs

(2014/16)

Manchester

England

Volition Manchester



Sonder Radio



People Plus

**PeoplePlus**  
People Skills Jobs

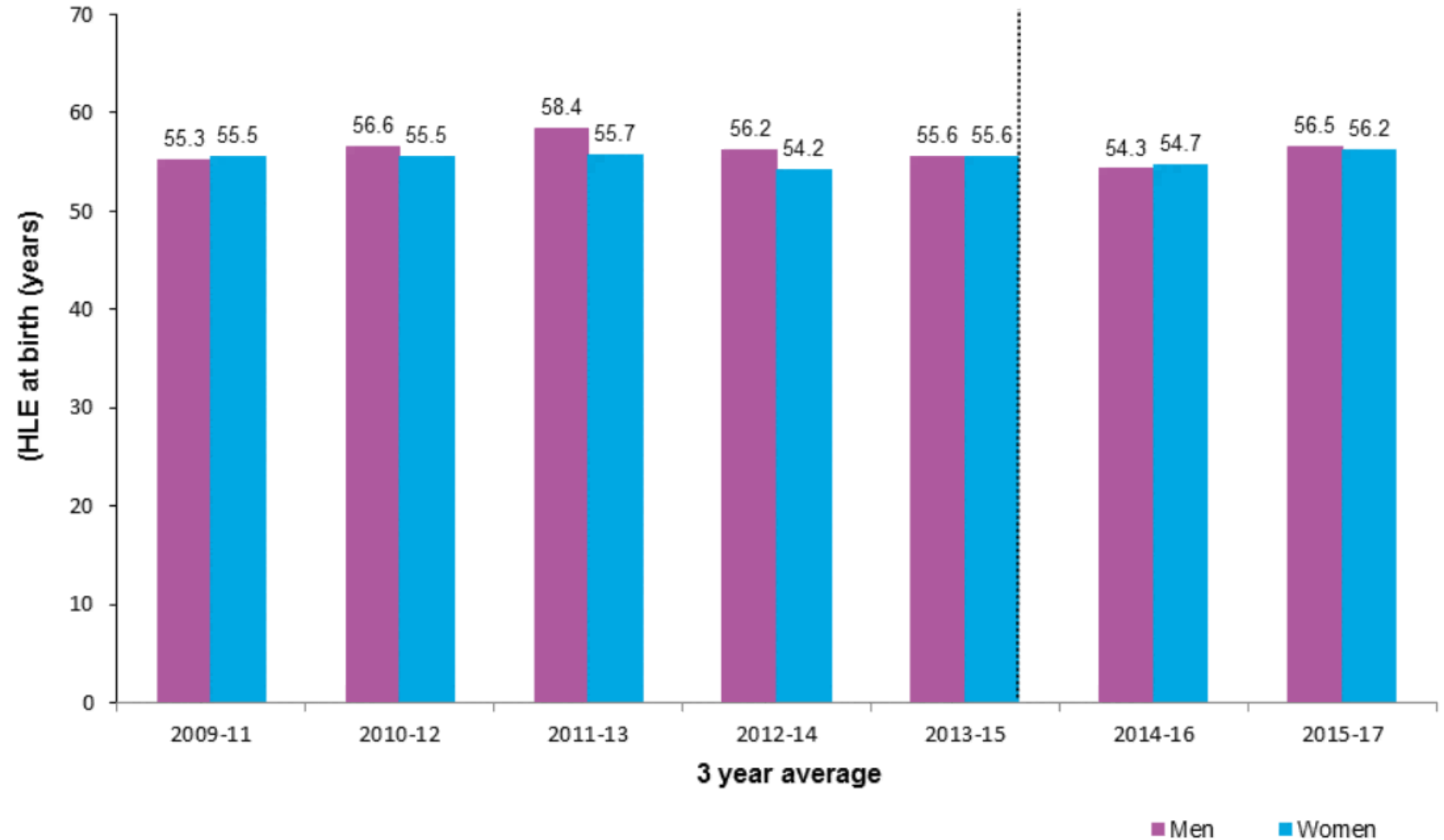


Annual rises in healthy life expectancy (HLE) had started to level off and even fall slightly in recent years, however latest figures suggest an increase again



Healthy life expectancy at birth

England HLE is 63.4  
and 63.8 years  
respectively.



