

Appendix 10.1: Baseline conditions

1. Introduction

This section provides an overview of the existing socio-economic conditions within the Manchester local authority area and compares the trends in the rate of change over time, over a range of key socio-economic indicators to those observed within Greater Manchester and nationally (UK/GB).

The site has been assessed at the Manchester level, with the postcode M1 2EG having been identified as representing the central location of the Application Site, for the purposes of the assessment of baseline conditions.

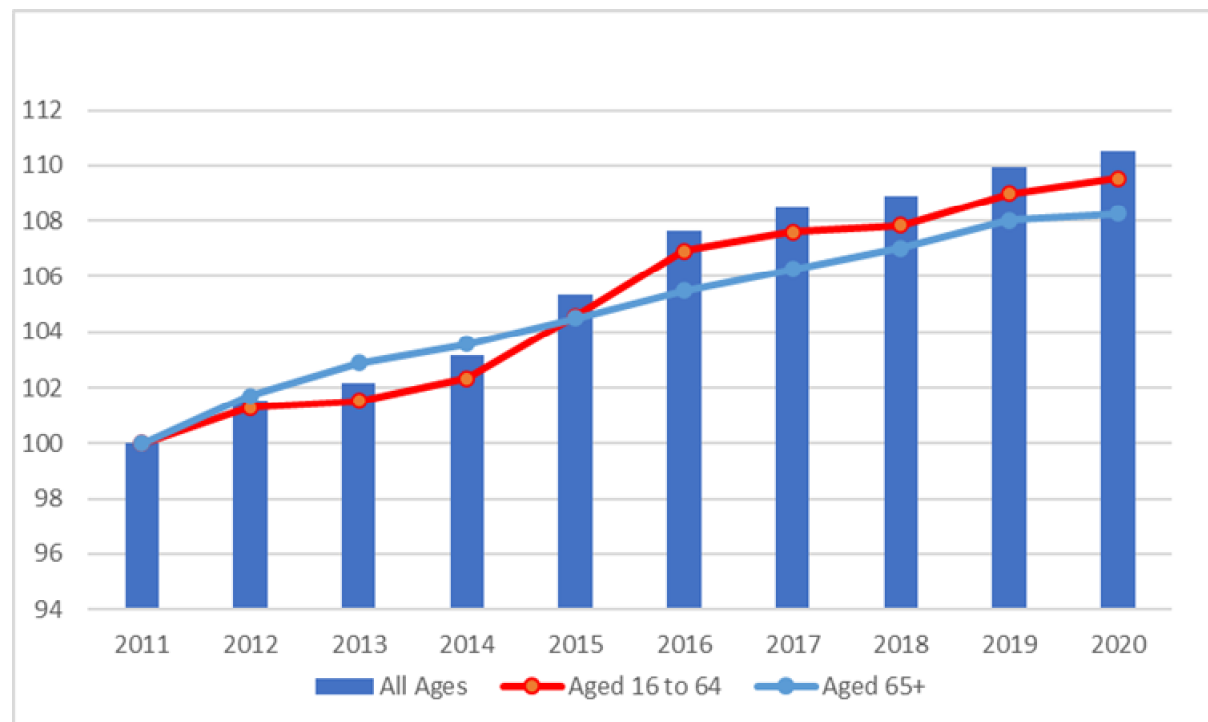
2. Population

In 2020, the total population of Manchester stood at 555,741 people, an increase of 10.51% since 2011. This growth has exceeded the levels seen at the comparator areas of Greater Manchester and nationally (GB), which saw their population grow at 6.07% and 6.04% respectively, during the same period.

As a percentage of total population, those of working-age (16-64) in Manchester account for 70.5%, a decline of 0.6% since 2011. Similarly, the working-age population in Greater Manchester declined by 1.9%, followed by the UK, which decreased by 2.3%.

