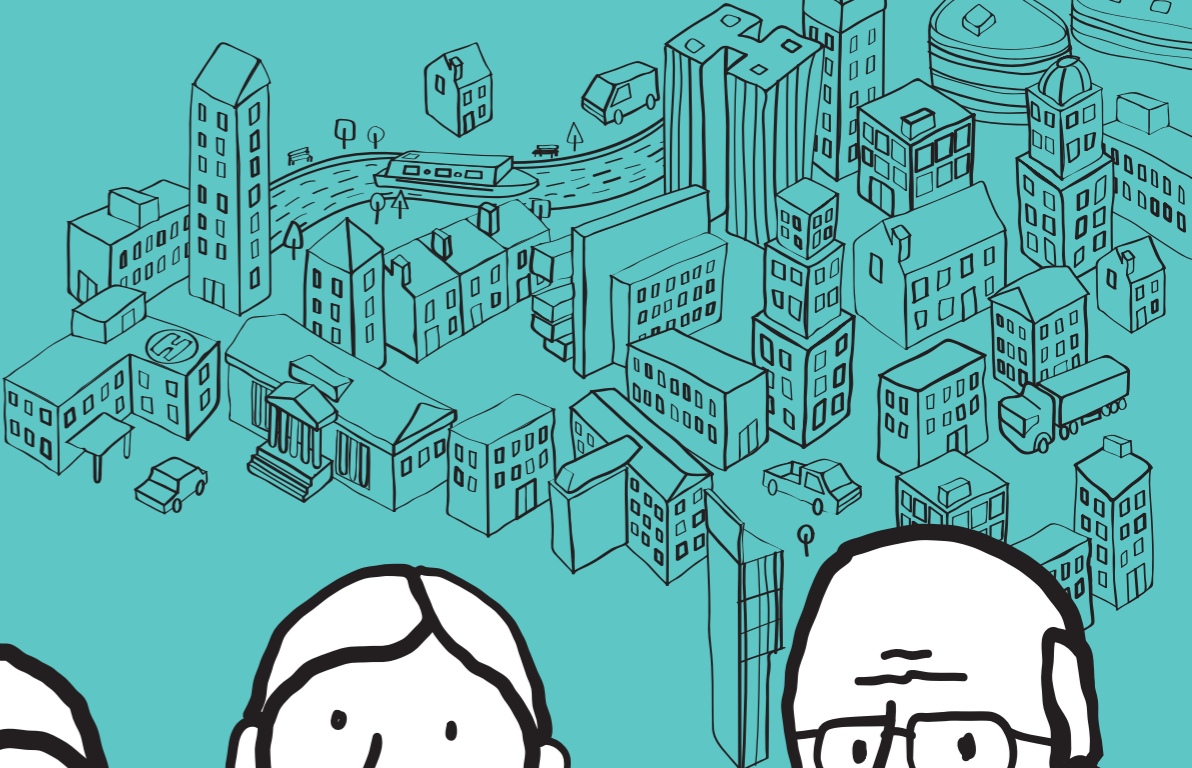


• Our Manchester •



# State of the City Report 2017



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## Overview and summary

### The Our Manchester Strategy

In 2015, people were asked what their dream Manchester would be like, to help shape the Manchester Strategy 2016–25 and to let us know what makes the city a place where people want to live, work, play and do business. The consultation, which reached tens of thousands of people, gave us the clearest picture yet of what matters to them, and conveyed to us that Manchester should aim to be:

- thriving – creating great jobs and healthy businesses
- a city filled with talent – home-grown and from the rest of the world
- fair – with equal chances for all to unlock their potential
- a great place to live – with lots of things to do
- a city buzzing with connections – including world-class transport and broadband.

The Our Manchester Strategy was the culmination of this process. It was formally adopted by the Council in January 2016 and was launched in March 2016, setting out our long-term vision for Manchester’s future and providing a framework for action by us and our partners across the city. The overarching vision is for Manchester to be in the top flight of world-class cities in 2025. It will be a city:

- with a competitive, dynamic and sustainable economy that draws on our distinctive strengths in science, advanced manufacturing, culture, creative and digital business to cultivate and encourage new ideas

- with highly skilled, enterprising and industrious people
- that is connected, internationally and within the UK
- that plays its full part in limiting the impacts of climate change



- where residents from all backgrounds feel safe, can aspire, succeed and live well
- that is clean, attractive, culturally rich, outward-looking and welcoming.

### Our way of doing things

The Our Manchester Strategy split this vision into 64 priorities, known as the 64 we-wills, which Manchester's people and organisations (not just the Council) have agreed we're all working towards together. Delivery of these actions is dependent on the city's people and organisations working together so that their collective knowledge, skill and effort can be harnessed. To facilitate this, the four basic principles of the Our Manchester approach identify ways to change what we do and how we do it, so we can all play our part in delivering the Our Manchester Strategy. The principles are:

- Better lives – it's about people
- Listening – we listen, learn and respond
- Recognising strengths of individuals and communities – we start from strengths
- Working together – we build relationships and create conversations.

Working well by using those basic principles takes a certain kind of person behaving in certain ways. Organisations working for Manchester have joined a conversation about which 'behaviours' would best make them into the people needed to deliver Our Manchester. Four of the top answers have been:

- We work together and trust each other
- We're proud and passionate about Manchester
- We take time to listen and understand
- We 'own it' and are not afraid to try new things.

### Our collective progress

The 64 we-wills sit under one of the five key themes in the Our Manchester Strategy, along with measures of success through which it is intended to monitor progress in achieving the aims and objectives of the document.

These five themes are:

- A thriving and sustainable city
- A highly skilled city
- A progressive and equitable city
- A liveable and low-carbon city
- A connected city.

Every year we will show our collective progress towards these goals through the State of the City Report, which is organised according to the five themes. This year's Report represents the first analysis of our progress against the Our Manchester Strategy (2016–25). This and the next ten State of the City Reports will focus on the progress the city has made since the 2015 baseline.

### A thriving and sustainable city

Manchester's population continues to grow rapidly. This growth has been concentrated in the core of the conurbation, with students, graduates and young professionals in particular attracted by the employment opportunities in the city centre and an increasingly attractive leisure and cultural offer. The population is projected to continue to grow over the next ten years. However, the extent of this growth will depend upon differences in the expected future levels of migration (a key driver of Manchester's population growth) where there is significant uncertainty linked to the future of the UK outside the EU and any associated changes to immigration rules.

Manchester's economy continues to thrive, outstripping both Greater Manchester and the UK economy as a whole. This has been driven primarily by growth in three key sectors: business, financial and professional services; cultural, creative and digital; and science, research and development. The development of a range of commercial, cultural and research facilities in the regional centre over the past 12 months has helped to facilitate the expansion of these sectors.

Outside the city centre, the regeneration of east Manchester continues to progress. The partnership between the Council and Abu Dhabi United Group (ADUG) has radically transformed Eastlands into an area focused upon sports and recreation. Plans are now in place to join up sport with higher education via the development of a higher education site at the Etihad campus to significantly enhance the further education facilities in the city. The rapid expansion of Airport City over the previous year has also radically transformed Wythenshawe and the surrounding area, helping to promote employment opportunities for local people and generating economic growth for Manchester and the wider region.

Expanding economic activity, alongside Manchester's continued success on the international stage driving inward investment and attracting visitors from across the world, means that the city's economy is much more diverse than in the past. Alongside strong growth fundamentals, such as an expanding population including large numbers of students and graduates, this represents a potent underpinning for future growth. However, we must treat projections of future growth with caution, as political uncertainty stemming from the June 2017 UK parliamentary general election and the economic impact of Brexit are yet to be understood.

### A highly skilled city

A highly skilled workforce is fundamental to Manchester's economic growth, and there are clear synergies with the ambitions in the 'a thriving and sustainable city' section. At the same time, upskilling our population is key to reducing levels of dependency by ensuring that more people have the opportunity to access jobs and share in that economic growth. Maximising the benefits of this interdependent relationship is therefore a critical priority for the city.

Beginning with our youngest residents, children and our schools are performing well compared to the national average at primary school level. Beyond this, at secondary school level, performance is below the national average; however, good progress is being made to bridge this gap as soon as possible. School absence has also improved over the past few years, with overall absence in Manchester schools better than the national average.

One of the major challenges for the city is to address the skills shortage identified by the digital sector. Learning options that exist outside the traditional routes are increasingly available and can provide learning and experience that is more relevant to the sector's needs. There remains a challenge to make sure these routes are accessible to all Manchester residents.

Across the wider population there is a disproportionate number of the city's residents with no or low skills and qualifications, despite the fact that Manchester has above-national-average levels of residents with level 4 (degree level) and above qualifications. There are some direct links between low skills and a low-wage economy – an area where progress has been made in ensuring that everyone is paid at least a living wage.

The integrated approach to employment and skills at the heart of the Manchester Work and Skills Strategy and the devolution of the Adult Education Budget in 2018 will offer an opportunity to address these challenges. By enabling us to work differently with our partners, we will be able to develop different approaches to public-service reform, welfare reform and work and skills that are more effective in ensuring all Manchester's residents can enjoy the benefits of economic success.

## A progressive and equitable city

The ambition articulated in the Our Manchester Strategy is for everyone in the city to have the potential to lead safe, healthy, happy and fulfilled lives, no matter where they live or were born. This means reducing the disparities between different areas of the city. Manchester has made real progress towards achieving this aim over the past decade, yet there are still areas of intense deprivation in the city. These are far less widespread than they were ten years ago but exist nevertheless, and we must do more to address them.

Although the overall proportion of children living in poverty in Manchester has fallen, the city still has one of the highest rates of child poverty in the country. The Family Poverty Strategy 2017–2022 seeks to improve outcomes for children by decreasing risk and increasing resilience. In doing so, the Strategy calls on all the city's anchor institutions to demonstrate what they are doing to tackle poverty and its effects.

Significant improvements have been delivered since Children's Services received an inadequate Ofsted Inspection in 2014. The Council has a clear improvement plan and can show progress against it that demonstrates the required improvements are being made on schedule. The rate of referrals to Children's Services is significantly above the national average. Despite a decrease over the past five years, the rate of children looked after by the Council is still above the national average. Recognising the importance of early intervention or Early Help, the national Troubled Families programme is now fully integrated with Manchester's offer and is a central part of our ambition to reduce dependency on public services.

Homelessness has become more visible in the recent past, with more people sleeping on the streets in the city centre. Street homelessness is a particularly complex problem and people who are living rough can be particularly vulnerable and marginalised. Manchester's Homelessness Charter was launched in May 2016 and has brought together stakeholders in a united front to tackle the problem of homelessness in the city.

The Age-Friendly Manchester programme aims to improve the quality of life for older people in the city and to make the city a better place to grow older. The core aspect of this programme is to improve social participation of older residents, as well as to improve the quality of local communities for older people. This is central to reducing demands on services, together with extending and improving the quality of life for older people.

The key vision for Adult Social Care and Public Health in Manchester has been set out in the Manchester Locality Plan – A Healthier Manchester, which details the strategic approach to improving the health outcomes of residents of the city, while also moving towards financial and clinical sustainability of health and social care services. This vision comprises three pillars: a single commissioning

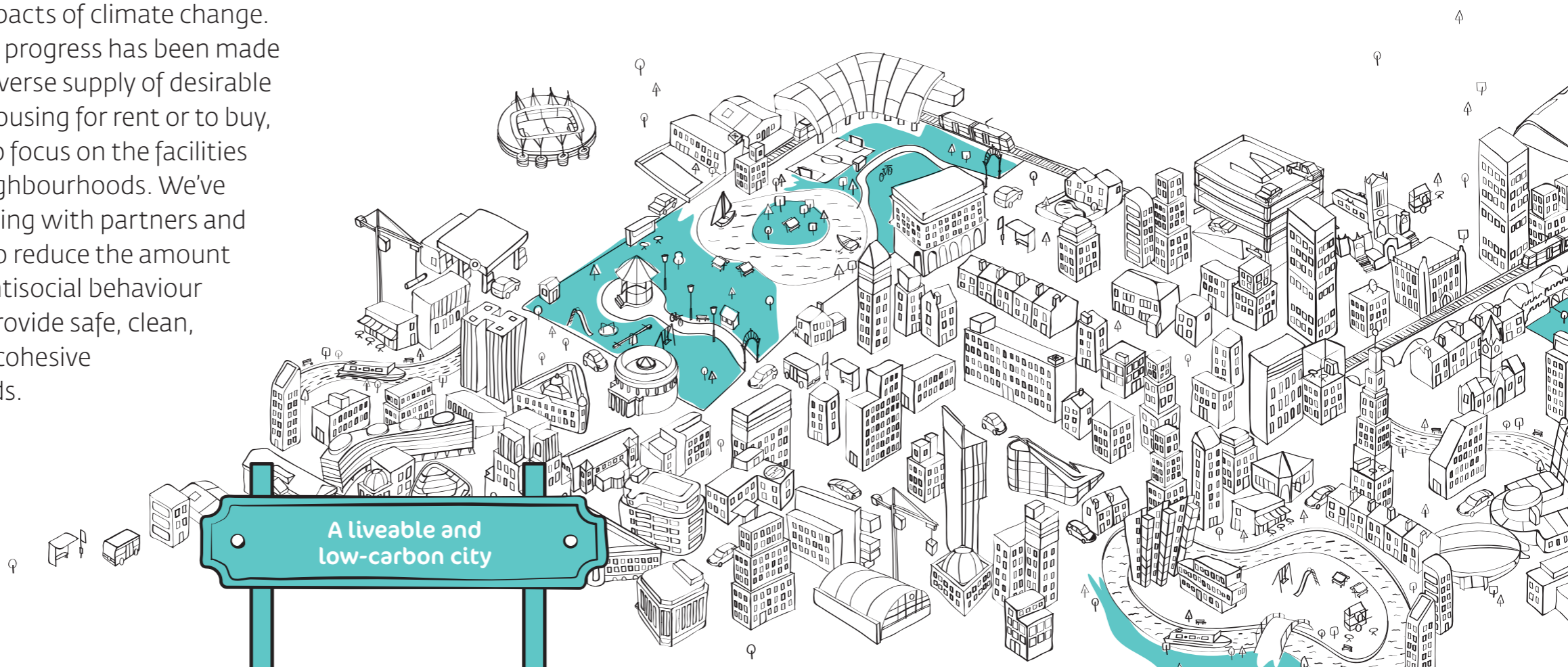
system with a single line of accountability; one team delivering integrated and accessible out-of-hospital services; and a single Manchester hospital service. The Council and its partners will continue to expand and transform services as new arrangements develop as part of the devolution deal and the integration of Health and Social Care through the Locality Plan.

## A liveable and low-carbon city

The Our Manchester Strategy sets out a clear ambition for Manchester to become a liveable city that is playing its full part in limiting the impacts of climate change. Although good progress has been made developing a diverse supply of desirable good-quality housing for rent or to buy, we also need to focus on the facilities that create neighbourhoods. We've also been working with partners and communities to reduce the amount of crime and antisocial behaviour in the city, to provide safe, clean, attractive and cohesive neighbourhoods.

In December 2016, following a public consultation, the new Manchester Climate Change Strategy 2017–2050 was published, including details about how Manchester will become a zero-carbon city by 2050. It has a number of key actions, including education, investment in our young people, innovation, institutional development and supporting businesses. The plan sets out the actions to be delivered within a given five-year period to make progress against the Strategy's objectives; future progress will be reported against these objectives.

While there have been improvements in air quality in recent years, parts of Manchester are still exceeding the legal limits for nitrogen dioxide (NO<sub>2</sub>), and these areas are declared Air Quality Management Areas (AQMA). An Air Quality Action Plan for Greater Manchester has identified a range of actions to encourage the uptake of low-emission vehicles, motivate behavioural change and drive technological innovation. The Council is also committed to increasing the amount of waste that can be recycled. The recent introduction of new refuse bins has had a positive impact on the city's recycling rate.





The Residential Growth Strategy (2016–2025) has been developed within the context of the Our Manchester Strategy and sets out the city's plans to deliver a minimum of 25,000 new homes over the next decade. Over the past few years, there has been increasing evidence that confidence is returning to the market, and the city has begun to see real progress in delivering the quantity of residential development required to meet the demands of a growing population. The Council's recently agreed Housing Affordability Policy Framework sets out the city's determination to ensure that in addition to increased residential activity we have a strong supply of housing to rent or buy for people in the city earning average incomes.

The city's key cultural, sport and leisure spaces (including our libraries, parks and galleries) play an integral role in creating an attractive and liveable city for residents and visitors alike. A key we-will is to invest in cultural and sports facilities for the benefit of the city's residents and to improve the city's international attractiveness. Many of Manchester's cultural partners are at the forefront of developing best practice to increase and improve the social impact of culture. There is a continuing challenge to reach more people, reflect diversity, and work with (rather than provide for) communities.

Manchester's new Domestic Violence and Abuse Strategy was launched in June 2016. Since then, statutory and voluntary sector partners have been working together to develop an action plan and deliver the five key pledges identified in the Strategy. Hidden crimes such as child sexual exploitation, female genital mutilation, forced marriage, so-called honour-based violence and modern slavery continue to be a challenge for the Community Safety Partnership. Over the past two years, we have begun to better understand these issues, and the work we have undertaken with colleagues from voluntary and community organisations has begun to result in an increase in the number of crimes being reported; however, we know there is still work to be done in this area.

### A connected city

Connectivity is fundamental to the success of any city, and the Our Manchester Strategy emphasises the importance of connectivity in terms of transport, international connections and digital connectivity. Strong connections across and beyond Manchester ensure that people are able to fully access all the opportunities the city can offer, while businesses can access the people and resources they need to grow.

An integrated, attractive and affordable transport network is needed to enable residents to access jobs and improve their health through increasing levels of active travel. Improvements to the transport network were made in 2016 with several major transport infrastructure schemes completed; these include the Second City Metrolink Crossing, and the new bus and cycling infrastructure along Oxford Road and Wilmslow Road. Rail connectivity is being supported through schemes that include the Ordsall Chord, High Speed 2 and Northern Powerhouse Rail, which will provide high-speed connection to the cities in the North of England. International connections continue to improve through investments at Manchester Airport, leading to strong growth in passenger numbers and major new international routes.

Increasing public transport patronage has been driven by the increasing use of Metrolink and rail services. Bus patronage has declined over the past ten years. The potential introduction of bus franchising for city regions with elected mayors provides an opportunity to deliver improved bus services in the city. There is also a strong case to support walking and cycling in Manchester, as these activities can potentially increase the capacity of and free-up space on our transport network, providing the opportunity to further support sustainable

growth. A variety of programmes overseen by the Council are promoting walking and cycling, including infrastructure investment, and social programmes such as Walk to School.

Manchester is continuing to channel the city's spirit of innovation into the development of its transport system to make it smarter, cleaner and more efficient. CityVerve is Manchester's 'Internet of Things' demonstrator, providing technological solutions to enable improved travel experience. A trial of autonomous vehicles will also boost Manchester's reputation as a leader in technology and transport innovation.

In terms of digital connectivity, the availability of superfast/ultrafast broadband (over 30 Mbits/s) to residential and small business premises has risen, and take-up has increased. However, in comparison to most of the UK Core Cities, Manchester is lagging behind. There may be opportunities to accelerate this process by switching from the expansion of 'superfast' broadband (which currently satisfies short-term demands) and refocusing on developing the much-faster fibre-to-the-premises (FTTP) infrastructure required to become a global leader in the digital economy. Efforts to lead connected and transformative digital innovation have been enhanced by the development of the Bright Building on

Manchester Science Park, which will be the nerve centre of digital innovation in the north west, housing Mi-IDEA and CityVerve.

## Conclusion

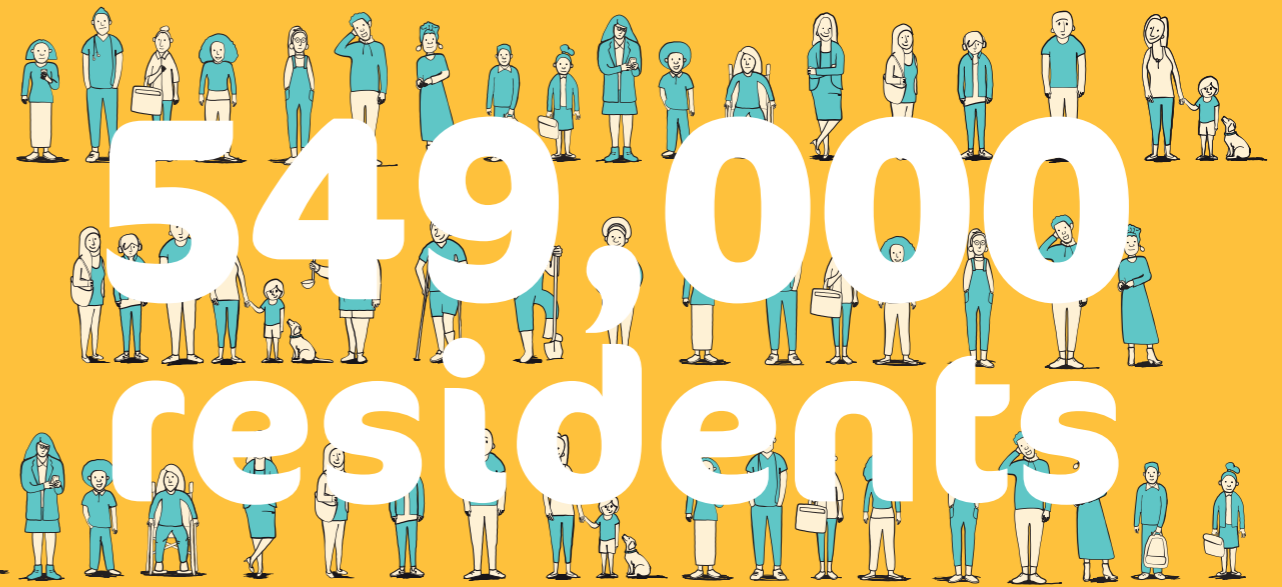
Significant progress has been made in the 18 months since the launch of the Our Manchester Strategy in March 2016. The city's population and economy continue to grow and Manchester continues to be renowned as an international and outward-looking city. However, there are a number of significant challenges to overcome to deliver the vision for the city by 2025. The future of the UK outside the European Union provides major uncertainty, and the type of relationship that emerges may have an impact on the levels of migration and investment. There are also significant challenges relating to health outcomes in the city, residents' skills, and the environment.

The Our Manchester approach represents an opportunity to address these challenges in a different way. Organisations, businesses and voluntary groups that work for and care about Manchester must now decide how putting the four basic principles of the Our Manchester approach (better lives; listening; recognising strengths of individuals and communities; working together) into action will change the way they work. The Our Manchester approach

will establish new and different relationships between the Council, its partners, and the city's residents and workers to make Manchester the best it can possibly be.

## Population

Manchester's population continued to grow in 2016, rising from 540,000 in 2015.



Source: Manchester City Council Forecasting Model, W2016

# Thriving and sustainable

## Tourism

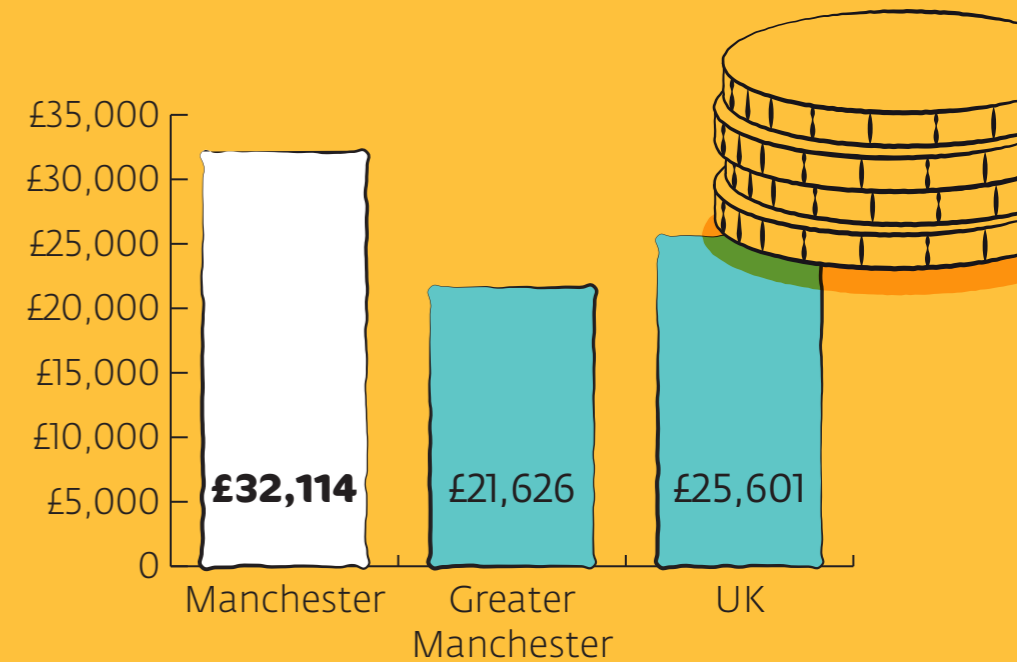
1.19m international visitors

Manchester remains the **third most-visited** destination by international visitors, after London and Edinburgh.

Source: 2016 International Passenger Survey, Visit Britain/ONS

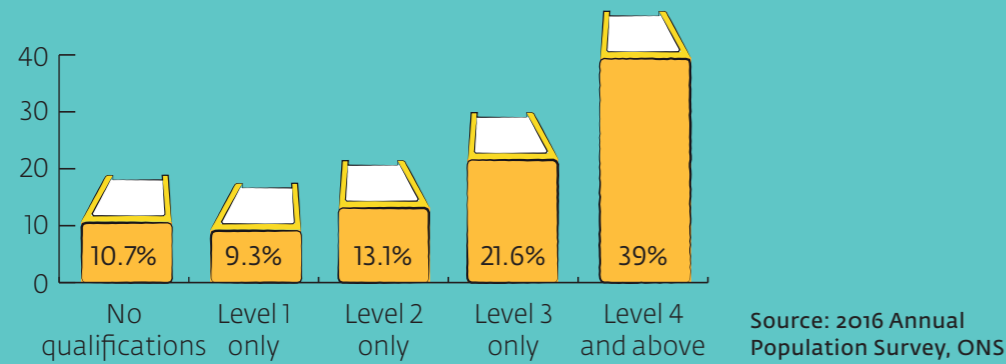
## Gross value added per head of population in 2015

Manchester's economy continues to thrive, with its performance outstripping Greater Manchester and the UK.



Source: ONS

## Manchester qualifications

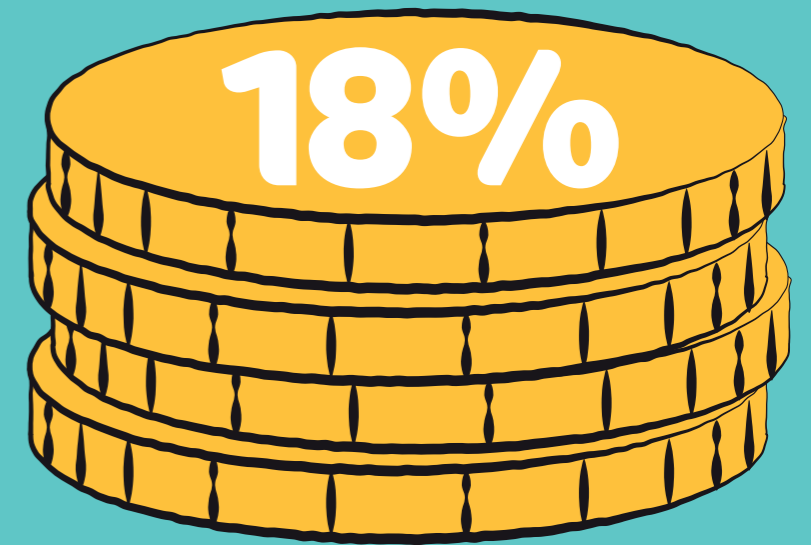


Above national average levels of residents with qualifications at degree level and above. A disproportionate number with no or low qualifications.

## Living wage

18% of Manchester's workforce earned less than the UK living wage vs 31% of Manchester's residents (who live in the city but may work elsewhere).

Source: 2016 (provisional) Annual Survey of Hours and Earnings, ONS

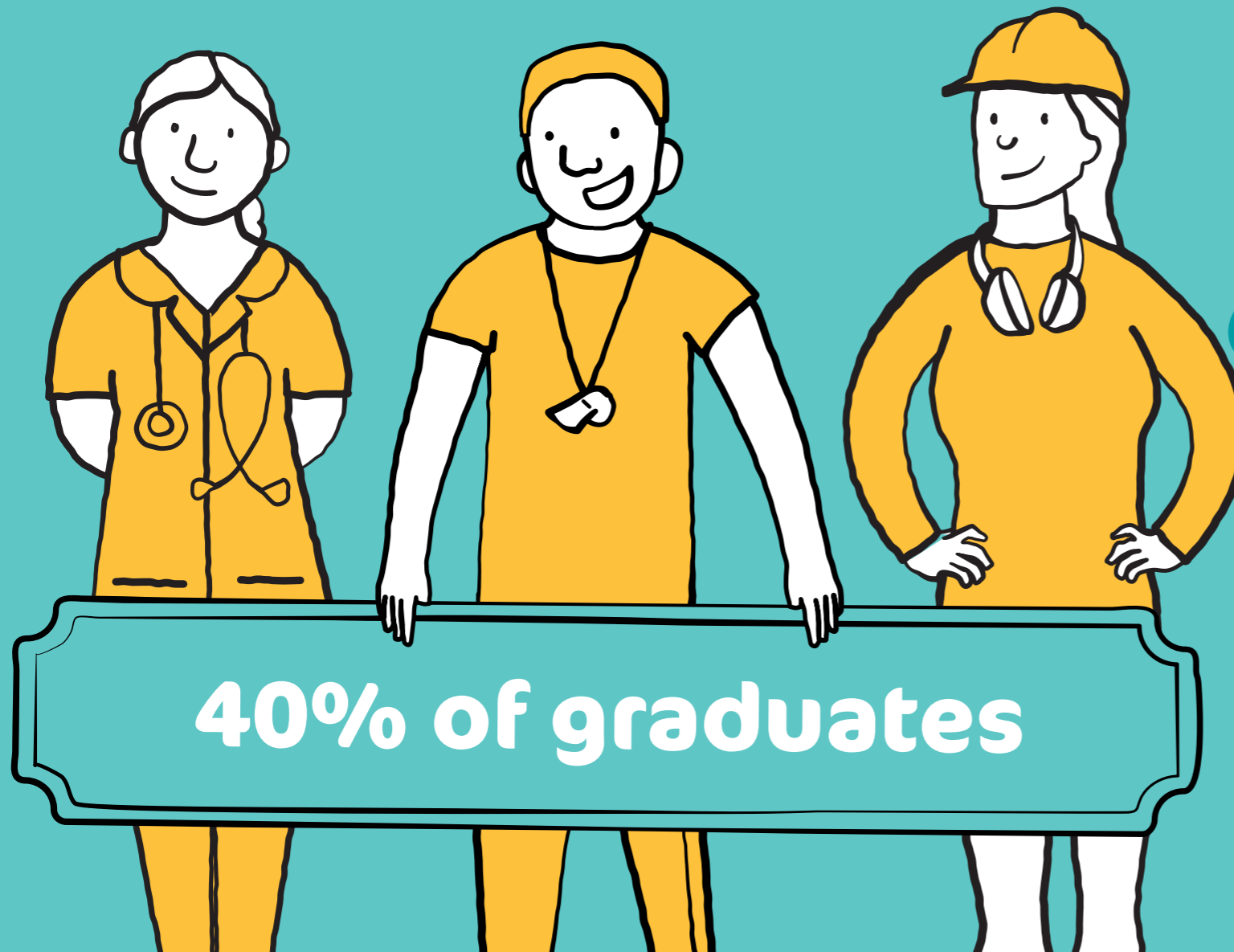


# Highly skilled

## Graduate retention

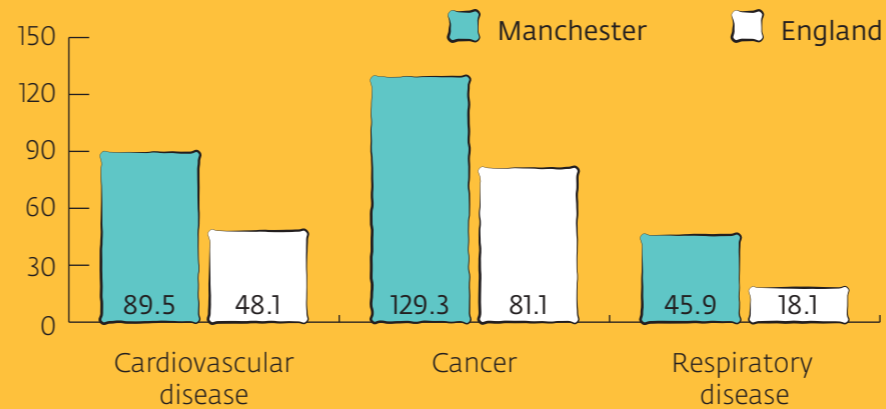
40% of graduates originally from Manchester chose to work in Manchester after leaving university.

Source: 2014/15 HESA destination of leavers' survey



## Premature mortality from causes considered preventable

Manchester has the highest rate (per 100,000) of premature deaths from cardiovascular disease, cancer and respiratory disease in England.



Source: 2013–15 three-year average, Public Health England/ONS

## Rough sleeping

78

78 rough sleepers were counted in Manchester city centre in 2016. As a rate per 1,000 households (0.35), this is almost twice the national average (0.18).

Source: DCLG

# Progressive and equitable

## Physical activity

24% of adults in Manchester were classed as being inactive, taking part in less than 30 minutes of activity a week, compared to the national average of 22%

Source: 2015/16 Active Lives Survey, Sport England

24%



**1,654**  
new homes last year

## Housing

1,654 new homes were completed across the city in 2016/17. Approximately 3,000 new homes are expected to be completed in 2017/18.

Source: Manchester City Council Residential Growth Sites monitoring

## Air quality

Oxford Road

**66**  
 $\mu\text{g}/\text{m}^3$

Piccadilly

**40**  
 $\mu\text{g}/\text{m}^3$

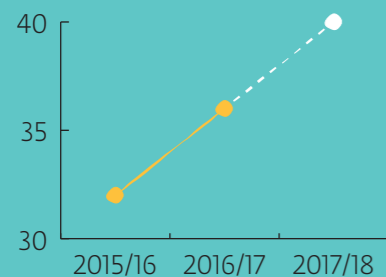
Parts of Manchester are still **exceeding the  $40\mu\text{g}/\text{m}^3$  legal limit** for nitrogen dioxide in 2016.

Source: Air Quality England

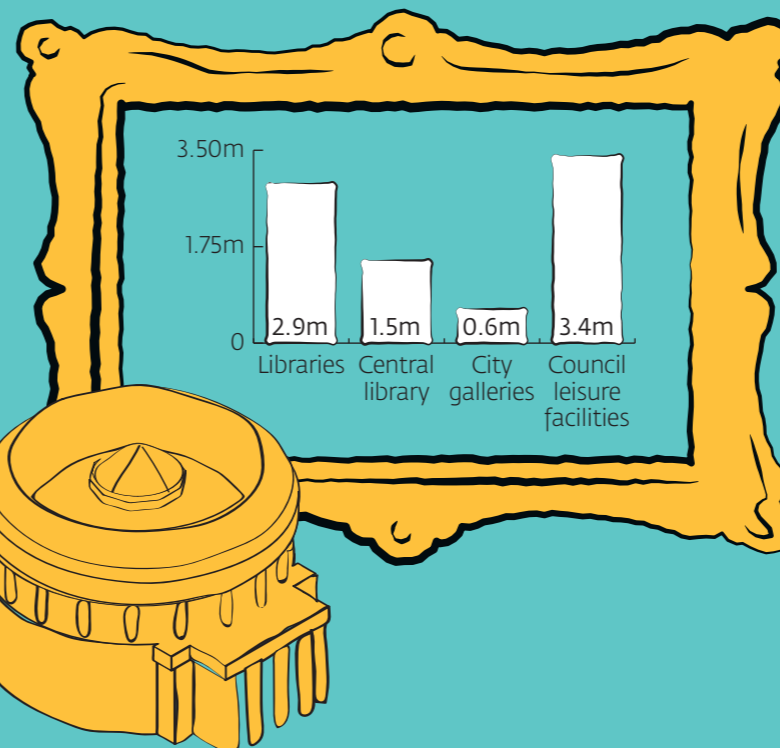
# Liveable and low-carbon

## Recycling

We're focused on improving recycling rates: 32% in 2015/16, 36% in 2016/17, **40% forecast in 2017/18**



Source: Waste Data Flow



## Cultural facilities

Overall, there has been a **10% increase** in visits to the city's main cultural and recreational facilities between 2015/16 and 2016/17.