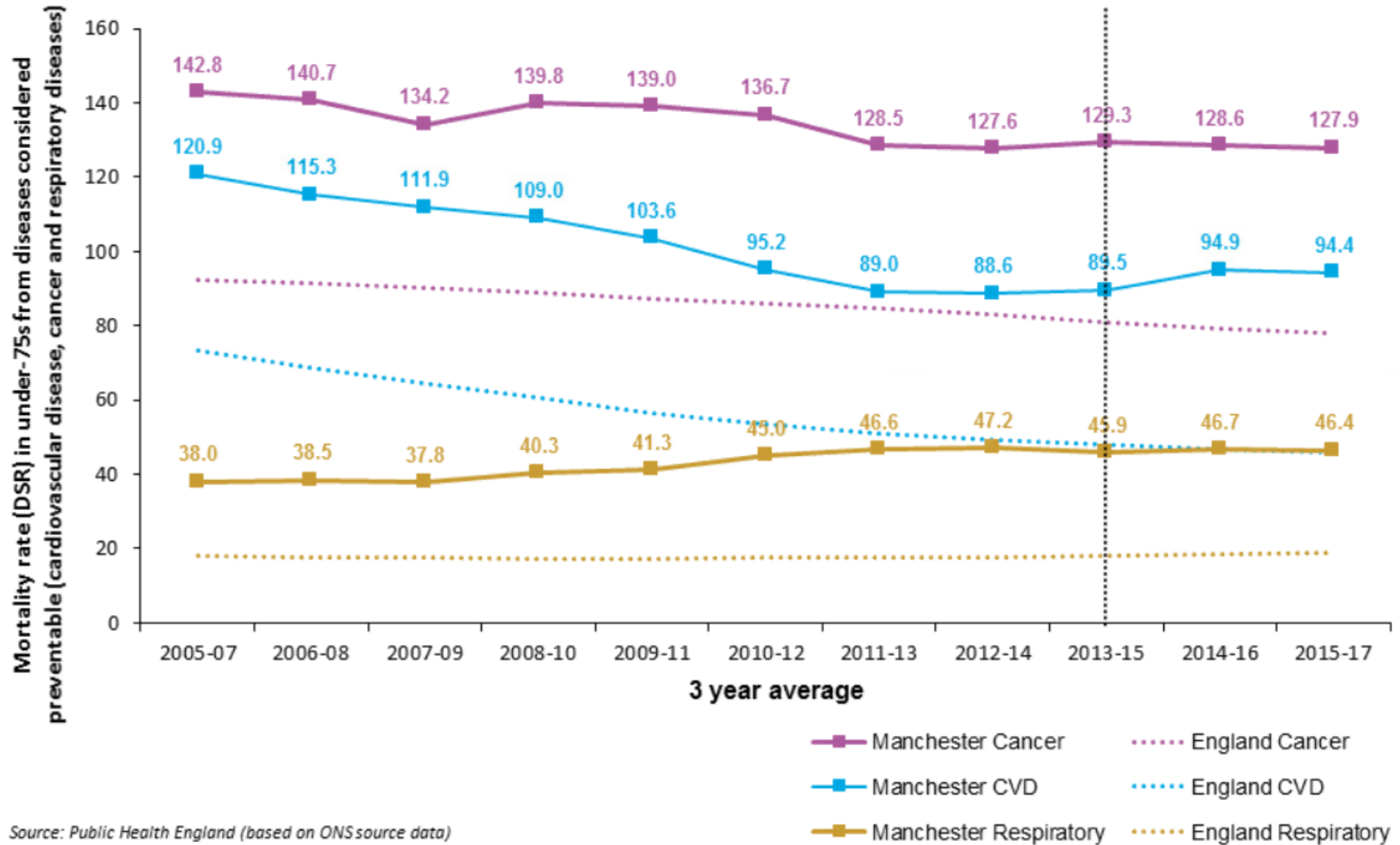
Source: Office for National Statistics © Crown Copyright 2018



## Worst mortality rates amongst under-75s from diseases considered preventable

Preventable premature mortality from cancer has fallen although not to the same extent as cardiovascular disease.

