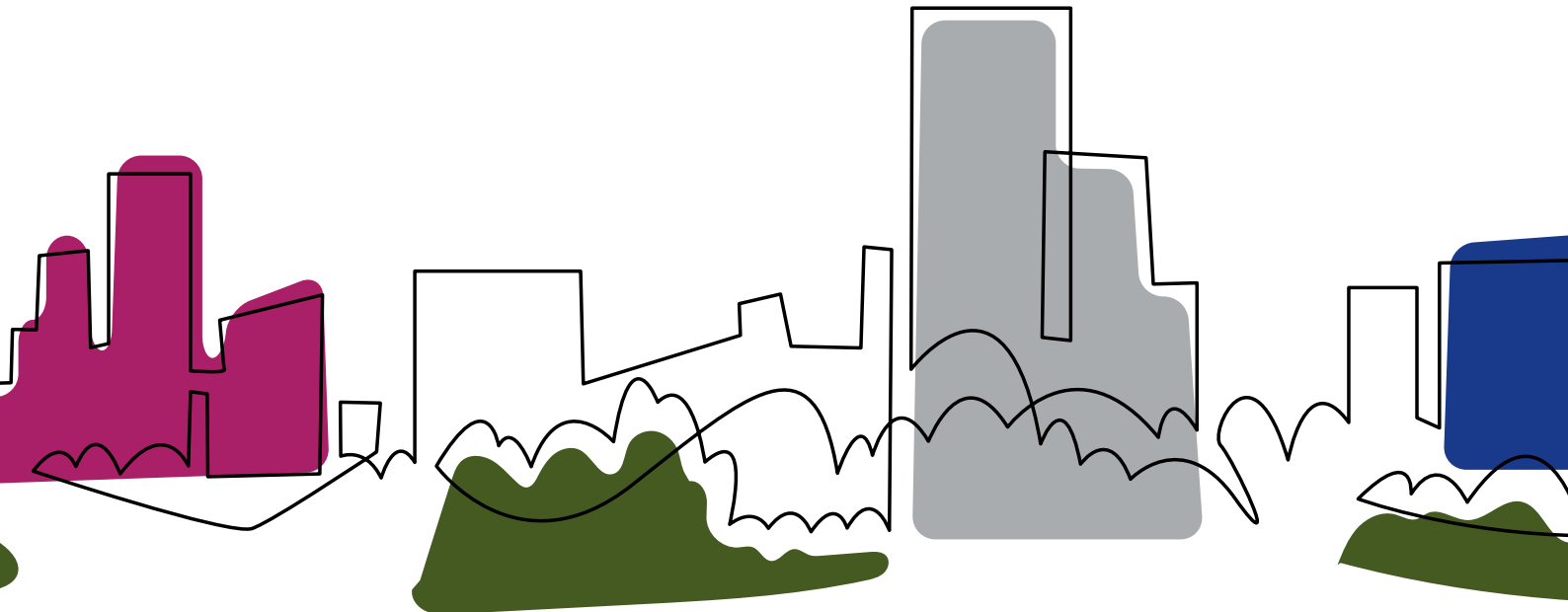


# POSITIONING CITIES for inclusive growth



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## Foreword

Trowers is packed full of people who are passionate about real estate in all its forms, and particularly passionate about the built environment in which we live and work and what it actually means to people's lives. This is not just the financial outcomes generated by the built environment, but the social and societal benefits that places can generate.

We've undertaken research over the past five years looking at how you measure societal value. Out of those discussions, other themes emerged which deserved further thought, such as what makes a place prosperous? We realised this was a much bigger topic than we could tackle ourselves so we embarked on an initiative to go round the country hosting workshops with local authorities, developers, investors and consultants in different communities. What people perceive and indeed want in terms of prosperity has been at the heart of the conversation at our City Exchanges.

Recently, communities across the world have been through unprecedented change and some of the toughest periods in living memory. It could change the way we work, how we engage and support those around us, and the choices we make about where and how we live. The extent of these changes is largely yet to be realised. It may be a transient period with minimal impact on the way our city functions in the long term or it may create some significant changes in dictating where we choose to live and work. From our findings so far, the experience of lockdown is exacerbating many of the issues that our towns and cities were already facing. The importance of where and how we live and people's mental and physical health has never been in greater focus.

Cities appear to concentrate inequality, with a growing challenge around housing affordability and urban design choices that lock people out of the benefits cities can provide. The division between those who have access to outdoor space and homes with rooms to work from as opposed to those in small flats with no outdoor space or indeed indoor space has been put under the spotlight. How can we create places with the focus on the long term resilience of the UK? How can we revitalise town and cities centres, investing and developing in a way that is inclusive?

From a personal perspective, I come from a small town in Yorkshire called Dewsbury, an old mill town that has been in decline for many, many years, and where a lot of the residents feel left out of the economic growth enjoyed elsewhere in the country.

Our challenge to the industry is to ask: "How do you breathe life back into a town like Dewsbury which had a great market, it had a great town centre and now doesn't?" Does the period we have just been through give Dewsbury an opportunity to reinvent itself? It's these kinds of personal and professional perspectives that we are seeking to understand to see how real estate can play a more active role in facilitating prosperity across the UK from the smallest village to the largest city.

As the national agenda shifts to economic and political rebalancing of cities across the country, it's increasingly important that an understanding of local context and dynamics informs development and regeneration



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## What we did

At MIPIM UK in October 2019, Trowers & Hamblins launched a new initiative exploring cities and prosperity. Over 18 months, we have brought together leaders across communities and businesses to look at how we create the towns and cities of the future as well as examine real estate's role in providing the platform for society to thrive. The impact of Covid-19 bisects this exploration. The pandemic, which has accelerated conversations around social value and climate change, arguably makes the need to understand how the built environment can drive prosperity in cities and urban centres even more pressing. Decisions are being made now about how cities will be used differently following the pandemic.

Trowers & Hamblins has set about exploring this topic in several ways. A YouGov poll was commissioned in late October 2019 looking into perceptions of prosperity in Birmingham, Exeter, London, and Manchester, the cities where our UK offices are located. We reran this survey in September 2020 to capture the impact of the pandemic. ING Media's City Strategist Peter Griffiths analysed these results alongside comparative statistics of each city's performance within the UK.

This data was then presented at a range of events to provide a starting point for exploring cities and prosperity. The event calendar included: London (October 2019); Manchester (November 2019); Exeter (January 2020); London roundtable (March 2020); Birmingham (October 2020); London (December 2020); Manchester roundtable (December 2020); and Exeter roundtable (January 2021).

Throughout the series, urban experts along with business, local and national government leaders were asked a range of similar questions around their perceptions of prosperity in the cities they live and work in. Given the essential role data plays in policymaking and setting agendas, we wanted to test whether there was agreement or disagreement on the findings, and to explore the role the real estate sector could play in improving prosperity.

As well as the 2,013 respondents to our YouGov surveys, over 160 people have attended our City Exchange events and contributed to the findings in this report, which can be downloaded at [trowers.com/inclusivegrowth](https://trowers.com/inclusivegrowth). Together their voices provide a rich picture of how prosperity is experienced differently not just across the North West, the West Midlands, the South East, and the South West, but also within the cities and towns in these regions. The topics raised consistently touched on aspects of both our business and our work from social concerns around affordable housing and health, to how we can sustainably use energy, transport, and infrastructure.

This report forms part of Trowers & Hamblins' longer-term exploration into how real estate, which has an impact on every aspect of our daily lives, can be the backbone of society. In 2016 we partnered with Oxford Brookes University to explore how to measure a broader value of a place that incorporates factors such as cultural, social, and environmental value. Our findings (see [trowers.com/highlyvalued](https://trowers.com/highlyvalued)) back then indicated that a broader definition of social value will lead to long-term financial success. We continued our research between 2016-2018, partnering with RealWorth to explore the barriers and opportunities to changing and broadening existing methods of valuation. We commissioned RealWorth to develop the rationale and suggest practical ways to initiate change in the real estate sector ([trowers.com/realvalue](https://trowers.com/realvalue)).

Urban centres are drivers of prosperity across the globe; they are hubs for commerce, culture, community, innovation, and education but prosperity means different things to different people in different places. Wealth disparity and variance of life expectancy exist both within and between our cities, prompting questions as to how to ensure investments in the built environment deliver maximum prosperity.

We have had years of cities improving, with urbanisation tightly correlated with economic and social development. This global reality, that cities drive both opportunity and inequality, has dominated the debate around the prosperity successes and challenges across the country, from the Northern Powerhouse to the more recent levelling up agenda.

The global pandemic has brought into focus that well-managed, equitable and quality built environments seem to be a key ingredient to urban resilience, all aspects that may only be fully captured in broader measurements of social value. Exploring perceptions of prosperity at a local scale may help highlight where UK cities are not maximising prosperity benefits specific to the people living and working in them.

In our workshops, experts regularly debated the need to consider prosperity beyond measures of financial success, which was one of the fundamental aims of this report. To avoid ambiguity, we included the following in the survey questions: by 'prosperous', we mean being successful in the sense of financial, physical, emotional, and material success, in someone's personal and professional life.

This report documents this journey in the sections that follow. This includes key findings (as part of this overview); followed by an analysis of data and workshop responses. The report concludes with the case studies of Manchester, Exeter, Birmingham, and London that were developed ahead of each workshop with some covering thoughts from a Trowers & Hamblins partner in each city.



## What we learnt

While the breadth of discussions was significant across four cities and eight events, several themes were repeated before and during the pandemic. Many of these are not necessarily new challenges for the sector but do reinforce the positive impact the real estate sector can have as we navigate recovery. They include:

### + **Growing importance of climate change and social inclusion**

The real estate sector's understanding of the impact it has and can have on society and the environment is evolving and, in some instances, overlapping. When it comes to ESG frameworks, however, there is generally more confidence in Environmental than Social given a sense that sustainability initiatives feel more measurable and easier to understand. However, Governance, which would provide the regulation and measurement tools to understand how to implement positive change was largely absent from the discussion.

### + **Poor integration between where people live and work**

Before the pandemic, many respondents were frustrated by the lack of quality local amenities, including workspaces, social infrastructure and public realm, and high travel burdens from congestion or poor public transport connectivity. More thoughtful regeneration of local high streets and better transport infrastructure were sought before and during the pandemic, but lockdowns have increased focus on local interventions.

### + **Design places to feel more connected**

Severance (either through poor quality building and public realm design that discourages social interaction or physical infrastructure barriers) exacerbates poverty and limits opportunity to share resources between communities and within wider regions. The conversation went beyond thinking of connectivity in only public transport terms to promoting proximity, connectedness, and spaces that people can feel part of. With the pandemic boosting the significance of local government's contribution to prosperity and an expanding focus on devolution, championing regional coordination at a local scale may take on new importance.

### + **Access to arts/culture/hospitality/leisure increases prosperity**

There was a strong desire before the pandemic for more appealing high streets, particularly outside major urban centres. During the pandemic, accessing arts and culture showed the greatest increase as a contributor to feelings of prosperity, suggesting expanding cultural assets and the quality of urban experiences will play a key role in reinventing places. Increasing use of these assets may require either increasing residential densities or by people spending more time locally in the long-term through increased remote working or shorter work weeks.

## **+ Space inside buildings**

While housing affordability remains the most pressing concern, the pandemic has expanded the importance of quality of space inside and outside buildings as a contributor to feelings of prosperity. Without solving this positively, cities and urban centres may continue to lose dynamism as a wider range of activities and people are priced out. Before the pandemic, a lack of quality was associated with negatively impacting talent attraction, however, with more people working from home, space has grown in importance too. Increasingly, housing affordability may require better integration between price, space, quality, and proximity to off-site amenities able to support productivity and wellbeing, and to ensure homes are built where people want to live.