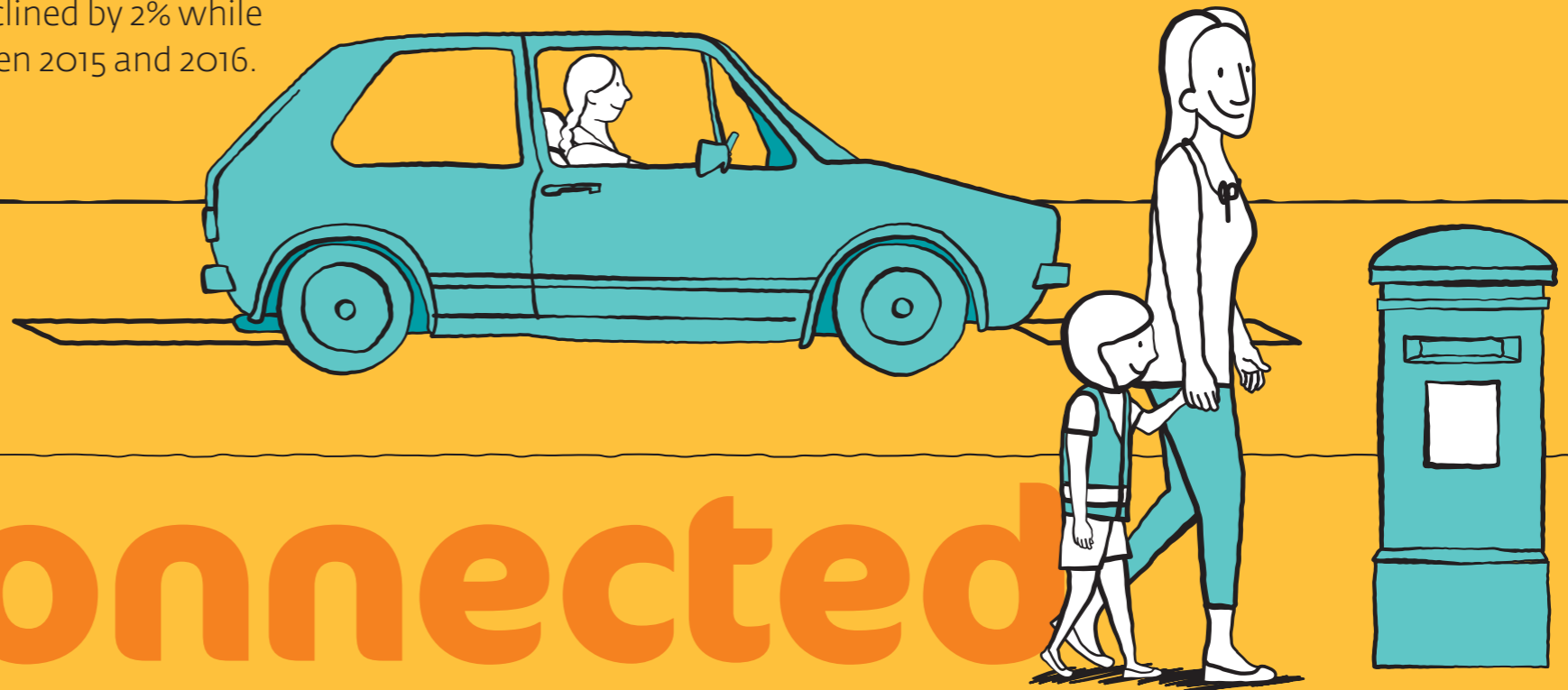
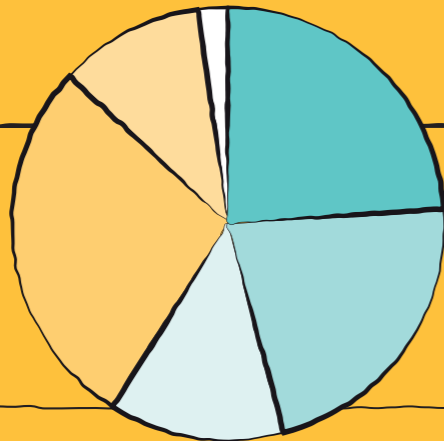
Source: Manchester City Council

# Trips into Manchester key centre

Proportion of trips made by car and bus declined by 2% while rail and metrolink increased by 2% between 2015 and 2016.

- Car – 24%
- Bus – 22%
- Metrolink – 13%
- Rail – 28%
- Walking – 11%
- Cycling – 2%

Source: TfGM.  
The share in trips into Manchester key centre (7.30-9.30am) in 2016.



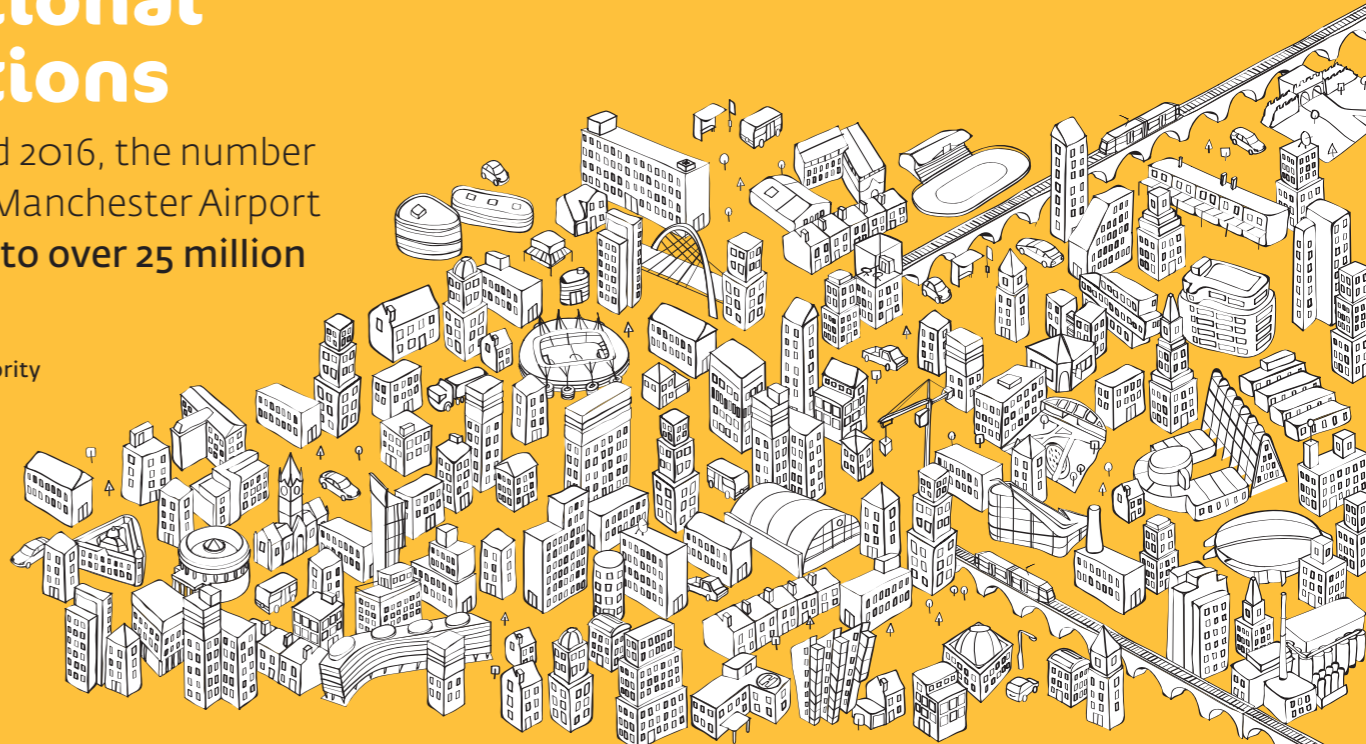
# Connected

## International connections

Between 2015 and 2016, the number of passengers at Manchester Airport increased by 11% to over 25 million passengers.

Source: Civil Aviation Authority

# over 25m



# A thriving and sustainable city

## Strategic overview

The Our Manchester Strategy sets out the ambition for Manchester to be in the top flight of world-class cities ‘with a competitive, dynamic and sustainable economy that draws on our distinctive strengths in science, advanced manufacturing, culture, creative and digital business, cultivating and encouraging new ideas’. The Strategy also sets out a number of clear objectives, including supporting the growth of established and emerging business sectors, delivering the European Science Open Forum to increase engagement with science, becoming a leading digital city, and capturing the commercial potential of research and innovation.

The analysis in this chapter demonstrates that the city’s economy is continuing to grow and that developments in the regional centre (city centre) continue at a significant pace. Population growth is a major factor in Manchester’s continued success and is a reflection of the city’s diverse, distinctive and well-connected economy creating jobs and opportunities for all.

## Analysis of progress

### Population

#### A population continuing to grow

Manchester’s population continues to grow rapidly, and according to the Manchester City Council Forecasting Model (MCCFM) it has risen from 540,000 in 2015 to 549,000 in 2016.

The MCCFM has been developed to strengthen and develop the mid-year estimates from the Office for National Statistics (ONS) using local intelligence (including the school census, higher education data and National Insurance number registrations). Importantly, in 2016 the model was enhanced to forecast population by ward in line with the city’s expected residential development pipeline, in recognition that the city’s growth will not be distributed evenly, sometimes being a direct response to new housing development.

In recent years, the gap between the Manchester City Council and ONS forecasts has widened, partly as a result of the ONS methodology (introduced in 2010), which calculates the national and regional distribution of international migrants differently to the MCCFM – the key driver of Manchester’s

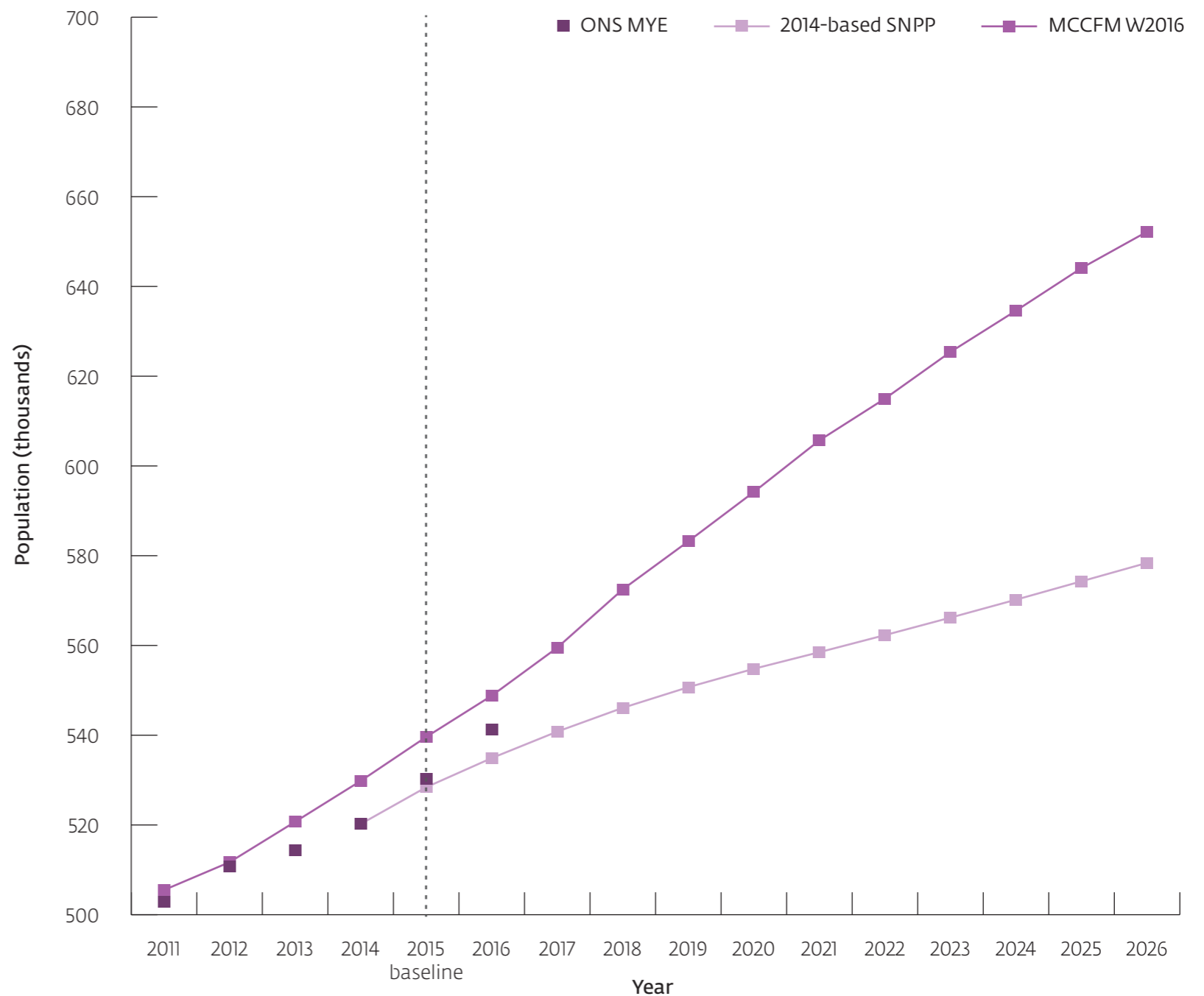
recent population growth.<sup>1</sup> The reduction in international migrants attributed to Manchester, coupled with a higher internal migration loss (to other Greater Manchester districts) has heavily influenced overall migration numbers in the ONS projections.

<sup>1</sup> Following the 2011 Census (which gave a Manchester population figure more in line with pre-adjusted methodology) a set of revised estimates were issued, but the new methodology is used in the current population projections from 2014.



As a result, the mid-year estimates released by ONS since the 2011 Census have given Manchester a lower growth trajectory than expected.<sup>2</sup> These figures feed into ONS's current 2014-based Subnational Population Projections (SNPP), resulting in a significantly lower future growth trajectory (figure 2.1). MCCFM addresses this anomaly by offering an alternative forecast that assumes expected growth patterns from migration based on previous years.

**Figure 2.1**  
Manchester's population (in thousands)



<sup>2</sup> Manchester would be expected to increase by around 1.76% per annum based on the average growth seen in the last decade.

Sources: Mid Year Estimates (MYE) of population and Subnational Population Projections (SNPP).  
ONS © Crown Copyright; MCCFM W2016, Manchester City Council (PRI)

### A growing city centre resident base

Population growth has occurred across the whole of the city but has been concentrated in the city centre and surrounding wards (map 2.1). Students, graduates and young professionals in particular have been attracted by the growth in skilled jobs and an increasingly attractive accommodation, leisure and cultural offer.

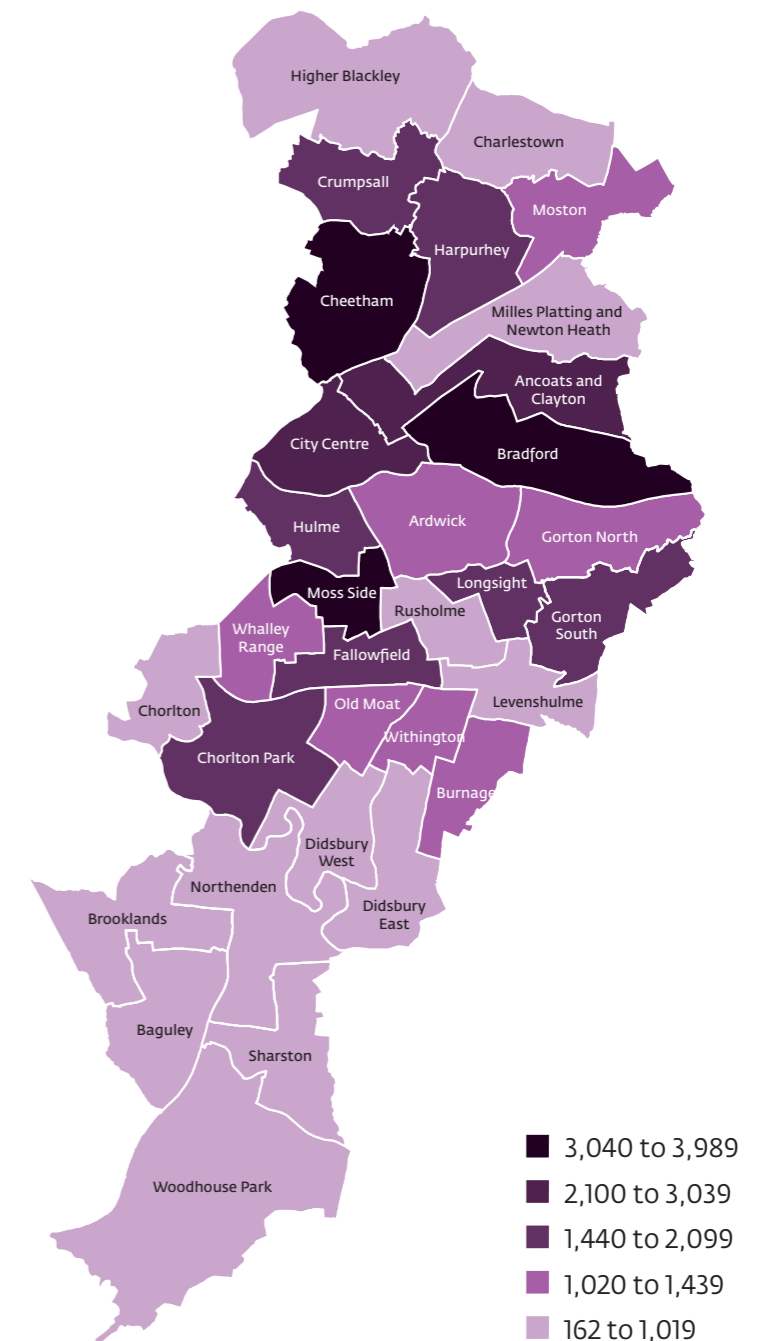
Students make up a large and important part of Manchester's population. The city's two main universities (The University of Manchester and Manchester Metropolitan University) attracted approximately 73,100 students in 2015/16 (with the population returning to the levels seen before the student tuition fees hike in 2012). In 2015/16 47,500 of these students lived in the city, joined by a further 4,400 residing in Manchester but attending other universities in Greater Manchester. As the total student population has recovered, Manchester's universities have also experienced a proportional increase in international students, who now account for one in five students.

Manchester's evolving student profile has been reflected in a changing spatial distribution across the city. Students have traditionally lived in parts of south and central Manchester, principally along the Wilmslow Road corridor, with particularly high concentrations in parts

of Fallowfield and Withington wards. However, a thriving good-quality apartment rental market and large purpose-built student housing developments have prompted a northward shift towards the city centre and surrounding wards over the last decade.

Today, some 54,000 residents currently live across the Manchester city centre neighbourhood – a 2,000 increase since 2016. MCCFM forecasts that the rate of city centre population growth is set to increase over the next five years, as expected new apartment-led residential development adds further capacity and opportunities for further population growth.

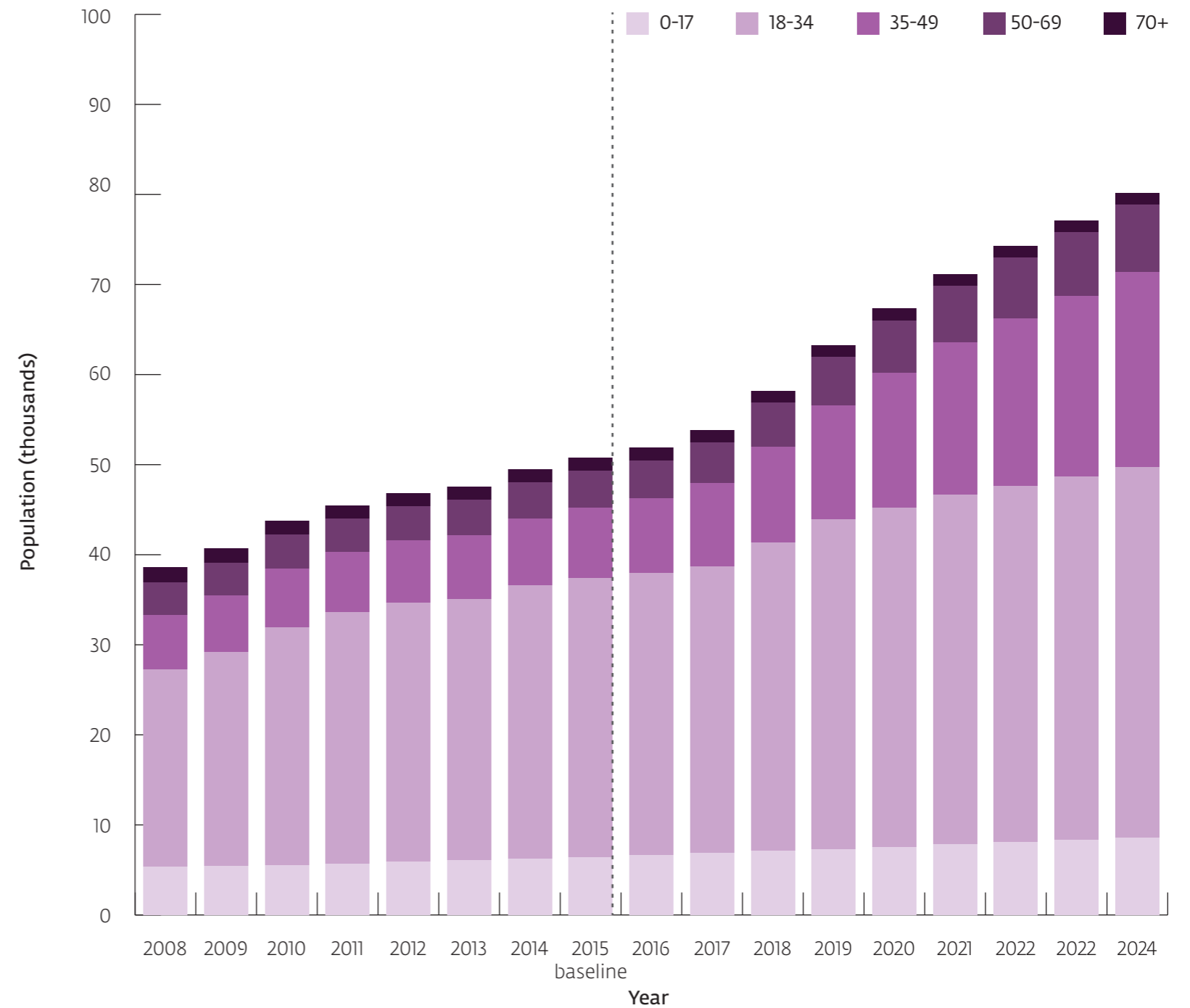
**Map 2.1**  
Population change by ward 2011–2016



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Manchester City Council 100019568 (2017)

It is interesting to note that the age profile of the city centre is beginning to mature (figure 2.2), and while 18 to 34-year-olds remain the dominant cohort, there are increasing numbers of 35 to 49-year-old residents, suggesting that people are choosing to live in the apartment market for longer.

**Figure 2.2**  
Manchester wider city centre population by age



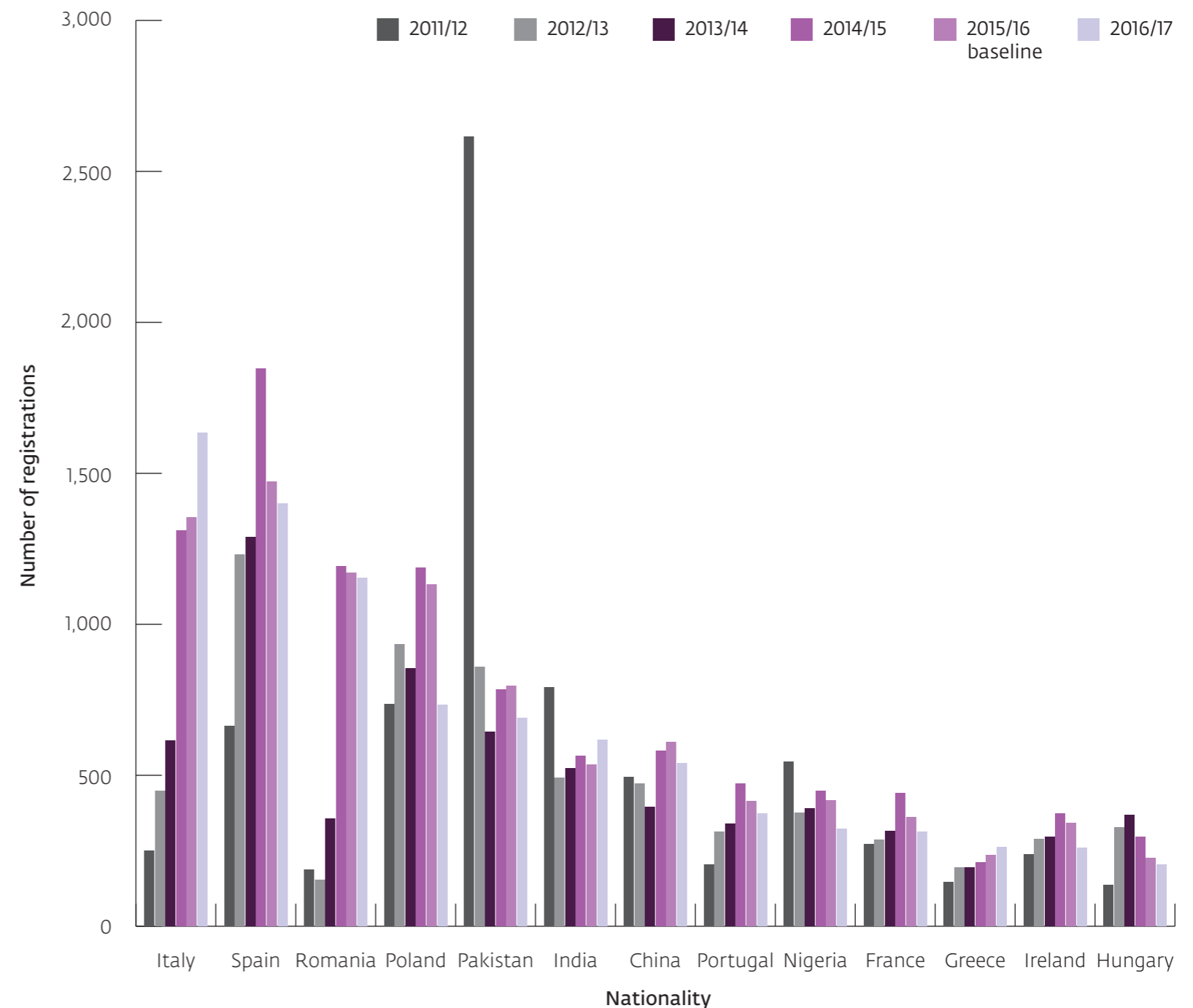
Source: MCCFM W2016, Manchester City Council (PRI)

### International immigration continues to drive population growth

International immigration remains an important driver behind the city's growing population, with European Union Mediterranean countries such as Italy, Spain and Portugal making up an increasing proportion of new arrivals to the city (figure 2.3). Over the past five years, National Insurance number (NINo) registrations in Manchester have fluctuated from a low of just below 9,700 in 2012/13 to 13,300 in 2015/16, but this level has fallen to around 12,400 in 2016/17. In recent years, the largest growth in numbers has been from Italian, Spanish and Romanian nationals.

In 2016/17, the Department for Work and Pensions (DWP) dealt with 12,405 NINo registrations for overseas nationals in Manchester, a decrease of 917 or 6.9% since 2015/16. The largest number of registrations (1,633 or 13.2%) came from Italian nationals, with Spanish and Romanians also showing more than 1,000 registrations each.

**Figure 2.3**  
NINo registrations 2011/12–2016/17 (Manchester)



Source: 100% sample from National Insurance Recording System (NIRS), DWP; Nationalities with over 200 registrations in Manchester in 2016/17

### A diverse and welcoming city

Manchester's diversity is a welcome and vital part of the city's success. Our diverse population with its vast array of languages and cultures is increasingly attractive to those businesses seeking to operate in the global marketplace.

The city has a global reputation as a welcoming city, and residents have a proud track record of positive integration and respect for one another's cultures, faiths and ways of life. The city embraces and works to improve the lives of the minority groups that make up its diverse character.

Thirty-three per cent of people living in Manchester in 2011 (168,000 residents) were from a black and minority ethnic (BME) background compared to 7% across the UK. This has continued to grow in recent years, with new economic migrants joining well-established BME communities from Pakistan, Bangladesh, China, Nigeria and Somalia.

The city is currently utilising MCCFM and local intelligence sources to develop a better understanding of ethnicity and diversity across Manchester in 2017. This includes the school census, which shows the percentage of pupils with English as an additional language has

risen to 38.5% in 2016 (from 23.5% in 2005) – with 190 different languages spoken by pupils attending Manchester schools.

### Future challenges

The city's population growth is expected to continue, with MCCFM predicting that the total population will exceed 600,000 by 2021.<sup>3</sup> While all current projections point to continued growth, there is a varied pace reflecting a level of uncertainty across a range of growth indicators. Differences in the expected future levels of international migration remain the key factor explaining the difference between the ONS and Manchester City Council forecasts shown in figure 2.1.

In the same way that changes to immigration rules and student tuition fees impacted on Manchester's growth over the last decade, external influences (including the ongoing Brexit negotiations) will continue to have a major bearing on the city's future population and demographic profile. Importantly, current uncertainty will have an impact on the ability of local and national bodies to forecast increases or decreases in population growth.

MCCFM is responding to this challenge by utilising diverse kinds of local intelligence to enhance the ONS baseline. The full extent of

the city's expected residential development pipeline was built into the model during 2016; this will be further refined during 2017 to reflect an increasing pace of development in the city centre and surrounding neighbourhoods.

<sup>3</sup> Manchester City Council Forecasting Model, W2016

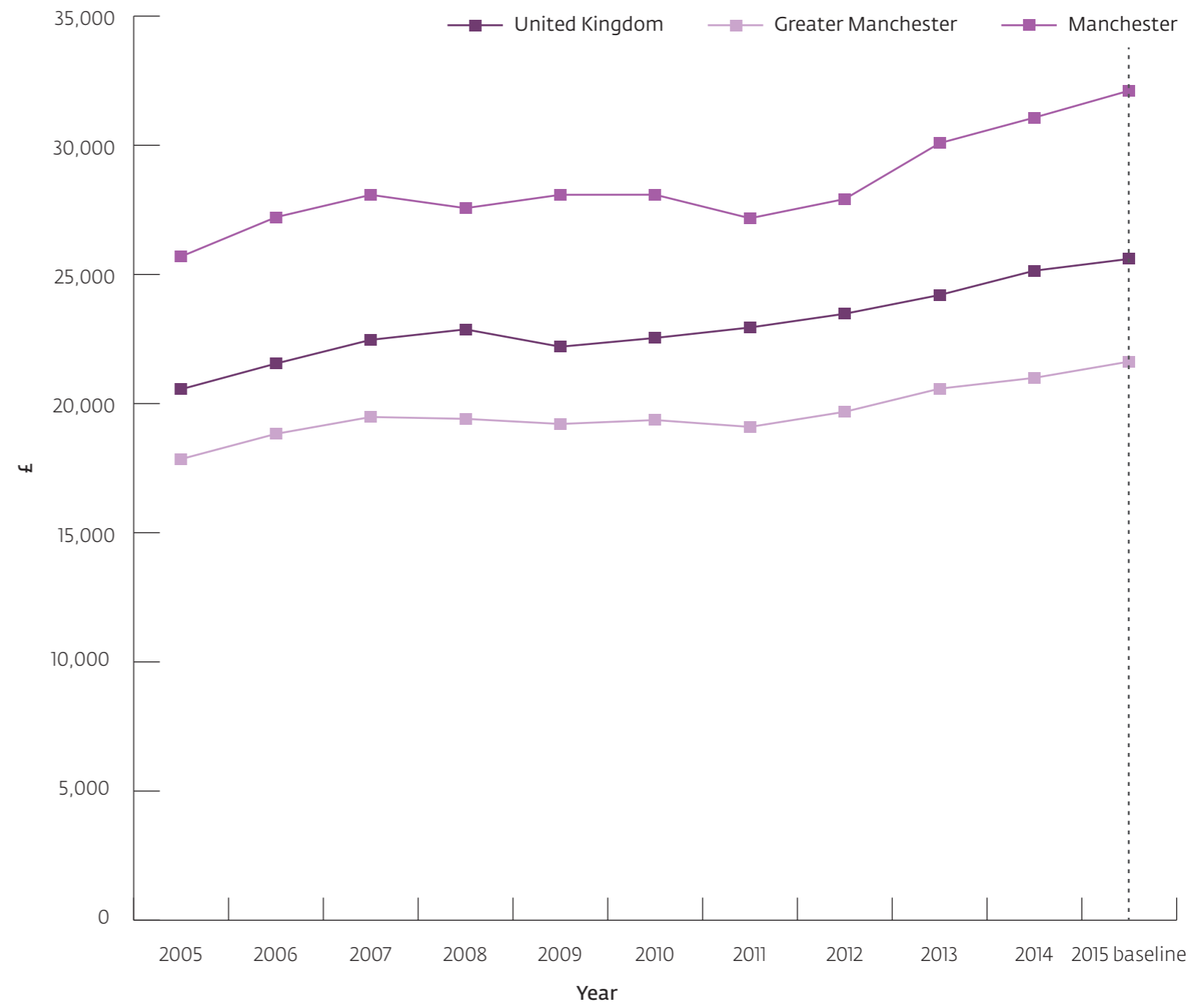
## Economic growth and regeneration

### Key economic indicators

#### GVA

Manchester's economy continues to thrive with its performance outstripping that of Greater Manchester and the UK economy as a whole. Gross Value Added (GVA) is a measure of the value of goods and services produced by an area, which is used as an indicator of economic performance. In 2015, Manchester's GVA income per head of population was £32,114, compared to £21,626 for Greater Manchester and £25,601 for the UK as a whole (see figure 2.4). The 2015 figure for Manchester is an increase on the 2014 figure where the GVA per head of population was £31,072. Manchester's overall GVA has grown by 5.4% between 2014 and 2015, whereas the UK's growth slowed to 2.6% over the same period.

**Figure 2.4**  
Gross Value Added (GVA) per head of population

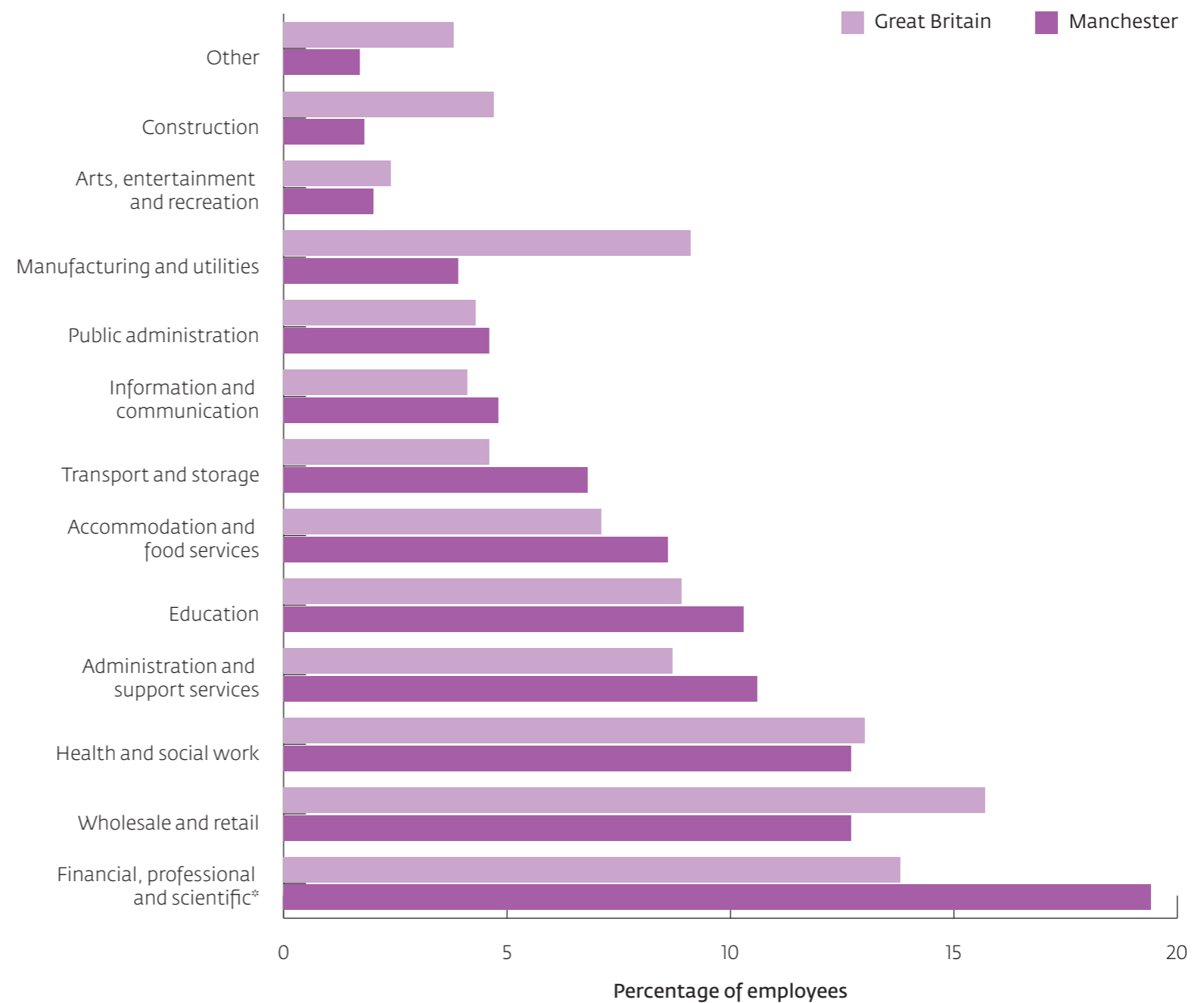


Source: ONS Regional Gross Value Added (Income Approach), December 2016. Latest figures are provisional

### Employment

Total employment in Manchester continues to rise, with the latest ONS Business Register and Employment Survey showing that employment rose from 341,100 in 2014 to 355,300 in 2015.<sup>4</sup> Figure 2.5 shows the distribution of employment across sectors. The data shows that the largest number of employees (19.4%) are employed in the financial, professional and scientific sectors compared to just 13.8% in Great Britain as a whole. The chart also shows how much the city's economy has diversified towards a knowledge-intensive economy and away from an overreliance on the public sector and manufacturing. The enduring gap between resident and workplace wages remains a significant issue for the city and a barrier to inclusive growth. Further analysis is provided within the 'a highly skilled city' chapter.