In contrast, preventable premature mortality from respiratory diseases (including asthma and COPD) has gradually risen over the period since 2005-07 although may now be flattening out.



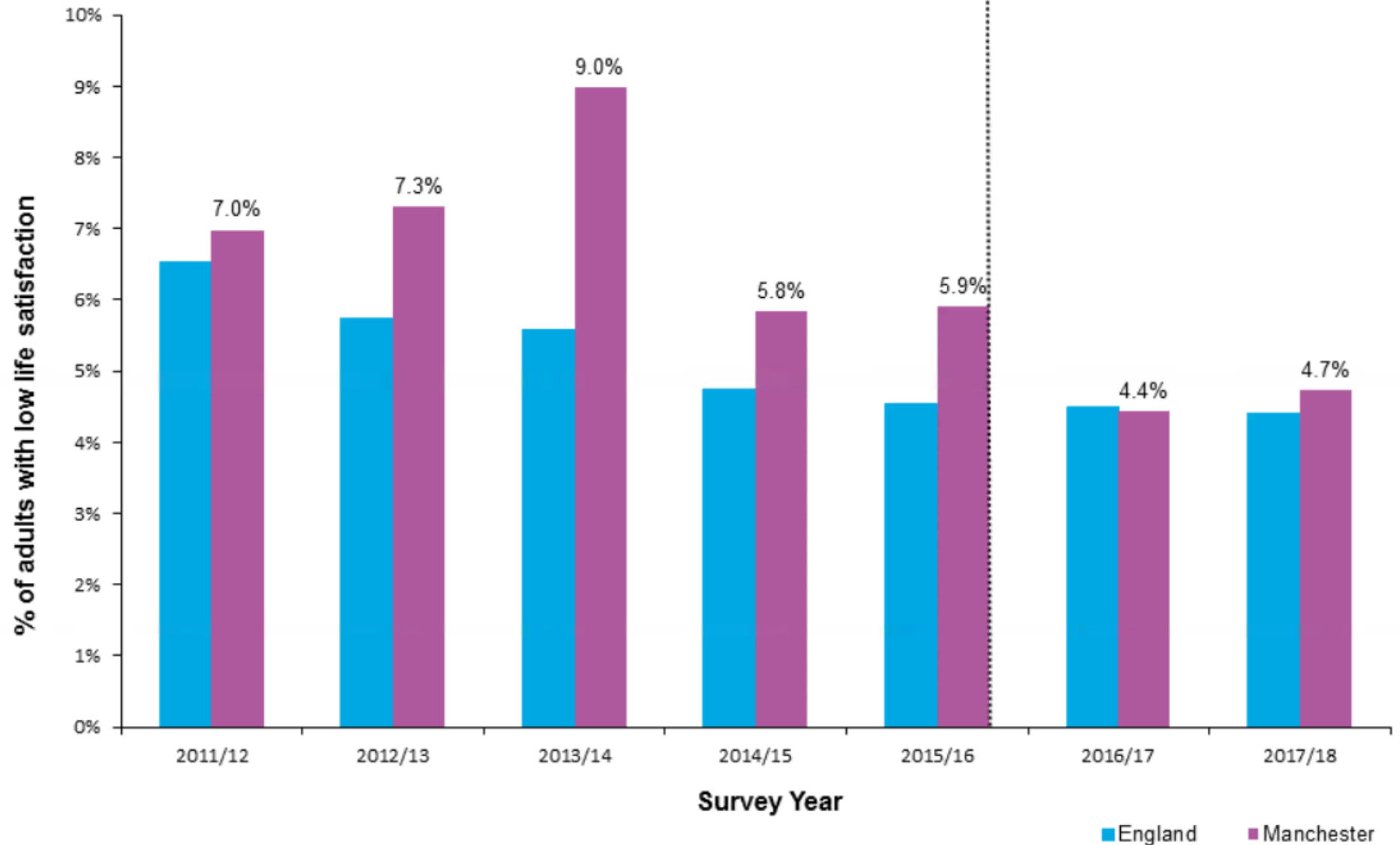
Public health picture indicates improvements in some key health outcomes but there is still more to do. Progress with the inclusivity of our economy will support this.