## **+ Space outside buildings**

The crunch on internal space has expanded calls for enhancing green and other outdoor public space. Dwell space, particularly on high streets where streets or co-located internal and external assets encourage a sense of belonging, was key to improving social inclusion. The continued reviewing of large retail spaces during the pandemic may be an opportunity to broaden space for connection and sharing, and to ensure cities provide benefits that are both tangible to a wide range of residents and unique to urban living.

## **+ Cities are not providing freedom of choice**

The costs associated with accessing new opportunities, including a lack of appropriate housing, high transport times, and uneven services and amenities, was a significant barrier to prosperity. The impact on productivity may be substantial, with cities not able to easily match or share talent. A lack of affordable living and work spaces may also be making innovation too expensive to pursue. Some saw the pandemic as an opportunity to drive economic growth and wellbeing by increasing the supply of buildings and spaces able to support a more diverse set of uses closer to where people need them.

## **+ Opportunities will remain concentrated in cities**

While the pandemic has seen a negative impact on people's immediate outlook on job opportunities, this does not appear to be long-term, with practically the same percentage of people saying their city will have lots of job opportunities in future before and during the pandemic. Of greater concern is that the YouGov poll highlighted that social inclusion would improve only slightly in future. While accessing opportunities was a key concern for many of those attending our events, this outlook suggests only minimal improvement for those currently unable to access urban opportunities. The relative de-prioritising of public transport and education during the pandemic, both central to increasing access and recovery, may further undermine efforts to respond to inequality and poor productivity. Urban leaders will need to champion these to ensure cities continue to expand opportunities, possibly through real estate commitments that prioritise accessibility and learning.

## Global city context

### Do cities concentrate prosperity?

*Peter Griffiths – City Strategist, ING Media*

It wasn't that long ago that living in the world's larger urban centres was grave for life chances. Charles Booth's maps of working-class life in London towards the end of the 19th century, for example, highlight a city riddled with poverty, severe overcrowding and poor-quality housing. New York City, which would soon overtake London to become home to the world's largest population, didn't fare much better; neither did Paris. In many ways the global pandemic has reminded us of what we already know: a well managed, equitable and quality built environment tends to be more resilient.

Global cities may be facing existential threat, but they likely hold many of the answers to recovery. Since the middle of the last century the clustering of people into urban areas has concentrated prosperity; as urbanisation has gone up in every world region (including areas struggling today with many of the challenges Victorian London faced) so has life expectancy, according to UN data. Life expectancy at birth (which includes factors of socioeconomic status, the quality of governance and access to health infrastructure) provides a good indicator for wellbeing.

Cities, where 55% of the global population live, generate 80% of global GDP, and people living in a large city have an even greater chance of being wealthy. It isn't just money. A 2011 study by London School of Economics and Political Science indicated that 110 out of 129 cities around the world outperformed their national contexts on measures for health, education and wealth. It doesn't seem to matter where in the world you're born, if you're in a city the chances of being prosperous seem to increase. Ensuring cities deliver these benefits to the residents living in them seems key to national prosperity.

However, cities also appear to concentrate inequality, with a growing challenge around housing affordability and urban design choices that lock people out of the benefits cities can provide. That pattern isn't always as expected: home ownership rates in far wealthier London are far lower than in Cape Town. In-country differences can also be vast with Frankfurt experiencing far higher income inequality than Berlin, a city where almost everyone rents.

There are also concerns about the sustainability of cities, which produce 70% of global CO<sub>2</sub>, even though studies suggest cities are best positioned to solve climate change challenges. Public transport, energy efficient buildings and renewable energy could reduce greenhouse gas emissions in cities by 87% according to C40.

The summary is that at a global level, moving to a city will increase the likelihood of being wealthy, healthy and educated, but not everyone living in them is able to access these benefits. So while it is real that cities concentrate opportunities for prosperity, the paradox is that they may also create the conditions for inequality.

Why this is the case depends on who you ask, but could include:

- Uneven infrastructure provision/access
- Poor quality built environment/design
- Uneven social services/access
- Uneven social network access/knowledge
- Talent/innovation needs may disproportionately reward 'superstars'
- Taxation may be ineffective for spatial redistribution
- Policy, subsidy, legal and/or market failure

Exploring cities at a local level and comparing solutions between places is key to responding to instances where cities aren't maximising prosperity benefits.





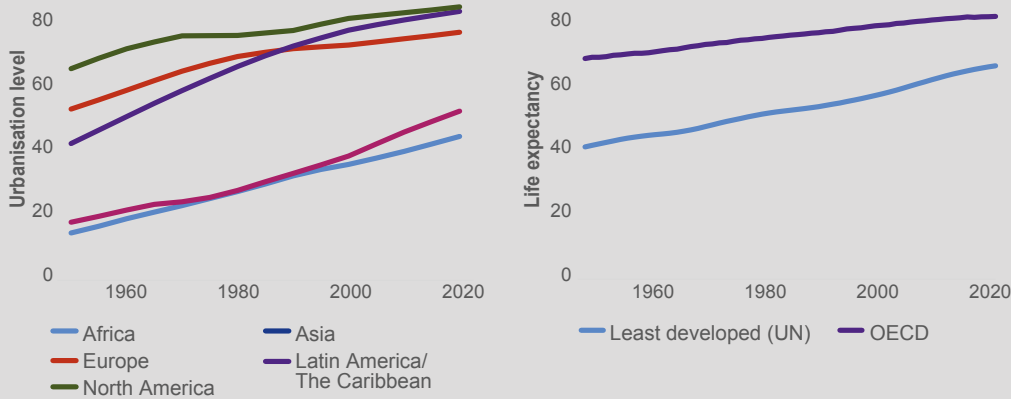


Cape Town, South Africa – How we design cities and encourage real estate development has a significant impact on prosperity, and frequently determines the possibility of positive connection between places.

## Cities and prosperity

Cities are the most complex systems we have ever built. Identifying what drives prosperity in them is fraught with challenges. However, lots of data suggests prosperity (in the broadest sense) concentrates in cities, as do higher levels of inequality. If our starting point is that living closer to other people improves opportunities for prosperity, how can this be unlocked for more people?

### Comparing urbanisation to life expectancy



*Life expectancy, in developed and developing parts of the world, is one of many indicators that has increased alongside urbanisation.*

UN & World Bank (2018)

Cities concentrate wealth

Cities host **55%** of the global population but generate **80%** of global GDP

Brookings (2012), World Bank (2019), UN (2018)

...global emissions

And **70%** of global CO<sub>2</sub> emissions

C40 (2018)

...and opportunities

**110** Out of **129** major cities globally outperform their national contexts in measures of health, education and wealth

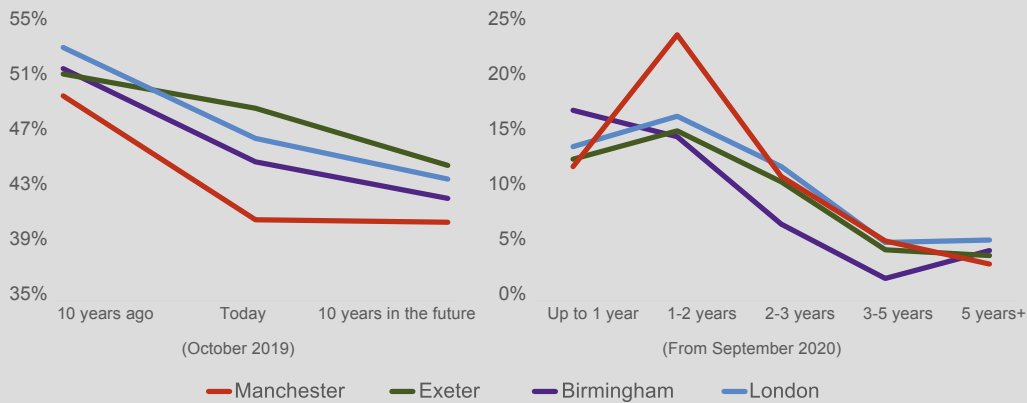
LSE (2011)



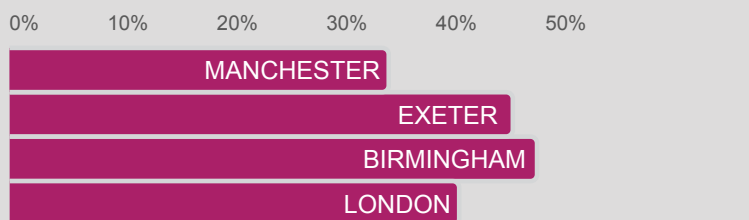
## Tracking prosperity in our cities

In the first YouGov survey respondents in Manchester, Exeter, Birmingham, and London felt their prosperity was declining over time. The post-pandemic results are perhaps more positive, suggesting recovery will happen, mostly in the next few years. While there are clear trends, the data highlights differences between the cities when it comes to perceptions of prosperity. In some instances, the pandemic also seems to have shifted prosperity priorities. The following pages will use this data to explore what may have changed.

### Tracking perceptions of prosperity before and during the pandemic

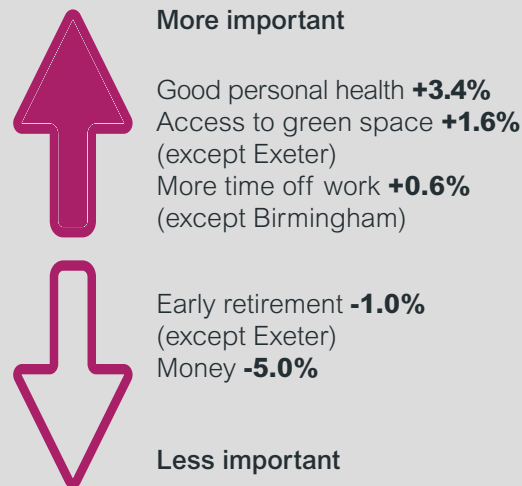


### The pandemic has not decreased my prosperity



Birmingham had the highest percentage of respondents reporting that the pandemic had not decreased their level of prosperity. Re-Leased data on commercial rent collections has consistently shown the West Midlands as one of the most resilient UK regions during the pandemic, and this data may point to its strategic role in terms of logistics.

## What matters most?



The pandemic may cause long-term structural change in people's relationship to work. During the pandemic London moved to rating time off work and money relatively higher than other cities suggesting the capital may provide solutions to the UK's wider productivity challenge. Exeter's divergence may be partly demographic (it is older and early retirement may seem a more tangible benefit in a context of wide job losses nationally) and its access to surrounding green space.

*“Rather than regenerating existing communities we should be rehabilitating places where people already live, removing restricting barriers to life, and giving agency and dignity back to communities.”*

Josh Artus – Centric Lab

## Who matters most?



With families and the third sector becoming relatively more important, people's sources of prosperity may expand. Successful partnerships may increasingly take on non-traditional sources of support.

*“Prosperity is about the myriad of opportunities within cities that should cross all generations and sectors.”*

David Ainsworth – CO—RE

### Do we still want to be in cities?

Respondents in all cities (except Manchester) answered the question about 'future generations will want to live in my city' more positively during the pandemic than before.

#### Future generations will want to live in my city

**73% Agree (vs 67% pre-pandemic)**

Access to arts and culture, amenities particularly concentrated in dense urban areas, increased in importance across all the cities too.