**Figure 2.5**  
Structure of employment (percentage by sector), 2015 (provisional)



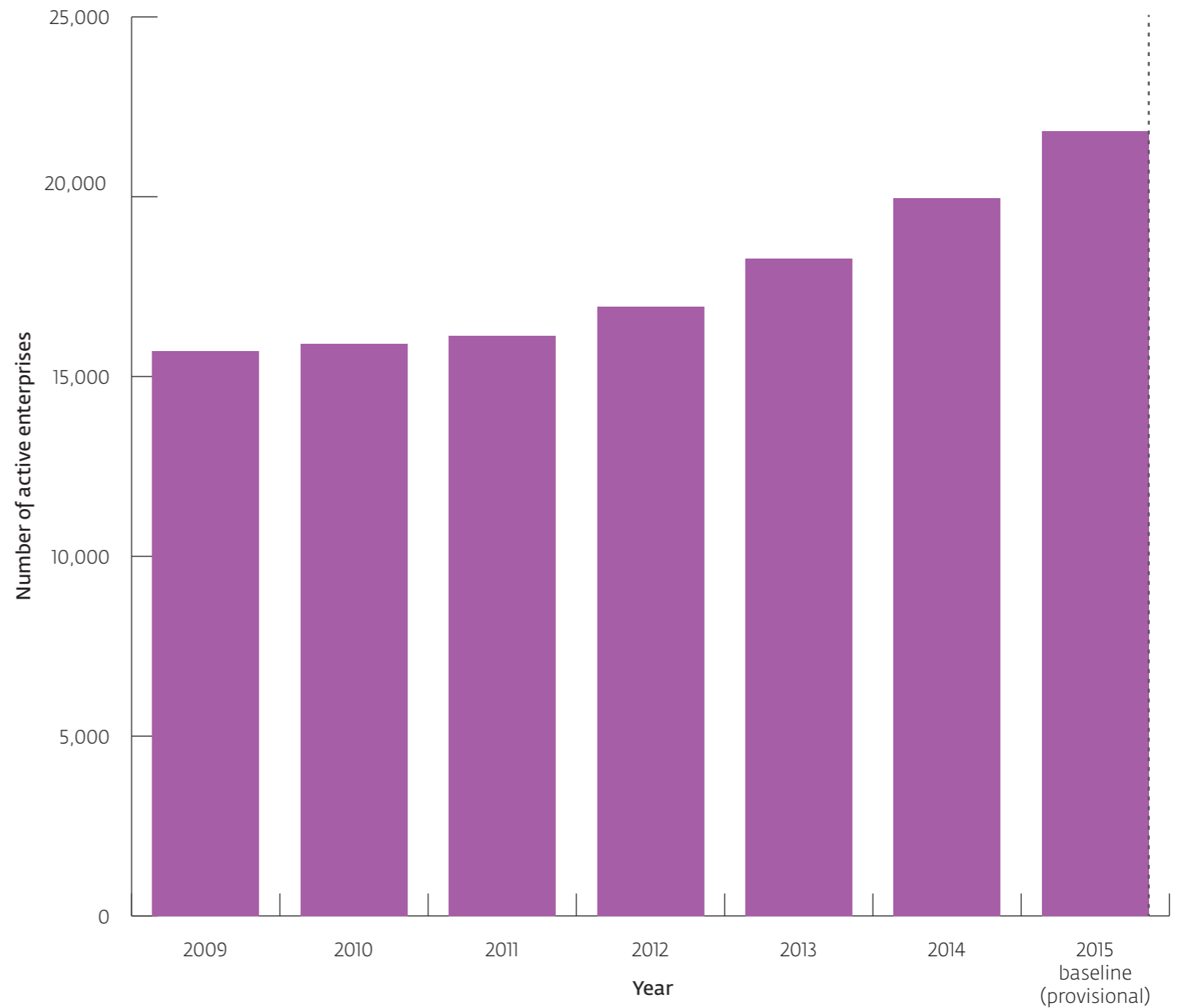
\* includes three sectors: financial and insurance; real estate; professional, scientific and technical.  
Source: ONS Business Register & Employment Survey, Provisional 2015 figures.

<sup>4</sup> Provisional figures.

### Active enterprises

Manchester continues its growing reputation as a leader in enterprise. Figure 2.6 shows the increase in the number of active enterprises in Manchester since 2009. In the past year, the number of enterprises has increased by 9%: from 19,965 in 2014 to 21,815 in 2015.<sup>5</sup> This data demonstrates that the city continues to be an incredibly enterprising place where residents and workers feel supported to innovate and take charge of their own financial futures.

**Figure 2.6**  
Number of active enterprises in Manchester



<sup>5</sup> Provisional figures.

Source: ONS Business Demography

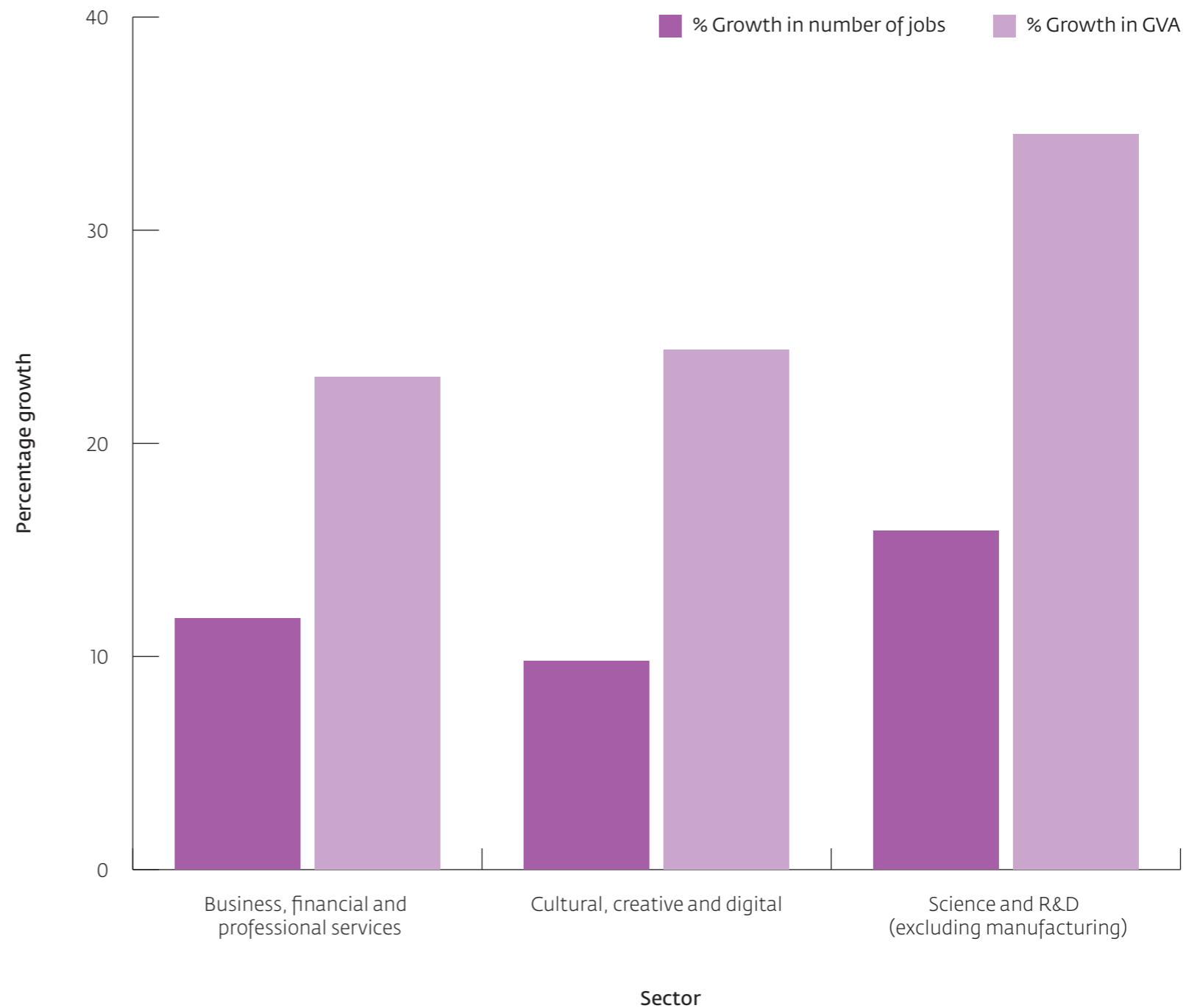


### Growth sectors

The growth in Manchester’s GVA is primarily due to the growth in the city’s top three fastest-growing sectors in the period 2017–2025: business, financial and professional services; cultural, creative and digital; and science, research and development. As highlighted in figure 2.7, science, research and development in particular continues to show significant potential for accelerating Manchester’s growth (albeit from a low base), with Corridor Manchester key to its success. It is forecast that the number of jobs in science, research and development (excluding manufacturing) will increase by 15.9% between 2017 and 2025, and GVA will increase by 34.5% over the same period. In employment terms, 4,000 people are employed in this sector in 2017, but this is forecast to increase to 4,700 in 2025.

As well as making Manchester a more attractive place to live, visit and do business, the cultural, creative and digital industries make a significant contribution to Manchester’s economy. It is forecast that in the period 2017–2025, this sector will see a 24.4% growth in GVA, making it the second fastest-growing sector in the city (see figure 2.7). There are also a number of other sectors – such as retail, construction and health – predicted to grow at a slower rate yet still provide a significant contribution to the local economy.

**Figure 2.7**  
Fastest-growing sectors (2017–2025)



Source: Greater Manchester Forecasting Model (2017), Oxford Economics

## Regional centre – business, financial and professional services

The city centre has continued to experience significant development over the past year. The continued growth of Manchester city centre as a leading international city area in which to live, visit and do business is closely aligned with the Our Manchester Strategy objectives. The delivery of major regeneration schemes will continue to deliver the growth and regeneration objectives of the city. These schemes include:

- **St John's** – This will develop as a new and unique city centre neighbourhood, a community of creativity, culture and innovation where people can live, work and experience the best of the city. Following the endorsement of an updated Strategic Regeneration Framework, the first phases of development now have planning approval and are due to start on site later in 2017. These will include a mixture of bespoke new city centre homes, the Factory Manchester (a unique national culture and art venue), a range of new commercial, retail and leisure spaces, and a 110-bed five-star hotel.
- **Great Jackson Street** – This is currently experiencing transformational change into a residential-led mixed-use neighbourhood situated at a key gateway location to the

city centre. Over the past 12 months, work has commenced on the initial phase of development at Owen Street, with the construction of 1,400 high-quality homes and new public realm alongside the River Medlock.

- **Kampus** – Development is now underway at the former Manchester Metropolitan University site, creating a vibrant and creative neighbourhood that will be distinguished by a mix of uses and its waterside location. The masterplan encompasses significant residential accommodation, in addition to a mixture of leisure and retail amenities. The past 12 months has seen planning permission secured for the site and work commence on the initial phases of development.
- **Mayfield** – Following a tendering process, the appointment of a development partner (U&I) has now been made for the regeneration of the 20-acre city centre site, which is set to emerge as a distinctive and unique mixed-use district. The next 12 months will see the launch of a variety of facilities, including food and drink outlets, theatres, and performance and creative work space that will increase the awareness and profile of the neighbourhood throughout its development.

- **Circle Square** – Construction is now underway on the initial phases of commercial, residential and public realm development at Circle Square, Oxford Road on the site of the former BBC building. This will see the delivery of a commercially led, mixed-use development in partnership with Bruntwood. The masterplan for the area includes 2.25million square feet of floor space comprising 1.34million square feet of commercial space. The scheme also incorporates 650 new apartments alongside retail, leisure and hotel amenities in addition to significant public realm investment.
- **NOMA** – Manchester City Council is working in partnership with the Co-operative Group and Hermes to deliver the comprehensive redevelopment of the 20-acre NOMA estate, which is now in its second phase. The refurbishment of the Hannover Building, which will deliver flexible working space for the technology and digital sector, is due for completion in the second quarter of 2018. Construction will also commence later this year on No.2 and No.3 Angel Square, which will provide 145,000 square feet and 212,000 square feet of Grade A commercial space respectively.

→ **Medieval Quarter** – A public realm masterplan has been approved that is formed around enhancing the setting of the heritage buildings in the area, including Chetham's, the Cathedral, the Football Museum and the Corn Exchange. Work is now underway on the scope and delivery of the initial phase of public realm improvements.

Key successes during 2016 include:

→ **Civic Quarter** – Delivery continues of a new Civic Quarter in the heart of the city centre that combines the civic estate and its key heritage assets with significant commercial floor space. Further new retail and leisure amenities have opened through the construction of No.1 St Peter's Square. Significantly enhanced public realm has been delivered at St Peter's Square, alongside the completion and reopening of the extended Metrolink stop. The next few months will see the further significant addition of Grade A commercial space and retail amenities through the completion of No.2 St Peter's Square.

→ **Spinningfields** – Construction is nearing completion on the final components of the Spinningfields regeneration scheme. The past 12 months has seen the completion of the XYZ Building, which will provide innovative

and flexible work/creative space. The construction of No.1 Spinningfields, which will add further high-quality Grade A office space, is set for completion later this year.

→ **Manchester Tech Hub** – The Government announced in the Spring Budget 2016 that it would be providing a £4million grant for the delivery of tech incubation space in Manchester. The Council is now working in partnership to finalise the grant award and facilitate the delivery of flexible tech/digital workspace in St John's and at Circle Square on Oxford Road. This investment will lead to new job creation through the growth and development of existing tech companies and the emergence of new start-ups, and utilise the graduate talent from the city's universities.

→ **Commercial Sector growth** – Manchester has the largest office market of any city outside London, with headline rent this year reaching £35 per square foot. 2016 saw 558,100 square feet of commercial office space delivered, which is the highest volume since 2008. There is a delivery pipeline for significant further office floor space over the next decade; 2017 will see construction starts at 2/3 Angel Square and Landmark on Oxford Street, and the completion of No.8 First Street (173,600 square feet), No.2

St Peter's Square (161,000 square feet), and No.1 Spinningfields (160,000 square feet).

## Science research and development

Corridor Manchester (which stretches south from the city centre along Oxford Road) is host to nearly 70,000 students and a dense cluster of knowledge-intensive organisations. The alignment of science, creativity and tech in key businesses along Corridor Manchester is critical to commercialising the city's assets. Accordingly, the area is benefiting from significant investment in digital, science, research and development across The University of Manchester, Manchester Metropolitan University, and the Central Manchester University Hospital research cluster. Current developments include:

→ **The Corridor Manchester Enterprise Zone** – in April 2017, a 10.6-hectare site within Corridor Manchester was designated an enterprise zone. Clustered alongside world-leading teaching hospitals, The University of Manchester and Manchester Metropolitan University, the sector focuses of the zone are Life Sciences, Health Innovation, Med Tech and ICT. Building on the success of Citylabs 1.0, 2017 will see construction start on further commercial floor space within the Corridor Enterprise Zone area, including Citylabs 2.0, which will provide 85,000 square feet of lab and office space.

- **Graphene Engineering Innovation Centre (GEIC)** – this new £60million facility focuses on the development of commercial graphene applications, and is due to open in 2018.
- **Sir Henry Royce Institute** – this £235million facility encompasses advanced materials research and innovation, and is due to open in 2019.
- **Manchester Science Park** – there are plans to triple this Corridor Manchester campus from the current provision of 350,000 square feet to one million square feet by 2018.

### Cultural, creative and digital

The creative industries are the UK's fastest-growing economic sector, and the UK's film, television, video games, music, design, fashion and publishing arms are world renowned. In Manchester, museums, galleries, theatres and heritage play a key role in both attracting visitors and contributing to wider inward investment. The creative industries help to give the UK its competitive edge. That edge is a consequence of being open and international. Creative industries have the power to open up trade opportunities for other sectors, and awareness of our strengths in this sector helps to promote Manchester as 'open for business'.

### Case study – EuroScience Open Forum and European City of Science 2016

In July 2016, Manchester played host to the EuroScience Open Forum (ESOF), the pan-European science conference dedicated to scientific research and innovation. ESOF, which takes place biennially, once more reaffirmed the city's growing international reputation as a leading city of science, innovation and invention.

The ESOF programme comprised 157 sessions and included everything from advice on how to make science attractive to school pupils so that future generations take up careers in Science Technology Engineering and Maths (STEM), to supporting scientists to promote their work through social media.

The conference attracted delegates from across Europe, the USA and Japan, and included early career researchers, business delegates, and four Nobel Laureates. As well as promoting Manchester's reputation as a centre of scientific excellence among the global community of scientists, the city benefited economically from hosting the conference. It is estimated that delegates spent in the region of £3.54million, which provided a significant boost to the city's economy.

Indeed, it was precisely because of the city's scientific excellence that Manchester was also awarded the European City of Science in 2016. To celebrate Manchester being the first UK city to receive this accolade, a free week-long festival was held (22–29 July). The science festival comprised a host of activities aimed at engaging the public in all things science. Activities included The Great

Science Share, which encouraged young people to share and celebrate science. Over 150 schools from across Greater Manchester registered to take part, and more than 200 teachers and STEM professionals participated in the Great STEM TeachMeet. The festival also featured a number of exhibitions and events, including the Imitation Game at Manchester Art Gallery and the Bluedot Festival at Jodrell Park.

In addition, Manchester continued to host its annual Manchester Science Festival in October 2016. The festival comprised 125 unique events, and attendance was up 13% on 2015.

It is anticipated that the legacy of the ESOF together with its two science festivals in the past year will consolidate and enhance Manchester's reputation as a city of science, and that this will have a lasting impact on the city's young people as they progress into their future careers.

In Greater Manchester, the creative and digital sector was the fastest growing in terms of employment between 2010 and 2013, and joint-fastest in terms of output growth.<sup>4</sup> The region has almost 55,000 jobs in the sector, with an even split of 28,300 jobs in digital industries and 26,100 in creative industries; combined they generate a total GVA of £3.1billion.<sup>5</sup>

The national importance of both creative and digital sectors has been strengthened by the development of MediaCityUK at Salford Quays, where one in seven of the BBC's staff works, with over 1,000 specialising in digital applications. The presence of ITV and Channel 4 in the city, together with assets such as The Landing and The Sharp Project, has enhanced Manchester's role as a cluster for digital, media and creative firms.

The city region has now positioned itself as the leading creative, media and digital centre outside London, and has major potential for 'North Shoring' (attracting firms from the overheated London and south east).

Employment in Greater Manchester is expected to continue to increase markedly, growing over the next 20 years by 18,700 jobs at a rate of 1.2% per annum under the Accelerated Growth Scenario (AGS 2015).<sup>6</sup> The growth in GVA is even

more marked, with an annual forecast growth rate of over 3.6%, adding £3.7billion GVA to the region's economy by 2035.<sup>7</sup>

In terms of challenges, while the sector has experienced strong growth, levels of GVA per employee in the sector in Greater Manchester (£51,200) fall behind the national average (£56,800).<sup>8</sup>

There are also considerable variations between the two major subsectors. GVA per person employed in the digital industries in both the UK (£73,900) and Greater Manchester (£66,200) is significantly higher than that in the creative industries (UK £42,600, Greater Manchester £37,300).<sup>9</sup>

In both cases, GVA is lower than the UK average, although the national figure is distorted by London being a global leader in both the digital and creative sectors. The variation in productivity also reflects the industrial structure within the two sectors.

A top-class cultural offer is vital to Manchester's international positioning and profile. The Greater Manchester Internationalisation Strategy has been refreshed and provides details on the global opportunities that exist for the region. The EU and USA remain the

prime markets, with China, India, Japan and the UAE identified as opportunity markets. Digital tech and creative media are key sectors within the strategy.

## Area-based regeneration Transformation of Eastlands

The regeneration of east Manchester continues to transform the social, physical and economic landscape of this part of the city. Since 2011, the transformation of Eastlands, led by a partnership between the Council and Abu Dhabi United Group (ADUG), has seen investment in excess of £400million from public and private investors. This has strengthened the area's focus on sports and recreation, increasing community access to sports facilities, and increasing employment opportunities.

4–9 New Economy Deep Dive Digital and Creative Sector 2016

The next planned phase of transformation will join up sport with higher education via the development of a higher education site on the Etihad campus. It is anticipated that this partnership will enhance the further education facilities in the city and will provide a competitive university sports offer to bolster Manchester's reputation as a global centre of sporting excellence.

Discussions have commenced with a number of potential academic partners, including Manchester Metropolitan University. In parallel with the consultation process around these proposals, discussions are also taking place with Sport England and ADUG to explore how their respective land interests can be combined with the Council's to realise this vision.

### Airport City

The transformation of Airport City continues apace with a number of significant investments in the past year. A new £15million logistics facility has been launched by Beijing Construction Engineering Group International, a Chinese construction and engineering firm. Alpha, which is part of a £1billion development, is being built at the heart of Airport City's Global Logistics site and will offer units from 17,500 square feet to 35,000 square feet, ideal for the

growing demand of small and medium-sized businesses. The construction site has already seen high levels of interest from firms keen to take advantage of exceptional transport and business links.

In addition, online giant Amazon opened a 260,000 square feet warehouse in Airport City in autumn 2016, which employs up to 3,000 staff at peak times. These developments have added to an increasingly buoyant Airport City area, helping to further promote employment opportunities for local people, driving investment, supporting business growth, and generating economic growth for Manchester and the wider region.

### Economic impact of culture

Manchester benefits from a wide range of cultural partners, including museums, galleries, performance venues and production groups. Combined, they provide a well-rounded and internationally significant offer covering fine art, historical events, natural history, visual arts, performing arts and popular culture. The city's cultural offer is boosted every two years when the artist-led Manchester International Festival (MIF) is held. As the world's first festival of original work and special events, MIF makes a very important contribution to the city's cultural brand.

2016 was a significant year for culture in Manchester, as the city continued to develop infrastructure and high-profile cultural events, cementing Manchester's reputation as a major cultural player. Lonely Planet ranked Manchester eighth out of the ten best cities to visit in the world in 2016, beating Nashville and Rome, citing its 'role as a cultural dynamo of British culture'.<sup>10</sup>

To maintain and enhance the competitiveness of the Manchester cultural offer, the sector needs to continue its growth and development. A commitment to this agenda has been underpinned by further plans and investments, in particular, a new £110million Factory cultural facility. This progressed well during 2016/17 to achieve planning permission for its ambitious and architecturally significant building, which is scheduled to open in 2019.

In 2016, Manchester City Council commissioned an evaluation of the Impact of the Cultural Sector by consultants Ekosgen. The study reviewed organisational survey data from 2014/15 with visitor data from 2016/17.<sup>11</sup>

<sup>10</sup> Lonely Planet's Best in Travel 2016

<sup>11</sup> The Impact of Manchester's Cultural Organisations 2016, Ekosgen

Generating in excess of 4.7million visits per annum, plus an additional 259,000 attendances every two years when MIF is held, the cultural organisations covered by this study form a central part of the city's wider cultural and tourism offer.

Headline findings included a 7% increase in visitors to the top 16 cultural attractions in Manchester from 2013/14 to 2014/15, and a further 16% increase in visitors to cultural attractions in the city by 2015/16. These numbers are significant and are indicative of the improving quality and reputation of Manchester's cultural offer.

The evaluation also revealed that expenditure related to visits to cultural organisations in the city has increased too, from £1.6million in 2013/14 to £2.2million in 2014/15, generating a gross additional tourist visitor expenditure of £232million in 2013/14 and £256million in 2014/15.

Cultural organisations in Manchester employed 1,002 full-time equivalent staff in 2014/15, a 4.3% increase since 2013/14, and direct employment across the 16 organisations surveyed generates an estimated £39.9million of GVA per annum, an increase of £1.6million since 2013/14.

### Artists' workspace

There is now a growing demand in the city for studio spaces for visual and performing artists. The development of the city's world-class cultural offer and top-quality learning provision means that Manchester is retaining higher-than-ever levels of creative talent and is attracting artists to live and work in the city. However, the success of Manchester city centre as a growing business and residential centre has driven up the cost of premises beyond levels that artists and small-scale cultural organisations can afford. There are few studio and production bases where artists have a long-term stake in facilities.

The Council responded to this challenge during 2016 by commissioning an evaluation of current provision and likely future demand. The report highlights the pressure on existing studio space, which is driven by a loss of provision and increasing demand and the need to look at the issue from a Greater Manchester perspective. The report found that as of November 2016, four out of the 14 studios reviewed needed to find alternative premises over the coming six months.<sup>12</sup>

Work has now started in partnership with key studio groups and cultural organisations to identify specific spaces for artistic production.

### Visitor economy

#### Tourism

Manchester's visitor economy has continued to thrive. The city remains the third most-visited destination in the UK by international visitors, after London and Edinburgh. Data from the 2016 International Passenger Survey showed that the total number of visits to Manchester doubled between 2000 and 2015. Figure 2.8 shows that the number of visits to the city rose to 1,190,550 in 2016 from 1,151,870 in 2015: an increase of 3.4%, compared to the UK growth rate of 4.1%.<sup>13</sup>

Ireland, Germany and the USA continue to generate the highest volume of international leisure visits, followed by Australia, and Italy, appearing in the top five for the first time.

The tourism sector is also supported by visitors from within the UK – staying visitors and day visitors. Over the three-year period 2013–15, the Visit England Great Britain Tourism Survey showed Manchester to be England's most-visited local authority area with an average of 2.5million domestic staying visits a year, followed by Birmingham and the City of

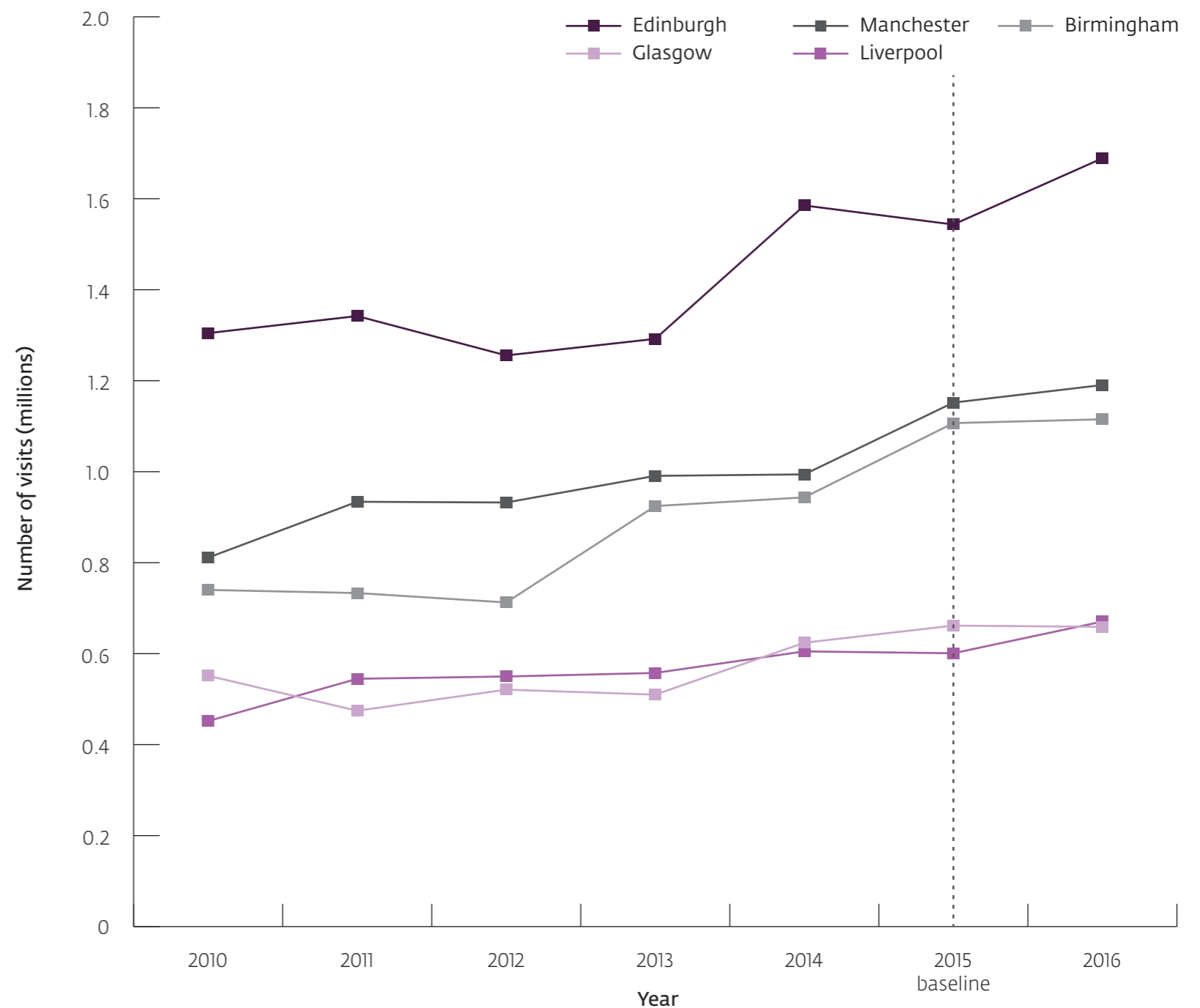
<sup>12</sup> Artists' Studios in Greater Manchester Study 2016, Ekosgen

<sup>13</sup> International Passenger Survey 2016, Visit Britain/ONS

London.<sup>14</sup> Over the same three-year period, the Visit England Great Britain Day Visits Survey also highlighted Manchester as the second most-visited local authority in terms of day visits from residents of Great Britain, with an average of 30.1million day visits per year, behind the City of London.

This level of activity has made a huge contribution to Manchester's tourism sector and economy more generally, generating £4.2billion in 2015: a 5% increase on the £4billion in 2014. This same period saw a 4% growth in the number of visits, from 61million in 2014 to 63.4million in 2015, and a 3% increase in the number of jobs supported by Manchester's tourism industry, from 48,100 to 49,400.<sup>15</sup>

**Figure 2.8**  
Estimated number of visits by overseas residents (excluding London)



Source: International Passenger Survey, Visit Britain/ONS

<sup>14</sup> London has a number of local authorities that are counted separately, including City of London and City of Westminster

<sup>15</sup> STEAM (Scarborough Tourism Economic Activity Monitor, Global Tourism Solutions (UK) Ltd



## Hotels

Manchester's hotel sector continues to attract major investment, with the city seeing a surge in new properties coming onto the market, notably Hotel Gotham, INNSIDE Manchester, Motel One Piccadilly, King Street Townhouse, and a Holiday Inn opening in the city centre. The combination of these five properties has generated an additional 934 rooms per night for incoming visitors, producing an 8% uplift.

So far it would appear that the vote to leave the European Union in the June 2016 Referendum has had little or no impact on hotel numbers. The annual occupancy rate for Manchester city centre was 79% in 2016, just below the 80% record occupancy level reached in 2015. September to November 2016 continued to be the peak occupancy period, with June and July 2016 also producing an occupancy rate of above 80%.<sup>16</sup>

Manchester's hotel sector is expected to increase further during 2017 and 2018. As well as AC by Marriott and Staybridge Suites, the Manchester hotel scene will include the opening of Manchester Grande, the Stock Exchange Hotel and The Cow Hollow Hotel. The Crowne Plaza, Holiday Inn Express, Motel One, StayCity and Roomzzz will all open additional properties in Manchester.

This injection of new hotels will boost Manchester's local authority room count to 13,940 by the end of 2018, a growth of 12% since December 2016, with 10,300 of these being located in the city centre itself.

## Manchester as a conference venue

Manchester as a conference destination has proved to be part of the city's economic success. The conference value and volume study estimated that in 2015, Manchester hosted some three million delegates at conference and business events with a value of £528million. This activity provided significant employment opportunities, having supported 26,300 FTEs either directly or indirectly. In addition, delegate spending has also supported the city's visitor economy. For instance, a delegate paying a day rate was valued at an average of £54 per day, and a staying delegate was found to spend an average of £179 per day and £305 per trip.

## Conclusion

Manchester's economy and employment offer continues to grow, broaden and diversify. The city has continued to thrive in the past year, with its economic performance outpacing that of the UK economy as a whole. A key challenge remains how to ensure that this growth is truly inclusive and that it benefits as many residents of the city as possible. The enduring resident and workplace wage gap, covered in more detail within the 'a highly skilled city' chapter, remains one of the key challenges for the city.

This can be partly explained by the city's continued growth in a number of sectors: science and research and development; cultural, creative and digital; and business, financial and professional services. Corridor Manchester continues to drive research innovation across advanced materials, life sciences and technology. The success of the ESOF and European City of Science has also helped to promote Manchester internationally as a forward-thinking city of science, technology and innovation.

<sup>16</sup> STR Global

Perhaps more significantly, the big story over the past few years has been the growth of the creative industries. As well as adding to the buoyancy of Manchester's economy, the creative industries are helping the city realise its vision to be in the top flight of world-class cities. This can be seen in the growth of the city's population, as students, young professionals and new communities increasingly choose to stay in Manchester, attracted to its knowledge-based economy and the richness and vibrancy of the city itself.

Manchester continues to thrive on the international stage, attracting growing numbers of visitors from across the world. The spread of visitors' home nations demonstrates that established relationships remain strong, such as those with the USA and Ireland, but that Manchester is becoming increasingly attractive to new places. Growing popularity with Chinese visitors is particularly important, reflecting the wider benefits of the city's diplomatic efforts between China and the city of Wuhan in particular.

While Manchester's economy has continued to grow, projections for future growth must be treated with some caution. The economic impact of the UK's decision to leave the EU in June 2016 is yet to be fully understood.

However, Manchester's economy is much more diverse than in the past and provides a strong foundation for coming years.

## A highly skilled city

### Strategic overview

A highly skilled population to drive the city's economic growth is a priority within the Our Manchester Strategy and the Work and Skills Strategy. Linked to this is the need to reduce the levels of dependency across the city and ensure that everyone has equal opportunity to benefit from the city's economic growth through the creation of jobs that are accessible to Manchester residents, reducing the number of people who are out of work. The devolution of the Adult Education Skills Budget will enable us to respond to these challenges more effectively by developing different ways of working with our partners and different approaches to public service reform, welfare reform and skills to ensure all of Manchester's residents can enjoy the benefits of economic success.

Ensuring Manchester residents, especially those furthest from the labour market, are provided with skills as part of an integrated employment support offer that leads to jobs with progression opportunities or real Living Wage remains a challenge. The real Living Wage is independently calculated each year

based on what employees and their families need to live and is currently set at £8.45 per hour.

The skills that Manchester's economy will need to grow will be at the Professional and Associate Professional level, generally level 3 and above (those who have achieved at least A-level qualifications or equivalent). The Skills Funding Agency datacube reports that the projected growth sectors for the city are professional, scientific and technical; administrative and support services; and accommodation and food services. Common skills, such as communication and problem solving, are the most referenced on job adverts and IT skills are also in high demand. There is also the requirement to ensure residents whose first language isn't English are given the opportunity to learn and have access to roles and progression in the city. The challenge is to ensure that all Manchester residents are skilled and work-ready to meet future demand given that there continues to be a disconnect between many residents and the city's economic success.