## Improvements in smoking rates (including amongst pregnant women at the time of delivery), alcohol hospital admission rates, exercise rates and air quality

KPI	Period	Manchester	England	D.O.T
Early diagnosis of cancer (Proportion of cancers diagnosed as stage 1 or 2)	2017	51.2%	52.2%	Improving
Smoking prevalence	2018	17.2%	14.4%	Improving
% of women who reported being a smoker at the time of delivery	2017/18	10.7%	10.8%	Improving
Exercise - Active - Doing more than 90mins physical activity per week	2017/18	67.8%	66.3%	Improving
Exercise - Inactive - Doing less than 30mins physical activity per week	2017/18	22.3%	22.2%	Improving
Air Quality - NO <sub>2</sub> at Oxford Rd / Piccadilly	2018	62/35	N/A	Improving
Admission episodes for alcohol-related conditions (standardised rate per 100,000)	2017/18	734.2	632.3	Improving

## Average levels of life satisfaction

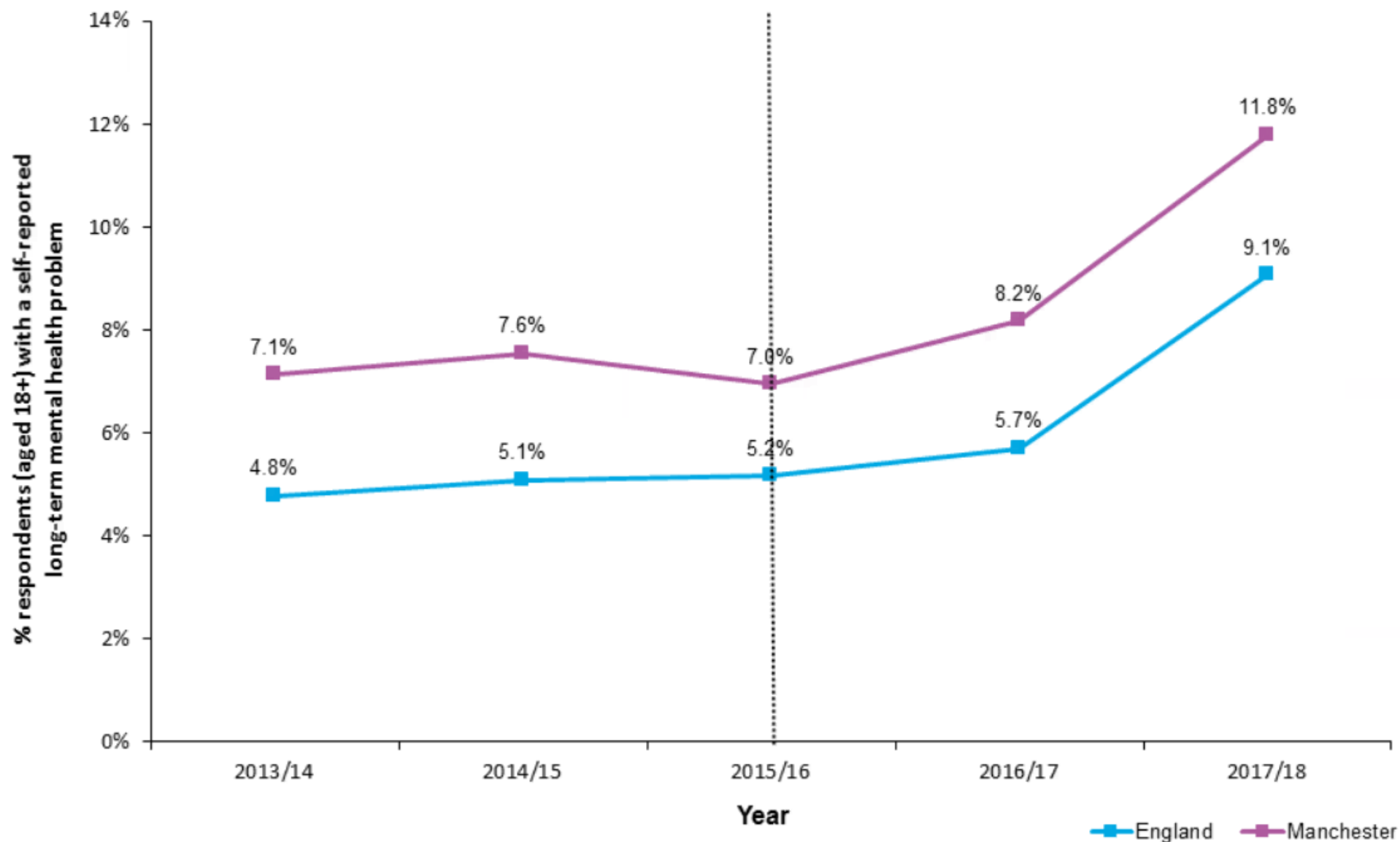
People with higher well-being have lower rates of illness, recover more quickly (and for longer) and generally have better physical and mental health.