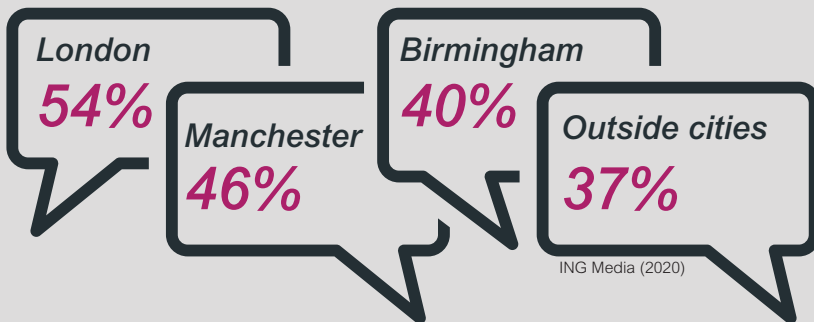
#### Better access to the arts and culture would increase my prosperity

**57% Agree (vs 51% pre-pandemic)**

*“A lot of younger people still want to move into cities.”*

Michael Howard – Urban Bubble

#### Online conversation growth during Covid-19



Faster growth in cities across topics including diversity, technology, and wellbeing, suggests culture and innovation needed to recover and this will continue to be concentrated in large urban areas.

Interestingly, 'my city is a good place to do business' in dropped slightly in every city, except Exeter, which received the most positive responses across all these questions. It is possible that virtual networking may make it easier to access opportunities that previously required a presence in much larger cities.

#### My city is a good place to do business/work in

**78% Agree (vs 83% pre-pandemic)**

## Can people and nature thrive in cities?

Inequality and the environment are long-term interconnected themes that have been elevated as people explore sustainable recovery. However, it seems more effort will go into solving climate challenges. People seem confident economic activity will again concentrate in cities in the future, suggesting urban areas will continue to be at the centre of solving environmental and social challenges.

My city is good for people and for the planet?

**60%** Agree my city is socially inclusive

**62%** Agree it will be for the future

**34%** Agree my city is environmentally sustainable

**47%** Agree it will be for the future

My city has lots of job opportunities today

**55%** Agree (vs **69%** pre-pandemic)

My city has lots of future job opportunities

**62%** Agree (vs **63%** pre-pandemic)

Building heating and transport emissions are some of the largest contributors to carbon emissions in cities, while education is key to sharing ideas and accessing networks. London has the UK's lowest emissions per capita partly because of higher densities and public transport. Education and mobility will be key to enabling access to the jobs people expect to return to cities in future:

Better access to public transport will increase my prosperity

**60%** Agree (vs **69%** pre-pandemic)

Better access to education will increase my prosperity

**55%** Agree (vs **45%** pre-pandemic)

## Who will make our cities affordable?

Despite the pandemic, and the expectation that housing cost pressures will expand, there is a sense that our cities will continue to be attractive to people seeking opportunities for prosperity. The pandemic may have made local government far more important for driving prosperity, except in London. This may lead to a more dynamic conversation on how best to progress devolution, particularly as the national government's focus shifts from combined authority metropolitan integration to smaller urban centres.

My local government is improving prosperity in my city:

**46% Agree** (vs **40%** pre-pandemic)

**41% Disagree** (vs **47%** pre-pandemic)

My national government is improving prosperity in my city:

**21% Agree** vs **64% disagree**

Negativity of national government's ability to deliver prosperity pulled down the overall sense of the importance of politicians even as local government became more important during the pandemic. At both scales of government, it appears that people's feelings of prosperity may not automatically support the political party they voted for.

**Homes for people: people agreeing these factors would improve prosperity during and (before) the pandemic**

	Manchester	Exeter	Birmingham	London	Overall
Better quality housing	65% (75%) ↓	51% (62%) ↓	61% (68%) ↓	70% (75%) ↓	62% (70%) ↓
More space to live in	62% (64%) ↓	52% (50%) ↑	55% (51%) ↑	68% (67%) ↑	59% (58%) ↑
More affordable housing	69% (73%) ↓	56% (75%) ↓	64% (68%) ↓	70% (74%) ↓	65% (72%) ↓

Perhaps not surprisingly, the pandemic has seen a shift away from quality and price towards space as homeworking, home-schooling and home-leisure intensifies. The UK's homes, which are some of the smallest in Europe, may have less resilience to the use changes required by the pandemic. Despite this, the expectation is that house prices will continue to grow (except for Manchester):



The value of the home I live in will increase over time

**78% Agree (vs 73% pre-pandemic)**

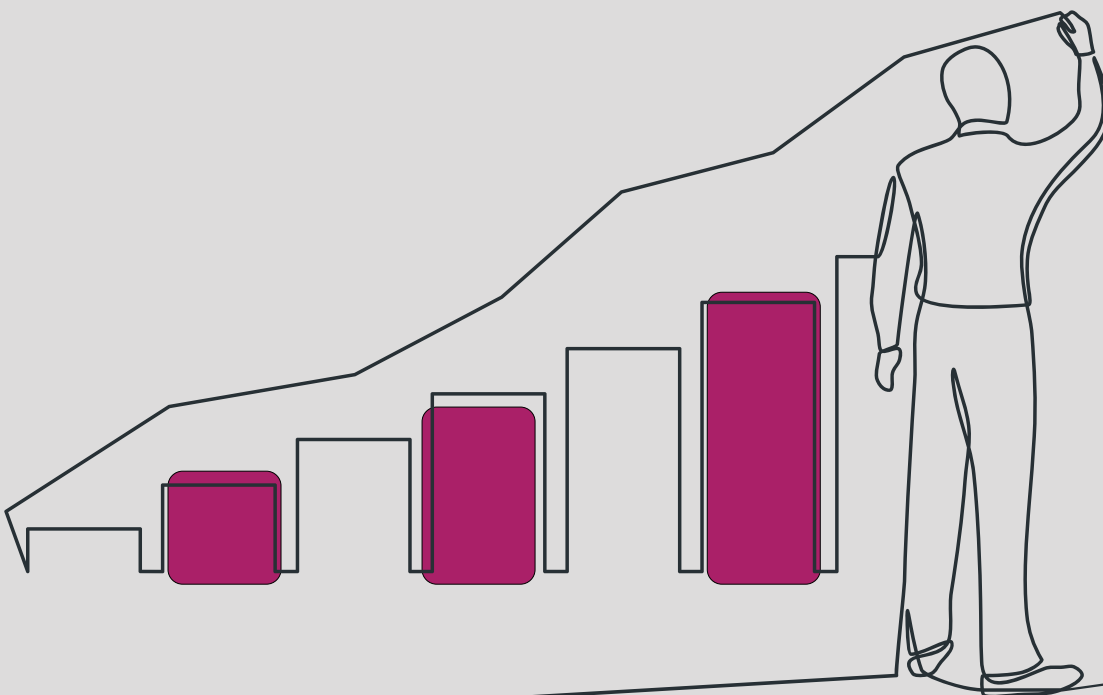
Typologies that are easier to reconfigure or expand may help ensure homes are more resilient to future demands, suggesting apartments may only be part of the solution. While the pandemic may have marginally improved affordability, more creative solutions will be required to ensure more people can enjoy the benefits the real estate sector is able to offer.

Future generations will be able to afford to live in my city

**28% Agree (vs 21% pre-pandemic)**

*“We currently live in a world where monthly rents cost more than mortgage payments on homes. This is a fundamental issue in terms of affordability – more affordable homes and PRS are key to sorting out our broken housing market.”*

Paul Britton – Homes England



## Expert views from across the country

Over 160 city leaders and experts contributed to this exploration into prosperity from the North West (Manchester), the South West (Exeter), the West Midlands (Birmingham), and the South East (London). In some instances, pre-pandemic conversations suggested areas where improvement could lead to increases in prosperity that have since become more central during the pandemic.

### How would you define prosperity?

Participants felt prosperity should include access to good health, wellbeing, and lifestyle choice and not only focus on measures of wealth. Capacity to choose was also seen as a key contributor: from being able to easily change jobs, home, or schools to having greater control over infrastructure decisions and urban investment. The built environment also has a profound impact on people's sense of prosperity, however, not everyone is impacted in the same ways.

Access to green, social and cultural space (especially in central urban locations); vibrant and diverse urban centres; better design and management of public space and urban mobility; and even seeing that people in need are being cared for all contributed positively to feelings of prosperity.

Closing the inequality gap within and between cities and ensuring rising housing costs do not price out or segregate communities was important to retain talent and a sense of belonging. Some suggested the stress caused by housing and other insecurity was impacting negatively on productivity too.

In some instances, the pandemic shifted the conversation between participants. Arts and culture gained greater focus, while some felt smaller towns and centres may find more opportunities for talent retention, levelling up, and urban regeneration with welfare now more evenly split between commercial/work spaces and where people live. Generally, however, conversations around prosperity were not significantly different before and during the pandemic.

### Do you agree with the YouGov findings?

The YouGov findings, alongside other data points, resulted in significant debate. While YouGov results were representative of all city adults (except in Exeter where the panel was too small), some participants felt the results did not fully reflect their experiences. The most regular concerns were that the data may mask internal inequalities or not fully highlight their city's strengths. On the latter, many felt their city needed to do more to translate the benefits of urban living.

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## What role does real estate play in driving prosperity?

Participants felt the real estate sector's understanding of the impact it has and can have on society and the environment is evolving and, in some instances, overlapping. When it comes to ESG frameworks, however, participants suggested sustainability initiatives were more measurable and often got more attention than social value. Ensuring there is a much wider mix of uses, including employment, leisure, culture, residential, education, social and health amenities, was key to using real estate to boost prosperity more effectively.

Several different approaches were suggested including developing more mixed and flexible spaces; intergenerational housing; cross-subsiding local commercial or social initiatives; and prioritising walkability to improve intra-urban connectivity. Urging greater integration between infrastructure investment, social housing, and urban regeneration was suggested to maximise the benefits of urban living for more people.

While participants were already questioning the appropriate balance between city centre and outer-lying towns and suburbs to increase central housing supply alongside creating a stronger role for secondary urban areas, the pandemic has provided further incentive for improving the relationship between where people live and work. A desire for working towards an authentic offer to attract people, particularly in less prominent areas, will require stronger partnerships with local communities to rehabilitate existing cultural and real estate value.



## Case studies

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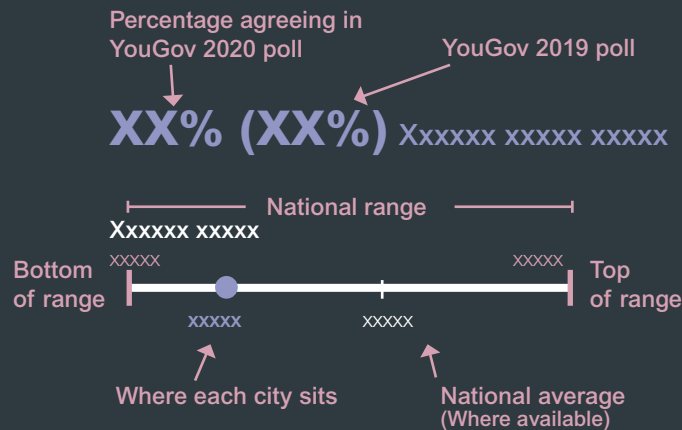


## Perceptions of prosperity/inclusive growth

We commissioned a YouGov poll looking into perceptions of prosperity in Birmingham, Exeter, London and Manchester in November 2019 and updated in September 2020 to better understand the impact of the global pandemic. ING Media's City Strategist Peter Griffiths presented the results of the YouGov poll alongside comparative statistics of each city's performance within the UK.

## Explanation of results

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 1006 adults in 2020, and 1007 in 2019. Online fieldwork was undertaken between 4-17 September 2020 and 25 October-3 November 2019. The figures for Birmingham, Manchester and London have been weighted and are representative of all city adults (aged 18+). Results for adults in Exeter is non-representative. Other data is from ONS, NOMIS, Centre for Cities, Nesta, OECD, ING Media, and TomTom. Each data bar illustrates the city's position within the range for UK cities. The average is indicated in most instances.