This chapter sets out how we are working to achieve an improvement in schools results so that they are significantly better than the UK

average and how we are continuing to increase the proportion of graduates in the city. It outlines how we are working with employers to ensure that everyone is paid at least a living wage and to encourage a work placement for every young person, including how as a major employer we are responding to this. We are also working to increase the number of apprenticeships by developing new models that encourage high-level apprenticeships in a wide range of fields.

### Analysis of progress

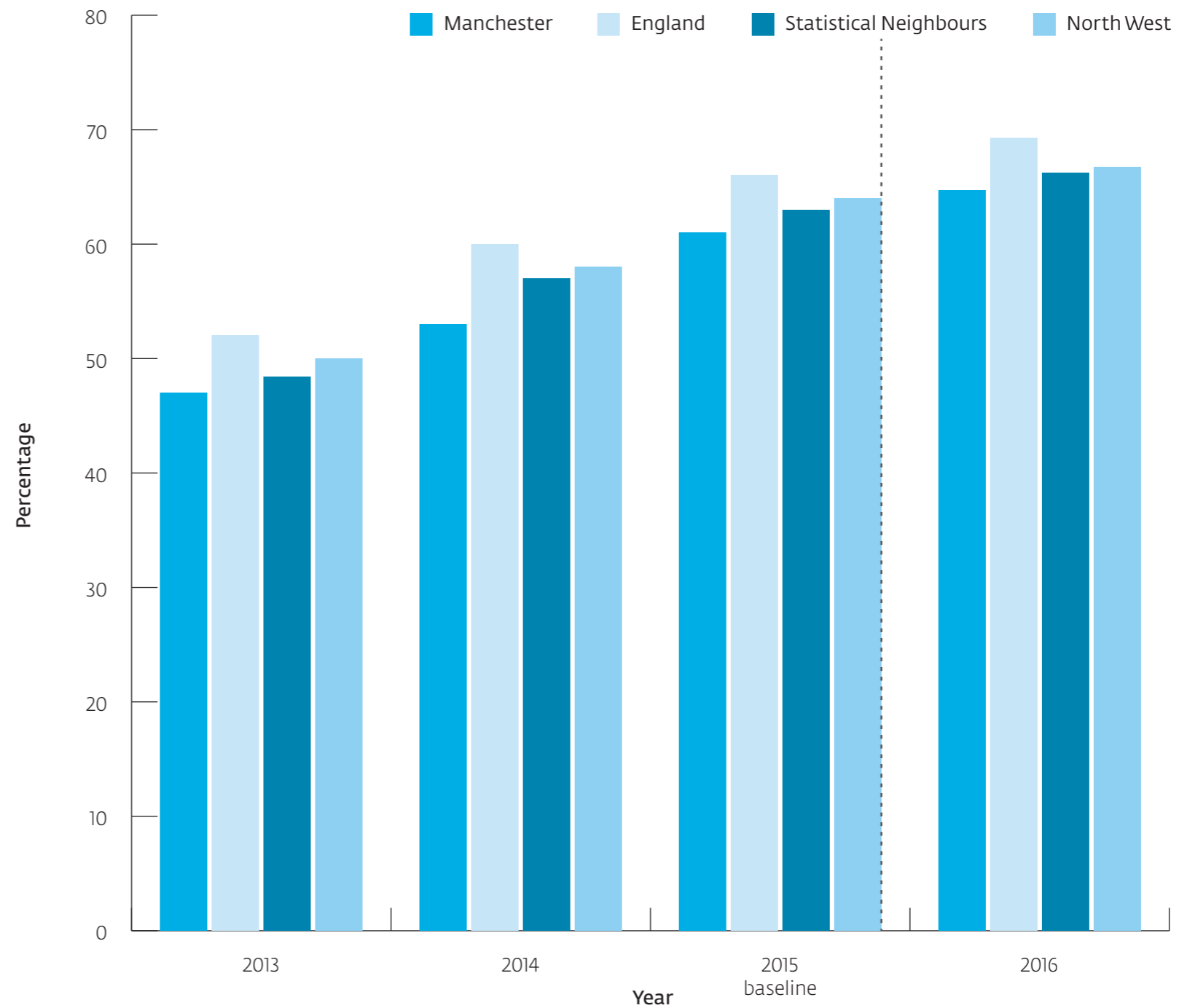
#### Getting the youngest people in our communities off to the best start

##### Early Years Foundation Stage (EYFS)

The Early Years Foundation Stage (EYFS) profile is a teacher assessment of children's development at the end of the academic year in which the child turns five. Children reach a good level of development if they achieve at least the expected level in the early learning goals in the prime areas of learning (personal, social and emotional development, physical development, and communication and language) and in the early learning goals in the specific areas of mathematics and literacy.

The 2016 results show that the proportion of children achieving a good level of development has increased since 2013 but is still lower than the national average and those of statistical neighbours<sup>1</sup> and North West local authorities (Figure 3.1).

**Figure 3.1**  
Percentage of EYFS children achieving a good level of development



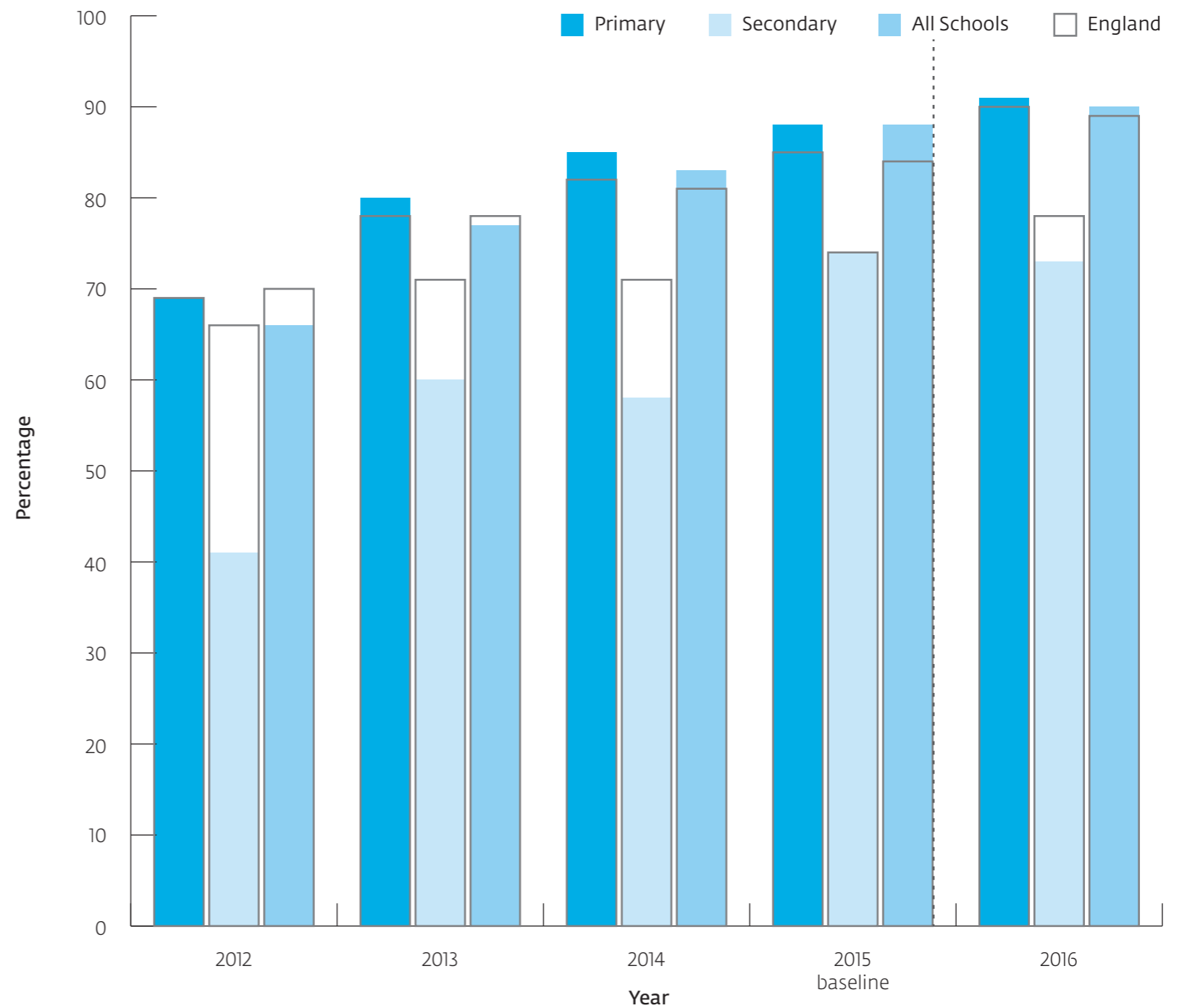
<sup>1</sup> Statistical neighbours: Newcastle upon Tyne, Middlesbrough, Liverpool, Salford, Greenwich, Nottingham, Birmingham, Coventry, Bristol, Southampton.

Source: Department for Education

### School inspection judgements

The percentage of Manchester schools judged to be good or outstanding by Ofsted in their most recent inspection is higher than the national averages for primary schools and all schools, but lower in secondary schools (Figure 3.2).

**Figure 3.2**  
Percentage of schools judged to be good or better



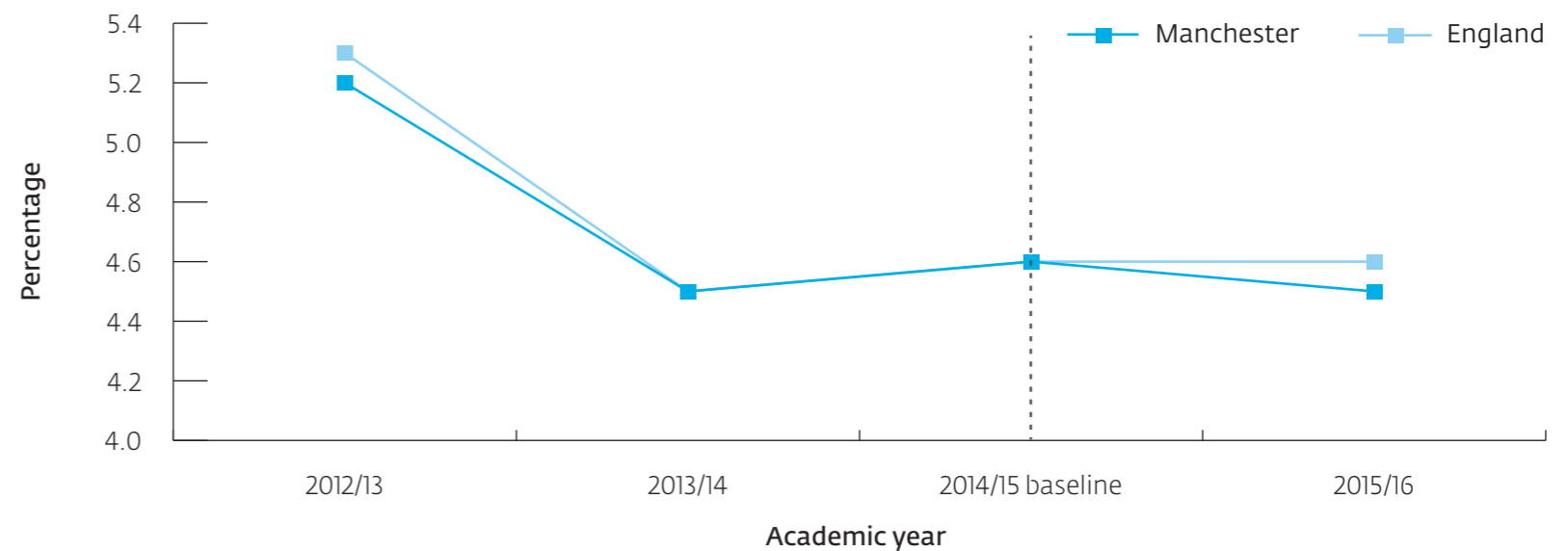
Source: Ofsted

### School absence

Figure 3.3 shows the overall absence rates in schools in Manchester and Figure 3.4 shows the percentage of pupils who have been persistently absent from schools. A new definition of absence and persistent absence started in 2015/16 such that absence is based on all six half terms for years 1–10 and half terms one to five for year 11. The percentage of sessions missed before a pupil is deemed to be persistently absent is 10%. The results in Figures 3.3 and 3.4 show prior years' figures calculated using the new definition so results are directly comparable.

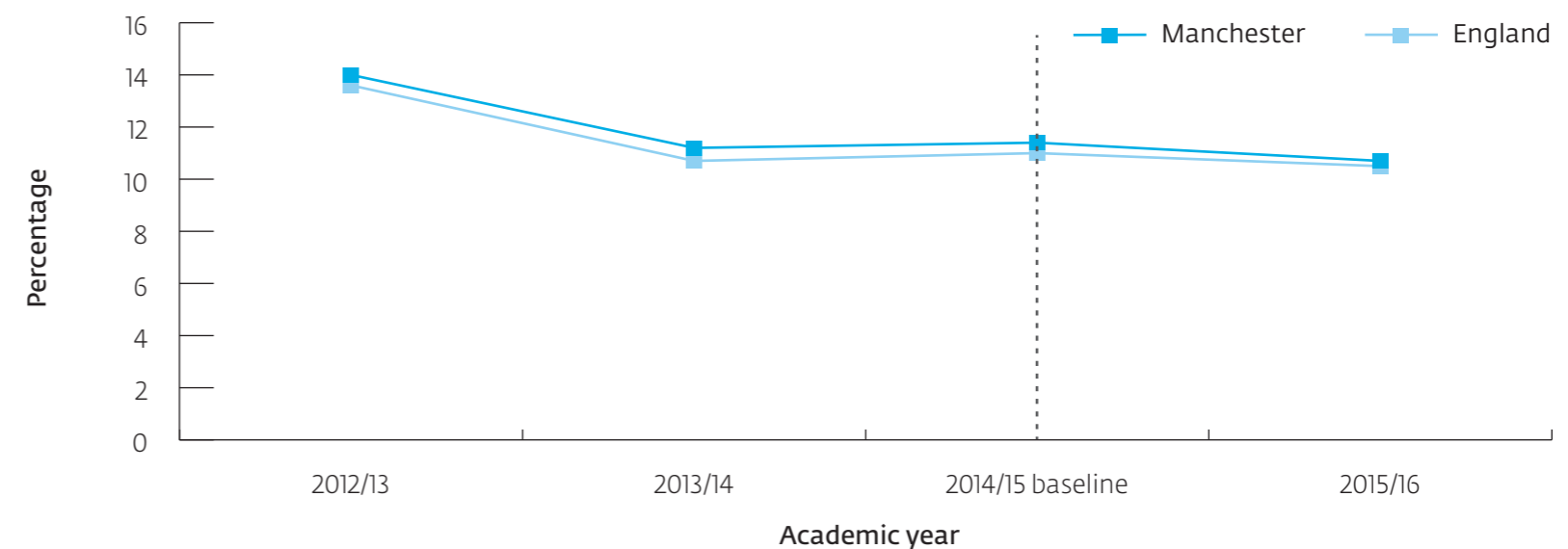
School absence has improved over the past few years with overall absence in Manchester schools better than the national average. Manchester secondary schools are now below the national average by 0.3 percentage points with overall absence figures of 5.2%. This has improved each year since 2012/13. Absence in primary schools has seen a slight increase in 2015/16 so they are now above the national average by 0.1 percentage point with an absence rate of 4.1%.

**Figure 3.3**  
Pupils' overall absence – percentage of school population



Source: Department for Education

**Figure 3.4**  
Pupils' persistent absence – percentage of school population



Source: Department for Education

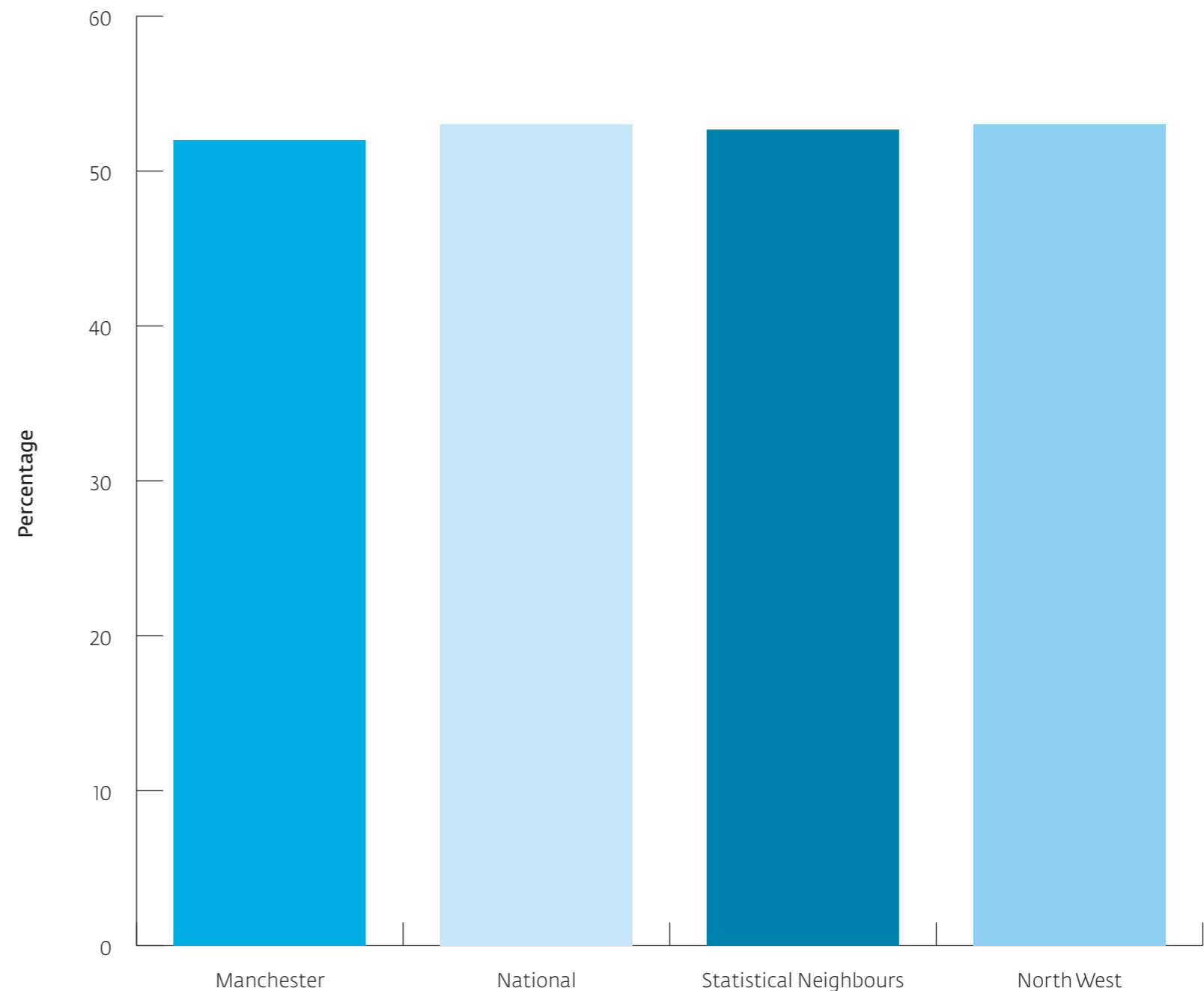
The percentage of pupils classified as being persistently absent has decreased in secondary schools such that levels of persistent absence in secondary schools are now lower than the national average by one percentage point at 12.1%. Persistent absence in primary and special schools remains above the national average, by 1.2 and 4.6 percentage points respectively.

### Key Stage 2

Recent changes to the national curriculum have resulted in a new testing regime for pupils at the end of Key Stage 2. This means that results for the academic year 2015/16 are not comparable with prior years.

The key performance measure of attainment at the end of Key Stage 2 is the percentage of pupils achieving the expected standard in the core subjects of Reading, Writing and Maths. Figure 3.5 shows how Manchester compares in this new measure relative to national figures and those of statistical neighbours and North West local authorities. With 52% of pupils achieving the expected standard, Manchester is performing slightly below the national figure of 53% and these other comparator groups.

**Figure 3.5**  
Percentage of pupils achieving the expected standard in Reading, Writing and Maths, 2015/16



Source: Department for Education

### Key Stages 1–2 progress

In line with the new performance measures for KS2, new progress scores have been introduced to measure progress between KS1 and KS2. The new measure compares the progress pupils have made relative to other pupils nationally with the same level of attainment at the previous key stage. As well as looking at the scores, confidence intervals need to be considered as they take into consideration the size of the cohort. KS1–2 progress scores do not include special schools. The national progress score for each subject, by definition, is set to 0.

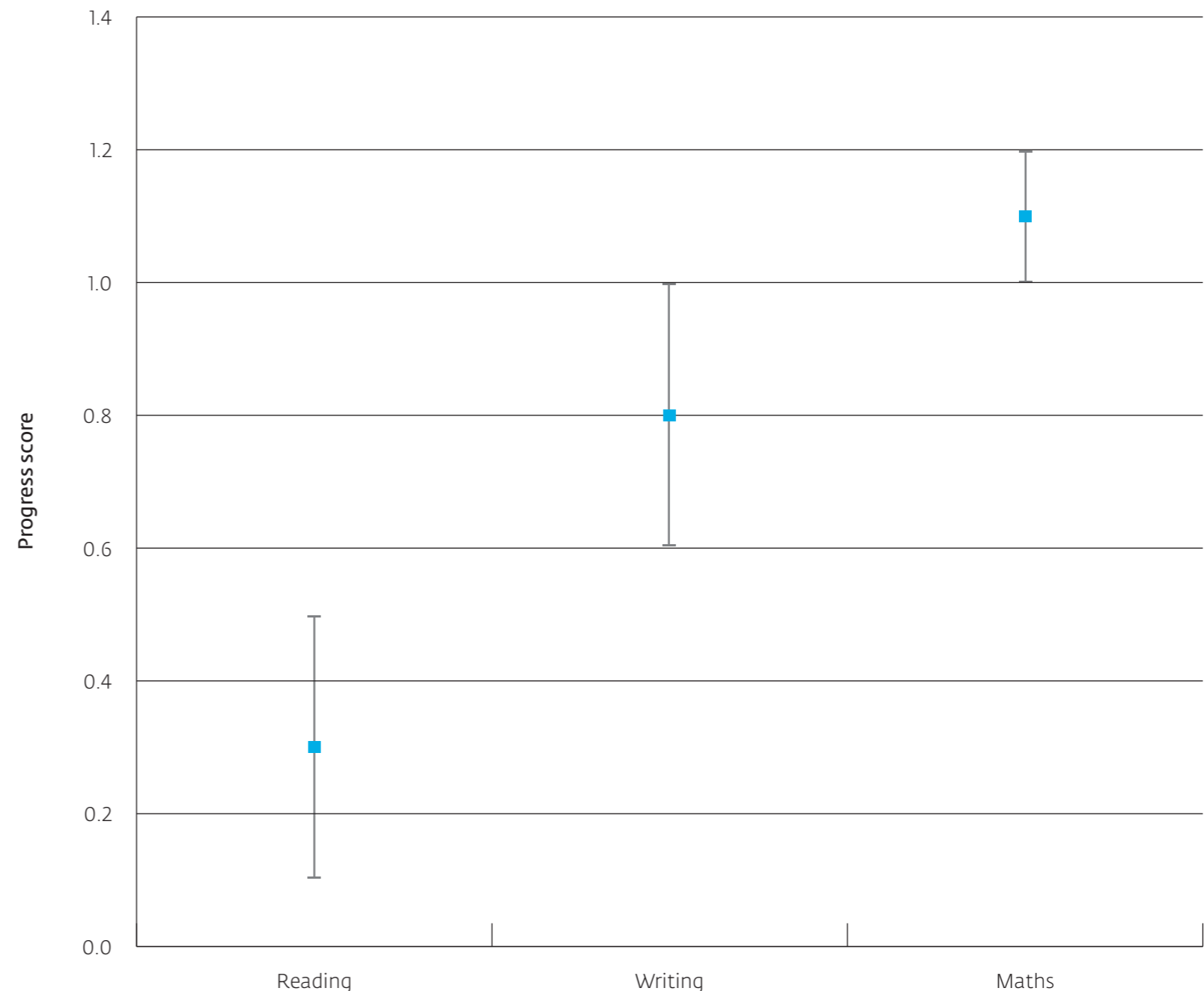
Figure 3.6 shows that the progress made by Manchester pupils in Reading, Writing and Maths is statistically significantly above the national average, with the most relative progress being made in Maths.

Confidence intervals should be interpreted as follows:

- If the entire confidence interval line is above 0, then the progress score is statistically significantly above the national average.
- If the entire confidence interval line is below 0, then the progress score is statistically significantly below the national average.
- If the confidence interval line crosses or touches 0, then the progress score is not significantly different from the national average.

**Figure 3.6**

Progress scores of pupils in Reading, Writing and Maths, 2015/16



Source: Department for Education



### Key Stage 4

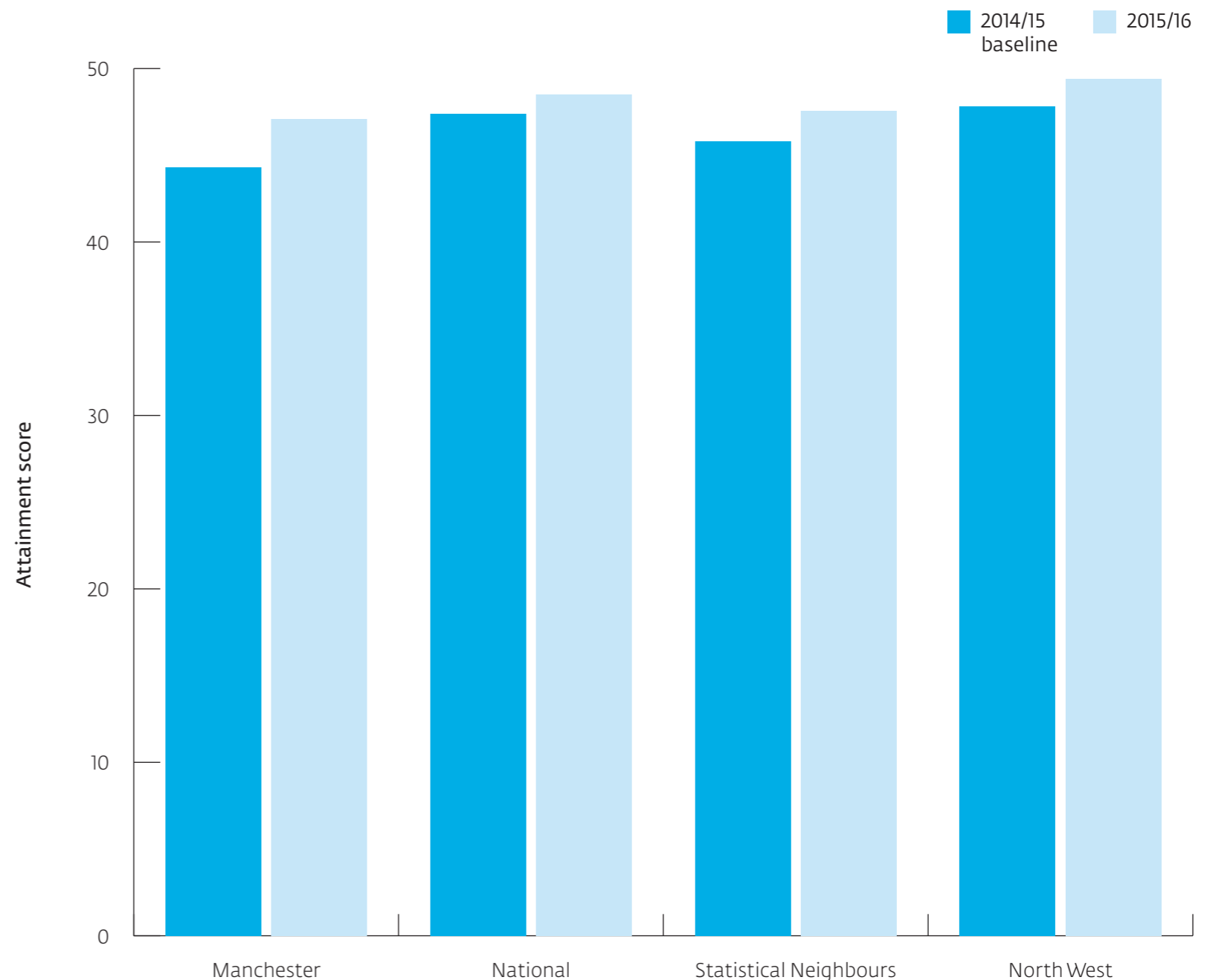
The academic year 2015/16 also saw a revision of the key performance measures for Key Stage 4. The new measures are now:

- Attainment 8
- Progress 8
- % of pupils achieving A\*–C in both English and Maths
- % achieving the English Baccalaureate

Attainment 8 replaces five or more GCSEs graded A\*–C including English and Maths. It measures the average achievement of pupils on up to eight qualifications including English and Maths, three qualifications that count towards the English Baccalaureate (that is sciences, languages and humanities), and three other qualifications from the DfE approved list. For comparison purposes, the DfE have provided local authority level Attainment 8 scores for 2014/15 which are shown in Figure 3.7 with the 2015/16 results.

In both years, Manchester has a lower Attainment 8 score than national and the comparator groups. However, Manchester improved their performance at a faster rate than the other groups, with the score increasing from 44.3 to 47.1, thereby closing the gap.

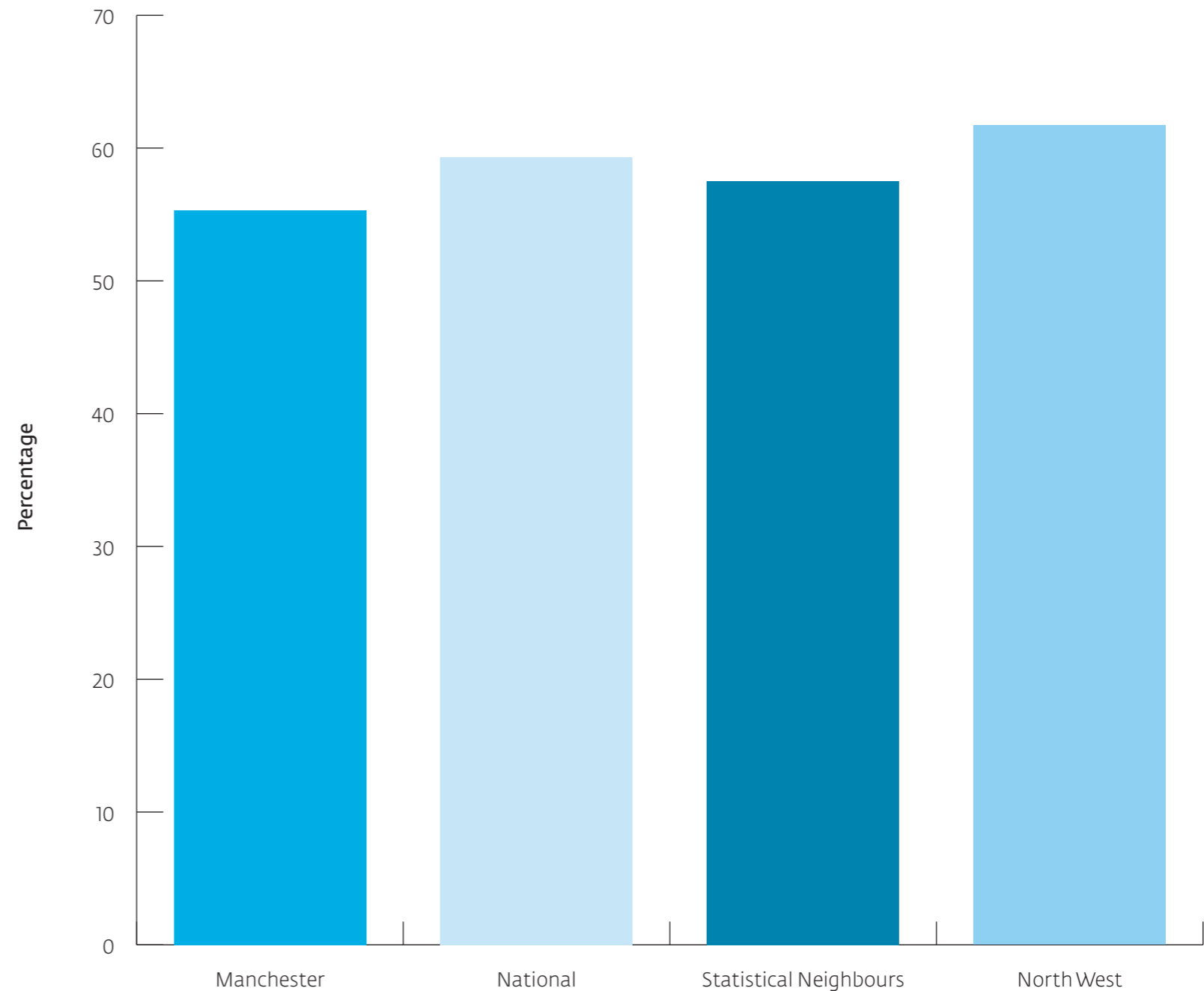
**Figure 3.7**  
Attainment 8 score



Source: Department for Education

Figure 3.8 shows that Manchester has a lower percentage of pupils achieving a GCSE in both English and Maths than nationally, or in the comparator groups. The academic year 2015/16 saw a change such that either English Language or English Literature could be treated as English for the purposes of this measure, while previously it had been both. As a result, 2015/16 results are not directly comparable with prior years' results so these have not been included.

**Figure 3.8**  
Percentage of pupils achieving A\*–C in both English and Maths, 2015/16

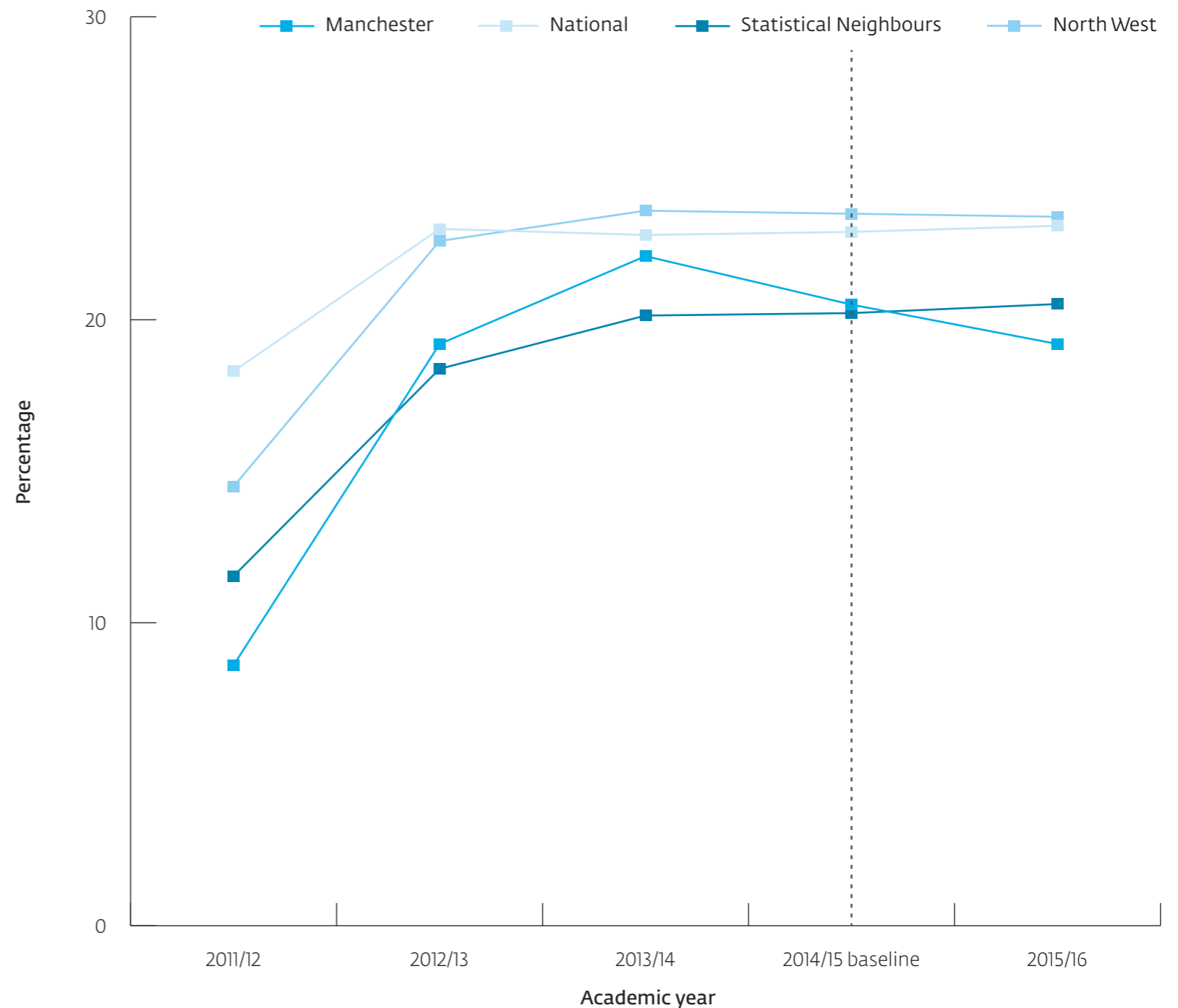


Source: Department for Education

The English Baccalaureate is a measure of pupils who have achieved the required standard in all of the English Baccalaureate subjects as mentioned above, as well as English and Maths. It is calculated as a percentage of the number of pupils in the Key Stage 4 cohort, not the percentage of pupils who have been entered for all the qualifying subjects.