Figure 2.1 shows indexed change in the total, working age and retirement age (65+) populations for Manchester. Over the period of 2011-2020, the population of Manchester's total population has grown exponentially (10.51%). This increase has been seen across age-related population indicators, where both the working age and retirement age populations have seen a marked increase, over the same period (9.54% and 8.26%).

Figure 10.1.1: Indexed population change (2011-2020)



Source: ONS population estimates

3. Employment

Total employment in Manchester has seen significant levels of growth in the period 2015-2019, with some 53,000 new jobs. This growth has been felt across the comparator areas, with Greater Manchester seeing a 10.8% growth in jobs (including double counting of those included within the Manchester level analysis), whilst Great Britain as a whole has seen a smaller, but nevertheless significant level of employment growth at 4.3%.

Table 10.1.1: Employment change	
Area	Change 2015-2019
Manchester	14.8% (53,000jobs)
Greater Manchester	10.8% (135,000 jobs)
Great Britain	+4.3% (1,269,000 jobs)

Source: ONS Business Register and Employment Survey

4. Sectoral composition of employment

In 2019, the sectors with the highest proportion of employment in Manchester were professional, scientific & technical (13.9%), health (12.2%), business administration & support services (11.7%) and retail (8.5%). Employment in the professional, scientific & technical and business administration & support services were also significantly higher than in all comparator areas.

Table 10.1.2: Employment by Sector				
Employment by sector (2019)	Manchester		Greater Manchester (%)	Great Britain (%)
	Total	%		
Agriculture, forestry & fishing (A)	225	0.1	1.6	1.6
Mining, quarrying & utilities (B,D and E)	1,250	0.3	1.3	1.3
Manufacturing (C)	12,000	2.9	7.8	7.8
Construction (F)	8,000	2.0	5.0	5.0
Motor trades (Part G)	2,500	0.6	1.9	1.9
Wholesale (Part G)	11,000	2.7	3.8	3.8
Retail (Part G)	35,000	8.5	9.2	9.2
Transport & storage (inc postal) (H)	29,000	7.1	4.8	4.8
Accommodation & food services (I)	34,000	8.3	7.6	7.6
Information & communication (J)	19,000	4.6	4.2	4.2
Financial & insurance (K)	20,000	4.9	3.4	3.4
Property (L)	10,000	2.4	1.9	1.9
Professional, scientific & technical (M)	57,000	13.9	8.8	8.8
Business administration & support services (N)	48,000	11.7	8.7	8.7
Public administration & defence (O)	19,000	4.6	4.2	4.2
Education (P)	40,000	9.8	8.4	8.4
Health (Q)	50,000	12.2	12.8	12.8
Arts, entertainment, recreation & other services (R,S,T and U)	16,000	3.9	4.5	4.5
TOTAL	410,000	100.0	100.0	100.0