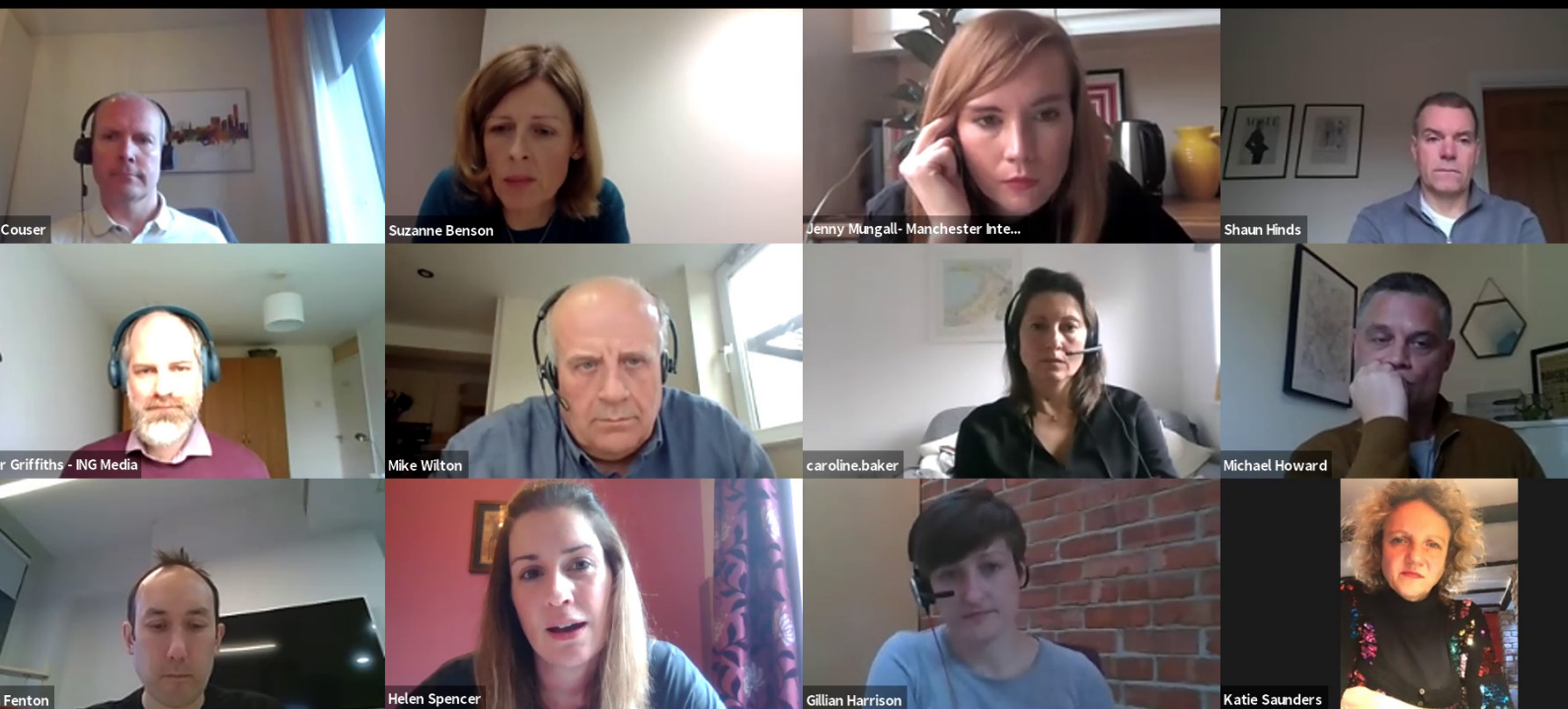
## Manchester and the North West

Our first event in Manchester was in November 2019, where we invited 30 professionals to HOME. Following the updated YouGov poll from September 2020 we ran a smaller, virtual roundtable discussion in December 2020 which took into account the effect that Covid-19 has had on prosperity in Manchester and the North West. At both events ING Media's City Strategist Peter Griffiths discussed the results from YouGov and offered a global perspective on the challenges and benefits of urban development.



“ One of the interesting aspects of Manchester is the way the city has grown and what the city has to offer such as the different kinds of companies and jobs, education, opportunities that exist but also retail, hospitality, the arts, the culture, everything that the that city centre is all about. ”

Shaun Hinds – Manchester Central



## Thoughts on Manchester

Manchester is at a key stage in its evolution. Recent years have seen significant growth in the city in all areas: from the boom in people choosing to live within the boundaries of the city, through a significant shift in the location and quality of the office and retail space in the city, to the enduring focus on arts and culture with new venues such as Home creating alternative hubs in the city for people to gather.

The response to the pandemic in 2020 has to a large extent stalled momentum in many areas of the city, although the cranes have continued to operate throughout. Whilst the challenge posed in emerging from the current lockdown will undoubtedly slow progress for the city, the pause has also provided time and opportunity to assess the key priorities for the city in the medium term.

Manchester City Council led a strategic consultation in 2020 to determine the policy priorities for the next five years. Many of these closely align with the outcome of our research with respondents focusing on sustainability and more equitable outcomes, whether in job opportunities, healthcare or housing. The challenge for the city looking forward will be to focus these priorities into deliverable targets. One of the most prominent of these being the city's commitment to achieve a zero carbon target as set out in the Manchester Climate Change Framework for the next five years.

Other priorities will be to revive the cultural and hospitality sectors in the city with the future of the Manchester International Festival and the Factory development currently attracting attention. Although both sectors have suffered significant losses in recent months there is a clear imperative to support and revive these industries in order to encourage people back to the city.

On a wider basis Greater Manchester will also be looking to the operation of the spatial framework to strategically promote development which encourages growth. Nine of the ten Greater Manchester authorities are now looking to form a committee to allocate housing and employment sites across the area. Improved facilities in the surrounding Greater Manchester towns together with enhanced transport links will be a key priority in securing and resetting the importance of our conurbations to stimulate growth and innovation.



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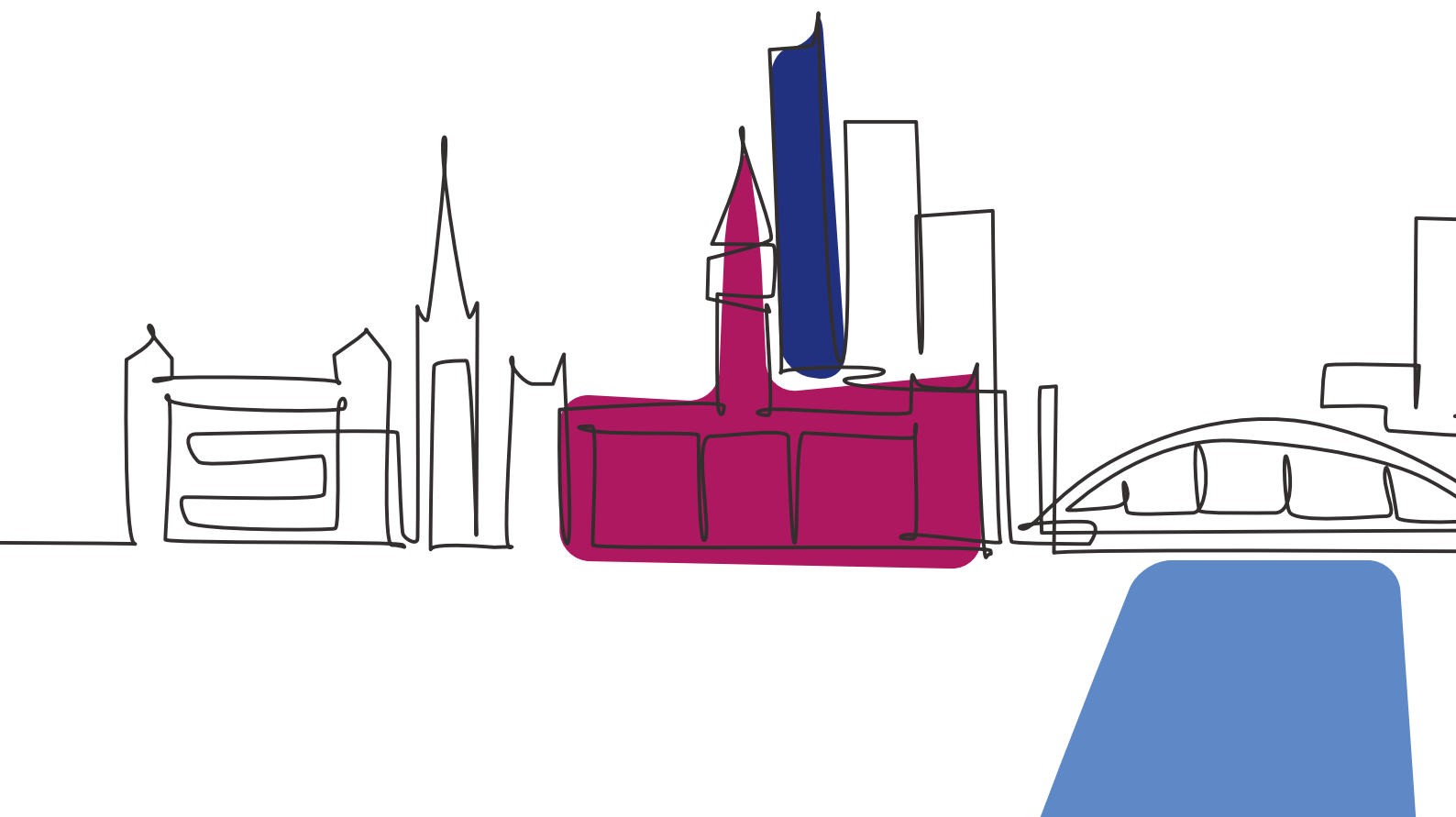
# YouGov poll results in context

## Manchester

### Which three of the following have the biggest impact on your prosperity?

- **64% (70%) Myself** moved to lowest of cities polled
- **51% (47%) My family** stayed lowest of cities polled
- **41% (44%) My friends** stayed highest of cities polled
- **31% (34%) The business community**
- **32% (33%) Politicians**
- **3% (3%) Religious communities** moved to lowest of cities polled
- **1% (2%) Charities**

While YouGov respondents in Manchester were the only ones to rank the business community as more important than politicians before the pandemic, the latest results show London as the only city with this profile. Respondents in Manchester continue to see friends as relatively more important contributors to prosperity; however, 'myself', 'my family' and 'religious communities' are now all the lowest ranked.



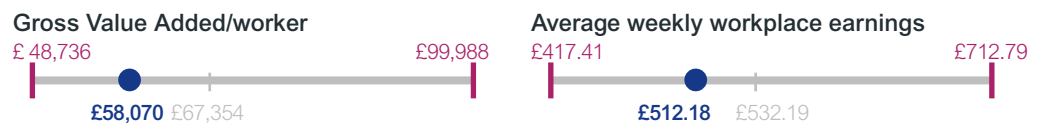


## What would improve your prosperity the most?

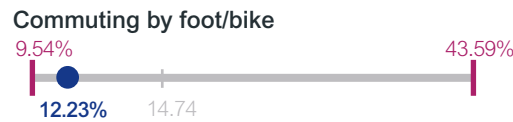
Manchester's productivity and weekly income are both below the UK average. Income for the wider region, however, is slightly higher, suggesting inequality may be concentrated more centrally. Its relatively lower access to ultrafast broadband may put the city at a remote working disadvantage. Like Birmingham, its comparatively lower green space may limit health benefits, particularly in areas where access is low.

The figure of welfare per capita can be seen as an indicator of a community's capacity to look after its residents.