Figure 3.9 shows that the percentage of Manchester pupils achieving the English Baccalaureate started to decrease in 2014/15 after an initial increase. The 2015/16 result of 19.2% is below the national average, 23.1%, and other comparator groups.

**Figure 3.9**  
Percentage achieving English Baccalaureate



Source: Department for Education

### Key Stage 2 to 4 progress

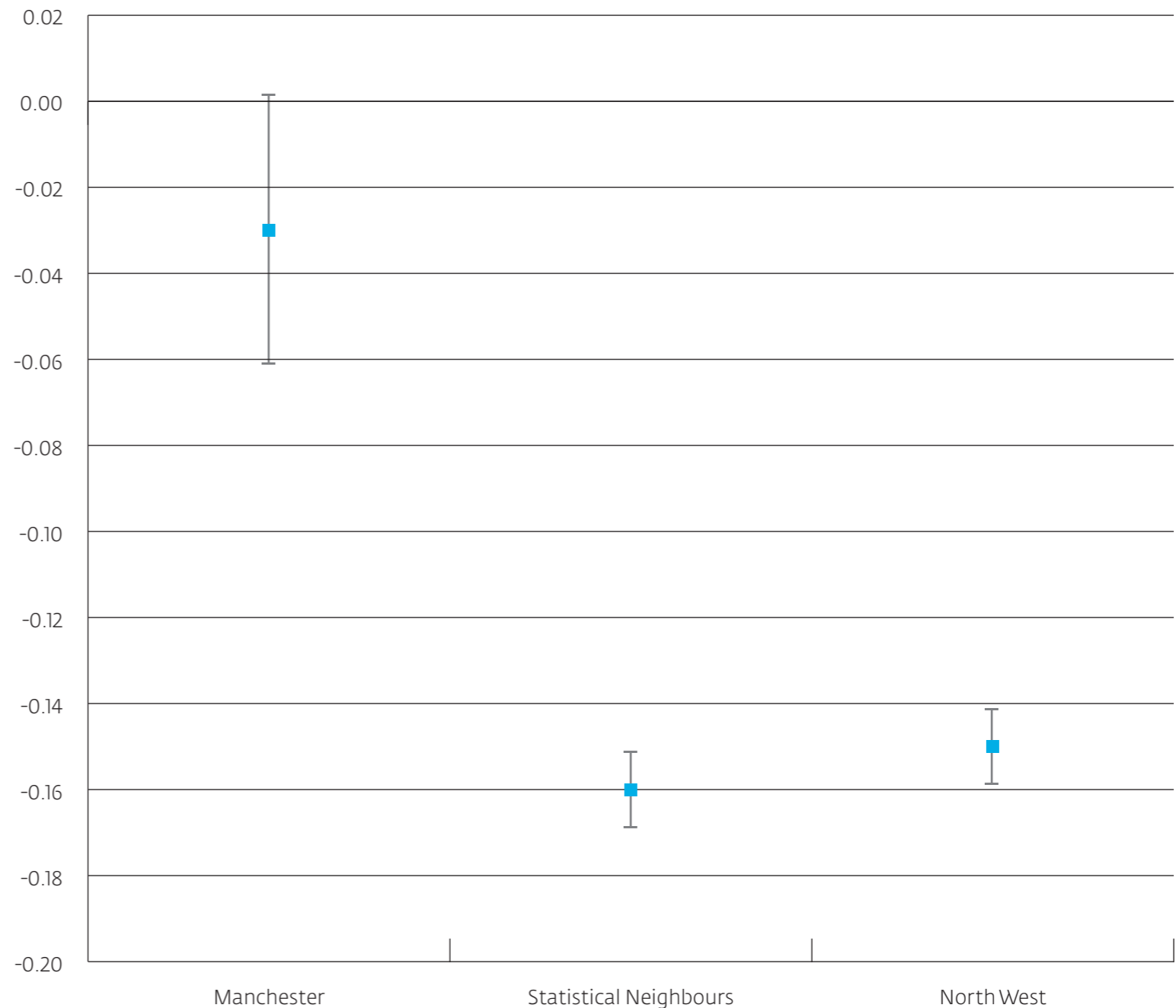
The new progress measure, Progress 8, measures the amount of progress pupils have made relative to other pupils nationally with the same level of attainment at Key Stage 2. As well as looking at the scores, confidence intervals need to be considered as they take into consideration the size of the cohort. Progress 8 scores include special schools. The national progress score for each subject, by definition, is set to 0.

Figure 3.10 shows that while Manchester pupils have a negative Progress 8 score of -0.03, it is not significantly different from the national progress score. It is better, however, than the other comparator groups.

Confidence intervals should be interpreted as follows:

- If the entire confidence interval line is above 0, then the progress score is statistically significantly above the national average.
- If the entire confidence interval line is below 0, then the progress score is statistically significantly below the national average.
- If the confidence interval line crosses or touches 0, then the progress score is not significantly different from the national average.

**Figure 3.10**  
Progress 8 scores



Source: Department for Education

## Case Study: Read Manchester

Read Manchester is a partnership between Manchester City Council and The National Literacy Trust. It brings together parents, teachers, family members, schools, local businesses, voluntary organisations and libraries to promote and celebrate reading.

Evidence shows that being able to read is the foundation for success in education and employment. We know that children who can read well do better at work, are confident speakers and are more able to lead healthy, positive lives. For adults, reading for pleasure has been shown to reduce tension and improve health and well-being. Reading is good for you!

Since September 2016 Read Manchester has encouraged more parents to read with their young children through Sure Start Children's Centres. At Martenscroft Nursery School and Children's Centre this has led to over 80 families joining the local library, and children, parents and staff members took part in a 'walking bus' to Hulme Library. Families enjoyed activities including bookmark making, book making, storytelling and singing as well as creative activities based around the city's chosen top five most popular early years books.

To encourage adults to read for pleasure, Martenscroft is now part of Manchester Reading Ahead. This campaign invites young people and adults of all reading abilities to pick six reads and rate, record and review them. So far, across the city, 6,000 people are taking part.

Wythenshawe Community Housing Group has taken up this challenge setting up book corners and book swaps as well as promoting reading for pleasure with tenants in sheltered accommodation, with their over-55 age groups and through their extensive volunteering programme. Other groups involved include Manchester College, the Manchester Adult Education Service, and childminders and early years settings across the city.

A vibrant programme of activities and events for children, young people and families including author visits and story-telling; community and library events and a citywide book bench trail are all part of the campaign.

Through the focus on reading for pleasure Read Manchester aims to celebrate the enjoyment of reading in all our communities; support young children before they start school because the early years of a child's life can shape their life forever; increase library membership; and link with partners to promote the benefits of being part of a reading city.

## Post-16 attainment

### Key Stage 5

Results for the percentage of A-level entries that achieved an A\*–E pass grade have increased in 2015/16 in Manchester and are now better than national results. The percentage of entries achieving the top grades of A\*–A are lower in Manchester than nationally but almost a quarter of entries achieve these grades in Manchester (Table 3.1).

### Educational attainment in STEM and creative subjects

There is a focus on pupils getting qualifications in the STEM subjects (Science, Technology, Engineering and Maths). Results for the percentage of A-level entries in STEM subjects are in Table 3.2. The percentage of pupils in Manchester achieving top grades of A\*–A in STEM subjects has been consistently around 27% over the past five years. This is lower than the national average which has been around 35%. The percentage of pupils achieving an A\*–E pass grade in STEM subjects is similar in Manchester and nationally at around 98.5%.

**Table 3.1**  
Percentage of Key Stage 5 A-level results

		2011/12	2012/13	2013/14	2014/15 (baseline)	2015/16
Number of entries	Manchester	5,935	5,946	6,646	7,469	8,271
Entries achieving A*-A	Manchester	24.4%	23.7%	23.2%	22.0%	22.3%
	England	27.2%	26.7%	26.7%	26.7%	26.5%
Entries achieving A*-E	Manchester	98.9%	99.1%	99.0%	98.8%	99.1%
	England	98.6%	98.7%	98.6%	98.8%	98.8%

Source: Department for Education

**Table 3.2**  
Percentage of Key Stage 5 A-level results in STEM subjects

		2011/12	2012/13	2013/14	2014/15 (baseline)	2015/16
Number of entries	Manchester	1,812	1,844	2,060	2,249	2,479
Entries achieving A*-A	Manchester	27.5%	27.5%	26.7%	27.0%	26.8%
	England	36.3%	35.8%	35.4%	35.3%	35.2%
Entries achieving A*-E	Manchester	98.3%	98.8%	98.8%	93.6%	98.7%
	England	98.3%	98.8%	98.4%	98.5%	98.5%

Source: Department for Education

These results are based on A-levels only, and on the following subjects identified from the DfE performance table: Biological Sciences, Chemistry, Physics, Other Science, Maths, Further Maths, Computing and ICT. The results may therefore not be a definitive list of STEM qualifications achieved.

The digital and creative industries are built upon the talent and innovation of the workforce, and many companies involved in the development of creative content and new forms of media place an emphasis on a young and high-skilled workforce.

In Greater Manchester it is estimated that almost 55,000 employees are directly employed in the digital and creative sector with an equivalent number employed in tech jobs across the wider economy. The sector generates over £3billion per annum, which is due to rise to £4billion by 2025.<sup>2</sup> To sustain the sector, Manchester needs to continue to attract highly mobile and sought after young workers and entrepreneurs, in the face of intense competition from London and other major UK cities. This target market is influenced by the quality of place and the combination of employment opportunities and lifestyle offered.

<sup>2</sup> New Economy – Sector Deep Dive 2016.

There is a major challenge to address skill shortages identified in the digital industries sector. Among the members of trade body Manchester Digital (MD), in its annual survey for 2016, MD reported that there was a continued growth rate with 83% of businesses reporting growth over the last 12 months with talent being attracted to respond to that growth and to bolster the regional talent pool from London (25%) and the EU (10%). This competition in the labour market nationally is driving up salaries with 51% of employers who responded to the survey reportedly having to inflate salaries. In addition there is a worrying trend of a growing gender imbalance at 72:28 male to female employees, which is significantly worse than the previous year's survey findings of 60:40.

Learning options that exist outside the traditional routes are increasingly available and can provide learning and experience that is more relevant to the industry's needs. Manchester Digital reported that half of the employers in their survey recruited apprentices and more than half of employers recruit 25% of their graduate talent from local universities. However, there remains a challenge to make sure these routes are accessible to all Manchester residents at a scale that can meet demand and to ensure that schools, learning providers

and Manchester's residents are aware of and understand the opportunities that exist in the sector. Forums such as the Manchester Digital Skills Network provide a platform for employers and educators to collaborate on understanding and resolving the digital skills gap.

In February 2017, the Greater Manchester Combined Authority (GMCA) approved the Greater Manchester Digital Talent & Skills Programme committing £2million over three years, with the expectation of leveraging further investment from private, public and third sector sources. The programme articulates Greater Manchester's ambition to become a 'digital learning city' creating a critical mass of digital skills and positioning Greater Manchester as the key centre to invest for businesses seeking a digitally skilled workforce outside London.

The programme aims to deliver a Greater Manchester-wide ambition to have a vibrant and inclusive pipeline of digital talent, where all educational institutions and providers embed digital skills within their curriculums and companies across all sectors invest in the skills of their current/future workforce.

The two other growth sectors business/financial and professional, and science and research and development show a different

picture. The supply of business/financial and professional apprenticeships is meeting the demand for growth and remains the most popular with 326 apprenticeship starts aged 16–18 in 2014/15 compared to 45 in digital. The picture changes again in science and research and development; this sector has relatively small growth compared to digital. The challenge is ensuring educational institutions are geared up to respond to growth sector demand in future and investing in tackling the skills deficits for those with no formal qualifications and those with level 2 qualifications with a sector focus (financial and professional, digital, and science and research and development).

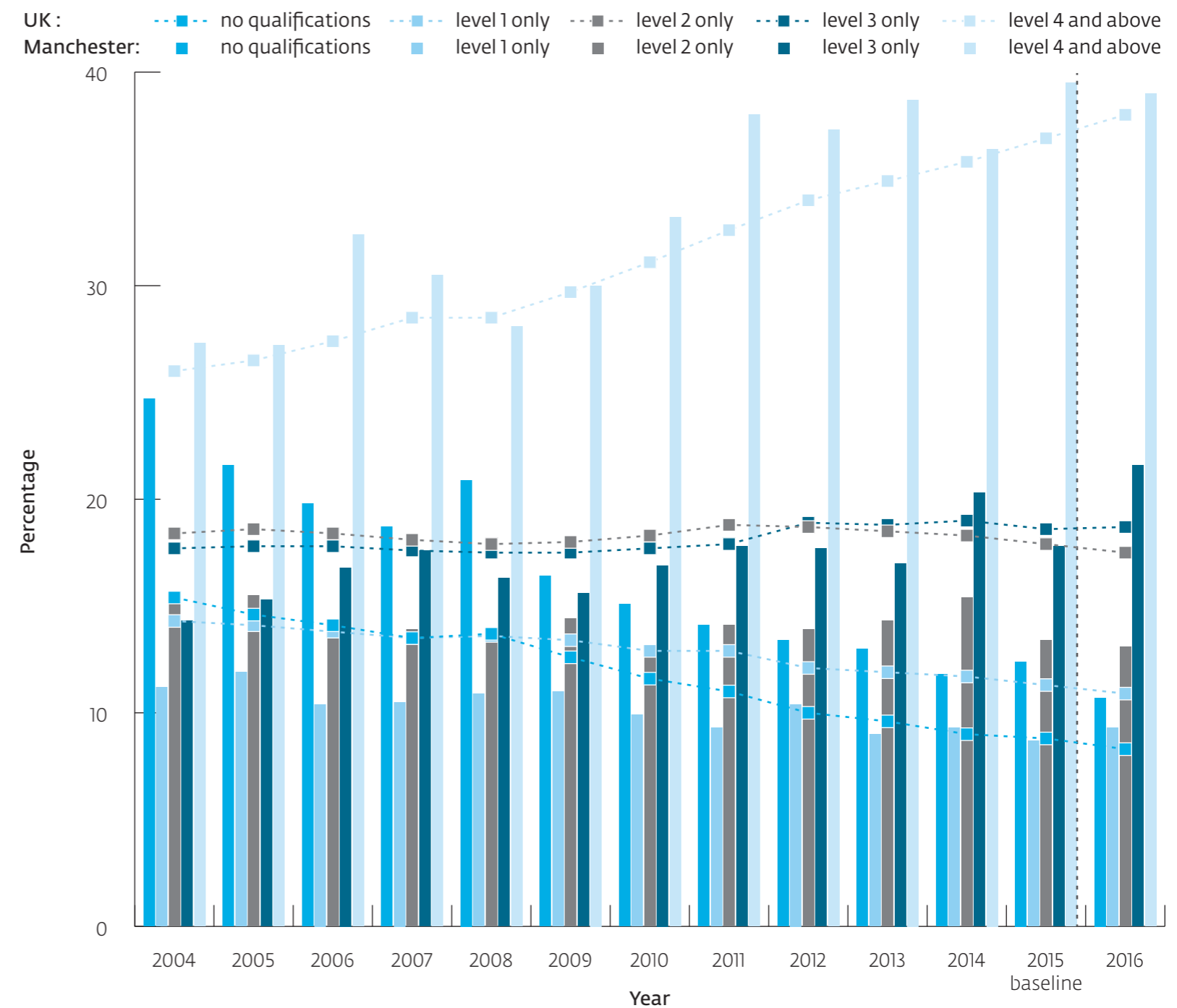
The low take up of STEM subjects at A-level stage is translating into apprenticeship and course starts later on and not meeting the demand in this sector. For those aged 19–24 in 2014/15, only six Manchester residents started an apprenticeship in science compared to 416 in business, financial and professional services and 38 in digital. Total Skills Funding Agency funded course starts for those aged 19–24 in 2014/15 show 307 in science compared to 797 in business and professional courses.

### Qualifications and apprenticeships

Due to the concentration of Higher Education Institutions (HEI) and the attractiveness of the city and employment opportunities, Manchester has above national average levels of residents with level 4 (degree level) and above qualifications. However, there are still skills gaps for key growth sectors, such as the digital sector. At the other end of the spectrum, there is a disproportionate number of the city's residents with no or low skills and qualifications. The integrated approach to employment and skills which is at the heart of the Greater Manchester Work and Skills Strategy and the devolution of the Adult Education Budget in 2018 offers an opportunity to address this.

Figure 3.11 shows that in 2004, 24.7% of Manchester residents had no qualifications, compared to a national rate of 15.4%. By 2015, the Manchester rate had reduced to 12.4%, narrowing the gap between this and the national rate from 9.3 to 3.6 percentage points. By 2016, the percentage of those without qualifications in Manchester had fallen to 10.7% compared to a national rate of 8.3%.

**Figure 3.11**  
Skill levels of working age population (NVQ)



Source: Annual Population Survey 2016, ONS © Crown copyright



In 2004, 27.3% of Manchester residents were qualified to level 4 or above, compared to a national rate of 26%. By 2015, the Manchester rate had increased to 39.5%, taking this from 1.3 to 2.6 percentage points above the national rate. By 2016, the percentage of those qualified to level 4 or above in Manchester was 39% compared to a national rate of 38%.

We continue to promote apprenticeships as a credible pathway to career progression. To support higher level skills there is a need to significantly increase the number of young people completing higher and advanced level apprenticeships. While 4,730 people started apprenticeships in the academic year 2015/16, over half of these (2,840) were in intermediate level apprenticeships. If Manchester is to continue to grow high-value sectors to retain and attract the best talent there is more work to do to increase the number of advanced and high level apprenticeships and to develop new models of high level apprenticeships in a wide range of fields. The introduction of an apprenticeship levy in April 2017 and national targets for apprenticeships for public bodies will provide us with an opportunity to deliver this as well as a challenge in ensuring we recoup the cost of the levy.

Comparison of 2001 and 2011 census data also indicates a significantly improving picture, especially for working residents and those aged under 50 years. However, challenges remain in raising the skill levels of those who are regularly out of work and those aged over 50. Generally, skill and qualification levels are better in younger age groups with the biggest proportion of residents with low or no skills in the city in the 50 plus age group. Lack of digital skills is also an issue for this age group. Opportunities such as employer engagement, the apprenticeship levy and public sector leadership have been identified across Greater Manchester to respond to this.

### Graduate retention

Through the Our Manchester Strategy we have committed to ensuring higher education and business will connect graduates to good jobs and support new ideas, to give graduates a clear route to quality employment or support for an innovative idea. We will do this by establishing and maintaining productive relationships between higher education institutions and businesses to maximise the number of graduate level opportunities in the city and we will continue to work closely with the main further education and higher education providers in the city to ensure the offer is tailored to meet the demands of Manchester's future economy.

To support higher level skills there is a need to retain more graduates. According to the HESA destination of leavers' survey, for the academic year 2014/15 nearly 40% of graduates originally from Manchester worked in Manchester after leaving university (Table 3.3). This includes graduates who were from Manchester but did not necessarily study in Manchester institutions. Six months after graduating, the HESA destination of leavers' survey reports that most degree graduates working in Manchester are employed in business, financial and professional services as well as health and retail.

**Table 3.3**  
Work location of graduates originally from Manchester

	Academic year				
	2010/11	2011/12	2012/13	2013/14	2014/15 baseline
Manchester	27%	28%	41%	39%	40%
Greater Manchester (excluding Manchester)	45%	41%	31%	31%	32%
Greater Manchester	72%	69%	72%	70%	71%
North West (excluding Greater Manchester)	7%	8%	7%	7%	8%
UK (excluding North West)	18%	21%	19%	20%	18%
Non-UK	2%	2%	2%	3%	3%

Source: HESA destination of leavers' survey

**We will inspire the next generation to reach their full potential by providing them with the knowledge, skills and resilience they require to succeed** through building on the positive work to date with schools in delivering quality Careers Education, Information, Advice and Guidance (CEIAG), to open up routes to employment and meet the aspirations of young people in schools. We are doing this by supporting schools to meet their CEIAG Ofsted requirements through networks, resources and information on real time labour market intelligence to offer their students. Through effective employer engagement we will continue to link businesses with schools and colleges through work experience and

enabling enterprise skills at all levels of education. At a Greater Manchester level we will drive the Careers & Participation Strategy (Greater Manchester's response to the duties and responsibilities around the raising of the participation age). In addition the Careers and Enterprise Company Network has recently matched 25 schools and 25 businesses to roll out the Careers and Enterprise Company Adviser Network which is a strategic employer-led approach to improving careers and employer engagement in schools and colleges.

**We have committed to ensure that every young person will have a good work placement.** As a major employer in the city we

are leading by example and promoting quality work placements across the Council. A new pilot in the Growth and Neighbourhood Directorate will make opportunities available to Manchester residents via an on-line application tool. This will give people a holistic search to find placements and gain meaningful work-based experience, assisting with job seeking in the future. The opportunities will be made available to all Manchester residents from age 14, and Working Well providers will be made aware of opportunities so they can support their clients to apply.

### Manchester wages

The Our Manchester Strategy 2016–2025 and the Work and Skills Strategy 2016–2021 have clearly demonstrated the Council's strategic commitment to promoting the real Living Wage within the city. There is a direct link between low skills and a low wage economy. Poor skills levels, benefit dependency and worklessness are still prevalent in many Manchester neighbourhoods. Attaining the skills required to access quality jobs and wage progression is even more crucial in tackling in-work poverty following the introduction of Universal Credit.

The actual UK Living Wage is set by the National Living Wage Campaign every November; the UK Living Wage per hour was set at £7.65 in 2014, £7.85 in 2015 and £8.25 in 2016; it is currently £8.45. The provisional 2016 ONS Annual Survey of Hours and Earnings (ASHE)<sup>3</sup> suggests that approximately 18% of Manchester’s workforce (those who work in the city but may live elsewhere) earned less than the UK Living Wage in 2016.

This rises to 31% of Manchester residents (those who live in the city but may work elsewhere) earning less than the UK Living Wage. Tables 3.4 and 3.5 show that the proportion of employee jobs paying less than the UK Living Wage has increased over the last couple of years for both the Manchester workforce and Manchester residents.

As an employer, Manchester City Council agreed an increase to the Manchester Minimum Wage for its employees equivalent to £8.25 per hour, as well as a continued commitment to advocating the take-up of the Manchester Minimum Wage and its adoption by schools, contractors and agency suppliers. As a procurer and commissioner the Council is ensuring that contracts are awarded to those suppliers who pay the Manchester minimum wage. Since its introduction a total of 23 contracts have been awarded and all successful suppliers have confirmed that they are paying the Manchester Minimum Wage or above.

**Table 3.4**  
Proportion of employee jobs paying less than UK Living Wage: Manchester workforce

	2014	2015 (baseline)	2016 (provisional)
Greater Manchester (+/-1%)	23.4	23.0	24.4
Manchester (+/-1.5%)	17.3	15.8	18.0

Source: ONS Annual Survey of Hours and Earnings (ASHE); these estimates are reported within a (+/-) margin of error

**Table 3.5**  
Proportion of employee jobs paying less than UK Living Wage: Manchester residents

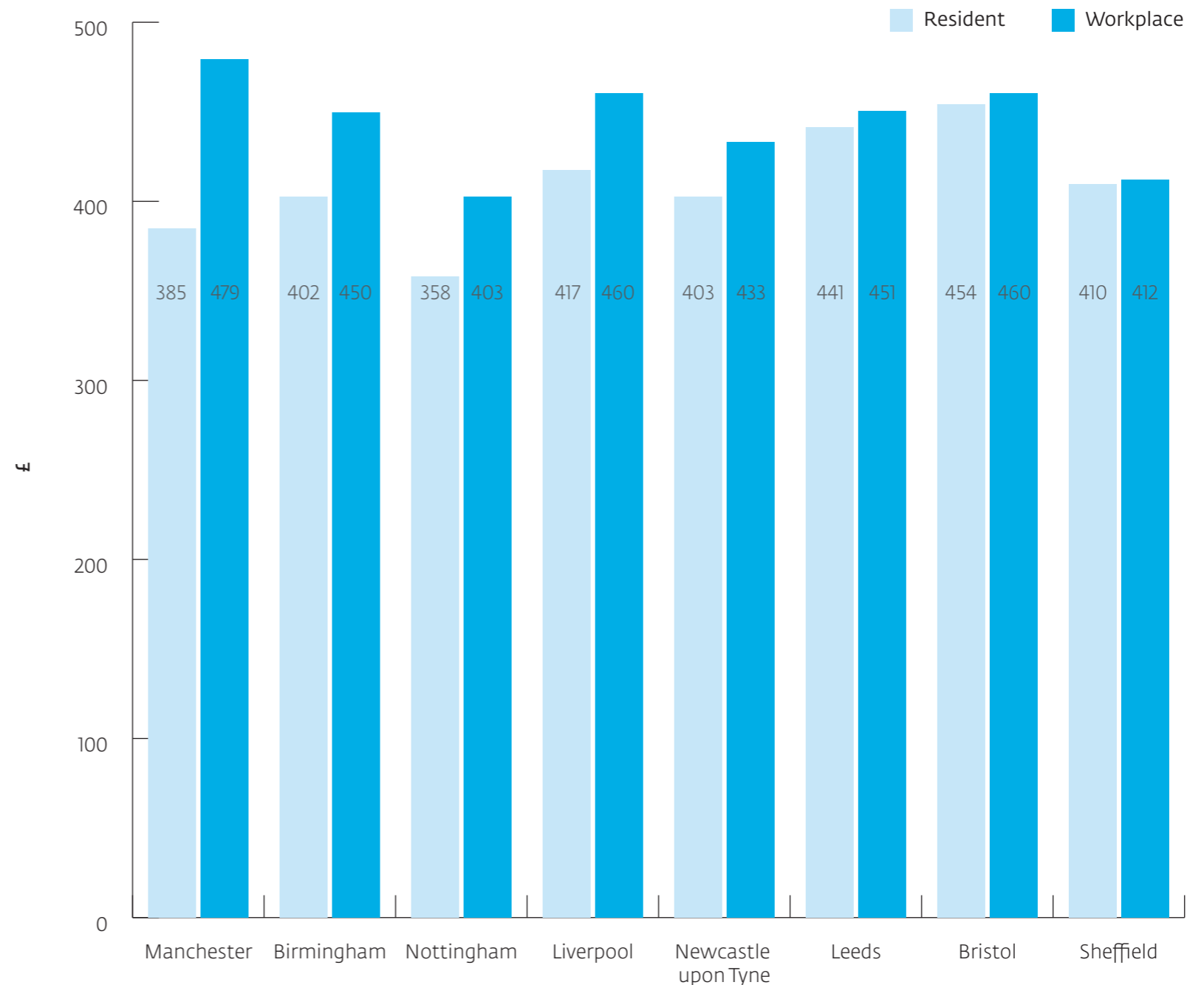
	2014	2015 (baseline)	2016 (provisional)
Greater Manchester (+/-1%)	26.8	23.9	25.6
Manchester (+/-2.5%)	29.7	26.6	30.8

Source: ONS Annual Survey of Hours and Earnings (ASHE); these estimates are reported within a (+/-) margin of error

<sup>3</sup> The ONS ASHE is a 1% sample of Pay As You Earn (PAYE) data.

According to the ONS Annual Survey of Hours and Earnings (ASHE) Manchester's workplace wages (those who work in the city but may live elsewhere) have risen for six consecutive years and reached £479 per week in 2016, the highest of all the English Core Cities<sup>4</sup> (Figure 3.12) and well above the England average of £442. However, Manchester's resident wages (those who live in the city but may work elsewhere) are the second lowest of the English Core Cities and fell to £385 per week in 2016. The combination of high workplace wages and low resident wages results in the largest wage gap of the English Core Cities, standing at £95 in 2016.

**Figure 3.12**  
Resident and workplace average weekly wages (all workers, full and part time), English Core Cities (provisional 2016)



<sup>4</sup> Birmingham, Bristol, Leeds, Liverpool, Manchester, Newcastle, Nottingham, Sheffield.

Source: Annual Survey of Hours and Earnings, ONS (Provisional 2016) © Crown copyright.

The gap between resident and workplace wages is long standing and the reasons complex. People who live outside Manchester have tended to be better qualified to fill the opportunities in the higher paid and higher skilled roles in the city than Manchester residents. Reducing this gap is a priority in our Work and Skills Strategy and we are responding to this by ensuring Manchester residents are equipped with the right skills so as to be competitive against those candidates for roles that live outside the city. We are doing this by creating a more equitable city by ensuring all residents have access to the same opportunities regardless of geography, such as access to higher education, by tackling NEETs through prevention and by increasing the number of school and college leavers obtaining the skills and qualifications which are valued by emerging sectors such as STEM subjects.

### Residents claiming out of work benefits

The number of residents claiming an out of work benefit can be used as a proxy for worklessness. Out of work benefits include:

- Job Seeker's Allowance (JSA)
- Incapacity Benefit (IB)/Employment Support Allowance (ESA)

- Lone Parent Income Support (LPIS)
- Others on income-related benefits
- Universal Credit (UC) claimants not in employment

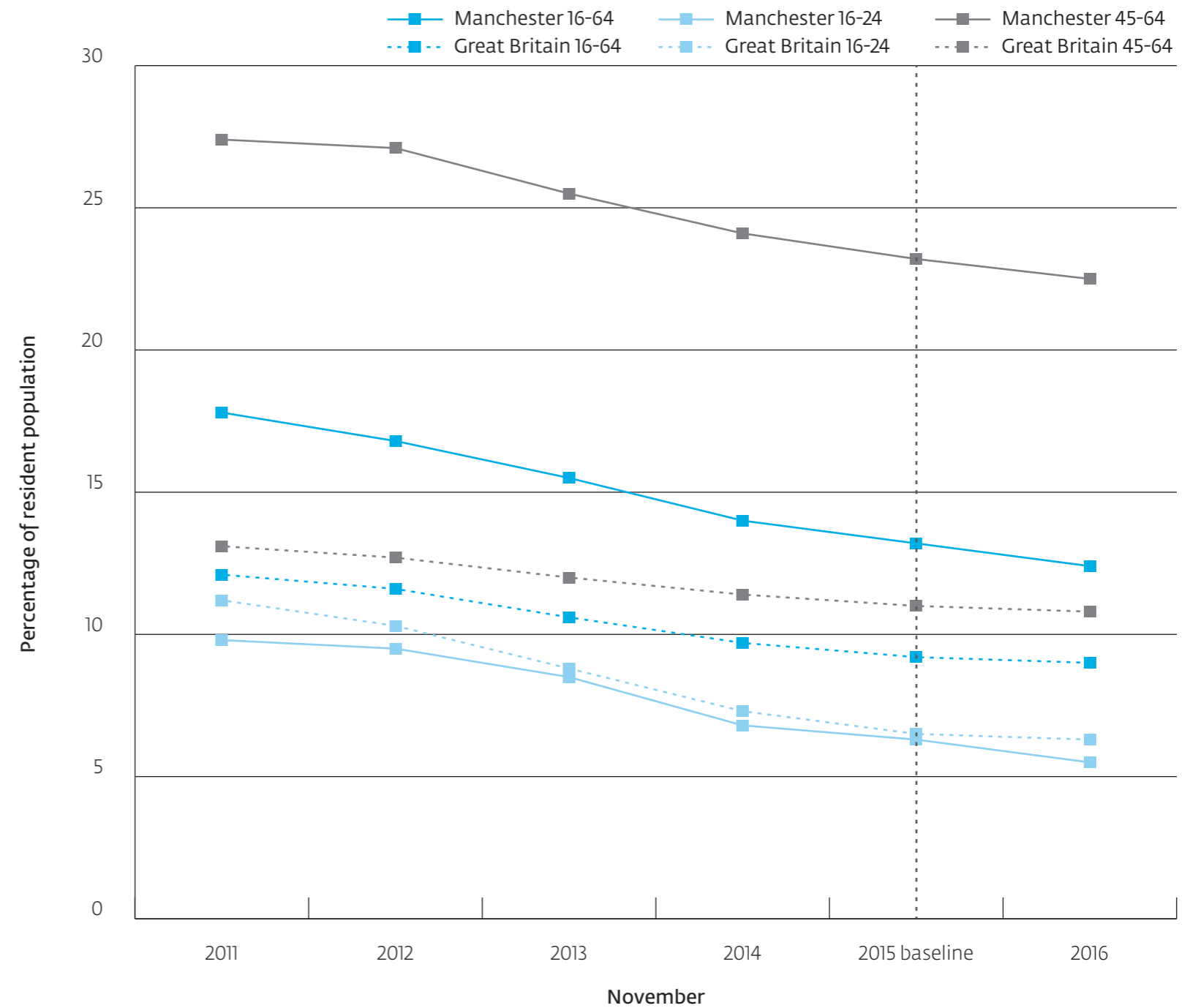
Apart from an increase during 2008 and 2009 due to the start of the recession, the proportion of Manchester residents aged 16–64 claiming an out of work benefit has steadily reduced over the past ten years, from 19% in November 2006 to 13.2% in November 2015 and reaching 12.4% in November 2016. Figure 3.13 shows that although the out of work benefits rate remains above the Great Britain rate for those aged 16–64, the gap has narrowed from 5.7 to 3.4 percentage points. Overall, the reduction in the total number of out of work benefit claimants, from 61,070 in November 2006 to 47,350 in November 2016, is particularly noteworthy given the substantial increase in the size of the city's working age population during this period. In the context of rapid working age population growth, maintaining a rate of reduction on a par with national comparators suggests that the city's increased population growth is not coming at the expense of increased benefit dependency.

The out of work benefits rate for Manchester's younger population, aged 16–24, has reduced steadily in line with Great Britain and as at November 2016 was 5.5%, compared to 6.3% for Great Britain. It is however worth noting that many young people who are out of work don't claim benefits; some estimate up to 50%. The out of work benefits rate for the older population of Manchester, aged 45–64, is more than double the rate of Great Britain, 22.5% compared to 10.8%.

The principal factors that lead to older workers exiting the labour market are economic crises and high levels of unemployment, poor work environments, poor health, caring responsibilities and low skills. In terms of skills, older workers in Manchester are far less likely to possess qualifications to level 2 than their younger counterparts, and in particular are less likely to be digitally literate. Manchester experiences high levels of ill-health and social exclusion among people in mid and later life. In addition to health factors, having low levels of qualifications significantly reduces the likelihood of working. The Greater Manchester Ageing Hub, set up in March 2016, has made increasing the numbers of older workers in employment one of its key priorities. Working jointly with the National Centre for Ageing

Better, the Hub has commissioned the Centre for Local Economic Strategies (CLES) – in partnership with the Learning and Work Institute – to carry out research and co-design work to address worklessness and job insecurity among people aged 50 and over in Greater Manchester.