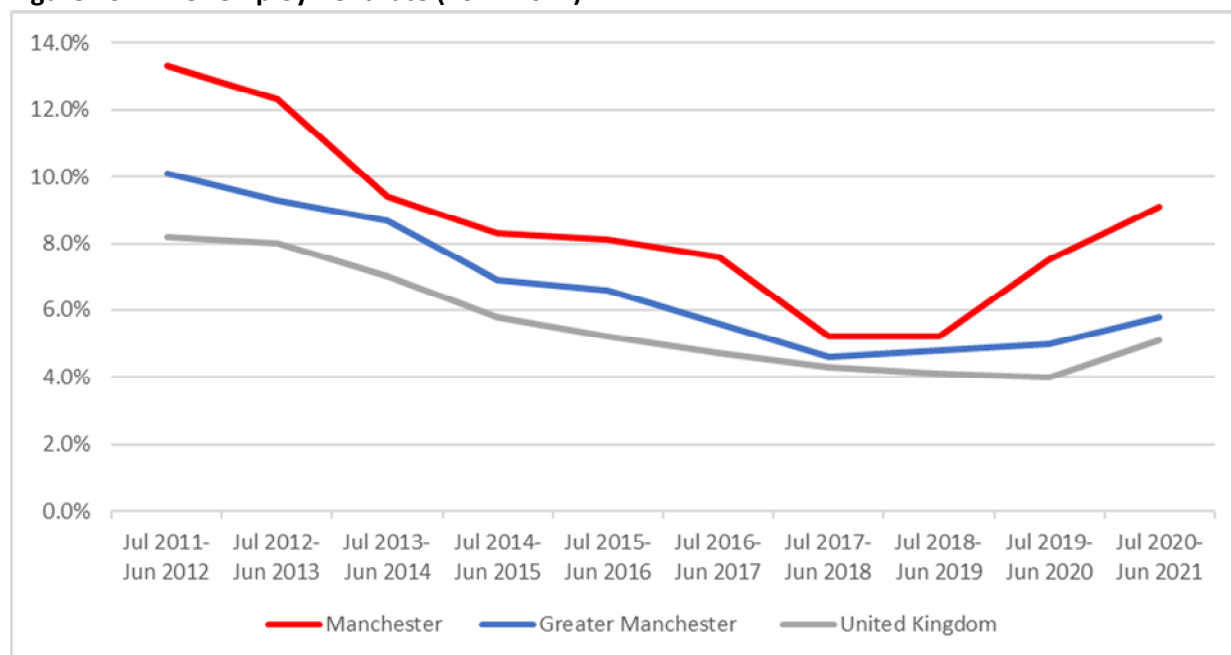
Source: ONS Business Register and Employment Survey

5. Unemployment and worklessness

Between July 2020 and June 2021, the unemployment count¹ for Manchester stood at 26,700, representing an increase of 6,500 (32.2%) since July 2016. This compares to increases of 5% in Greater Manchester and 9.5% across the UK, over the same period.

Figure 10.1.2 shows the change in employment rate for Manchester and comparator areas from July 2011 to June 2021.

Figure 10.1.2: Unemployment rate (2011-2021)



Source: ONS annual population survey

The unemployment rate in Manchester stood at 9.1% in July 2020 – June 2021, compared to 5.8% in Greater Manchester and 5.1% in the UK. Between July 2011 and June 2021, the unemployment rate in Manchester declined from 13.3% to 9.1%. Over the same period, the unemployment rate declined by 4.3% in Greater Manchester and 3.1% in the UK.

The claimant count identifies those people in receipt of out of work benefits² (See Table 10.1.3) stood at 29,205 between September 2020 and September 2021. This represented 7.5% of the resident population (as of 2020) aged 16-64, which is above both the Greater Manchester average (6.4%) and the national (GB) average (5.0%).

The claimant rate in Manchester has increased in recent years (between September 2019 and September 2020) – largely due to the economic impact of COVID-19. This follows the same wider trend experienced across Greater Manchester and nationally (GB). Nevertheless, as the country enters a period of economic recovery, claimant rates are beginning to fall, although Manchester (-15.7%) is lagging behind comparators Greater Manchester (-17.7%) and nationally -(21.7%).

¹ All people aged 16+ without a job who were available to start work in the two weeks following their interview and who had either looked for work in the four weeks prior to interview or were waiting to start a job they had already obtained.

² Jobseeker's allowance (JSA), National Insurance credits, and Universal Credit

Table 10.1.3: Claimant rate (2017-2021)					
Claimant rate (% of resident population aged 16-64)	September 2017	September 2018	September 2019	September 2020	September 2021
Manchester	2.5%	3.3%	4.2%	8.8%	7.5%
Greater Manchester	2.6%	3.0%	3.8%	7.8%	6.4%
Great Britain	1.9%	2.2%	2.8%	6.4%	5.0%

Source: ONS Claimant Count

There were 40,100 workless households (households where no-one aged 16 or over is in employment) in Manchester in 2020. Representing 21.2% of total households – this figure is considerably higher than Greater Manchester (16.4%) and nationally (GB) (13.6%).