### 45% (47%) More income/money

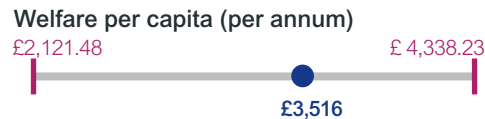


### 23% (21%) Good personal health

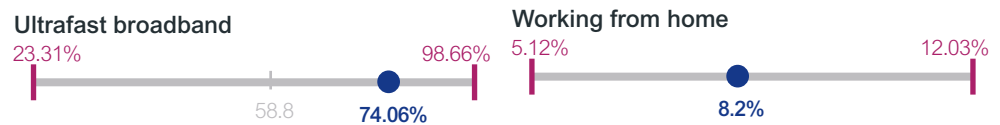


### 8% (8%) Having a stronger community around me

Moved to highest of cities polled

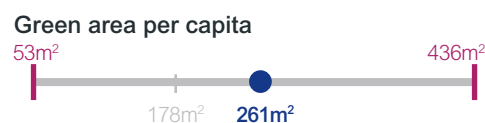


### 7% (7%) More time off work



### 4% (2%) Access to green spaces

Moved to highest of cities polled



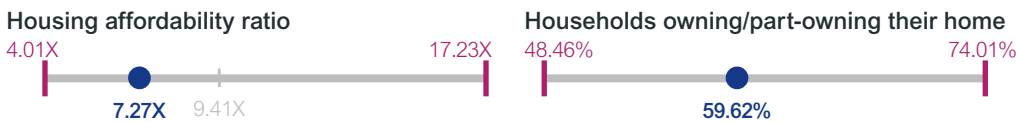
### To what extent would each of the following increase your sense of prosperity in your city?

One in five homes in the North West failed the English Housing Survey’s minimum standards in 2017. While affordability has dominated the national debate, quality is a major concern. It is the only city where respondents did not increase their score for space during the pandemic.

**65% (75%)** Better quality housing

**69% (73%)** More affordable housing

**62% (64%)** More space to live in

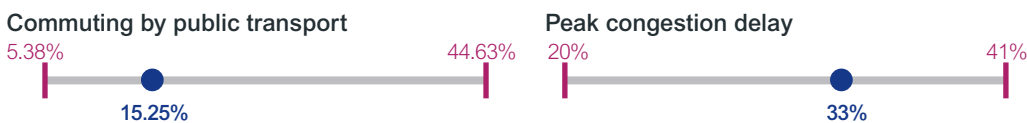


### To what extent would each of the following increase your sense of prosperity in your city?

Manchester consistently ranked transport, education and culture higher than other cities. Despite even fewer people using public transport, improving it, which could include more or faster routes, or more frequent services, could significantly improve feelings of prosperity in the city. Improving access to education was also central to improving prosperity although this figure dropped during the pandemic. A changing job market may make access to education, for young and old, increasingly important.

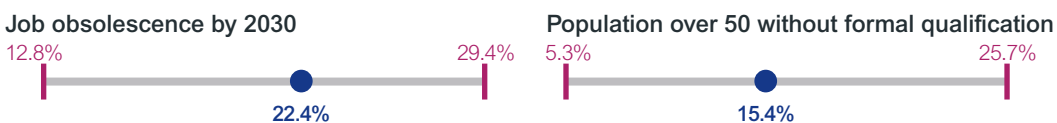
**65% (73%)** Better public transport

Stayed to highest of cities polled



**49% (61%)** Better access to education

Stayed to highest of cities polled



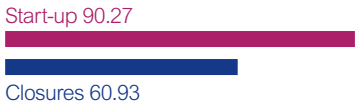
**59% (53%)** Better access to arts and culture

Manchester has a proportionally higher business success rate, with most cities in the UK seeing almost as many closures as new business annually. Boosting the city's innovation and knowledge sectors may be an important aspect of recovery. The percentages below indicate the extent to which the respondents in Manchester agree with the statement.

### 65% (71%) My city has lots of job opportunities

Moved to highest of cities polled

Start-ups/closures per 100,000 inhabitants



### 79% (83%) My city is good to do business/work in

Patent applications per 10,000 inhabitants

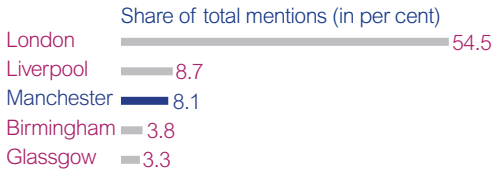


### 63% (66%) Future generations will be able to find jobs

Manchester punches above its weight for global digital visibility. Within the UK, its visibility is third, just behind Liverpool. A strong perception of identity may be a key asset in positioning the city for future prosperity.

### (70%) My city is an attractive place to visit

ING Media Global Cities Digital Visibility Series – The UK's Most Talked About Cities



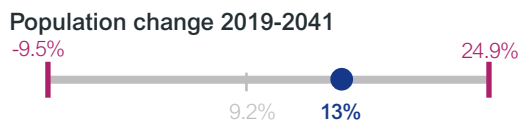
### (91%) My city has a strong identity

Highest of the cities polled

## Thinking about your city in the next 20 years, to what extent do you agree or disagree with the following statements?

Despite feelings that prosperity will decrease over the next decade, the city is expected to retain and attract people. This is matched with projected population growth above the UK average. However, respondents are slightly less confident that people will want to live in Manchester in future, even though they expect it to be more socially inclusive.

**74% (77%)** Future generations will want to live in my city  
No longer highest of cities polled



**27% (30%)** Future generations will be able to afford to live in my city

**64% (71%)** The value of the home I live in will increase over time  
Stayed lowest of cities polled

**64%** My city will be socially inclusive versus **62%** today  
Highest of cities polled

**47% (44%)** My city will be environmentally sustainable versus **35%** agreeing it is today



## Exeter and the South West

Our event in Exeter looked at prosperity in towns and cities in many key centres across the South West. We invited over 30 professionals engaged in the process of making places better to live and work to our second event in this series which took place at co-working hub Venaspaces in Exeter on the 22 January 2020. ING Media's City Strategist Peter Griffiths offered a global perspective on the challenges and benefits of urban development. The contributors then split into groups to discuss prosperity in Exeter and the South West. Our second event took place virtually on 27 January 2021.



“ There is a tension between cities growing in scale so they can support sustainable arts, culture and leisure opportunities and growth in population size. Communities often want the services and facilities but are reluctant to support new build housing to accommodate the population growth to sustain these services and facilities. The growth in student accommodation across the city has added to the vibrancy and sustainability of Exeter but it's the most contested growth which attracts opposition from many existing residents. ”

Emma Osmundsen – Exeter City Living



## Thoughts on Exeter

The South West region has seen significant growth in recent years in key sectors such as sustainability, renewable energy and marine technology. The South West remains a key destination for people looking to live and work in a wealthy region with a growing economy; beautiful and accessible green space whether countryside or coast; connectivity to the rest of the UK and fantastic vision of growth and brand.

Exeter has leading businesses based here: the Met Office which relocated to Exeter in 2003; the University of Exeter, and the Exeter Science Park (with a plethora of businesses focused on science, technology, engineering, medicine and maths). It is also home to Exeter Cathedral; the award winning RAMM museum and Exeter Chiefs Rugby Club. New development opportunities sit successfully alongside historic buildings in places like the historic quay, and the city continues to evolve and develop exciting and unique projects.

Exeter is at an exciting stage in its development as a city and it's a great time to be involved with this and to work in the region. The city has bold visions and ambitions. It has committed to becoming carbon neutral by 2030 and it was given Garden City designation in 2019. 'Liveable Exeter' was created in order to bring to life the vision of the Garden City developments and to create 12,000 new homes and quarters within the city, all guided by garden city principles. The city is also developing a UK first: a leisure centre built to Passivhaus standards and the delivery of affordable homes along the same principles.

Of course, it's not going to be plain sailing and sitting amongst this opportunity is the need for increased development of infrastructure, a cementing of the region's 'brand' to clearly show others what a unique place it is and managing growth at a steady pace. There needs to be a more collaborative approach between public and private sectors in order to best utilise combined strengths and expertise to deliver growth in a sustainable way, building to complement our natural environment.

One of the effects of the pandemic will be the increased relocation for many people to the South West, recognising the benefits of a fantastic place to live. This will bring challenges to the resources which we have but an opportunity to bring new investment into the region and an attraction of new talent to our work force. Whilst this is of huge benefit to the region there is the challenge of ensuring that homes remain affordable to those already in the region and that need will have to be balanced against the desire to raise the brand of the South West and the continued investment in the development of the city and surrounding areas.



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# YouGov poll results in context

## Exeter

### Which three of the following have the biggest impact on your prosperity?

- **69% (70%) Myself** no longer lowest of cities polled
- **57% (55%) My family**
- **33% (41%) Politicians** stayed highest of cities polled
- **38% (39%) My friends** moved lowest of cities polled
- **28% (26%) The business community** no longer lowest of cities polled
- **5% (7%) Religious communities**
- **2% (1%) Charities** moved to highest of the cities polled

YouGov respondents in Exeter consistently ranked politicians as relatively more important than in other cities; a higher percentage also agreed that the local council was improving prosperity before and during the pandemic. The relatively lower score for friends may link with conversations around loneliness.



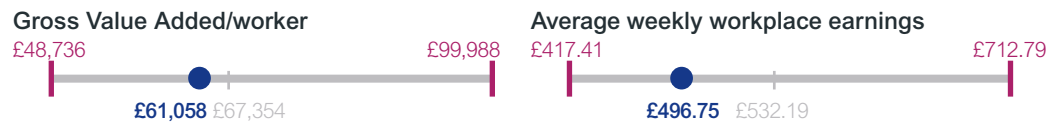


## What would improve your prosperity the most?

Exeter's responses were largely divergent to other case study cities. This may reflect that it is a far smaller city offering an alternative lifestyle choice to larger urban centres, as well as far lower levels of deprivation and a slightly older (and less diverse) demographic. The lack of comparable data available for Exeter, however, makes it difficult to fully assess the city's strengths.

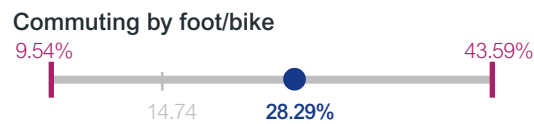
### 32% (42%) More income/money

Stayed lowest of cities polled



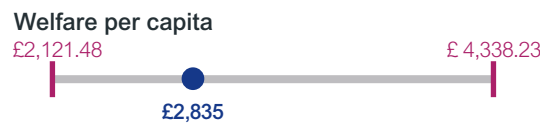
### 32% (27%) Good personal health

Stayed highest of the cities polled



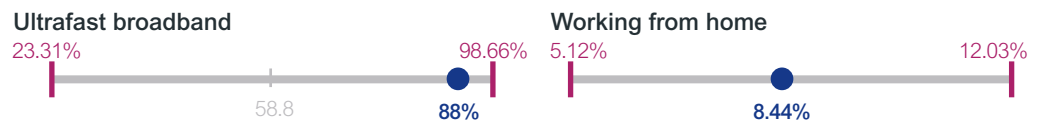
### 7% (11%) Having a stronger community around me

No longer highest of cities polled



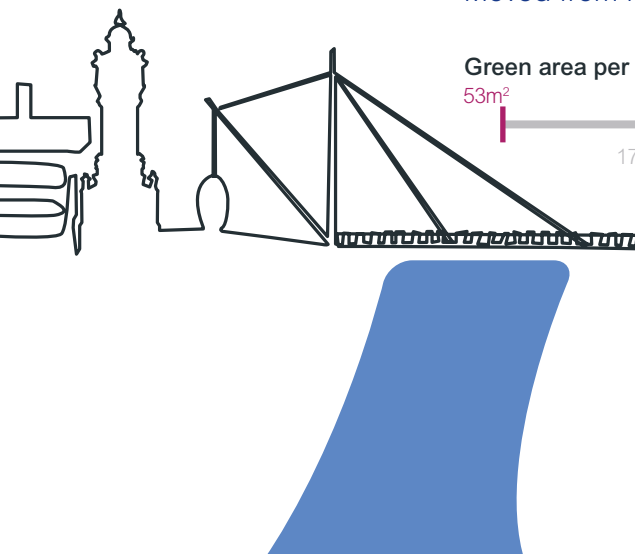
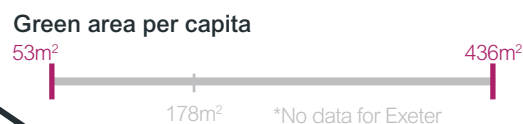
### 7% (6%) More time off work

Stayed lowest of cities polled



### 1% (3%) Access to green spaces

Moved from highest to lowest of cities polled



### To what extent would each of the following increase your sense of prosperity in your city?

Exeter's responses suggest the national conversation around housing affordability is nuanced, with cost being a far more significant factor than quality and space are in other cities. However, the pandemic may have shifted perceptions around affordability, with it moving from highest before the pandemic to lowest of cities polled during.