Source: Annual Population Survey, ONS © Crown Copyright 2019

## But higher levels of self-reported mental health problems

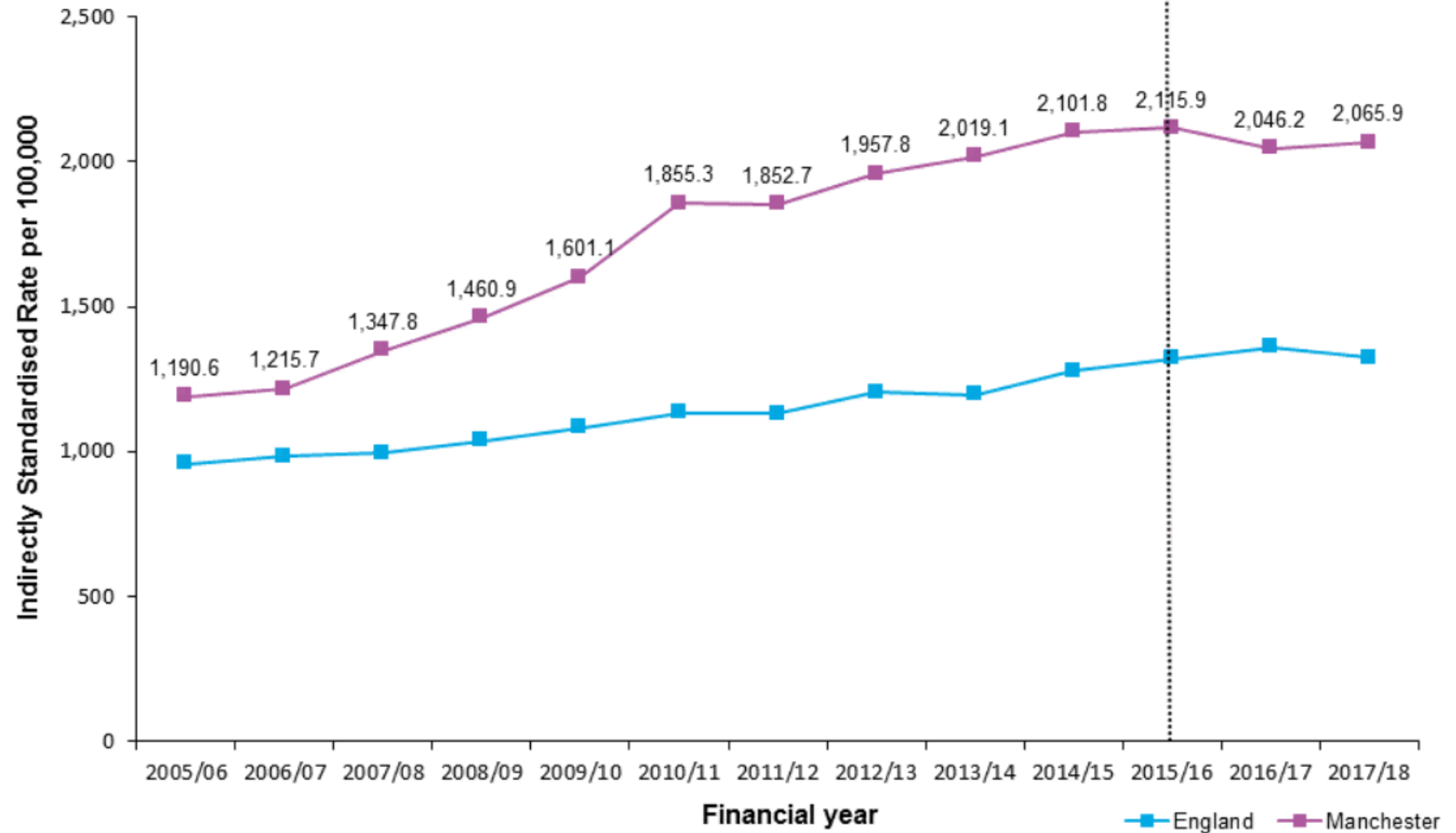
In 2017/18, just under 12% of respondents in Manchester said that they had a long term mental health problem compared with just over 9% of respondents across England as a whole.