6. Economic activity

There were 294,500 economically active people in Manchester between July 2020 and June 2021, accounting for 75.7% of the total working age population. The number of economically active people in Manchester has increased by 10.2% over the period of July 2016 to June 2021, which is considerably higher than the comparative figure for Greater Manchester (1.9%) and nationally (GB) (0.6%).

Table 10.1.4: Economic activity levels (2016-2021)					
Economic Activity (% of resident population aged 16-64)	July 2016 – June 2017	July 2017 – June 2018	July 2018 – June 2019	July 2019 – June 2020	July 2020 – June 2021
Manchester	70.2%	72.9%	70.1%	73.3%	75.7%
Greater Manchester	75.2%	76.3%	76.0%	76.7%	76.2%
Great Britain	78.0%	78.4%	78.9%	79.1%	78.4%

Source: ONS annual population survey

7. Earnings

In 2020, earnings of residents in Manchester (£537.90) were lower than the comparator areas of Greater Manchester (£549.80) and the national average (£587.10). Manchester has seen resident-based earnings increase by 8.2% over the period of 2018 to 2020, in contrast, Greater Manchester and the national (GB) average saw increases of 6.2% and 2.9% respectively.

Table 10.1.5: Resident earnings				
Median resident earnings for all workers (£ per week)	2018	2019	2020	Change 2018-2020 (%)
Manchester	£497.30	£535.80	£537.90	8.2%
Greater Manchester	£517.50	£541.20	£549.80	6.2%
Great Britain	£570.50	£587.50	£587.10	2.9%

Source: ONS annual survey of hours and earnings – resident analysis

In contrast, median weekly workplace earnings for Manchester were significantly higher at £599.80 in 2020, where unlike resident-based earnings, the increase was not as high at 6.0% from 2018 to 2020. Manchester's growth in the median gross weekly workplace-based earnings exceeds the wider trend in Greater Manchester and nationally (GB), as shown by the increase in workplace earnings across the

same time period, with workplace earnings for Greater Manchester and Great Britain increasing to £553.70 and £586.80 respectively in 2020.

Table 10.1.6: Workplace earnings				
Median workplace earnings for all workers (£ per week)	2018	2019	2020	Change 2018-2020 (%)
Manchester	£566.00	£600.60	£599.80	6.0%
Greater Manchester	£524.90	£547.20	£553.70	5.5%
Great Britain	£570.20	£587.00	£586.70	2.9%

Source: ONS annual survey of hours and earnings – workplace analysis

8. Qualifications

The proportion of residents with National Vocational Qualification (NVQ) equivalent qualifications in 2020 is shown in Table 10.1.7 for Manchester and the comparator areas.

A relatively high proportion (48.4%) of the resident population aged 16-64 in Manchester

held a higher level (NVQ4+) qualification in 2020 compared with 39.2% in Greater Manchester and 43.1% in nationally (GB). On the contrary, Manchester also contains a high proportion (7.4%) of residents with no qualifications, slightly below the level experienced within Greater Manchester (7.7%), with both being higher than seen at the GB level (6.4%).

Table 10.1.7: Qualifications (2020)						
Qualification level (% of resident population aged 16-64)	NVQ4+	NVQ3	NVQ2	NVQ1	Other qualifications	No qualifications
Manchester	48.4%	64.4%	75.3%	84.9%	7.7%	7.4%
Greater Manchester	39.2%	57.6%	75.2%	86.3%	5.9%	7.7%
Great Britain	43.1%	61.3%	78.1%	87.7%	5.9%	6.4%

Source: ONS annual population survey

Having regard to Apprenticeship opportunities within Manchester, there were 2,340 apprenticeship starts between August 2019 to April 2020, with 80 of these apprenticeships coming in the construction sector. This is likely a result of the COVID-19 pandemic, demonstrated by the data in Table 10.1.8 below, which demonstrates that Manchester as a whole has had between 11,000 and 12,000 apprenticeship starts per academic year from 2014/15 to 2018/19.