#### 51% (62%) Better quality housing

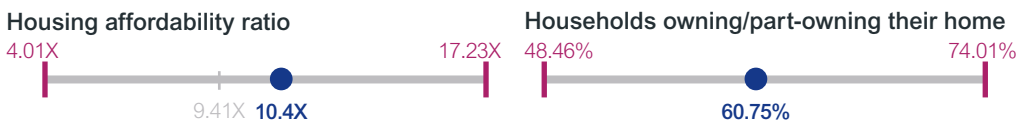
Stayed lowest of cities polled

#### 56% (75%) More affordable housing

Moved from highest to lowest of cities polled

#### 52% (50%) More space to live in

Stayed lowest of the cities polled

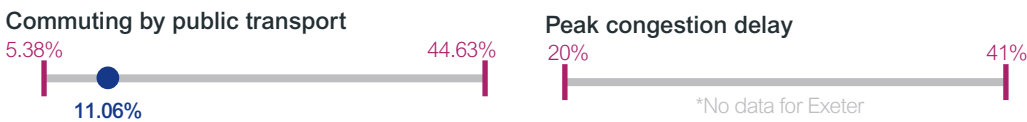


### To what extent would each of the following increase your sense of prosperity in your city?

Exeter's more rural surrounding and lower levels of deprivation may explain its significant divergence from other settings. While arts and culture venues are available across the South West, these are not concentrated in one urban centre as is the case for larger cities, suggesting initiatives like Greater Exeter or the wider South West brand and strategic use of infrastructure could help make these cultural assets feel more accessible to more people across the region.

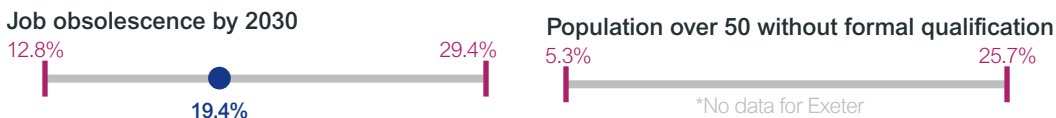
#### 53% (67%) Better public transport

Stayed lowest of cities polled



#### 37% (49%) Better access to education

Stayed lowest of cities polled



#### 59% (53%) Better access to arts and culture

Despite having one of Europe's top universities, Exeter's business innovation may not be delivering the stickiness required to generate high-quality long-term jobs, with roughly as many new businesses as closures annually. The percentages below indicate the extent to which people in Exeter agree with the statement.

## 43% (52%) My city has lots of job opportunities

Stayed lowest of cities polled

### Start-ups/closures per 100,000 inhabitants

Start-up 41.79



Closures 41.40

## 75% (73%) My city is good to do business/work in

No longer lowest of cities polled

### Patent applications per 10,000 inhabitants



## 55% (54%) Future generations will be able to find jobs

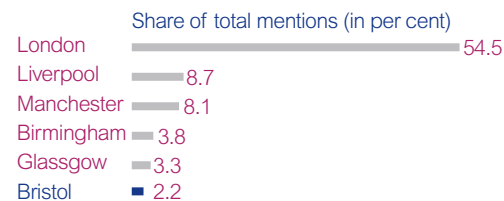
Stayed lowest of cities polled

Exeter and South West have relatively lower digital visibility globally, with only Bristol, at the edge of the region, featuring in the UK Top 20. This suggests the natural assets prized by those choosing the area as their home do not necessarily translate into a wider recognisability.

## (88%) My city is an attractive place to visit

Highest of cities polled

### ING Media Global Cities Digital Visibility Series – The UK's Most Talked About Cities



## (71%) My city has a strong identity

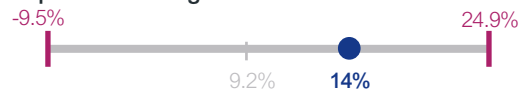
Lowest of the cities polled

## Thinking about your city in the next 20 years, to what extent do you agree or disagree with the following statements?

Exeter's compact size increases opportunities for walking and cycling, however its importance as a regional hub connected to several small and large urban areas increases the pressure for private car use. Significant green space outside the city likely impacts positively on feelings around sustainability. A narrative around moving to the countryside may explain why respondents in Exeter moved from having the lowest number of respondents thinking their house values would appreciate to having the highest.

**80% (74%)** Future generations will want to live in my city  
 Moved to highest of cities polled

Population change 2019-2041



**28% (17%)** Future generations will be able to afford to live in my city

**81% (71%)** The value of the home I live in will increase over time  
 Moved from lowest to highest of cities polled

**60%** My city will be socially inclusive versus **59%** today  
 Lowest of the cities polled

**56% (48%)** My city will be environmentally sustainable versus **51%** agreeing it is today  
 Stayed highest of the cities polled



## Birmingham and the West Midlands

Our Birmingham event looked at prosperity in towns and cities in many key centres across the Midlands. We invited over 30 professionals engaged in the process of making places better to live and work to our first event in this series which took place virtually on the 8 October 2020. ING Media's City Strategist Peter Griffiths offered a global perspective on the challenges and benefits of urban development. The contributors then split into groups to discuss inclusive growth in Birmingham and the West Midlands.



“ It is not just about the buildings but about creating hubs where there is a mix of people who can interact. Developments around streets and squares will be around for generations whilst buildings will change over time. The developments that are thought through with the wider masterplan in mind are able to connect areas and extend the city. ”

Ross Fittall – Argent



## Thoughts on Birmingham

Birmingham and the wider West Midlands has, for so long, sold itself short – and many have been quick to jump on that band wagon. But not any more. The West Midlands story is now one of culture, enterprise and growth.

With Coventry hosting the UK City of Culture this year and Birmingham hosting the Commonwealth Games in 2022, a new narrative is emerging. Art.Quarter is being developed in the industrial inner city area of Eastside with the aim of creating a new cultural quarter. The regeneration of the Custard Factory has given a home to a variety of creative and digital businesses, independent shops and cafes and bars.

And the region is emerging as an innovation hub with the development of new technologies and infrastructure. Driverless and electric vehicles are being made in Coventry, the Midlands Aerospace Alliance represents the largest aerospace cluster in Europe, the next generation of medicines are being pioneered in Birmingham, and two high-speed rail stations being built in central Birmingham and Solihull positioning the West Midlands at the forefront of the rail industry in Europe.

All of this is helping to continue to attract investment into the region and the take up of office space by big names such as HSBC, HS2, and BT has further confirmed that this is a vibrant attractive part of the country with a wide talent pool.

The last twelve months has created many challenges but also opportunities for the West Midlands. We have all witnessed the enormous growth in industrial and logistics development across the country and the region has been a particular beneficiary, but as the majority of these are on major out of city transport links, this draws employment opportunities to out of city locations and so challenges how we perceive our cities such as Birmingham and Coventry.

There has been much talk of how we will use offices and facilities in our city centres post pandemic and the research gathered as part of our City Exchange campaign and webinar discussions with members of the local community suggests that there is a desire to move away from conventional corporate uses towards greater accessibility and shared use of space in our cities. The pandemic has made many of us pause to re-think how we want to experience our cities and Birmingham is no exception. With so many office workers expressing a desire to continue to work flexibly once the pandemic is over, businesses are reviewing the size, location and configuration of their office space and thinking about how some of it can be repurposed.

Although new office developments have slowed in the last year, the most recent crane survey shows little loss of appetite in the housing and student accommodation sectors across the city. The youthful and culturally diverse population makes this one of the most important regions for life sciences and research. This talent pool is still attracted by the culture, education and employment opportunities presented by the West Midlands.

The key to the continued success of the cities in our region seems to be ensuring that they are a hub not only for commerce and employment but also an easily accessible magnet for those who no longer need to be in the city for work. Instead for those who want to be there for the things we have all missed so much during the pandemic; culture, education, entertainment and social interaction. Things Birmingham and the West Midlands has in spades!



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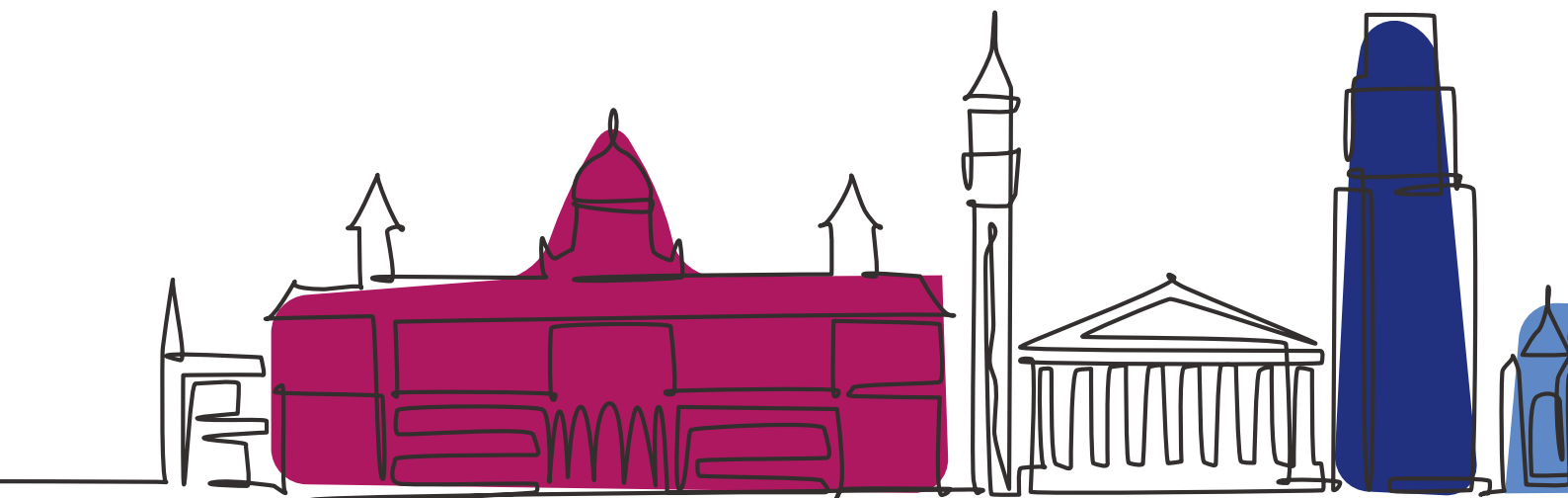
# YouGov poll results in context

## Birmingham

### Which three of the following have the biggest impact on your prosperity?

- 66% (71%) **Myself**
- 60% (57%) **My family** stayed highest of cities polled
- 39% (41%) **My friends**
- 25% (28%) **The business community** moved to lowest of cities polled
- 28% (31%) **Politicians** stayed lowest of cities polled
- 8% (5%) **Religious communities** moved to highest of cities polled
- 2% (2%) **Charities**

Birmingham ranks family as a more important contributor to prosperity than other cities polled. The business community joins politicians as relatively less important, suggesting there may be opportunity for businesses and the public sector to collectively raise the profile of their efforts. While charities are no longer ranked relatively higher than other cities, religious communities now do, suggesting the third sector is an important aspect of prosperity. However, residents are viewing local government more positively during the pandemic, with more agreeing it is improving prosperity than in any other city, moving up from the lowest before.