**Figure 3.13**  
Percentage of resident population claiming an out of work benefit, November snapshot

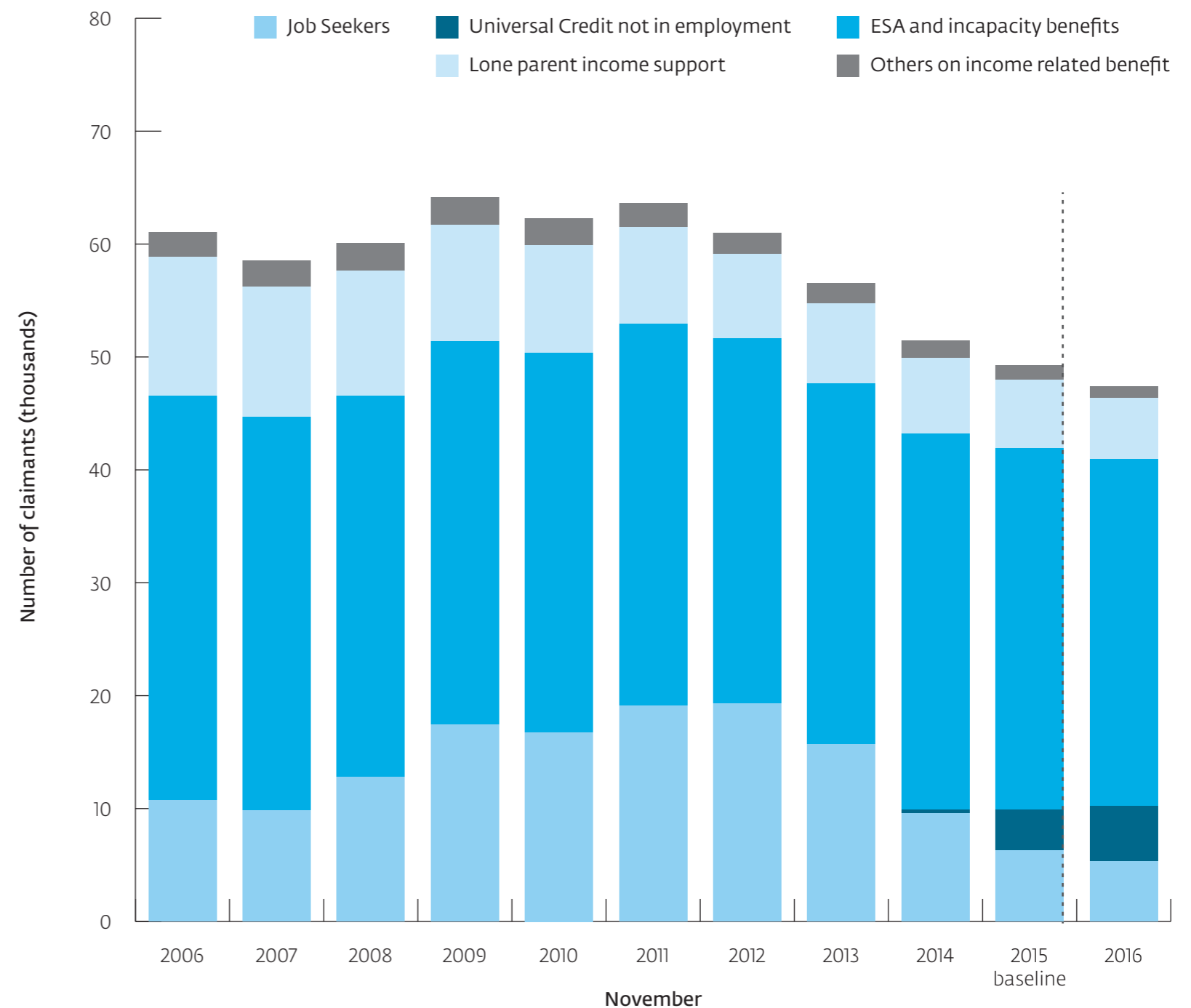


Source: Department for Work and Pensions

Over recent years, a combination of recession, benefit migration and changes to criteria and assessment processes have brought about changes to the composition by benefit type. Welfare reform, including the introduction of Universal Credit, has impacted on the make-up of the claimant population, including increasing proportions of residents making a claim for ESA who may then ultimately claim UC or JSA following assessment. As can be seen in Figure 3.14, the number of Lone Parent Income Support (LPIS) claimants more than halved, from 12,300 in 2006 to 5,420 in 2016; this is mainly due to the changes to LPIS with claimants now migrating to JSA once their youngest child reaches the age of four.

The combined JSA and UC claimant count of 10,211 in November 2016 is at a similar level to November 2006, having fallen by just 539 claimants. Compared to the November 2015 baseline the combined JSA/UC claimant count has increased by 307 claimants, the first increase noted since November 2012 when the count peaked at 19,300 claimants. The biggest impact on claimant figures, and JSA figures in particular, has been as a result of the introduction of Universal Credit and Lone Parent Income Support eligibility changes.

**Figure 3.14**  
Resident working age population (aged 16–64) claiming an out of work benefit by type, November snapshot



Source: Department for Work and Pensions

Universal Credit has had a phased introduction since September 2014 and as at March 2017 there were 8,461 claimants on the caseload in Manchester, of which 3,236 were in some employment. However, this cohort may still be seeking work and we do not have any further information on how many hours, the working patterns or the quality of work of those UC claimants in employment.

Prior to the introduction of Universal Credit, many of those claimants working fewer than 16 hours would have stayed on the JSA register. Some of the data received around residents claiming out of work benefits is therefore mixed in terms of the conclusions that can be drawn. What is clear is that there has not been a big move away from the proportion of residents claiming a health related out of work benefit.

## Conclusion

From early years, through to formal schooling and further and higher education, providing the right type, level and quality of education and skills for Manchester residents that is accessible to all regardless of age or background is key to the success of the economy and in promoting inclusive growth. In recent years Manchester has seen educational improvement resulting in more people educated to degree level or equivalent and a reduction in the number of people with no qualifications. An increasing number of the 20,000 students that graduate every year are choosing to stay in the city and apprenticeships are increasing at all levels and across all sectors. However, there are a number of challenges to overcome if we are to achieve the vision for the city as set out in Our Manchester.

Challenges remain in ensuring Manchester residents are equipped with the skills to thrive in and benefit from the growing economy. The Adult Education Budget has seen significant cuts in funding in recent years. While devolving it to the Greater Manchester Adult Education Budget provides an opportunity to better focus and target it to deliver the outcomes needed, at circa £100million per year it will not be sufficient to respond to demand in the city.

Young people aged 19 plus are required to achieve GCSE English and Maths if they haven't achieved the qualifications at school leaving age – a requirement for apprenticeships as well as education and training. In addition to this there is a requirement to focus on skills and work experience leading to sustainable employment needed at lower skill levels. Currently some qualifications at this level have little currency in the labour market. Implementation of the Government's Post-16 Skills Plan and the development of 15 career pathways with employer involvement will bring greater clarity and currency for employers and learners alike.

Recent research 'Closing the Skills Gap' by the New Economy estimates that the cost to bridging the Manchester skills gaps at all levels totals £125,529,000, with the vast majority of this at level 2 and below costing £80,190,000. This coupled with the lack of attractiveness of further education learner loans for adults in low skilled jobs means that we will be looking increasingly to employers to respond to, invest in and shape the post-16 skills offer.

However, we are in a good position to respond to these challenges. We have a track record in collaboration with the three biggest adult skills providers (Manchester Adult Education



Service, The Manchester College and The Skills Company) to align provision, provide a good quality and accessible local offer and respond more effectively to future growth and skills demand in the city. This provides the infrastructure needed to enable us to maximise the use of our devolved powers to align the skills system. Greater Manchester has agreed to become a pilot area for the Gatsby Foundation to support local colleges to become 'routes ready' for the introduction of Technical Education reforms. This is in response to the Skills Plan following Lord Sainsbury's review into technical education and will take us further down the path of connecting higher education institutions with businesses to give students a clear route to a quality employment outcome.

The apprenticeship levy and Greater Manchester and local apprenticeship campaigns will enable us to increase the number of apprenticeships, and the apprenticeship levy will enable us to develop new models that encourage high level apprenticeships in a wide range of fields that will respond to the growth sectors in the city.

# A progressive and equitable city

## Strategic overview

The Council's aim is for everyone in the city to have the same opportunities, life chances and potential to lead safe, healthy, happy and fulfilled lives, no matter where they are born or live. This means reducing the disparities between different areas of the city. Manchester has made real progress towards achieving this aim over the past decade, including improvements in education and housing, better access to jobs, falling numbers of children growing up in poverty, and reducing numbers of young people not in employment, education or training. This has in large part come from the strength of the collaboration between organisations, businesses and residents.

Despite these gains there are still areas of intense deprivation in the city. These are far less widespread than they were ten years ago, but exist nonetheless, and we must do more to address them.

As a progressive and equitable city we will:

- Radically improve health outcomes, integrating health and social care, and supporting people to make healthier

choices, so that people have the right care at the right place at the right time

- Reform services for children and families, increasing the number of children arriving at school ready to learn and increasing their life chances, supporting their future independence
- Continue to work with the voluntary and community sector to find new ways of reaching those communities that remain untouched by Manchester's success, creating resilient and vibrant communities of people
- Continue to be recognised as a pioneering Age-Friendly city
- Aim to be the UK's youth capital
- Use devolved powers to expand our programmes to support people with complex and multiple problems to get their life back on track
- Support people to find work, stay in work and progress at work, so that all residents can take advantage of the opportunities of economic growth and are able to provide for their children
- Ensure that shelter and support is available for homeless people who want and need it

## Analysis of progress

### Family poverty

The most commonly used national definition of child poverty is a household with children under 16 where income is less than 60% of the UK median. The latest figures<sup>1</sup> show that, between 2007 and 2014, the overall proportion of children living in poverty in Manchester fell from 44.6% to 35.6%.

However, Manchester still has one of the highest rates of child poverty by local authority area. Of those living in poverty, the vast majority (69.4%) are living in out-of-work poverty, whereas 13.6% are living in in-work poverty and 16.2% are classed as other poor.<sup>2</sup> The 35.6% figure equates to 36,255 children under 16 living in poverty out of a total number of 101,845. The Institute for Fiscal Studies has also predicted that the number of children living in poverty will rise sharply by 2020, in part due to planned benefit reforms affecting families with children.

<sup>1</sup> HMRC child poverty and child benefit data, 2014.

<sup>2</sup> Children in families receiving Child Tax Credit only with an income below 60% of the median UK income.

Since January 2016, the Council and its partners have been working to refresh the Manchester Family Poverty Strategy, which will sit under Our Manchester and work towards the ambition to create ‘a progressive and equitable city’.

The Family Poverty Strategy 2017–2022 seeks to improve outcomes for children by decreasing risk and increasing resilience, and ensuring that children living in Manchester are protected against national changes where possible. It recognises that there are certain fundamental needs that every Manchester child should be able to count on, including a safe, warm home environment; stable parenting; regular healthy meals; access to healthcare; and a family income above 60% of the national median. Along with these basic needs there are also a number of resilience factors – belonging, learning and coping – that can help a child to succeed and reach their potential, despite any problems or setbacks they may face.

The Strategy has been co-designed, using an Our Manchester approach, with our residents and partners. It is for the whole of Manchester, not just the Council, and calls on the city’s anchor institutions to demonstrate what they are doing to tackle poverty and its effects.

### Ensuring the best outcomes for vulnerable children

There is no higher priority for the Council than protecting vulnerable children and ensuring that children and their families receive good help and, when required, good care.

Significant improvements have been delivered since the inadequate Ofsted inspection in 2014 and the Council has a clear improvement plan, can evidence progress against it and is on track with delivering the required improvements.

Manchester’s Children and Young People’s Plan sets out further how the city intends to take forward the overall ambition and approach described in Our Manchester and our Locality Plan in relation to children and young people. This is a plan for children, not children’s services. All parts of the city have a role in supporting our children and young people, not least families.

It sets out priorities for both **what** the Council wants to achieve and **how** they will be achieved. This reflects the wider Our Manchester approach that is being taken forward in the city. It promotes a different way of working in the city, one which at its core forges a deeper understanding of children, families and local

communities, listening to what they care about and working together to improve quality of life.

The message is clear: as a city we are ambitious for all our children and young people and the plan is intended to stimulate different ways of working, consistent with the emerging Our Manchester approach and the integration of reform under the following four aspects:

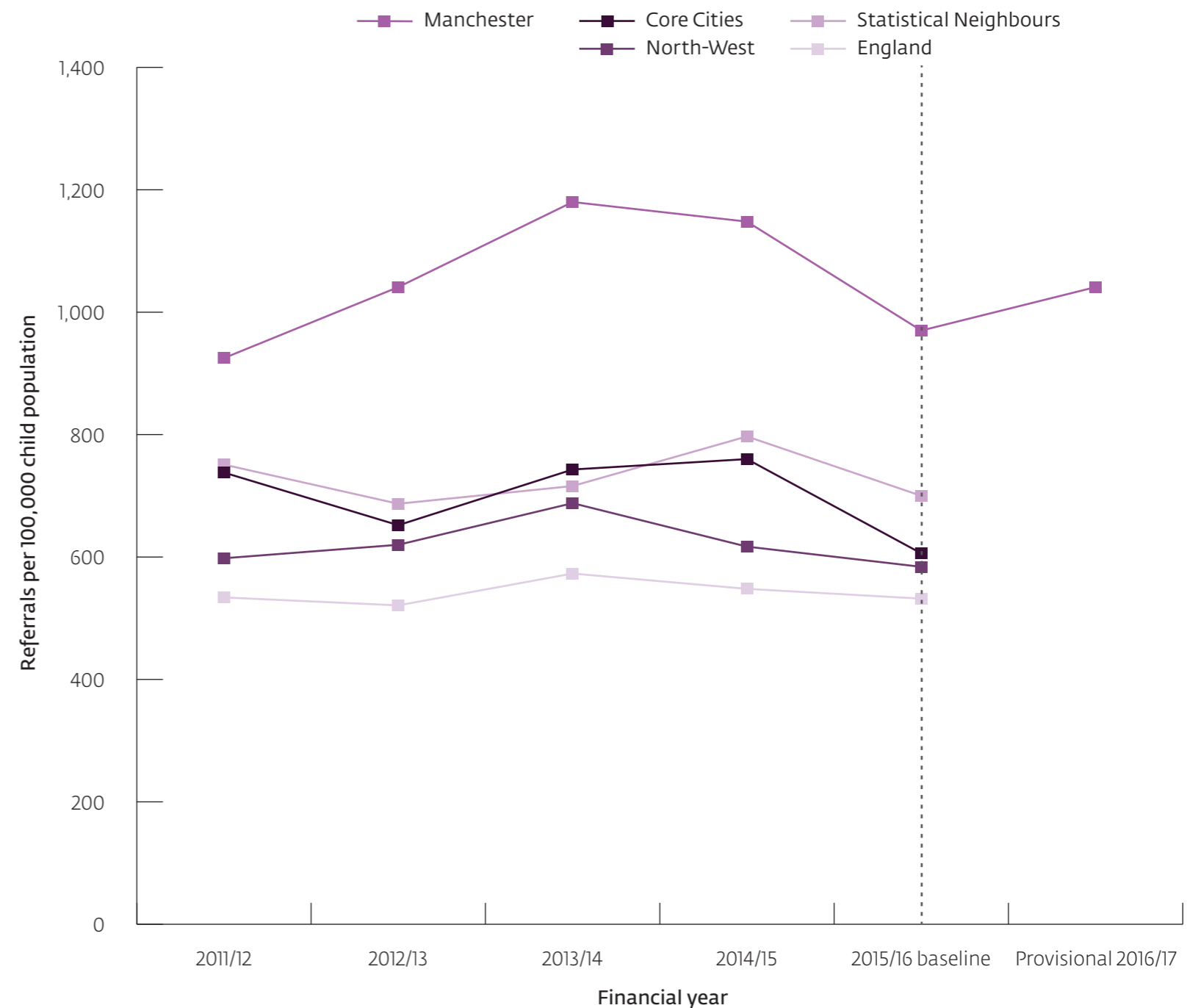
- **Safe** – All children and young people feel safe; their welfare promoted and safeguarded from within their homes, schools and communities
- **Happy** – All children and young people grow up happy – having fun, having opportunities to take part in leisure and culture activities, and having good social, emotional, and mental health
- **Healthy** – All children and young people enjoy good physical and mental health that enables them to lead healthy, active lives and to have the resilience to overcome emotional and behavioural challenges
- **Successful** – All children and young people have the opportunity to thrive and succeed in their education, emotional and personal lives

The plan also highlights particular areas that Manchester is passionate about achieving: ensuring children and young people live in safe, stable and loving homes; reducing the number of children and young people in care; ensuring children and young people have the best start in the first years of life; and ensuring children and young people fulfil their potential, attend a good school and take advantage of the opportunities in the city.

### Referrals to Children's Services

The provisional rate of referrals to Children's Services (1,041) has increased slightly since 2015/16 (970) and is now at an equal level to that recorded in 2012/13. The rate of referrals is significantly above the national (532), regional (584), Core City (606) and statistical neighbour<sup>3</sup> (700) averages for 2015/16 (Figure 4.1).

**Figure 4.1**  
Rate of referrals per 10,000 of the child population aged under 18



Source: Department for Education / MiCare

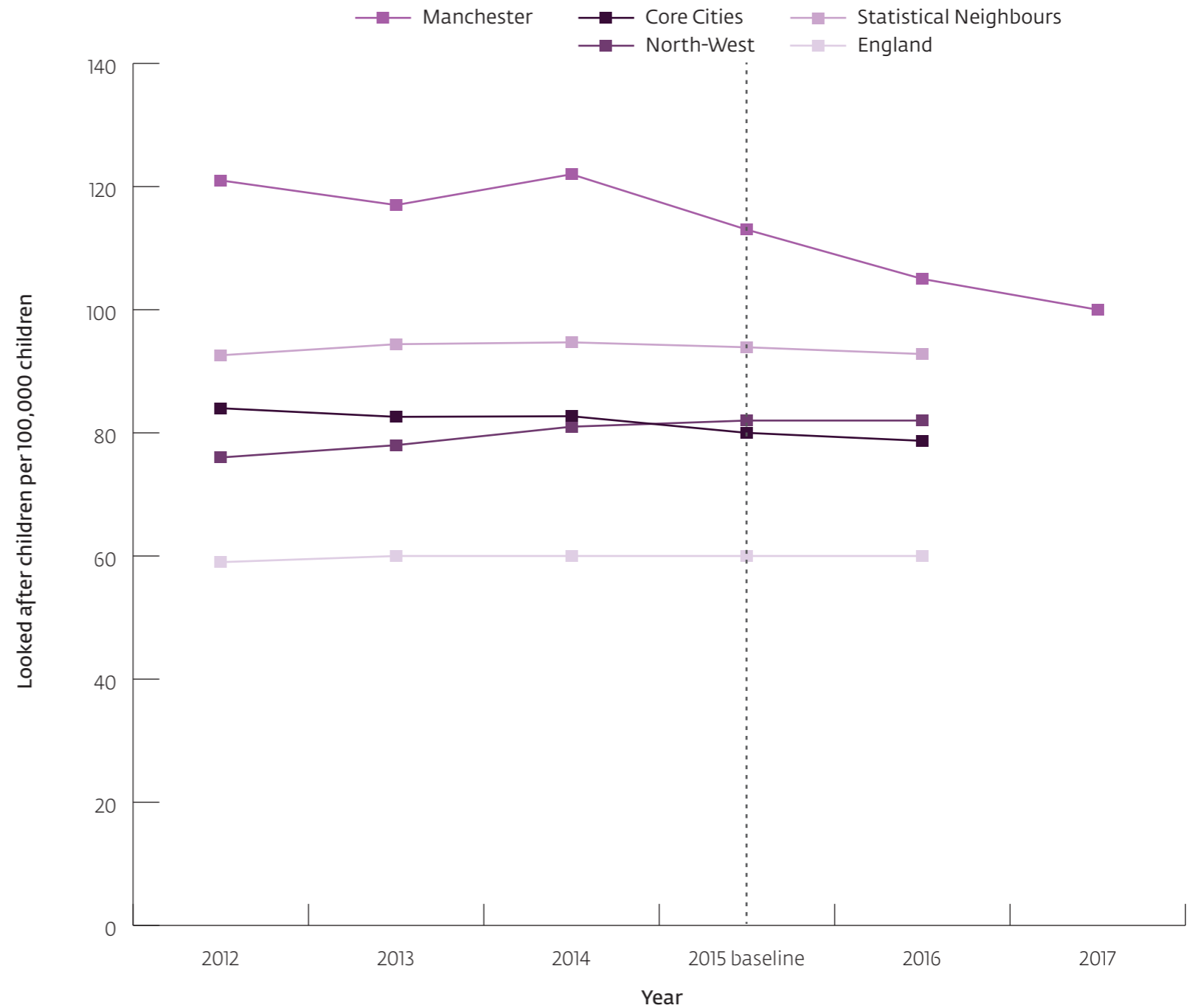
<sup>3</sup> Statistical neighbours are Southampton, Middlesbrough, Bristol, Coventry, Nottingham, Greenwich, Salford, Liverpool, Newcastle and Birmingham.

### Looked After Children (LAC)

Figure 4.2 shows that the rate of children looked after by the Council has decreased over the past five years despite an increase in 2014. Despite this reduction the rate of children looked after in Manchester in 2017 (100 per 10,000) is still above the national (60), regional (82), Core City (79) and statistical neighbour (93) averages for 2016. There were 1,291 Looked After Children at the end of March 2015 which has reduced further to 1,167 at the end of March 2017.

**Figure 4.2**

Rate of Looked After Children per 10,000 of the child population aged under 18 as at 31st March

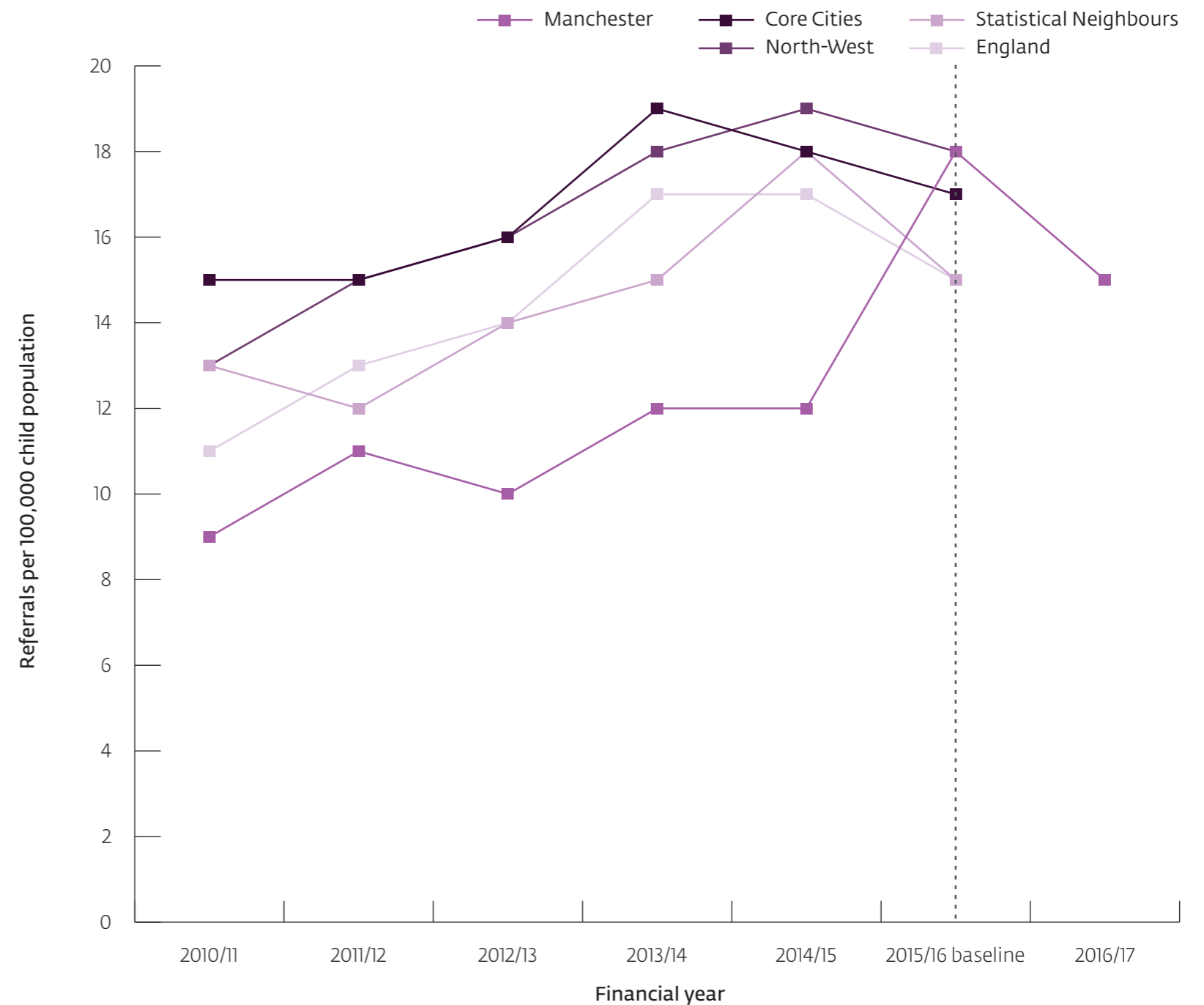


Source: Department for Education

### Children ceasing to be looked after during the year who were adopted

The percentage of children ceasing to be LAC through adoption fell from 18% in 2015/16 to 15% in 2016/17 but remains approximately in line with the most recent national and statistical neighbour comparators and above the level reported in previous years (Figure 4.3).

**Figure 4.3**  
Percentage of children ceasing to be looked after during the year who were adopted



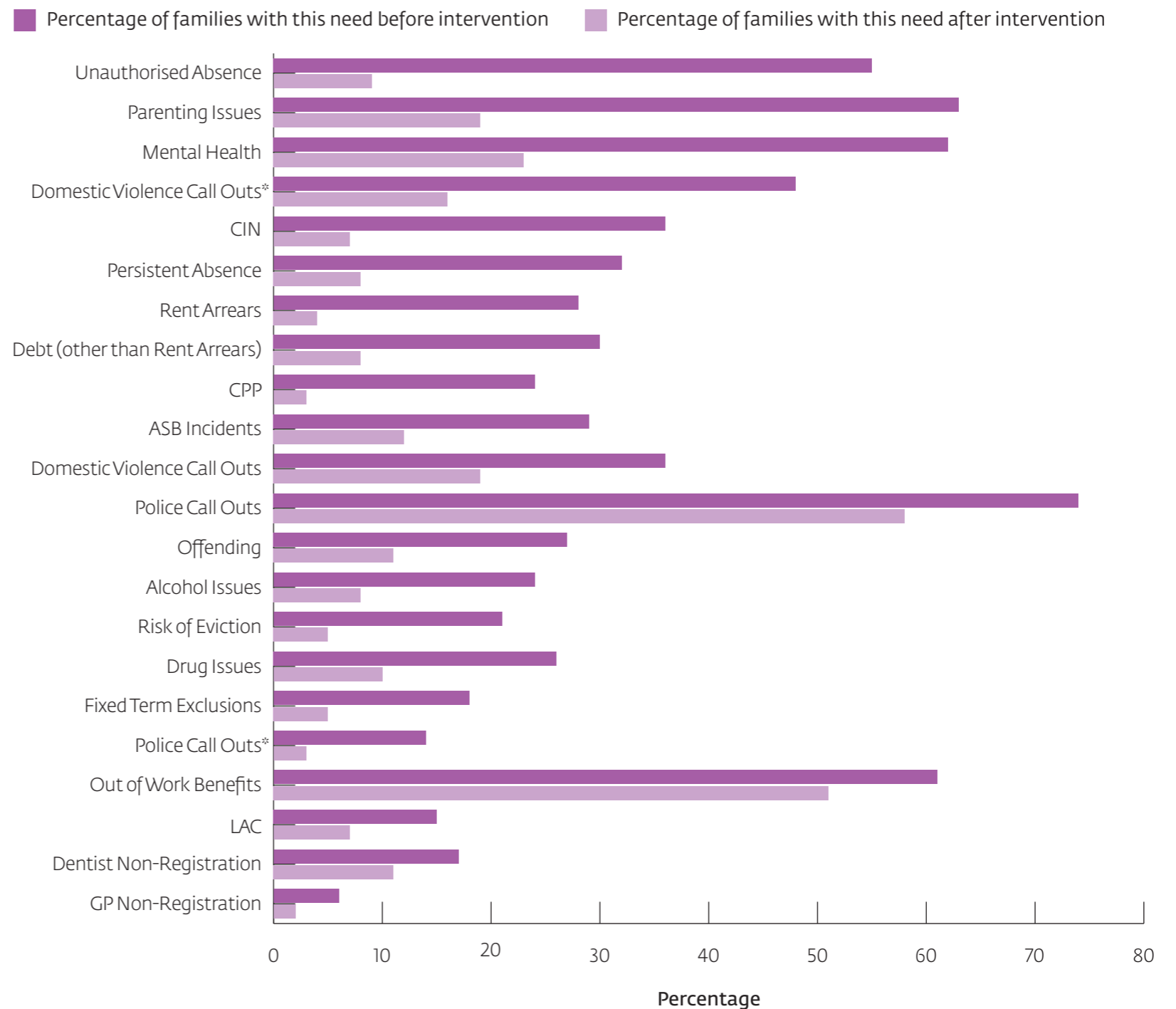
Source: Department for Education / MiCARE

### Early help

Over the past ten years, early intervention or 'early help', has become increasingly important nationally and in Manchester. A number of reviews have identified that providing early help can both enable children, young people and their families to achieve their potential, and reduce demand on more reactive and expensive services. The national Troubled Families (TF) programme is now fully integrated with Manchester's offer of early help and is a central part of our ambition to reduce dependency on public services. Furthermore, early help is a crucial element of our ongoing LAC reduction strategy.

For the first phase of the TF programme, which began in 2012 and ended in May 2015, Manchester formally received funding from the Government to work with 2,385 families. The Council has successfully 'turned around' all of these families according to the Government's success criteria. Figure 4.4 shows how support and intervention has led to reduced need in those families that have completed the programme in the first phase. This demonstrates that taking a co-ordinated, whole-family approach works for many families in the city, who saw sustained improvements in outcomes.

**Figure 4.4**  
Presenting need at start and end of intervention



Source: MCC Performance, Research and Intelligence. Based on 1,393 families.

\* Keyworker assessment only

The delivery of the Troubled Families programme has continued into a second phase, which began in May 2015, targeting more than 8,000 families in Manchester over the next five years. Manchester is using the funding available from the Government for Troubled Families to:

- Support Children's Services to bring down the number of cases known to social work – either through effective step-down pathways or through prevention.
- Build capacity among partners driving further public sector reform. (A number of external agencies deliver partner-led whole-family support or 'early help'. Their work, while hosted by the partner organisation, is aligned to our Early Help Hubs and Troubled Families. A range of partners, including schools, housing providers and the police, work with families at risk of becoming more complex and with whom they already have a relationship, e.g. a child on their school roll.)
- Continue to grow the multi-agency offer of early help in the city through our locality based Early Help Hubs. We will do this by aligning family-focused support services across the city. This ensures a family receives co-ordinated support, improving their outcomes and in turn reducing demand on high-cost public services.

The Early Help Strategy, supported by the national TF programme and aligned to Our Manchester, sets out how we hope to achieve this. At its heart is a culture change in the way we work and communicate with families, shifting our focus onto what a family does well and using strength-based conversations. This will empower families to help themselves rather than becoming dependent on high-cost services.

## Health

The Our Manchester Strategy provides a framework for accelerating some of the recent improvements that have been made in public health by taking a different approach to tackling the wider determinants of health. It supports a renewed focus and emphasis on population health and investment in services that actively promote health and wellbeing, prevent ill-health and deliver better health outcomes for the people of Manchester.

A suite of performance indicators has been developed which will help demonstrate how the city is progressing towards the Our Manchester Strategy vision to improve health and care outcomes for the people of Manchester by 2025. This section of the report contains an analysis of some of these indicators. It describes the current baseline and, where possible, looks

at progress during the first year of the strategy. The focus is on those indicators that we are committed to improving as part of the **Greater Manchester Population Health Plan** and the Investment Agreement that underpins the Greater Manchester Transformation Fund.

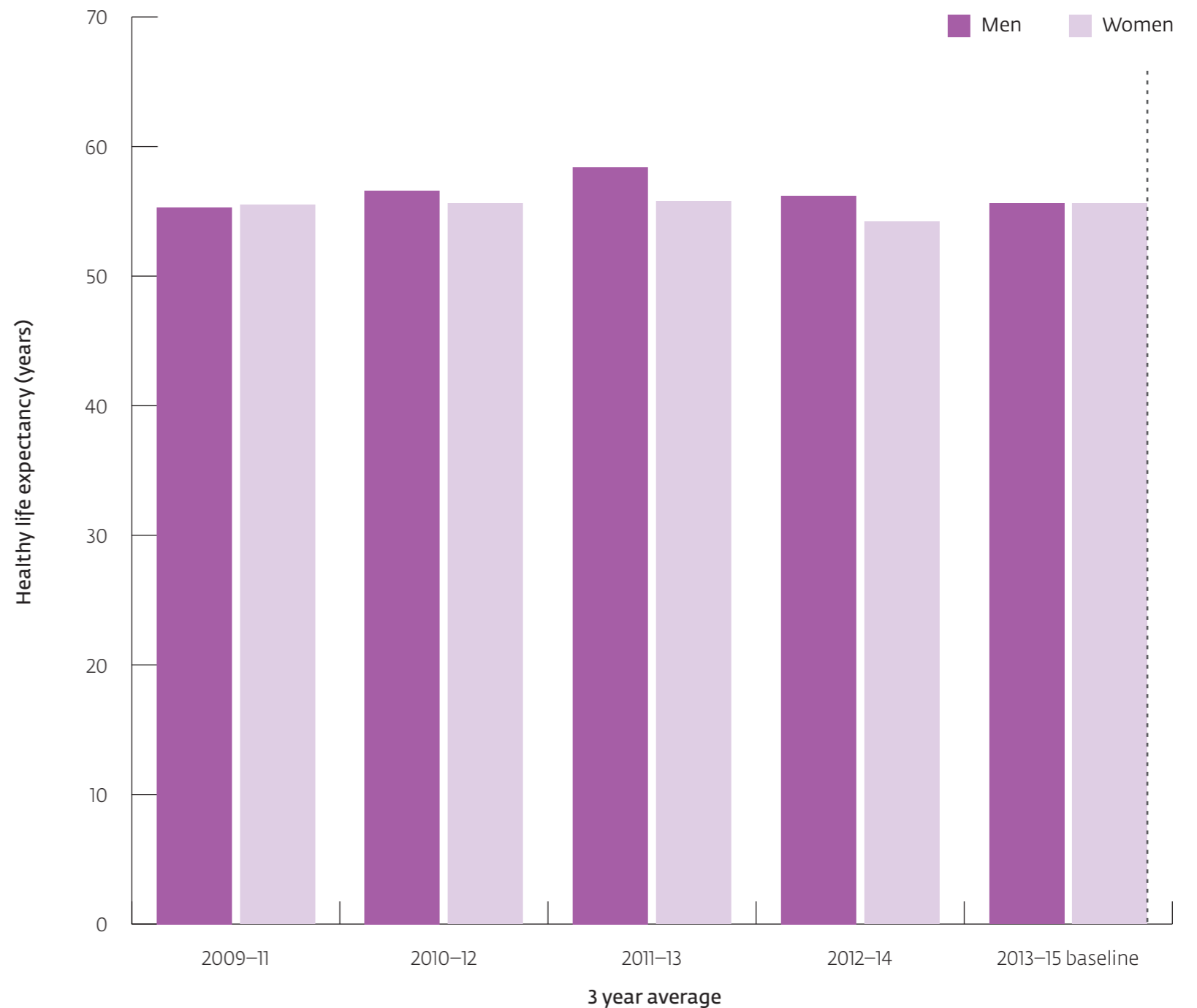


### Healthy life expectancy at birth

Healthy life expectancy (HLE) is a measure of the average number of years a person would expect to live in good health based on current mortality rates and the prevalence of self-reported good health.

The data trend presented in Figure 4.5 shows that HLE at birth has fallen slightly (i.e. worsened) in each of the last two data periods (2012–14 and 2013–15) for both men and women. This may be due in part to levels of mortality among a cohort of older people in born in the inter-war period who have survived longer than some of their peers but with relatively poor self-reported good health. Increases in accidental deaths among an existing cohort of people with long term acute substance misuse issues may also be a factor.