Table 10.1.8: Apprenticeships by sector – number of participants			
Year	Construction Apprentices - Manchester	Total Manchester	Total GB
2014/15	127	11,146	901,594
2015/16	187	11,565	931,413
2016/17	186	11,463	941,582
2017/18	184	11,641	833,879
2018/19	150	11,997	759,502

9. Occupations

The occupational profile of Manchester and comparator areas between July 2020 and June 2021 is set out within Table 10.1.9. In Manchester, the largest proportion of employment was in professional occupations (33.8%), which was higher than the proportion of professionals in Greater Manchester (24.0%) and Great Britain (23.3%). In addition, Manchester also had a higher proportion of residents employed in elementary occupations (10.3%) than comparator areas. In contrast, there were relatively small proportions of Manchester residents employed in manager, director and senior official occupations (7.0%), skilled trade occupations (5.8%) and process, plant and machine occupations (5.6%).

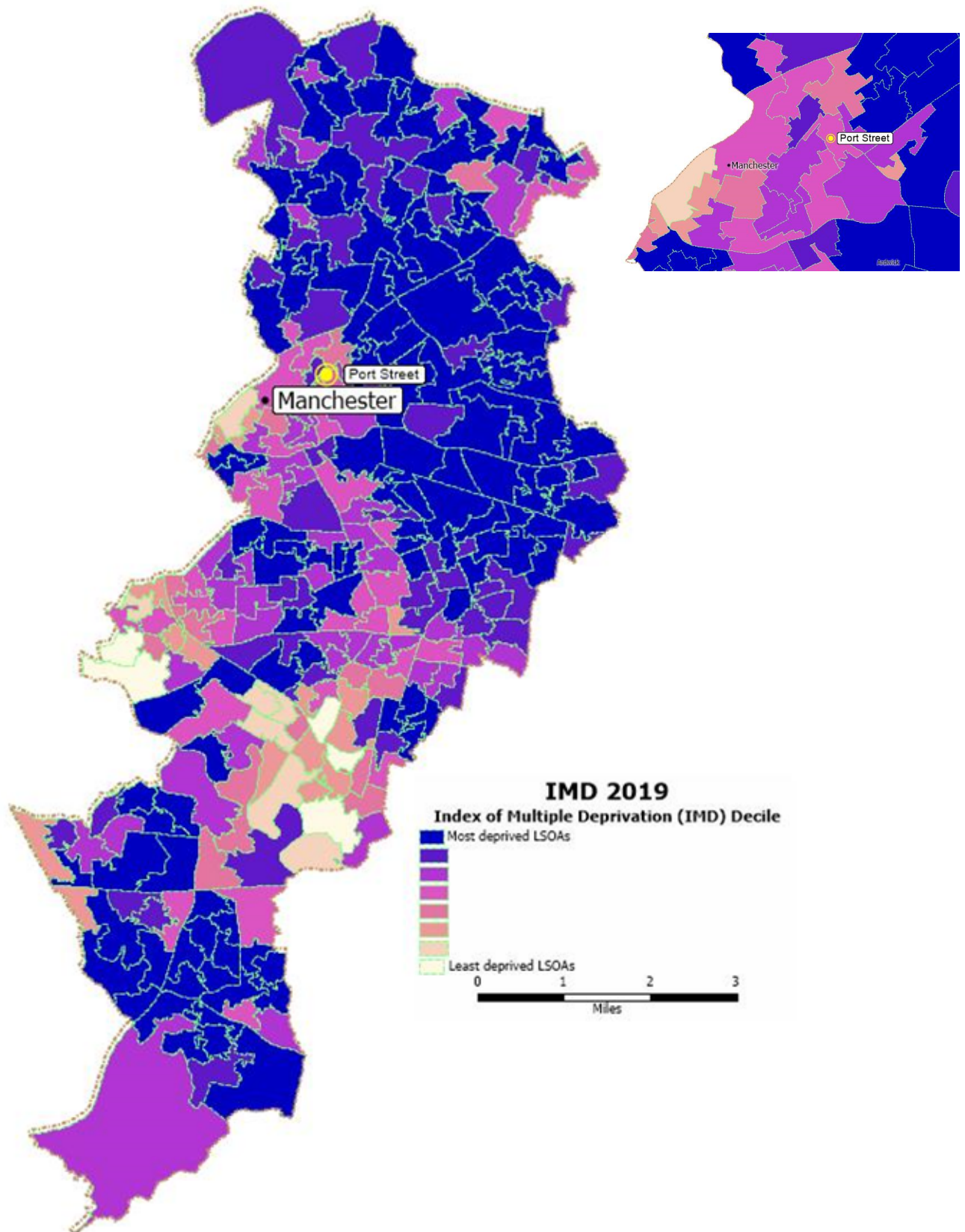
Table 10.1.9: Occupational profile (2021)			
Occupational level (% of all persons in employment, 2021)	Manchester	Greater Manchester	Great Britain
Managers, directors and senior officials (SOC2010)	7.0%	9.1%	10.9%
Professional occupations (SOC2010)	33.8%	24.0%	23.3%
Associate prof & tech occupations (SOC2010)	14.6%	14.9%	15.6%
Administrative and secretarial occupations (SOC2010)	8.5%	10.8%	10.2%
Skilled trades occupations (SOC2010)	5.8%	8.1%	9.0%
Caring, leisure and other service occupations (SOC2010)	7.1%	8.7%	9.0%
Sales and customer service occupations (SOC2010)	6.7%	8.2%	7.1%
Process, plant and machine operatives (SOC2010)	5.6%	6.0%	5.6%
Elementary occupations (SOC2010)	10.3%	9.7%	9.1%