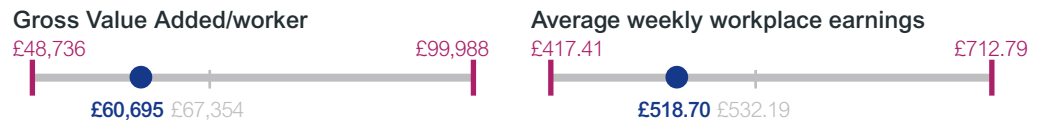




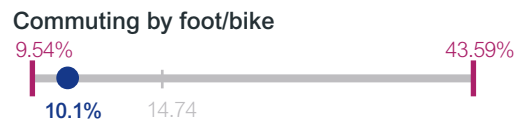
## What would improve your prosperity the most?

Active commuting is a key ingredient to improving personal health in cities, yet few people walk or cycle. Relatively higher access to broadband may help free up time otherwise needed to commute. The figure of welfare per capita can be seen as an indicator of a community's capacity to look after its residents.

### 37% (42%) More income/money

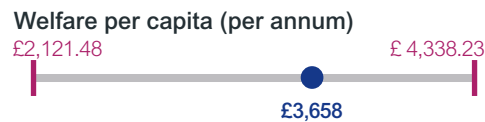


### 28% (25%) Good personal health



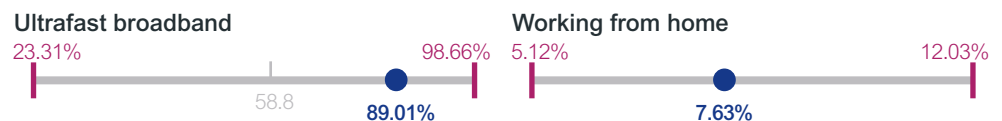
### 6% (6%) Having a stronger community around me

Stayed lowest of cities polled



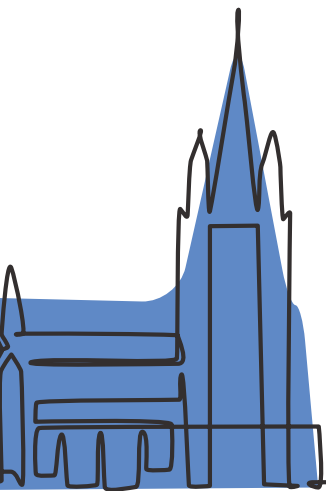
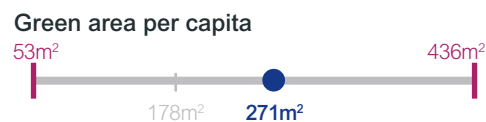
### 9% (12%) More time off work

No longer highest of cities polled



### 4% (1%) Access to green spaces

Moved from lowest to highest of cities polled



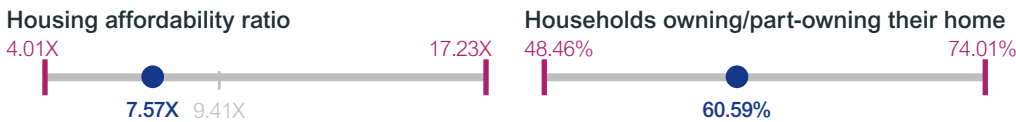
### To what extent would each of the following increase your sense of prosperity in your city?

Housing quality and affordability have become relatively less important than space. This likely reflects the rise in working from home and suggests technology innovation and/or shared workspaces may be an important aspect of housing supply. Affordably is no longer the lowest rated across the cities surveyed suggesting this may no longer be translating as a key advantage for the region.

**61% (68%)** Better quality housing

**64% (68%)** More affordable housing  
No longer lowest of cities polled

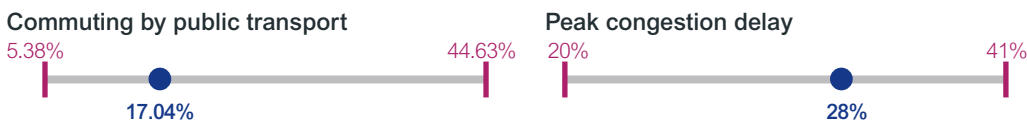
**55% (51%)** More space to live in



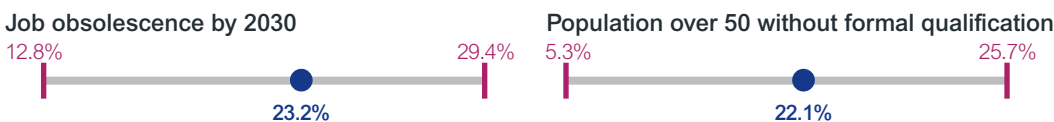
### To what extent would each of the following increase your sense of prosperity in your city?

Access to arts and culture increased for every city polled during the pandemic, while education and transport were scored lower. The positive is this suggests people are yearning for the civic assets concentrated in cities. However, the change in focus around transport and skills, key focus areas particularly for combined authorities, may require significant communications investment.

**59% (68%)** Better public transport



**48% (56%)** Better access to education

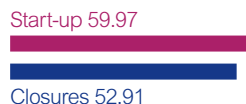


**56% (50%)** Better access to arts and culture  
Moved to joint lowest of cities polled

While Birmingham is the most positive about how long recovery will take and has a higher percentage reporting the pandemic has not affected their prosperity, relatively lower indicators for patents, jobs resilience and formal skills for those over 50 may impact recovery. The percentages below indicate the extent to which people in Birmingham agree with the statement.

## 49% (71%) My city has lots of job opportunities

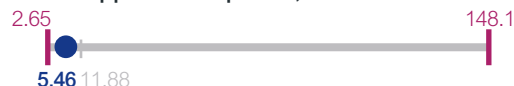
Start-ups/closures per 100,000 inhabitants



## 74% (80%) My city is good to do business/work in

Moved to lowest of cities polled

Patent applications per 10,000 inhabitants



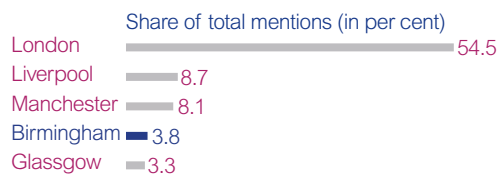
## 66% (63%) Future generations will be able to find jobs

Moved to highest of cities polled

Birmingham reported the lowest response across all the cities for being an attractive place to visit. This, and the region’s generally lower digital visibility, suggests the region may not be maximising opportunities to amplify its strengths.

## (62%) My city is an attractive place to visit

ING Media Global Cities Digital Visibility Series – The UK’s Most Talked About Cities



## (76%) My city has a strong identity

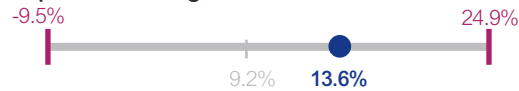
## Thinking about your city in the next 20 years, to what extent do you agree or disagree with the following statements?

While there was a general sense that Birmingham has fewer job opportunities now, it has the highest percentage of residents believing future generations will be able to find jobs. Birmingham still has the least residents reporting that future generations will want to live in the city but the highest for future generations being able to afford living in the city. Residents believe the city will be significantly more sustainable in the future but only slightly more socially inclusive.

### **66% (57%)** Future generations will want to live in my city

Stayed lowest of cities polled

Population change 2019-2041



### **43% (35%)** Future generations will be able to afford to live in my city

Stayed highest of cities polled

### **73% (72%)** The value of the home I live in will increase over time

### **63%** My city will be socially inclusive versus **60%** today

### **48% (31%)** My city will be environmentally sustainable versus **29%** agreeing it is today

No longer lowest of cities polled



# London and the South East

Our event in London looked at prosperity across the 33 Boroughs and in many key centres across the South East.

We invited over 40 professionals engaged in the process of making places better to live and work to our final event in this series which took place virtually on the 02 December 2020. ING Media's City Strategist Peter Griffiths offered a global perspective on the challenges and benefits of urban development. The contributors then split into groups to discuss inclusive growth in London and the South East.



“ London is an eco-system that relies on everyone being able to participate in the city to its fullest extent. The pandemic has exposed that we need to rethink the workers that are essential to the functioning of the city, which stretches way beyond traditional definitions of key workers. Think of the shop keepers, delivery drivers, broadband support workers, and property managers who have kept us all going this past year. ”

Ian Fletcher – BPF



## Thoughts on London

London, as the de facto financial capital of Europe and as a key driver of the British economy, has been through a lot recently. As a result of the pandemic, its streets remain empty, its restaurants and shops shuttered and even during lockdown, Amsterdam has now usurped London's position as Europe's biggest share trading hub.

But London has reserves in the bank ready to meet the challenges in play: it remains a world class international destination, coveted from East to West and feted for its glamour, modernity and excitement; its cultural and ethnic diversity make it a beacon of tolerance and progress; and it continues to offer the greatest opportunities in the UK for businesses and jobs.

The challenges it faces now are ones it already faced before, but they have been accelerated by Covid-19 and Brexit. Housing, technological infrastructure and urban/suburban placemaking remain key priorities and bold, focused investment together with the finest minds in British architecture and tech innovation are required to devise what will be costly but vital solutions.

Working in the leisure sector as I do, I see first hand the drive, decency and determination of London's businesses: adapting to necessary but potentially debilitating government restrictions through innovation, charity and hard work. Leisure could form the centrepiece of the new London as work retreats closer to home while the arts and tourism should come back stronger than ever as people realise what they were missing.

Predicting the landscape will be hard, as the age of commuting reaches a conceptual crossroads and the demand for offices, and attendant retail, changes. But London, on the front foot, is better at deciding and creating the landscape than predicting it. We will overcome.