Source: Department of Health, GP patient survey



## A&E admissions for acute conditions that should not usually require hospital admission has almost doubled over the last decade...



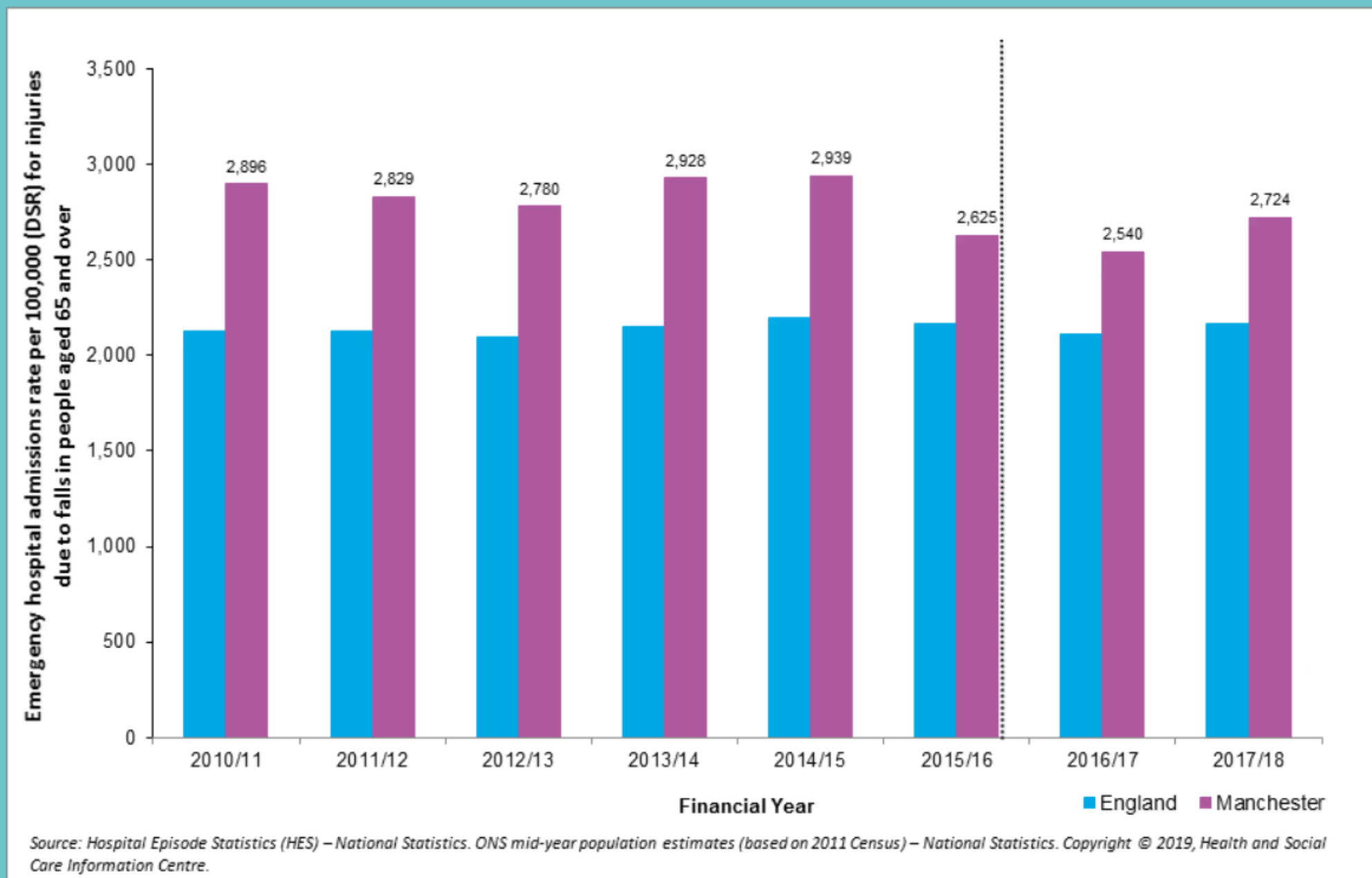
Source: Hospital Episode Statistics (HES), ONS mid-year population estimates, NHS Digital and Office for National Statistics © Crown Copyright 2019