Source: ONS annual population profile

10. Deprivation

On the basis of the English Indices of Multiple Deprivation (IMD) 2019, there are significant levels of deprivation within the Manchester local authority area. However, the levels of severe deprivation tend to move away from the City Centre, where deprivation at the LSOA level tends to be within the top 30% to 40% of all LSOAs within England.

Figure 10.1.3: English Indices of Deprivation – Manchester



11. GP Surgeries Capacity

Based on an analysis of the of NHS Service Search, there are 50 GP Surgeries within a 3-mile radius of the Proposed Development, however there is limited information available with regard to whether or not these surgeries are accepting new patients.

There is a generally accepted benchmark that an average of 1,800 patients per GP is considered acceptable. However, the NHS database does not provide clear information on the current and future capacity for GPs in Manchester and across the country and there could be some GP surgeries in Manchester operating at a level higher than 1,800 patients per GP.

Table 10.1.10: Manchester City Centre				
GP Practices	Patients	Total GP (headcount)	Patients per GP	Patient surplus
10	104,613	74	1,414	28,587

Source: Manchester CCG

12. Dental Practices

Based on an analysis of the of NHS Service Search, there are 50 dental practices within a 3-mile radius of the Proposed Development, however there is limited information available with regard to whether or not these surgeries are accepting new patients.

13. Education (Primary and Secondary Schools)

The existing capacity of Primary and Secondary schools has been tested at the within two miles of the Application Site, Table 10.1.11 shows that across the 2-mile catchment assessed (2018/2019 academic year), capacity is constrained, however, there are still remaining places in state-funded schools across the local authority area.

Table: 10.1.11: School capacity data				
Manchester	Number of Schools	School Capacity	Number of pupils/ % of school capacity	Number of unfilled places
Primary	51	29,046	28,260 (97%)	786
Secondary	8	8,824	8,421 (95%)	403
Total	59	37,870	36,681	1,189

Source: School capacity, local authority level, Department for Education