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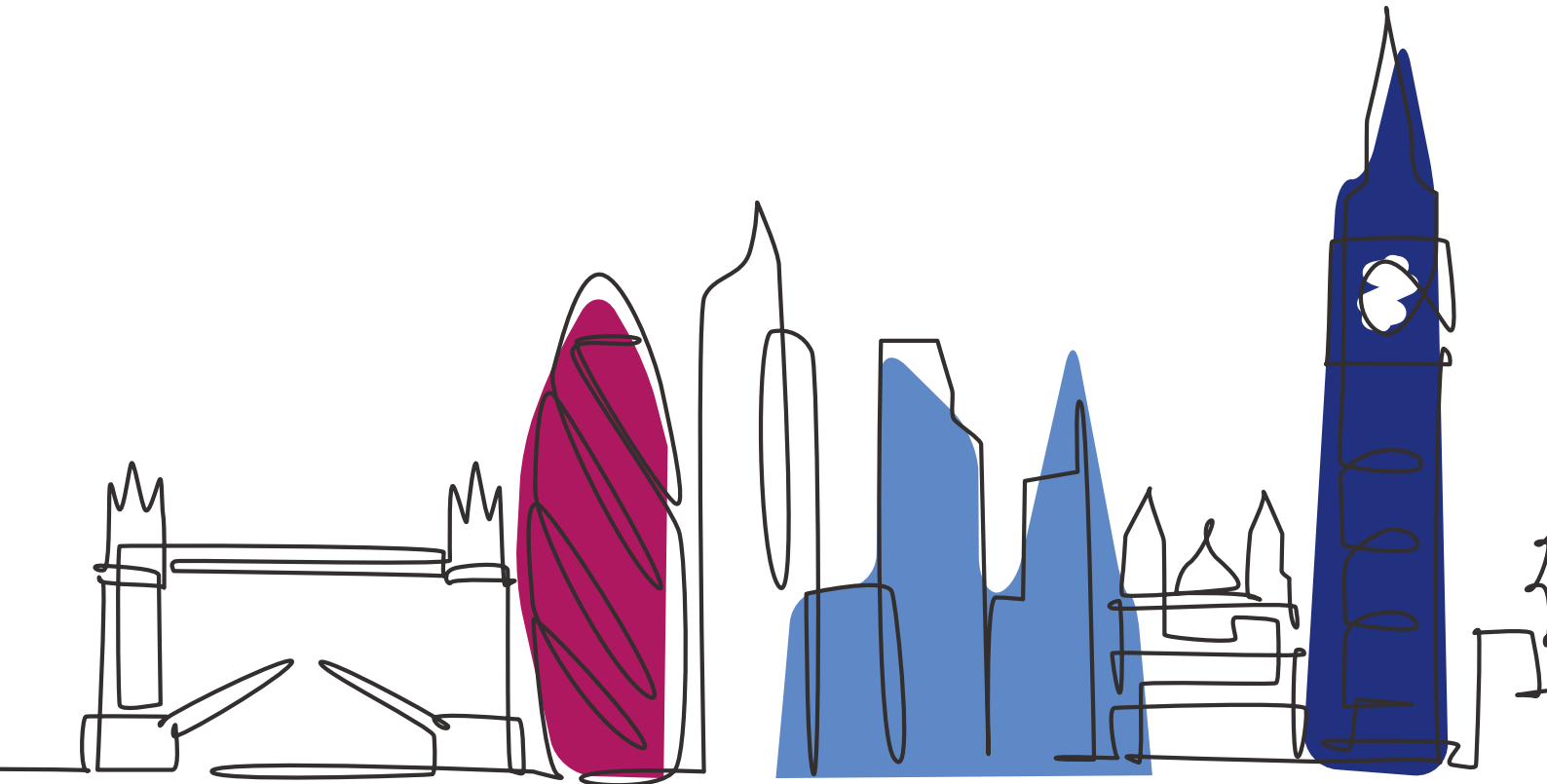
# YouGov poll results in context

## London

### Which three of the following have the biggest impact on your prosperity?

- 70% (71%) **Myself** stayed highest of cities polled
- 56% (53%) **My family**
- 40% (36%) **My friends** no longer lowest of cities polled
- 32% (38%) **Politicians**
- 33% (35%) **The business community** stayed highest of cities polled
- 1% (1%) **Charities**
- 5% (2%) **Religious communities** no longer lowest of cities polled

While London's profile of high scores around 'myself' and 'business' may illustrate the role it plays in driving commerce, friends and religious communities are no longer ranked of the lowest across the cities suggests the pandemic may be shifting Londoners perceptions around prosperity. Charities, however, remained the lowest before and during the pandemic.





## What would improve your prosperity the most?

London has of the highest productivity and weekly pay in the UK and relatively higher green space per capita. However, poor housing affordability has affected its ability to transition to working remotely, with many homes too small.

The figure of welfare per capita can be seen as an indicator of a community's capacity to look after its residents.

### 47% (49%) More income/money

Stayed highest of cities polled

Gross Value Added/worker?



Average weekly workplace earnings



### 23% (19%) Good personal health

Commuting by foot/bike



### 7% (7%) Having a stronger community around me

Welfare per capita (per annum)



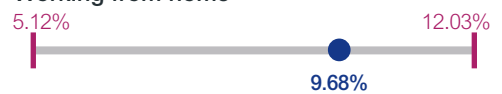
### 10% (9%) More time off work

Moved to highest of cities polled

Ultrafast broadband

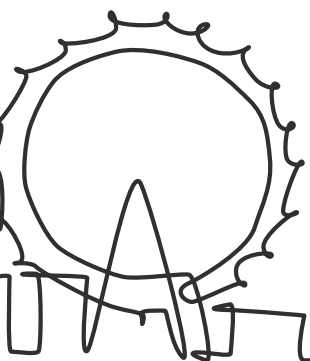
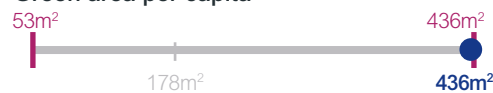


Working from home



### 3% (3%) Access to green spaces

Green area per capita



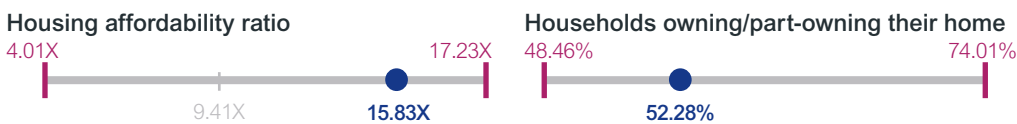
### To what extent would each of the following increase your sense of prosperity in your city?

While London scored better quality housing and more space to live in stayed higher than the other cities before and during the pandemic, more affordable housing also moved to top spot during the pandemic. The capital may find the space pressures associated with working from home particularly challenging, while converting bedrooms to offices may further decrease the availability of accommodation.

**70% (75%) Better quality housing**  
Stayed highest of cities polled

**70% (74%) More affordable housing**  
Moved to highest of cities polled

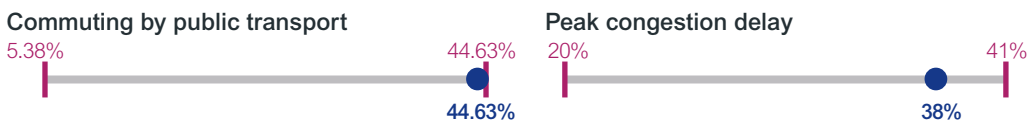
**68% (67%) More space to live in**  
Stayed highest of cities polled



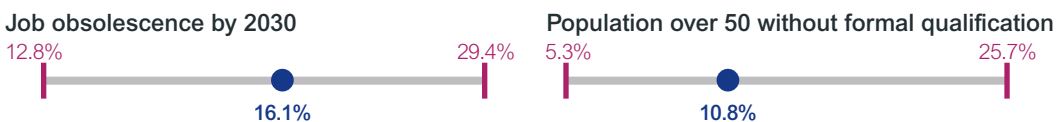
### To what extent would each of the following increase your sense of prosperity in your city?

While London's access to arts and culture score stayed the lowest across the cities polled before and during the pandemic, its increase mirrors that of other cities, suggesting people want to enjoy these opportunities. The lower number may also reflect the capital's relatively higher supply of cultural infrastructure.

**62% (67%) Better public transport**



**47% (56%) Better access to education**



**56% (49%) Better access to arts and culture**  
Stayed to lowest of cities polled

London's globally ranked universities and depth of skills may provide the city with significant resources as it navigates recovery. The percentages below indicate the extent to which people in London agree with the statement.

## 64% (83%) My city has lots of job opportunities

No longer highest of cities polled

Start-ups/closures per 100,000 inhabitants

Start-up 105.02



Closures 84.9

## 81% (85%) My city is good to do business/work in

Stayed highest of cities polled

Patent applications per 10,000 inhabitants

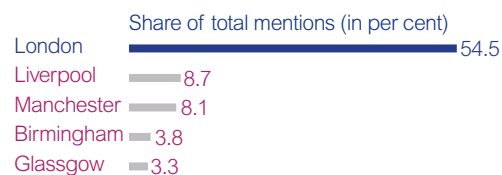


## 62% (69%) Future generations will be able to find jobs

London's digital visibility is an important UK asset, with only Tokyo and New York City generating more mentions across online news and social media. However, this does not necessarily translate into a perception that the city has a strong identity. The pandemic may be a unique moment to consolidate London's global identity as a local scale.

## (83%) My city is an attractive place to visit

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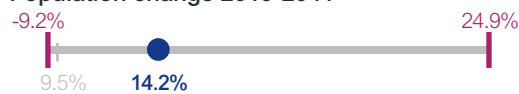
## (83%) My city has a strong identity

## Thinking about your city in the next 20 years, to what extent do you agree or disagree with the following statements?

London no longer has the highest number of people thinking future generations will want to live in the city; however, it still has the lowest number of people thinking the city will be affordable to live in. London is perhaps the most focused on the challenges of social inequality and environment despite it having more green space per capita.

### 72% (71%) Future generations will want to live in my city

Population change 2019-2041



### 12% (11%) Future generations will be able to afford to live in my city

Stayed lowest of cities polled

### 79% (75%) The value of the home I live in will increase over time

No longer highest of cities polled

### 60% My city will be socially inclusive versus 59% today

### 38% (31%) My city will be environmentally sustainable versus 23% agreeing it is today



## Contributors

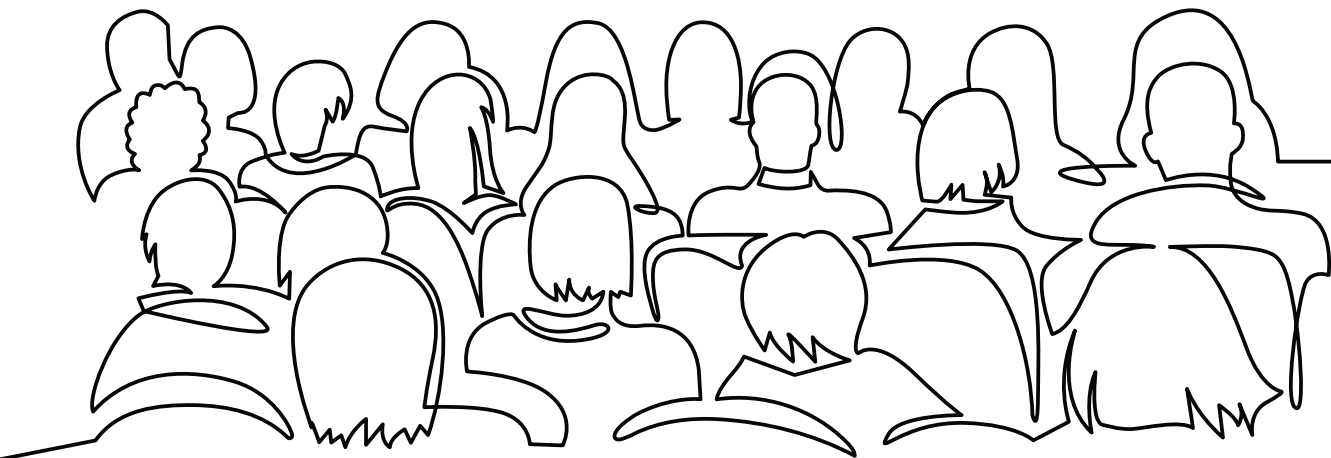
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## Trowers & Hamlins

Trowers & Hamlins is an international law firm committed to helping businesses and governments build stronger, more sustainable and economically successful communities. We are fascinated by the future of towns and cities and our work covers all forms of real estate across the private and public sectors and from residential to commercial and mixed-use schemes. We see real estate as the stage on which economies and communities develop and thrive.

## Positioning cities for inclusive growth

Over 18 months Trowers & Hamlins brought together over 160 leaders and conducted two YouGov polls across Manchester, Exeter, Birmingham and London to examine real estate's role in providing the platform for society to thrive. The pandemic, which has accelerated conversations around social value and climate change, arguably makes the need to understand how the built environment can drive prosperity in cities and urban centres even more pressing.

You can download this report at  
[trowers.com/inclusivegrowth](https://trowers.com/inclusivegrowth)