Rising from 1,191 in 2005/06 to 2,066 in 2017/18.

The England rate has risen too but not as rapidly.

## Many more Emergency admissions for falls amongst people 65+ than the national average

Falls are the largest cause of emergency hospital admissions for older people and significantly impact on long term outcomes.



## Many more Emergency admissions for falls amongst people 65+ than the national average

What are we doing about it?

**Specialist Community Falls Prevention Services** in Manchester conduct risk assessments and provide specialist advice and support to health and social care teams in the community, and to care home providers and voluntary organisations.

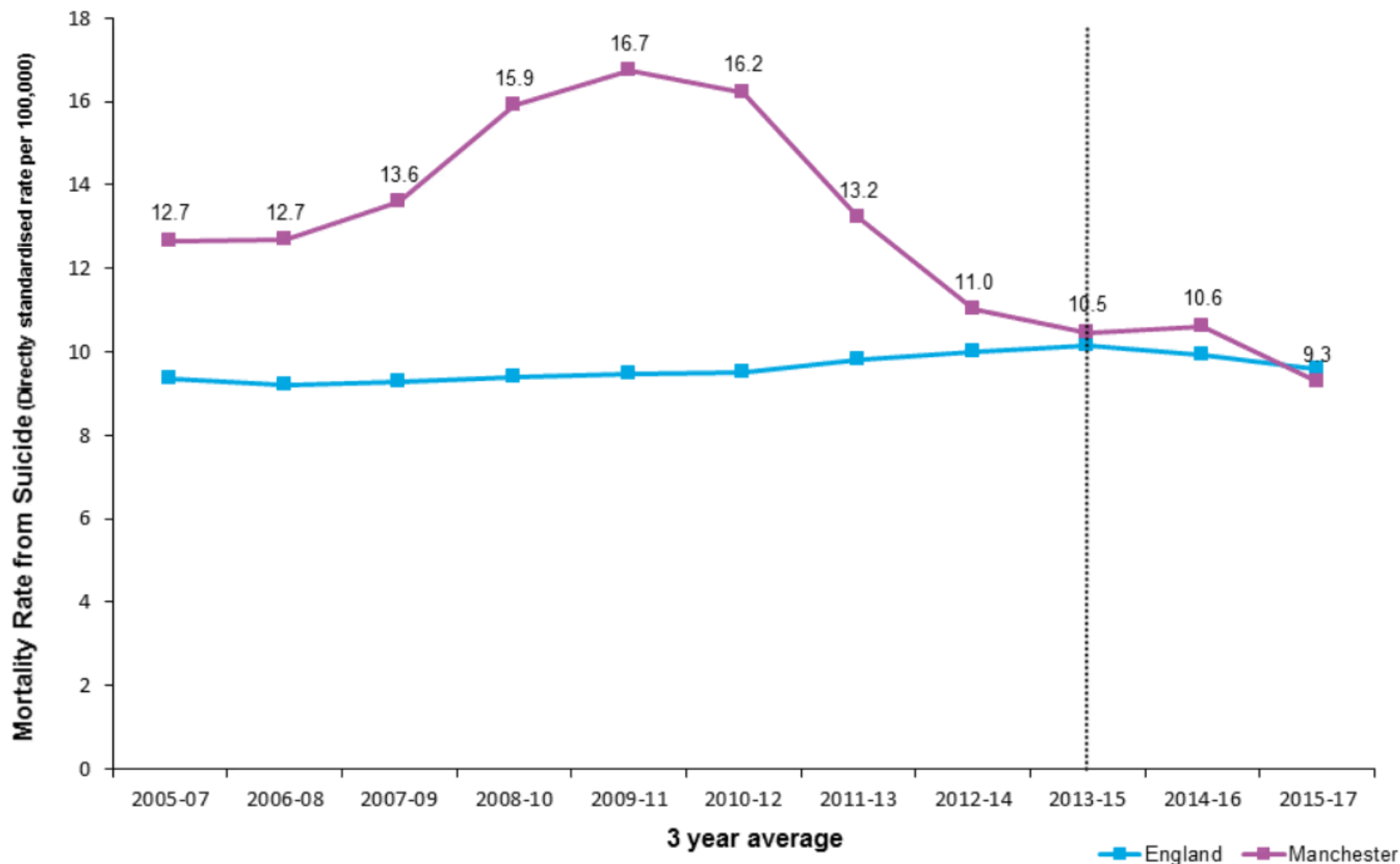
A new **Manchester Falls Collaborative** was established in early 2019 led by Manchester Foundation NHS Trust and is backed by a strong relationship with research institutions. It has a focus on early identification of those at risk, improved training and communication and shape future commissioning arrangements and delivery models.