**Figure 4.5**  
Healthy life expectancy at birth, 2009–11 to 2013–15



Source: Office for National Statistics © Crown Copyright 2015

### Low birth weight of term babies

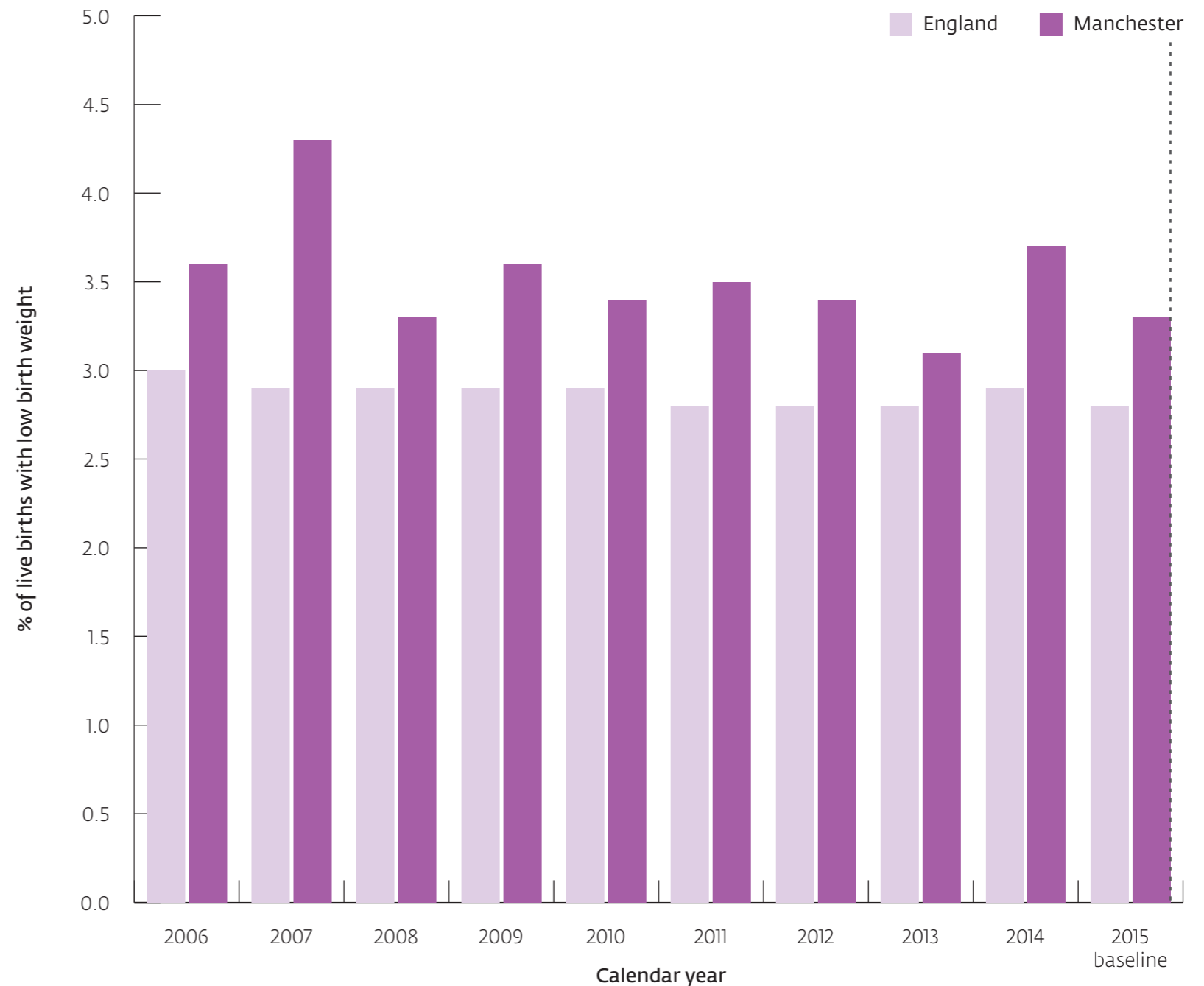
Low birth weight increases the risk of childhood mortality and of developmental problems for the child and is associated with poorer health in later life. A high proportion of low birth weight births could also indicate poor lifestyles among pregnant women and/or issues with the maternity services.

Figure 4.6 shows that despite year on year variations, historic trends point towards an overall reduction in the proportion of low birth weight births in Manchester, from a peak of 4.3% of term babies in 2007 to a figure of 3.3% in 2015.

The Greater Manchester Population Health Plan includes an aspiration to narrow the expected gap between Greater Manchester as a whole and the England average across a range of health outcomes over the next five years (2017–2021). If Manchester achieves its share of these targets it is calculated that the number of low birth weight term babies will fall from around 254 to 198 by 2021. This is equivalent to 76 fewer very small babies (under 2,500g) being born at term to mothers living in Manchester over five years than we would expect based on current trends.

**Figure 4.6**

Low birth weight of term babies  
(live births with a recorded birth weight under 2,500g and a gestational age of at least 37 complete weeks)



Source: Office for National Statistics © Crown Copyright 2015

### Dental health of children

Dental caries (tooth decay) and periodontal (gum) disease are the most common dental diseases in the UK. Tooth decay has become less common over the past two decades but is still a significant health and social problem. It results in destruction of the crowns of teeth and frequently leads to pain and infection. Dental disease is more common in deprived compared with affluent communities. The number of children admitted to hospital as a result of dental decay is both a good direct measure of dental health and an indirect, proxy measure of child health and diet.

Hospital admissions for dental caries in children aged 0–4 years is one of the prevalence measures chosen for inclusion in Manchester’s Investment Agreement.

Figure 4.7 shows that the rate of hospital admissions for dental caries in children aged 0–4 years in Manchester has been falling steadily in recent years, from 482.9 per 100,000 population in the three year period 2011/12–2013/14 to 380.5 per 100,000 in the period 2013/14–2015/16.

It is calculated that achieving Manchester’s share of the reduction needed to close the gap between Greater Manchester and England will

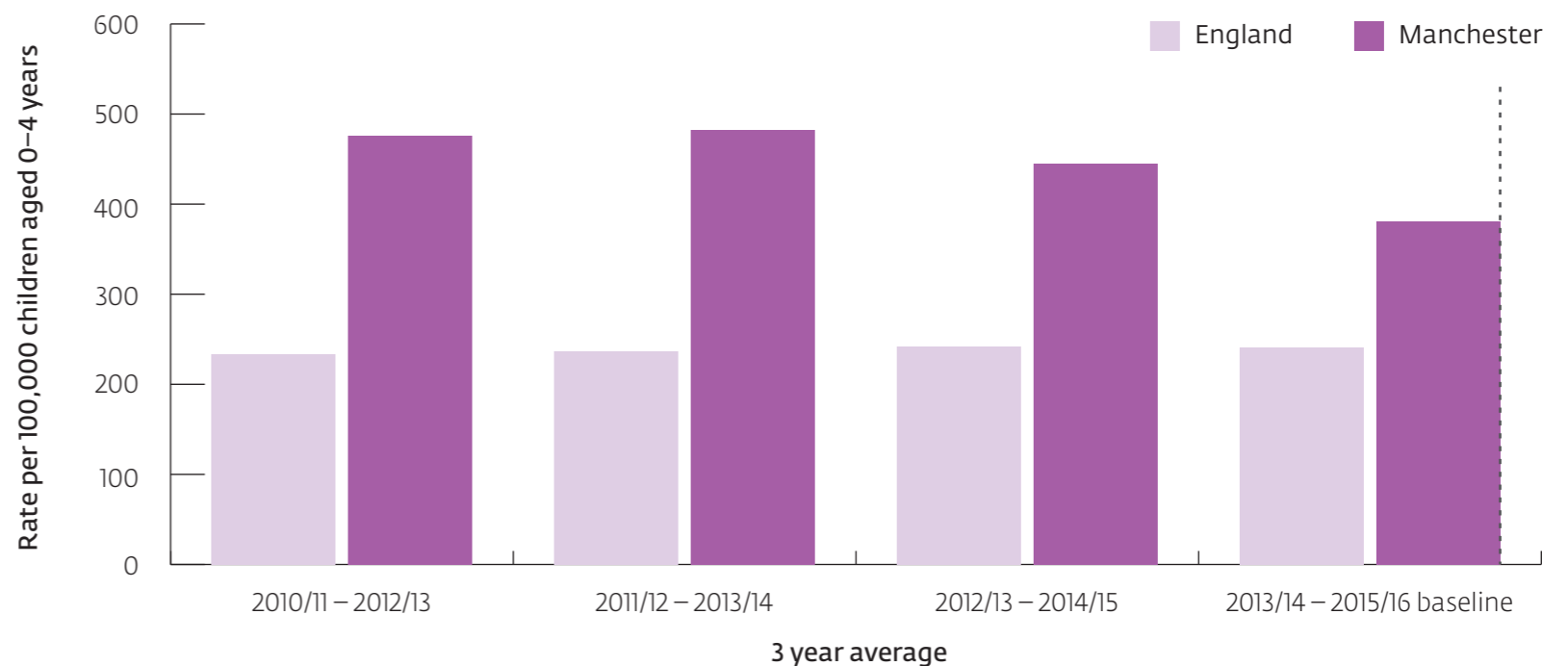
result in a reduction in the average number of children aged under 5 being admitted to hospital for dental caries from around 146 in 2014/15 to 51 by 2020/21. This is equivalent to 146 fewer children aged 0–4 years being admitted to hospital for this reason over a five year period than we would expect based on current trends.

Hospital admissions among older children (aged 10 and under) are also falling. The rate of children aged 10 and under being admitted to hospital for a tooth extraction in Manchester

has fallen from 1,167 per 100,000 in 2011/12 to 733 per 100,000 in 2014/15, although the latest figure for 2015/16 shows that the rate has increased to 848 per 100,000 children. This reduction may indicate an underlying improvement in childhood dental health but it might also reflect changes in the delivery of care, such as a move away from undertaking tooth extractions in a hospital setting on an inpatient basis and towards carrying out this procedure in an outpatient setting.

**Figure 4.7**

Hospital admissions for dental caries in children aged 0–4 years



Source: Hospital Episode Statistics (HES). Copyright © 2016, Re-used with the permission of the Health and Social Care Information Centre. All rights reserved.

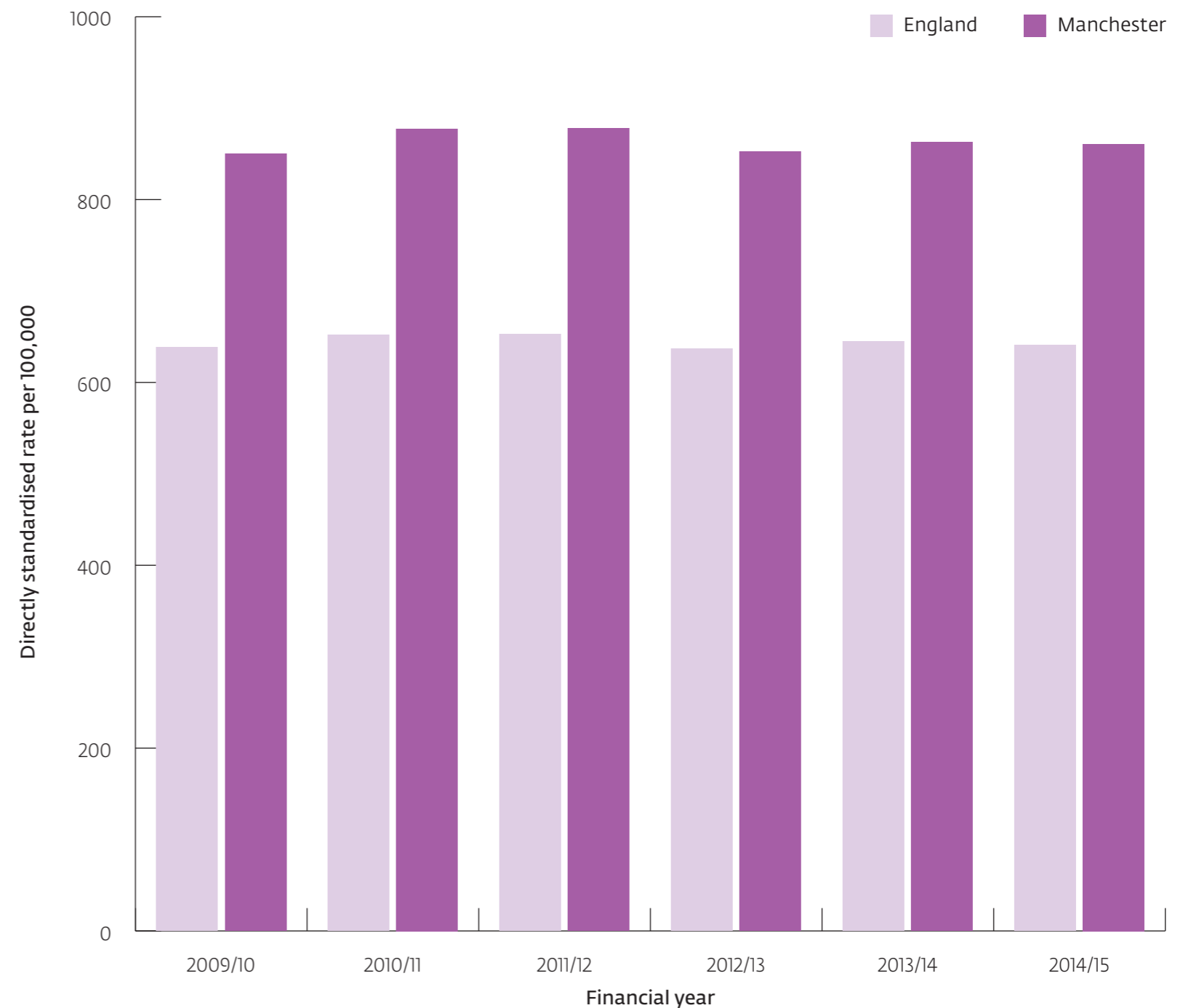
### Admission episodes for alcohol-related conditions

Alcohol consumption is a contributing factor to hospital admissions and deaths from a diverse range of conditions. Alcohol misuse is estimated to cost the NHS about £3.5 billion per year and society as a whole £21 billion annually. Reducing alcohol-related harm is one of Public Health England’s seven priorities for the next five years. Alcohol-related admissions can be reduced through local interventions to reduce alcohol misuse and harm.

Recent trends displayed in Figure 4.8 show that the alcohol-related admission rate in Manchester has changed very little over the past few years, although the current rate of 861 per 100,000 represents a reduction on the peak rate for the year 2011/12 (878 per 100,000). The current rate of alcohol-related hospital admissions in Manchester (861 per 100,000) is much higher than the England average of 641 per 100,000. The city also compares unfavourably with the average for other similarly deprived local authority areas (792 per 100,000).

Figure 4.8 shows the published data for the period up to 2014/15. More recent data for 2015/16 and 2016/17 are available but these are still provisional and subject to significant change.

**Figure 4.8**  
Admission episodes for alcohol-related conditions (narrow definition)



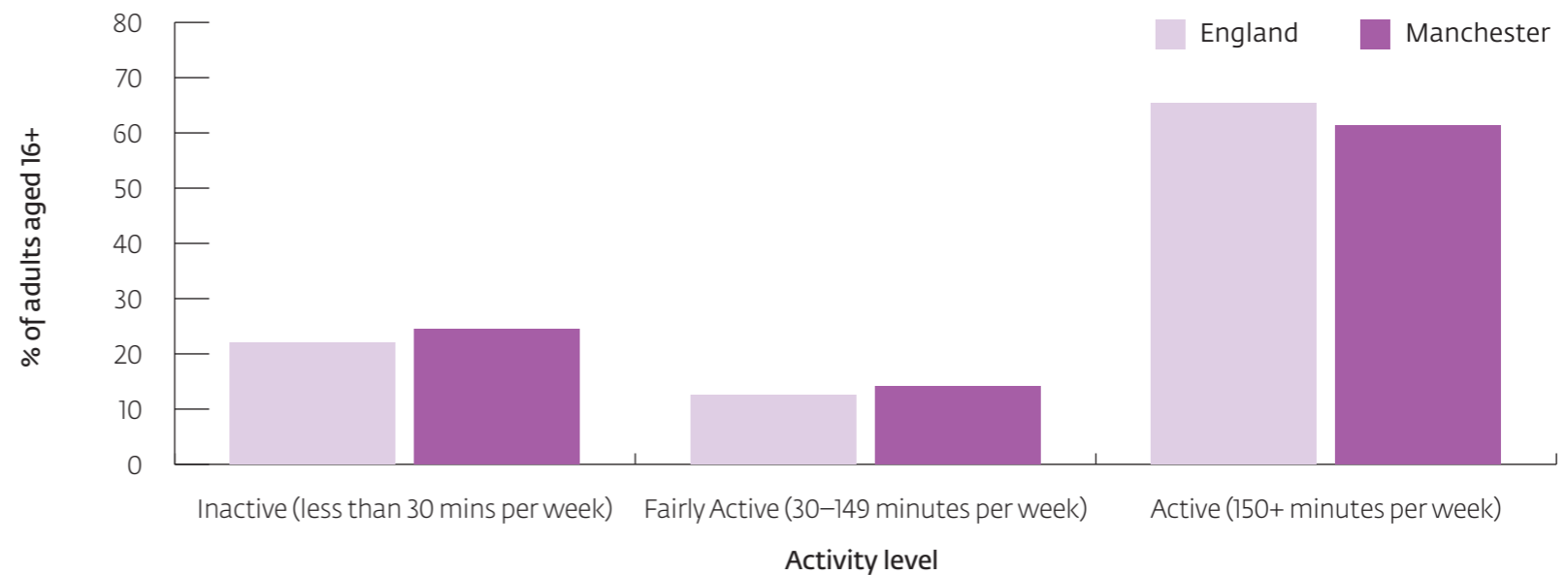
Source: Public Health England (based on Hospital Episodes Statistics and ONS mid-year population estimates)

### Physical activity and inactivity

Physical inactivity is the fourth leading risk factor for global mortality, accounting for 6% of deaths globally.

According to the Active Lives Survey, in 2015/16 nearly a quarter (24%) of adults in Manchester were classed as being inactive, taking part in less than 30 minutes of activity per week, compared with 22% of adults across England as a whole. The new Active Lives Survey is much broader than the previous Active People Survey, now including walking, cycling for travel and dance in addition to the sporting and fitness activities previously reported on. The data for 2015/16 in Figure 4.9 will therefore serve as baseline against which to judge the success of initiatives designed to increase physical activity and reduce physical inactivity.

**Figure 4.9**  
Weekly physical activity (November 2015–November 2016)



Source: Active Lives Survey, Sport England

### Improving Access to Psychological Therapies (IAPT)

Two-thirds of people with a long term physical health condition also have a mental health problem, mostly anxiety and depression. In addition, up to 70% of people with medically unexplained symptoms also have depression and/or anxiety disorders. These common mental health disorders are detectable and treatable. The Improving Access to Psychological Therapies (IAPT) programme provides evidence-based psychological therapies for people with anxiety/depression as well as supporting these people to find or stay in work.

Data collected as part of the IAPT programme can be used to show the proportion of referrals to IAPT services that are deemed to have recovered when they have finished a course of treatment. Recovery is measured in terms of the anxiety and depression scores. To be considered as recovered, a patient needs to score below the clinical threshold on both scores at the end of their treatment. This ensures that recovery is measured by looking at the welfare of the individual rather than one specific symptom.

The underlying trend appears to show a reduction in the proportion of Manchester patients deemed to be moving to recovery after finishing a course of treatment over the past 12 months (from 39.9% in September 2015 to 35.9% in September 2016). The gap between the recovery rate for Manchester patients and that for the IAPT programme as a whole is also widening.

### Emergency hospital admissions

A key focus of the work to develop a more integrated health and care system in Manchester is the need to reduce the high number of emergency admissions in the city, particularly admissions for acute conditions, such as ear/nose/throat infections, kidney/urinary tract infections and angina, which could potentially have been avoided if the patient had been better managed outside hospital in primary care.

The rate of emergency admissions for acute conditions that should not usually require hospital admission in Manchester has nearly doubled over the past decade, rising from 1,191 per 100,000 in 2005/06 to 2,116 per 100,000 in 2015/16. The rate of emergency admissions for these conditions across England as a whole has also increased but at a lower rate than in Manchester meaning that the gap between Manchester and the national average has widened.

### Case Study: A local suicide prevention plan for Manchester

Every suicide is both an individual tragedy and a loss to society. For every death by suicide between six and 60 people are seriously affected by that death including family, friends, work colleagues, practitioners and neighbours. Those bereaved and affected by suicide are at heightened risk of suicidal thoughts and behaviours themselves and the economic costs are immense – it is estimated that the cost of a suicide is £1.67million. For every year that a suicide is prevented, £66,797 costs are averted.

Manchester follows a national pattern where 75% of suicides occur in men and 75% of people who take their own lives have not been in contact with mental health services in the previous 12 months. This highlights the need to have both a targeted and universal approach to suicide prevention.

Public Health has led collaborative work in Manchester to develop an overarching local action plan for suicide prevention. This has been built on good work already taking place and making use of the assets we already have in the city – including active and engaged community organisations, strong statutory services, established networks of mental health providers and national and international leaders in academic research.

The development of the plan has been built on the following principles:

- Uses the best available data and evidence to inform both need and practice.
- Strengthens partnerships across public, private and community/voluntary sectors to work together to reduce suicide.

- Aligns to key national, regional and local strategies.
- Responds to the views of people with lived experience.
- Works to alleviate poor mental wellbeing and mental distress and to reduce self-harm and suicide attempts as well as preventing suicides.

Conversations with a range of stakeholders to gain further insights into what would be most effective in suicide prevention, what the most pressing issues are in Manchester and where efforts should be focused have also taken place. This approach has also allowed us to engage key partners in the process more fully and will be a good foundation for partnership working going forward. In addition to the engagement approaches described above the draft local action plan has been endorsed by a range of relevant boards and senior meetings to ensure it has the appropriate level of support and leadership. This includes Manchester Safeguarding Boards (Adults and Children), Health Scrutiny and the Health and Wellbeing Board.

The plan is based on the **Living Works Suicide-Safer Communities'** model which has seen worldwide recognition as a multi-agency framework for suicide prevention. The Living Works model has nine pillars of action which have been drawn from suicide prevention strategies around the world and these are reflected in the local plan.

The Manchester Plan can be downloaded [here](#)

Injuries due to falls are the largest cause of emergency hospital admissions for older people. It is estimated that about 30% of people aged 65 and over living at home will experience an episode of fall at least once a year. This rises to about 50% of people aged 80 and over living at home or in residential care. Falls in older people can result in serious injury with approximately one in 20 older people in the community experiencing a fracture or needing hospitalisation after a fall. Having a fall is also a major precipitant of people moving from their own home to long-term nursing or residential care. Across England as a whole, falls and fractures in those aged 65 and above account for over four million bed days per year at an estimated cost of £2billion.

As part of the Greater Manchester Population Health Plan, Manchester is committed to helping meet the aspiration of narrowing the expected gap between Greater Manchester as a whole and the England average in terms of emergency hospital admissions for injuries due to falls in persons aged 65 and over.

Figure 4.10 shows that the rate of emergency hospital admissions for injuries due to falls in persons aged 65 and over in Manchester has risen slightly in recent years, from 2,730.8 per 100,000 population in 2012/13 to 2,889.3 per

100,000 in 2014/15. This broadly mirrors the trend across England as a whole.

It is calculated that achieving Manchester's share of the reduction needed to close the gap between Greater Manchester and England will result in a reduction in the number of people over 65 being admitted to hospital due to a serious fall from around 1,447 in 2014/15 to 1,300 by 2020/21. Over a five-year period this is equivalent to 653 fewer emergency hospital admissions for injuries due to falls in persons

aged 65 and over than we would expect based on current trends.

In this case, hospital admissions have been used as a proxy of the prevalence of falls injuries. However, hospital admissions are only the tip of the iceberg in relation to the health and wellbeing burden of falls. Inpatient hospital admissions are a proportion of falls incidents; more may present to A&E Departments and GPs, not all of which will lead to hospital admission.

**Figure 4.10**  
Emergency hospital admissions for injuries due to falls in persons aged 65 and over



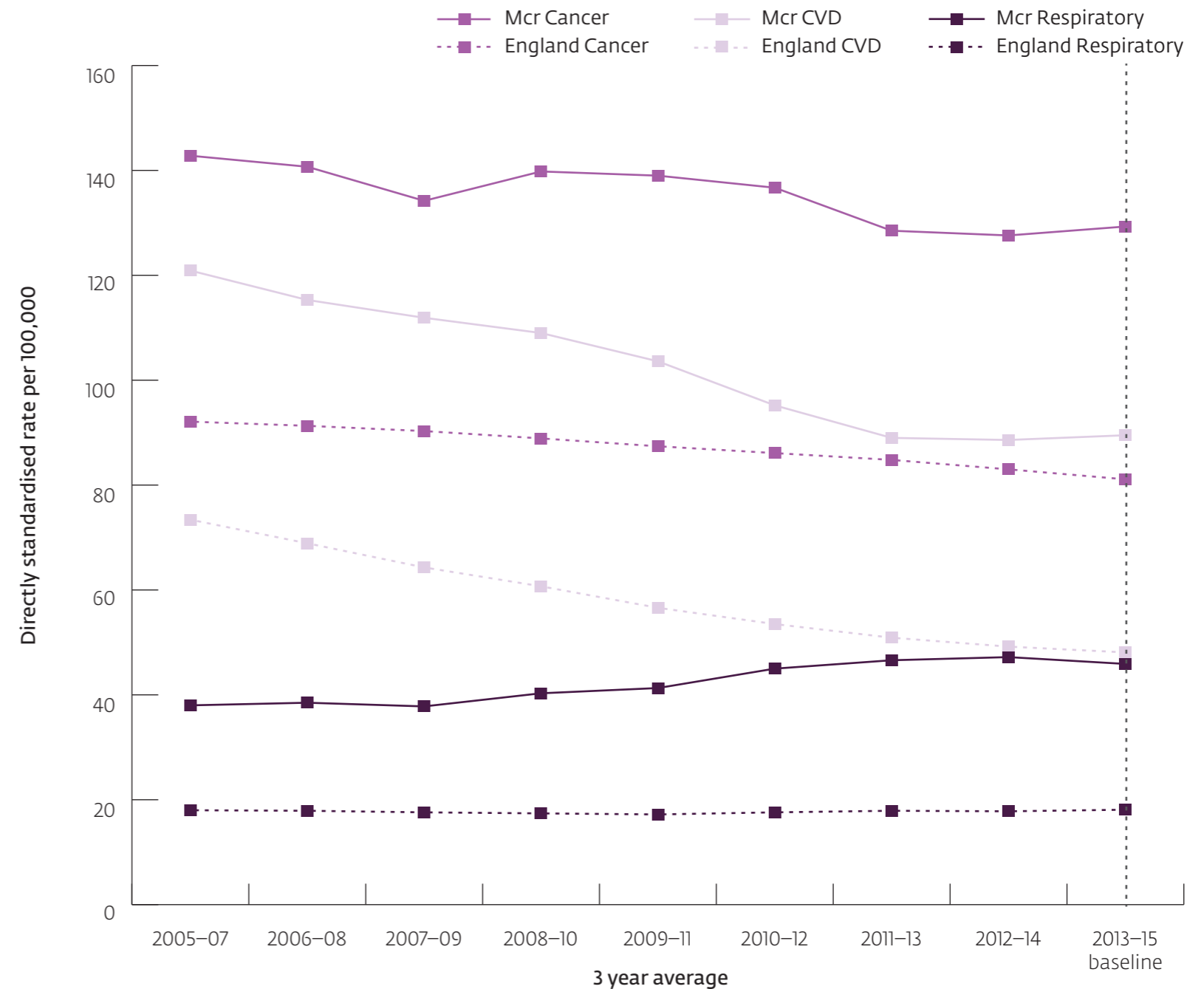
Source: Hospital Episode Statistics (HES) – National Statistics. ONS mid-year population estimates (based on 2011 Census) – National Statistics. Copyright © 2017, Health and Social Care Information Centre.

Premature mortality from causes considered preventable (cardiovascular disease, cancer and respiratory diseases)

Cardiovascular disease (CVD), cancer and respiratory diseases are the major causes of premature deaths (ie. deaths in people aged under 75) in Manchester. Compared with other local authorities, Manchester has the highest number of premature deaths from these three conditions in England. Manchester is also the highest ranked local authority for overall premature deaths from these diseases when compared with other similarly deprived areas, suggesting that deprivation alone is not the key factor in the high rates of premature deaths in the city.

Preventable mortality is a subset of mortality that is based on the idea that all or most deaths from a particular cause could potentially be avoided by public health interventions in the broadest sense.

**Figure 4.11**  
Mortality rate in under 75s from diseases considered preventable (cardiovascular disease, cancer and respiratory diseases)



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



A comparison of these three causes of death in Figure 4.11 shows that preventable premature mortality from cardiovascular disease has fallen considerably since the middle of the last decade. Preventable premature mortality from cancer has also fallen although not to the same extent as cardiovascular disease. In contrast, preventable premature mortality from respiratory diseases (including asthma and chronic obstructive pulmonary disease) has gradually risen from 38.0 per 100,000 in 2005–07 to 45.9 per 100,000 in 2013–15 (the latest published period).

The Greater Manchester Population Health Plan includes an aspiration to narrow the expected gap between Greater Manchester as a whole and the England average for each of these three causes of death over the next five years (2017–2021). If Manchester achieves its share of these targets, by 2021 there will be a total of:

- 174 fewer early preventable deaths from CVD
- 383 fewer early preventable deaths from cancer
- 168 fewer early preventable deaths from respiratory diseases.

These diseases are all associated with lifestyle risk factors such as smoking, alcohol and drug misuse, and obesity. Investing in prevention can, if implemented effectively, improve health and life expectancy as well as reducing spending over the longer term. Evidence demonstrates that interventions aimed at individuals alone will not reduce health inequalities and that population-wide interventions are needed to reduce the social gradient. Targeted interventions may also be required for population groups with additional health needs, children and young people, older people, the homeless, refugees and asylum seekers, and ethnic minority groups to reduce health inequalities.

Earlier identification and better treatment for people with long term conditions, such as cancer, is also a significant factor in improving health outcomes. For example, diagnosing cancer at an early stage (stage 1 and 2) leads to a dramatically improved chance of survival. Rates of early cancer diagnosis in Manchester continue to lag behind those in other parts of England. In 2014, 45% of new cases of cancer were diagnosed early at stages 1 and 2, compared with a rate of 59.7% in the best performing local authority. Specific public health interventions, such as screening programmes and information/education campaigns, aim to improve rates of early diagnosis.

## Adult Social Care

The key vision for Adult Social Care and Public Health in Manchester has been set out in the Manchester Locality Plan – A Healthier Manchester – which details the strategic approach to improving the health outcomes of residents of the city, while also moving towards financial and clinical sustainability of health and care services.

It builds upon the Our Manchester Strategy which is underpinned by the Joint Health and Wellbeing Strategy, the city’s overarching plan for reducing health inequalities and improving health outcomes for Manchester residents. The Locality Plan sets out how this transformation will be delivered. The plan will be supported by growth, development of skills, education, early years, improved housing and employment. Partners working across Manchester, in the public sector, in businesses, in the voluntary sector and in communities, all have a role to play in making Manchester the best it can be.

The vision for Adult Social Care and Public Health is on the integration of commissioning and services through the three pillars of the Locality Strategy. These are mutually dependent and are:

→ **A single commissioning system**

(‘One Commissioning Voice’) ensuring the efficient commissioning of health and care services on a city-wide basis with a single line of accountability for the delivery of services. This approach will integrate spending across health and social care on a high cost/high risk cohort, reducing duplication of service delivery and fragmentation of care

→ **‘One Team’** delivering integrated and accessible out of hospital services through community-based health, primary and social care services within neighbourhoods. Through the combining of resources residents will get integrated services, resulting in improved outcomes (holistic needs addressed) at reduced cost

→ **A ‘Single Manchester Hospital Service’** delivering cost efficiencies and strengthened clinical services, with consistent and complementary arrangements for the delivery of acute services achieving a fully aligned hospital model for the city.

Commissioners and providers of health and care have now come together into a single commissioning function, Manchester Health and Care Commissioning (MHCC). MHCC will ensure duplication and fragmentation of service provision is removed, that unnecessary

costs are avoided, and that our clinical leaders shape the model of delivery most suited to meet the needs of residents in Manchester ensuring that in future they get the right care, at the right time, in the right place.

The Locality Plan sets out the vision where neighbourhood teams of health, primary care and social care professionals work together as a single Local Care Organisation (LCO). These teams will work collaboratively with voluntary and community groups to empower people to increasingly self-care and improve wellbeing.

**New admissions to local authority supported permanent residential/nursing care**

The rate of those aged 18–64 admitted to permanent residential/nursing care was 18.72 per 100,000 in 2016/17.<sup>4</sup> The rate of those aged 65 and over admitted to permanent residential/nursing care was 857.88 per 100,000 in 2016/17.<sup>5</sup> The year 2016/17 is the baseline year which we will compare future years’ performance to as previous years’ figures are not directly comparable due to a change in the source and methodology of reporting. Comparative data for 2016/17 for other local authorities will be made available towards the end of 2017.

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4 ASCOF measure 2A (Part 1), Department of Health, Adult and Social Care Outcomes Framework 2015/16.

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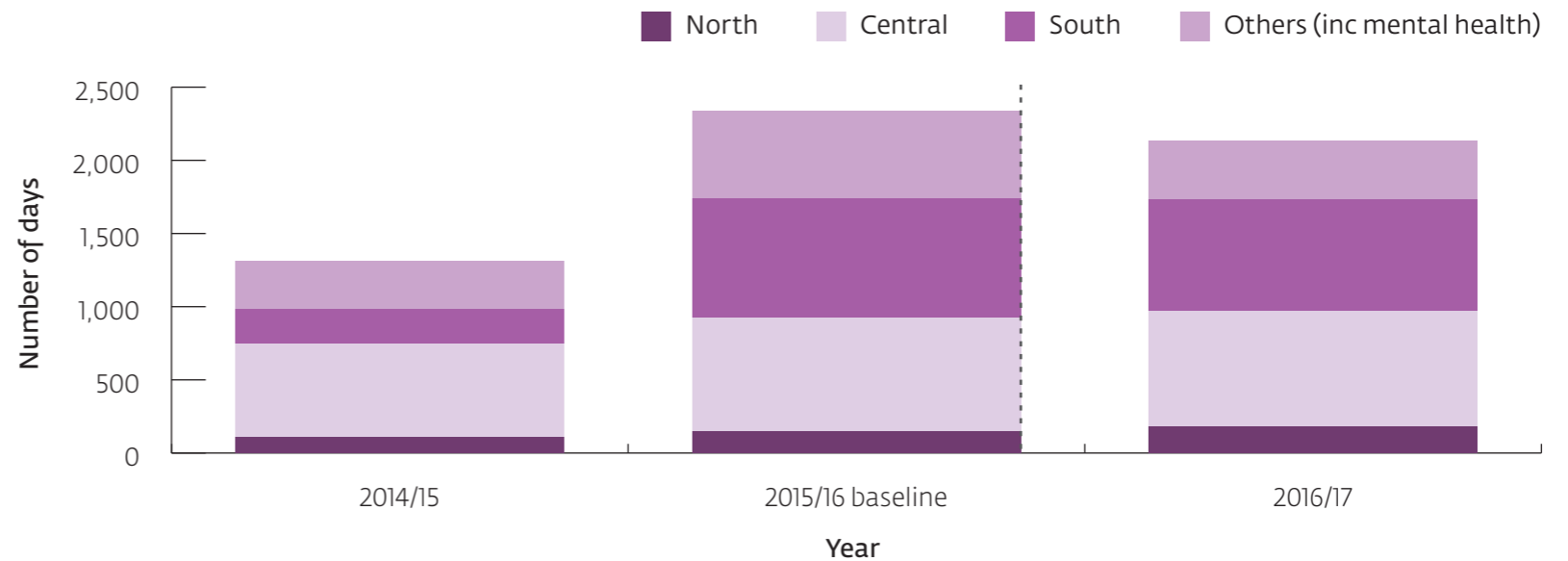
5 ASCOF measure 2A (Part 2), Department of Health, Adult and Social Care Outcomes Framework 2015/16.

### Delayed transfers of care

During the latter part of the financial year 2016/17, significant efforts were made to achieve the city-wide target of no more than 3.3% of people experiencing a delayed transfer of care across the three hospital sites. As at the last Thursday of March 2017, 3.6% of people experienced a delayed transfer of care at Central Manchester University Hospitals (central), compared to 5.8% at North Manchester General Hospital (north) and 10% at University Hospital South Manchester (south). Figures 4.12 and 4.13 show that although still at a high level, both the number of days delayed and the number of people delayed have reduced overall since the 2015/16 baseline.