The **Slipper Exchange** Falls Prevention Initiative is being delivered by Southway Housing to reduce falls, trips and slips in the home and reduce A&E attendance, working on the premise that a major cause of falls within the home is badly fitting, worn out, sloppy slippers. People aged 65+ living in Burnage, Chorlton Park, Didsbury and Withington can exchange their old slippers for a new and safer pair, all free of charge. As at May 2019, over 300 slippers had been distributed. There are plans to extend the scheme into Wythenshawe in the future.

## Another health success of the last few years - fewer suicides

Suicide is a major issue for society and a leading cause of years of life lost. It is a significant cause of death, particularly in young adults, and can be a reflection of the underlying rates of mental ill-health in an area.

Between the periods 2009-11 and 2015-17, the actual number of suicides has fallen from an average of 64 per year to 38 per year.



Source: Public Health England (based on ONS source data)



# Summary



Reducing the under-18 conception rate continues to be a success story. A high proportion of our children are living in poverty, more children are arriving at school ready to learn and there have been improvements in KS2 and KS4 attainment - we are still below but closing the gap with the national average. The quality of our schools is improving which could be key to further closing the gap.

A high number of university graduates staying in the city for employment means there is an increased supply of highly skilled residents. Over a number of years, the proportion of residents with no qualifications at all has reduced significantly, however, this still applies to 1 in 10 residents. Low skill levels are more prevalent in residents aged over 50.



Manchester has seen unprecedented population growth over the last two decades, particularly within the city centre. There is substantial growth predicted in a number of sectors including now construction, driven by some of the major developments in the city.

But inclusivity remains the key challenge - the Our Manchester Industrial Strategy sets out how a more inclusive economy can be developed for the city's residents and workers. A key challenge for the future is to transition to a more sustainable and ultimately zero-carbon economy by 2038.



There have been recent improvements in health outcomes for our residents such as increases in Healthy Life Expectancy, falling rates of alcohol-related admissions and more cancers diagnosed at an early stage. There has been a significant reduction in the rate of suicides.

Manchester still has some of the worst health outcomes in the country though. The rate of premature deaths remain the worst in England. Diet, exercise, smoking, alcohol and air quality are some of the factors that are key to addressing this, and we have seen improvements in many of these areas.

Email any questions to  
[intelligence@manchester.gov.uk](mailto:intelligence@manchester.gov.uk)