**Figure 4.12**

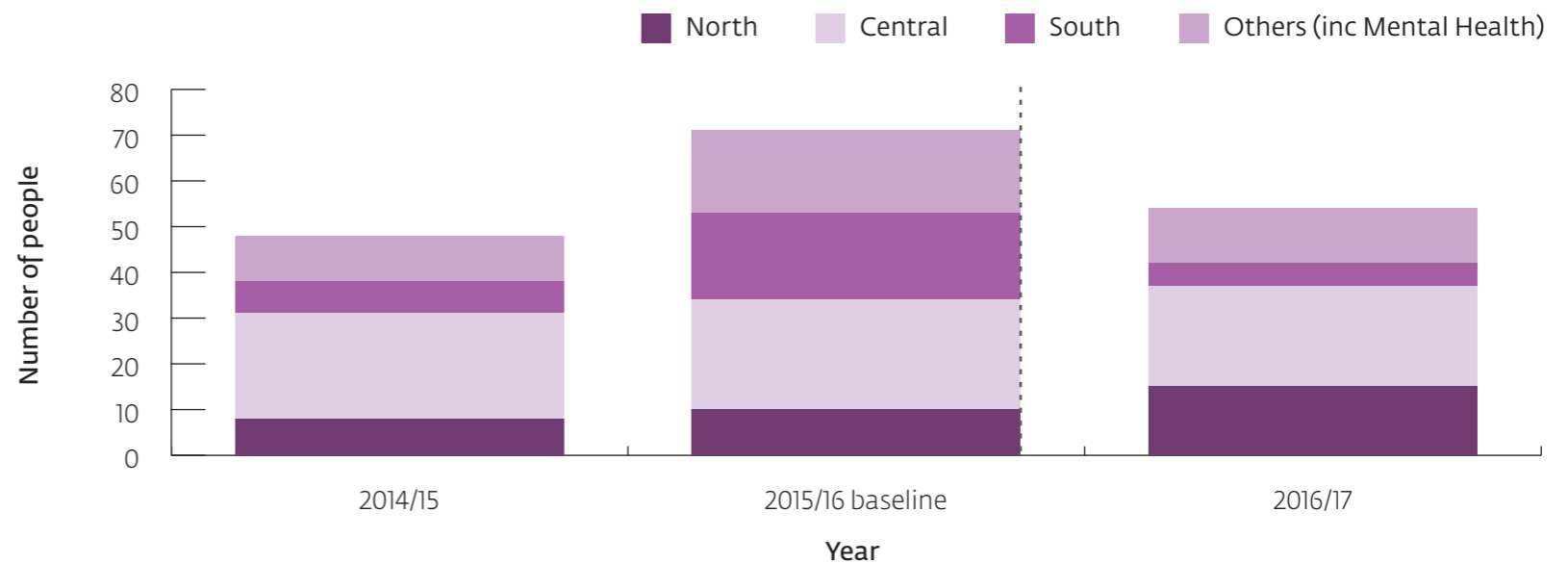
Delayed transfers of care (acute and non-acute delays): Number of days delayed during the month of March



Source: UNIFY2, NHS England

**Figure 4.13**

Delayed transfers of care (acute and non-acute delays): Number of people delayed on the last Thursday of March



Source: UNIFY2, NHS England

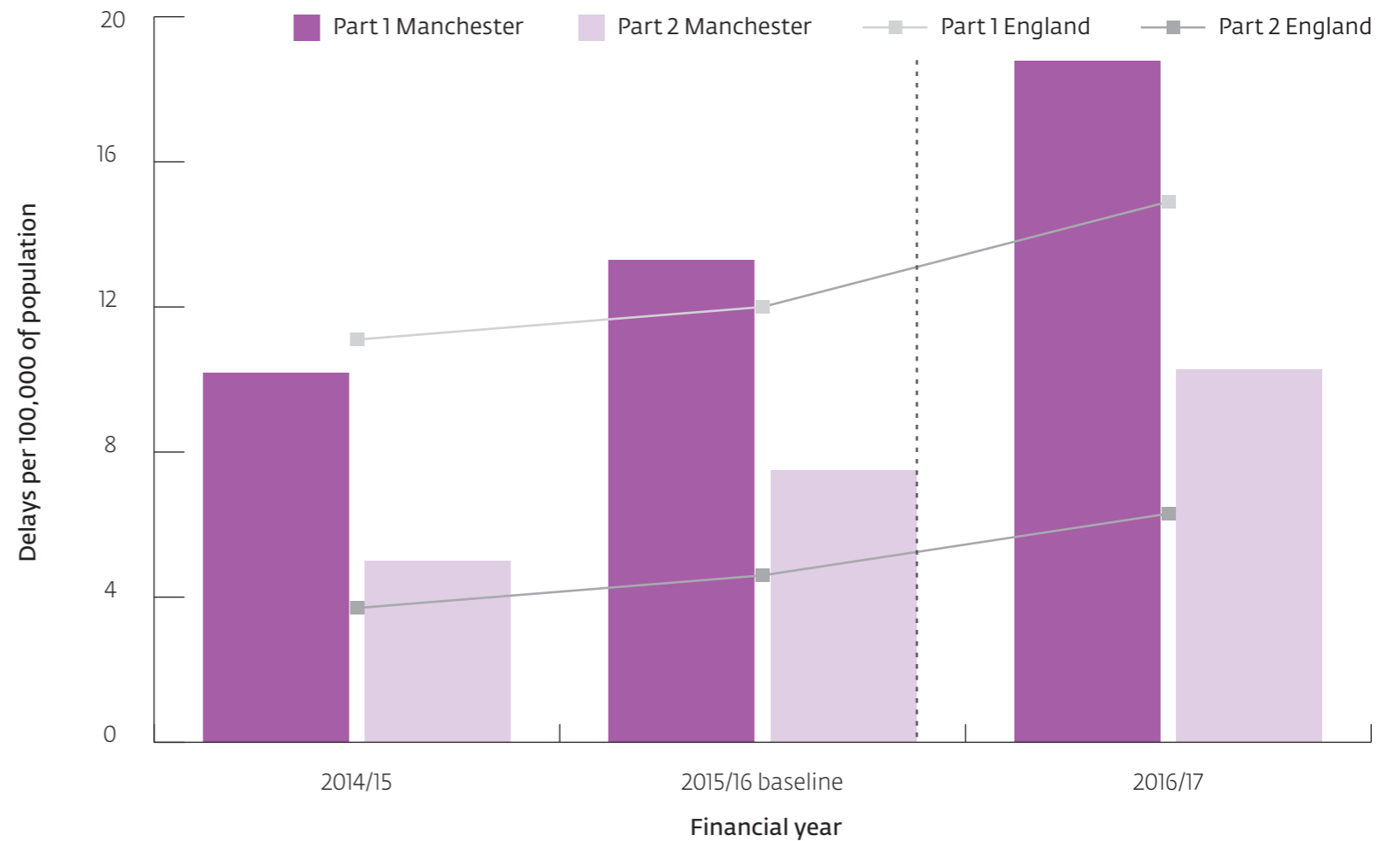
The number of delayed transfers of care (for those aged 18 and over), based on the average of 12 monthly snapshots on the last Thursday of each month (part 1), has increased over the past few years, both in Manchester and nationally. In Manchester the number of delayed transfers of care rose from 10.2 per 100,000 in 2014/15 to 18.78 per 100,000 in 2016/17 (Figure 4.14). A smaller increase was reported nationally, rising from 11.1 in 2014/15 to 14.9 in 2016/17, resulting in Manchester's performance becoming worse than the national average.

The average number of delayed transfers of care (for those aged 18 and over) that are attributable to social care or jointly to social care and the NHS, based on the average of 12 monthly snapshots on the last Thursday of each month (part 2), has also increased over the past few years both in Manchester and nationally. In Manchester the number of these delayed transfers of care rose from 5 per 100,000 in 2014/15 to 10.29 per 100,000 in 2016/17 (Figure 4.14). Manchester's performance remains worse than the national average which was 6.3 in 2016/17.

There is a continued effort to reduce delayed transfers of care, and work is underway to develop an integrated discharge team in the south of the city that will focus on a discharge to assess model, with Adult Social Care being a strong partner within the team. In addition,

Adult Social Care's commitment to supporting people to return home safely has led to the creation of several apartments across the city to support people get home safely and with reduced dependence upon residential settings/care.

**Figure 4.14**  
Delayed transfers of care from hospital (part 1), and those which are attributable to adult social care (part 2) per 100,000 population

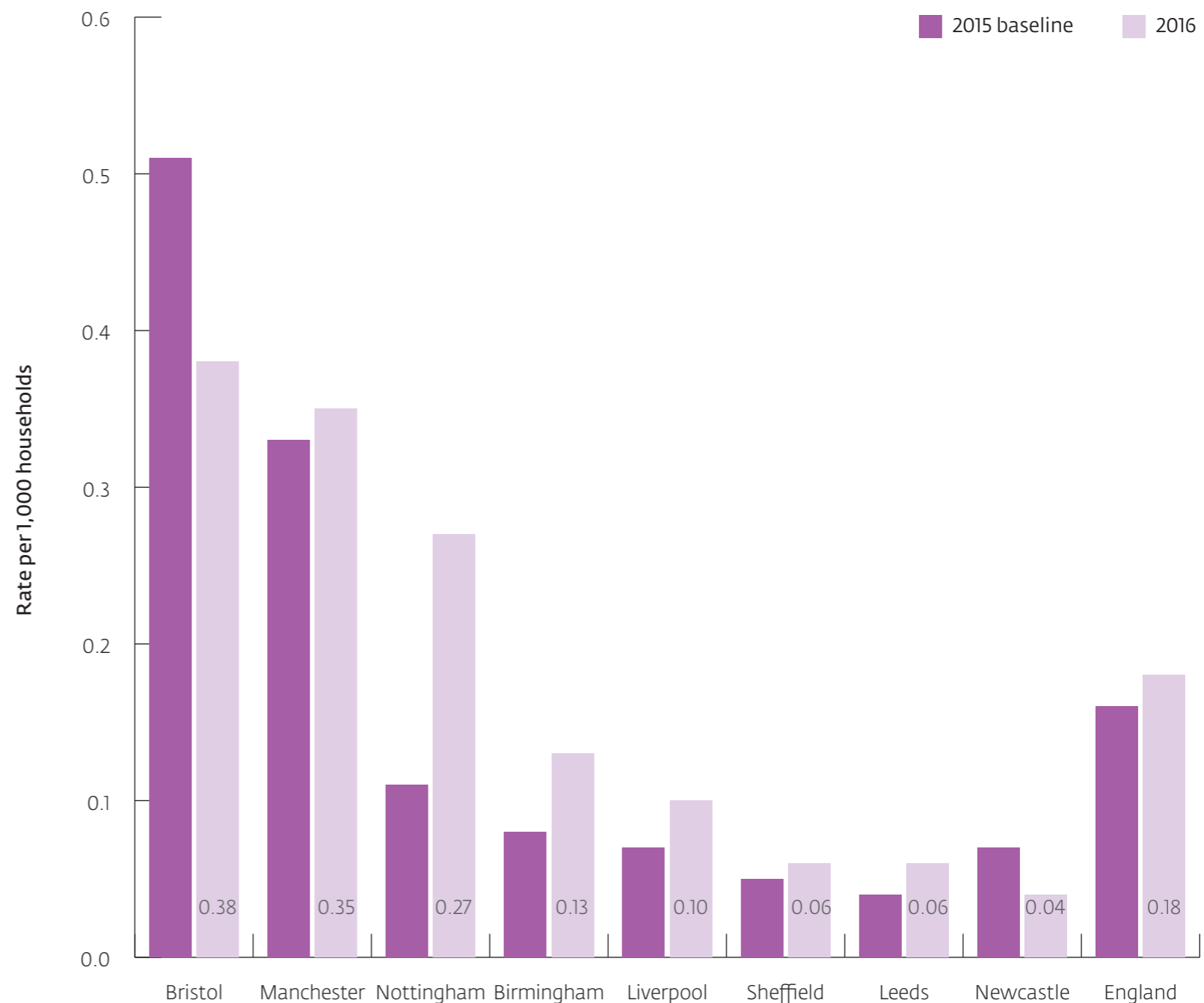


Source: ASCOF (2C), Department of Health, Adult Social Care Outcomes Framework 2015/16

## Homelessness

Homelessness has become more visible in the recent past, with more people sleeping on the streets in the city centre. Street homelessness is a particularly complex problem and people who are living rough can be particularly vulnerable and marginalised. The 2016 single night snapshot of people sleeping rough counted 78 rough sleepers in Manchester city centre, compared to 70 in 2015 and only 15 in 2011. Figure 4.15 shows that Manchester has one of the highest rates of people sleeping rough per 1,000 households when compared to other English Core Cities, and with a rate of 0.35 it is almost twice the national average.

**Figure 4.15**  
Single night snapshot of the number of people sleeping rough per 1,000 households



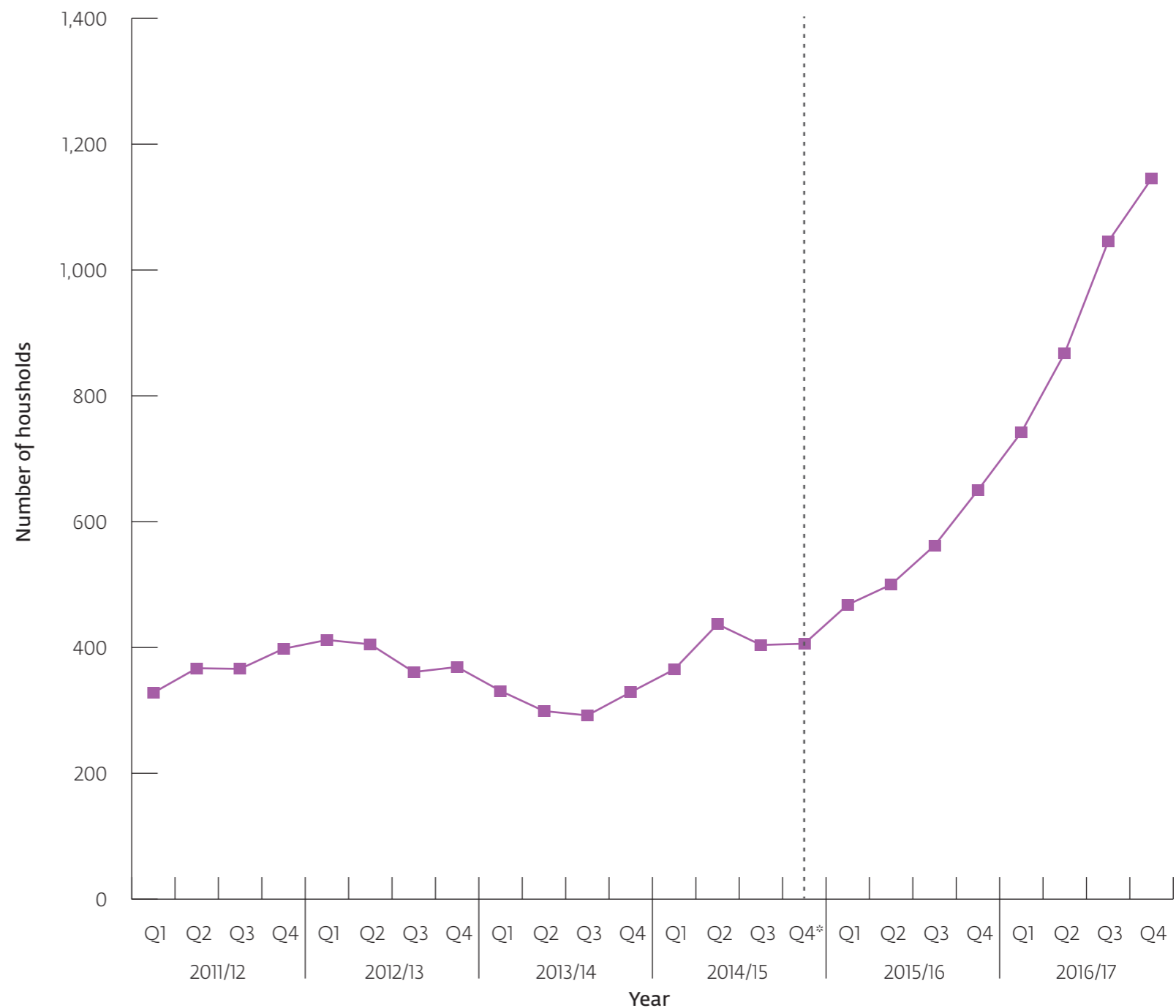
Source: DCLG

Manchester’s Homelessness Charter was launched in May 2016 and has brought together city leaders, faith groups, businesses, the voluntary sector, street charities, CityCo, Greater Manchester Police, Greater Manchester Fire and Rescue Service, Manchester Clinical Commissioning Groups, and Manchester City Council in a united front to tackle the problem of homelessness in the city.

The Charter launched with a series of priorities set by people with lived experience of homelessness, including rough sleeping. These priorities have become action groups that are already transforming the way that agencies work with people with lived experience to tackle homelessness. The Council and its partners in all sectors are working together to ensure that those people who need and want it can access the shelter and services that they need.

More widely than rough sleeping, the Council has also seen a significant increase in demand for its homelessness services. Figure 4.16 shows that the number of households residing in temporary accommodation has increased significantly over the past two years, from 406 at the end of March 2015 to 1,145 at the end of March 2017.

**Figure 4.16**  
Total number of households residing in temporary accommodation at the end of the quarter



Source: Department for Communities and Local Government (P1e statutory return); \* baseline

The Council's Homelessness Service launched a new approach in January this year focusing on offering a range of housing options to people who were at risk of becoming homeless. This pilot and new advice and information packs have been developed with the input of people with lived experience and will be rolled out during the current financial year.

This new approach will prevent homelessness by targeting those most at risk and empowering them to make choices that will help them resolve their own housing needs. This will ensure that the Council is well placed to meet the challenges of the Homelessness Reduction Act which is likely to be implemented next year and which places a wider statutory duty on the local authority to prevent homelessness.

### Age-Friendly Manchester

The Age-Friendly Manchester (AFM) programme aims to improve the quality of life for older people in the city and to make the city a better place to grow older. Manchester is a leading member of the World Health Organisation's Global Network of Age-friendly Cities and the programme has been running since 2003.

The programme has five themes:

- Age-friendly neighbourhoods
- Age-friendly services
- Involvement and communication
- Knowledge and innovation
- Influence

The programme is based on collaboration and partnership, with a leading role for older people. This partnership ranges across Manchester University and Manchester Metropolitan University, the voluntary and community sector, the private sector, and national and international partners.

AFM has been identified as a leading example of the Our Manchester approach. The core aspect of the AFM programme is to improve social participation of older residents and the quality of local communities for older people. This is central to reducing demands on services, together with extending and improving the quality of life for older people.

In 2017, the Age-Friendly Manchester Strategy will be updated. The aim is to launch the new strategy, which will be aligned with strategic priorities for the city at a Manchester and

Greater Manchester level. A number of key areas have progressed since 2015 and these are central to the programme in the future, examples of which are set out below, under the programme's five themes.

### Age-friendly neighbourhoods

- Age-friendly neighbourhood networks: In 2016, the Buzz Health and Wellbeing Service was launched. The service consists of a number of workers who are responsible for establishing age-friendly networks and plans across every ward in the city. The workers are establishing steering groups of council officers and partners to develop and oversee annual action plans to make their neighbourhood more age-friendly.
- Age-friendly neighbourhood projects: The AFM programme supports the development of older people led community participation work. An example of this includes North City Nomads, which is a non-profit-making community organisation offering days out for older people living in North Manchester. Trips are to places such as Southport and Llandudno and can cater for up to 250 people. Another example is the Inspired People Project at Levenshulme Inspire, which offers coffee mornings and health and wellbeing workshops.

### Age-friendly services

- AFM Older People's Charter: The AFM Older People's Charter was launched in October 2015. The Charter, which was developed by the Age-Friendly Manchester Older People's Board, has created the opportunity for organisations and groups across the city to pledge how they will make the city more age-friendly. Across 2016 there were over 50 pledges from organisations such as O2, Waites and Tesco. Due to the success of this work there will be a new push for businesses to sign up to the Charter in 2017 and pledge to make their services more age-friendly.
- Culture Champions: The Culture Champions are a network of over 160 older people who volunteer to change the cultural offer in the city to be more age-friendly and to oversee work such as academic research. This programme has been running for a number of years and is a strong example of partnership working with the University and of older people driving this agenda forward themselves.

### Involvement and communications

- Age-Friendly Manchester Older People's Board and Forum: Since 2004, there has been an Older People's Board (up to 20 older people) and Forum (over 100 older people), who shape the strategic direction of the programme and act as consultative bodies. Members are also community activists in their local communities. The Board and Forum will continue to shape the direction of the programme, while also being a place where partners can engage with older people to shape their work.

### Knowledge and innovation

- Research partnerships: Since the start of the AFM programme, there have been many collaborations with the University of Manchester and the Manchester Metropolitan University (MMU). This has involved students working with older people to develop and carry out research. It has also led to larger collaborations, for example the age-friendly Old Moat, Cheetham Hill and city centre work with researchers from Manchester University and MMU.

- Greater Manchester Ageing Hub: The Greater Manchester Ageing Hub was established in 2016. The aim of the Hub is to create a shared culture and environment across Greater Manchester where academic research informs commissioning, policy and practice. This includes for Greater Manchester to become the first age-friendly city region in the UK and to increase economic participation among the over 50s.

### Influence

- The AFM works with partners and other services to influence how their work is delivered with and for older people. This is seen as taking an age-friendly lens to all services across the city. Examples of this work include working with Transport for Greater Manchester in their strategic work for transport as well as the design of spaces such as bus stops.
- The programme is also influencing work that is happening across the city in terms of employment for over 50s. This includes the development of programmes and initiatives for the over 50s to increase levels of employment, address skills deficits and maintain healthy employment in later life.



## Support into employment

Greater Manchester Devolution has afforded the development of new service delivery models to tackle long term worklessness with a particular focus on those out of work due to a health condition. The Devolution deal with Government was based upon the poor performance of the nationally commissioned Work Programme for people with long-term health conditions – Greater Manchester made the case that better employment outcomes could be achieved through a locally commissioned and managed service. Following on from the initial Working Well pilot that was commissioned in 2014, an expanded Working Well service was commissioned by the Greater Manchester Combined Authority (GMCA) to start in 2016 as part of a wider work and skills 'eco-system'. In addition to the Working Well key worker model which provides an intensive, integrated and sequenced support service, the 'eco-system' offer includes additional Talking Therapies and skills support through the Skills for Employment service to support better sustainment of work.

### Working Well

Working Well is the programme, designed and jointly funded by the GMCA and the Department for Work and Pensions, which supports Employment Support Allowance

(ESA) Work-Related Activity Group claimants into sustained employment. Under the extension of the original pilot, Working Well has been opened up to other claimant groups, including Job Seeker's Allowance Work Programme returners and Lone Parents on Income Support. The majority of participants are referred into the programme by Jobcentre Plus having completed two years on the Work Programme without moving into sustainable work. All participants have at least one health condition, often including poor mental health. The **Greater Manchester Working Well Expansion** to 15,000 Greater Manchester residents includes a 'health pathway' which provides voluntary access to the programme via primary care referrals. This is a significant development for which Manchester advocated strongly during the programme development and procurement processes. It assists with the expansion, resourcing and sustainability of our work and health programmes in the city.

In Manchester there were 1,760 attachments to the programme between April 2016 and April 2017 (attachments show the number of people referred who have completed an initial engagement activity with the provider). The forecast attachment rate for the Expansion programme as a whole is 70% of all referrals. The attachment rate is calculated using the

previous month's referral figures to allow for time to engage clients onto the programme. In March 2017, 3,573 referrals had been made in Manchester, an attachment rate of 49%. At the end of April, 120 job outcomes had been claimed for Manchester residents against an expected target of 155 claimed job outcomes; an achievement rate of 77%.

Residents spend up to 2 years on the programme and there is post-employment support so we are expecting that the number accessing Working Well and moving into employment will increase. The majority of participants on the programme report improvements to their health and social and emotional well-being. There is more work to do to measure the health benefits of the programme.

### Healthy Manchester

The Healthy Manchester service acts as a primary care single point of access to biological, psychological and social support helping unemployed people aged 18–64 who are struggling to manage their health condition and need intensive support to progress back to employment. It effectively provides a pathway for GPs and their patients whose health is negatively affected by social determinants. By building the Healthy Manchester model into

Working Well, we are continuing to build the evidence base that a voluntary health referral can improve engagement rates and outcomes on employment support services. Of note is the fact that Healthy Manchester has successfully engaged with patients who are economically inactive or within the ESA Support Group and therefore not mandated to undertake any work-related activity. The learning from the Manchester model will be important in terms of supporting the development of the Greater Manchester Work and Health model within the population health strand of the Greater Manchester Health and Social Care Locality Plan.

### Fit for Work

The Manchester Fit for Work service continues to support in-work patients who are off sick and at risk of not returning to work, again using a biopsychosocial assessment model to support condition management, improve self-efficacy levels and support clients with work-related issues which are preventing them from returning to work. The cumulative number of referrals for Fit for Work is 977 resulting in 400 attachments. The programme has a very good track record of participants returning to work and GPs across the city refer to the programme because of its efficacy.

### Case Study: My Future programme

The My Future programme started in April 2015 and is an initiative developed in partnership with The Manchester College and Manchester City Council to offer young people from Manchester aged 16 to 24 years old the opportunity to carry out a 13-week work placement if they are not already in education, training or employment.

It consists of a four-week pre-employment programme followed by 13 weeks' paid employment. The young people will be employed by The Manchester College and paid at national minimum wage but will be seconded to a company that have recruited them for three months. It is fully funded and there is no cost to the employer. The idea of the programme is for the young people to gain valuable work experience, skills and knowledge that will help them be more successful at gaining an apprenticeship or permanent employment either with their host employer or with another company. As at March 2017, of the 115 people who had completed the My Future programme, 49% had achieved a job outcome.

In BC's<sup>6</sup> case, the programme became a lifeline. After fleeing Somalia and later Kenya he arrived in the UK in 2013. As an asylum seeker he worked as a volunteer for 35 hours a week and at the same time attended English for Speakers of Other Languages (ESOL) classes to improve his English. After being granted leave to remain in the UK, BC applied for the My Future programme and attended the Northwards Housing open day. BC was successful at the Open Day and was accepted onto the My Future programme with Northwards Housing. After completing his 13-week placement he was praised by Northwards Housing for his commitment and attitude towards work. Following the placement he was accepted onto an apprenticeship programme with Northwards and has trained to become a housing officer, a role in which he is flourishing.

<sup>6</sup> Initials anonymised

### Skills for Employment

The Greater Manchester Skills for Employment pilot programme is part of the Growth Deal agreed with Government in 2014. The programme aims to test the impact that improved integration of employment and skills services has on local residents who face barriers trying to access learning and employment. The pilot takes direct referrals from the Working Well programme as well as other sources. The programme is initially being funded via the European Social Fund and will continue to be funded under the Growth Deal programme. The Skills for Employment programme started delivery in March 2016 and over 3,500 customers have now been engaged on the programme across Greater Manchester with 270 having achieved an accredited qualification, 350 having started a work experience placement and over 300 having entered employment. At a Manchester level 143 customers have been engaged (against a target of 137) and received 1,622 referrals up to end March 2017.

### Conclusion

Improvements have been made for residents of all ages in meeting the Council's priorities and working towards the delivery of the Our Manchester Strategy vision. Notably:

- Although the rates of Looked After Children remain high compared to national averages, the number of Looked After Children is decreasing safely and steadily, and outcomes are improving.
- Preventable premature mortality from cardiovascular disease has fallen considerably since the middle of the last decade.
- Intervention, prevention, reablement and services that better serve people's needs in the community are resulting in fewer adults and older people in need of going into residential or nursing care.
- More people are being supported into work through targeted interventions.

The Council and its partners will continue to develop and transform services, under the Our Manchester Strategy and as new arrangements continue as part of the devolution deal and the integration of health and social care through the Locality Plan.

There will continue to be a shift in the focus of services towards prevention of problems and intervening early to prevent existing problems getting worse across the whole life course. The Council and its partners will continue to focus services within communities, bringing more together in 'hubs' in order to aid integration.

# A liveable and low-carbon city

## Strategic overview

The Our Manchester strategy sets out a clear ambition for Manchester to become a liveable and low-carbon city by playing a full part in limiting the impacts of climate change and by 2025, being on a path to being zero carbon by 2050. Other environmental factors also remain a priority for the city, such as developing our green infrastructure, repurposing our contaminated land (a by-product of our industrial heritage), improving air quality, reducing the amount of waste that goes to landfill and increasing recycling, making sure our streets are clean and litter-free, and reducing the amount of fly-tipping.

A liveable city is more than this. We are also focused on all the facilities we provide to create a city and neighbourhoods where people want to live. We are addressing our housing issues by developing affordable, diverse good-quality housing to rent or buy that is well designed, sustainable and energy-efficient. By meeting this objective we will encourage more working people to stay and live in Manchester, contributing to the city's success.

We're working with our partners and communities to reduce the amount of crime and antisocial behaviour in the city to provide safe, clean, attractive and cohesive neighbourhoods. Manchester is growing and becoming ever more diverse. We are a welcoming city, and residents have a proud track record of positive integration and respecting one another's cultures, faiths and ways of life.

This helps to secure Manchester's position as a liveable city, providing a richness of cultural, leisure and sports facilities, and offering many opportunities for people to engage with their communities and neighbourhoods through volunteering. We're providing better-quality parks and green spaces, and investing in libraries, culture, sports and events for residents' benefit and to increase the city's international attractiveness.

We want Manchester people to be proud of their institutions, their neighbourhoods and their city, which reflect and celebrate diversity.

This chapter outlines how progress is being made to achieve these aims, the strategies being used to structure the work, the

partnership approaches we're adopting, and the specific indicators that demonstrate where progress is being made. This is detailed in the following four subsections:

- Climate Change and Environment
- Housing
- Community Safety and Cohesion
- Libraries, Culture, Sport and Volunteering.

## Analysis of progress

### Climate change and the environment Manchester Climate Change Strategy 2017–2050

The Manchester Climate Change Strategy 2010–2020 set out an ambition for the city to reduce its CO<sub>2</sub> emissions by 41% in 2020 from the 2005 baseline. Despite significant progress being made, the actions have not been scaled up at the rate needed to meet the original 2020 goals and the latest data from 2017 shows that there has been a 37% reduction.<sup>1</sup> Based on the city's climate change progress to date, the views stakeholders expressed during the

<sup>1</sup> Manchester A Certain Future (MACF) Annual Report 2017

public consultation on the Our Manchester strategy, the UN Climate Change Paris Agreement, and the need for cities to play their part on global decarbonisation, it became clear that Manchester should develop a more ambitious and longer-term strategy.

A public consultation exercise took place between July and October 2016, and more than 700 people and organisations responded. The results showed that:

- 97% of respondents believe it is important for Manchester to take action on climate change
- 85% of respondents feel the commitment to become zero carbon by 2050 is the right target, while 6% felt this target is not ambitious enough.

The new Manchester Climate Change Strategy 2017–2050<sup>2</sup> was subsequently published in December 2016.

### Why a zero-carbon city aim?

The introduction of the Paris Agreement in 2015 at the 21st meeting of the United Nations Conference of the Parties (COP21) marked a landmark moment, as it was the world's first and most comprehensive climate change agreement. 196 countries decided to unite

against climate change, recognising it is one of the most severe threats to both wellbeing and prosperity in all countries of the world. In order to limit the damaging effects of climate change, the main aim of the agreement is to limit the increase in global temperature to 1.5 degrees above pre-industrial levels, as a 2 degree reduction target will not be sufficient.

In full support of the COP21 agreement, Manchester also believes that action on climate change needs to be at the heart of our plans and actions as a city. The 2017–2050 strategy is Manchester's commitment to supporting the Paris Agreement.

### Manchester Climate Change Agency and Manchester Climate Change Strategy and Implementation Plan 2017–2022

The Manchester Climate Change Agency (MCCA) Community Interest Company (CIC) was created in 2015 to oversee, champion, co-ordinate and facilitate the delivery of the city's Climate Change Strategy 2017–2050, and to support the delivery of five-year implementation plans, the first of which runs from 2017–2022. The plans set out the actions to be delivered within a given five-year period, to both make progress against the strategy's objectives and to undertake preparatory work that will enable progress to be made in future

five-year periods. The actions in these plans are the strategic actions that will help to drive, enable and support Manchester's physical and cultural transformation to 2050 and beyond.

Within the plan, there are five overall enabling actions for the city to undertake, which are:

- Educating and engagement
- Investing in our young people
- Innovation, investment and business growth
- Enabling and incentivising institutional development
- Supporting our businesses

The MCCA is the lead organisation for delivering the 'Investing in our young people' objective. Harnessing the large number of young people across schools, universities, colleges and neighbourhoods is an opportunity to not only provide young people with skills, knowledge and opportunities, but to deliver the action and behaviour change needed to tackle climate change in the long term.

<sup>2</sup> Manchester Climate Change Strategy 2017–2050  
<http://www.manchesterclimate.com/plan>

## Royal Exchange Theatre's action on climate change

The Royal Exchange Theatre began its sustainable journey more than ten years ago. The theatre set up a green group of interested individuals from all areas of the organisation, starting simply with the introduction of basic recycling and the monitoring of energy use.

In the theatre's main St Ann's Square building, the use of electricity was a great cause for concern, as the mid-1990s refurbishment had left it with very energy-hungry premises. The theatre looked for ways to reduce its usage, and with the help of grants a switchover to LED lighting was made and a voltage optimisation unit was installed. Energy reduction now plays a key role in the theatre's planned maintenance. The results have been startling, and the building now uses 48% less electricity than it did in 2006.

At the theatre's second building in the Northern Quarter (where workshops are housed), material reuse and offcut recycling was looked at. The theatre also began to seek other uses for things it made, offering them to local organisations and through national networks. For the past two years the theatre's sets have been recycled by a private contractor, which has resulted in a 75% reduction in refuse going to landfill. More recently, the theatre worked with local emerging artists Powderkeg on 'Bears', which explores the impact of climate change. All the scenery was made from recycled materials, and sustainable production processes were used.

In 2011, a project brought together some of the city's cultural leaders to explore the environmental agenda, and through this the Manchester Arts Sustainability Team (MAST) was born. Within this network, cultural organisations and businesses large and small report against climate targets set by the city. The Royal Exchange Theatre has chaired the group since 2015, and a member of its senior management team sits on the steering group of the Manchester Climate Change Agency. MAST will publish its five-year report in July.

The Royal Exchange Theatre is passionate about making theatre for our city and its people, and continuing to explore how this can be done in a way that works for our environment. The city has set inspiring and bold climate-change targets and the theatre is committed to playing its part in delivering them.

Another focus of MCCA is to get the city talking about climate change. During 2016, the Agency, under the umbrella brand Manchester Climate Lab 2016, helped to curate or organise more than 32 events across Manchester, which attracted some 92,000 people. An analysis of the programme is being used to develop the Agency's Communication and Engagement Plan for 2017–20.

### Green Infrastructure

To be considered an 'attractive, liveable and global city', Manchester continues to maximise the potential of its Green Infrastructure (GI) and provide benefits for its neighbourhoods, its residents and its businesses. Manchester demonstrates a committed approach to the preservation and enhancement of its natural assets, understanding their value and role in working towards achieving zero-carbon status by 2050 and the city's broader ambitions for growth.

GI can be broadly defined as 'a network of multifunctional green spaces, urban and rural, which is capable of delivering a wide range of environmental and quality-of-life benefits for local communities'.<sup>3</sup> These green spaces include woodlands, formal parks and gardens,

<sup>3</sup> National Planning Policy Framework, 2012

allotments, school grounds, street trees, golf courses, highway verges, private and domestic gardens, green roofs and green walls. GI also includes lakes, rivers, ponds and canals – as ‘blue’ infrastructure. The many benefits that GI provides include helping us adapt to climate change, reducing the city’s risk of flooding, improving the health and wellbeing of the people who live and work here, and providing valuable ecological networks that enhance biodiversity. These benefits are also known as Ecosystem Services.

Manchester has its own Green and Blue infrastructure Strategy called Manchester’s Great Outdoors. The Strategy sets out the importance of having functional high-quality green and blue spaces, and delivering its Implementation Plan is seen as an important part of realising the Our Manchester strategy. The Manchester GI Strategy was adopted in 2015 to provide the strategic backdrop for GI initiatives across the city and has proved to be a catalyst for attracting additional investment in GI.

One of these successes is the Natural Course: a €20million EU LIFE Integrated Project aimed at accelerating the delivery of the EU Water Framework Directive (WFD) objectives across the North West River Basin District. Initial

work involves a series of small-scale research interventions along the River Irwell and its tributaries, which include the Irk and Medlock in Manchester. The work is intended to gain a greater understanding of the issues affecting the catchment and develop innovative and workable solutions to increase the value of the natural environment, as well as to improve water quality in Greater Manchester and beyond.

Another high-profile success is the Grow Green project that is to be undertaken in West Gorton. A successful bid to the EU Horizon 2020 Research and Innovation programme by the Manchester Climate Change Agency will see the delivery of a €multimillion extended research project focused on identifying nature-based solutions to urban environmental problems. The highly competitive process led to Grow Green being one of only four projects across Europe to be chosen from 35 applications. Over the next five years, Manchester will be leading several other cities from Spain, Poland and France on the delivery of the programme.

The GI Strategy has also provided the strategic backdrop for a series of academic project bids co-designed and developed by University of Manchester and Manchester Metropolitan University academics and other partners for

applied GI research projects, funded by UK research councils. The funding (equating to £1.1million) is spread across three projects, which include:

- **Green Infrastructure and the health and wellbeing influences on an ageing population**, which assesses the accessibility and value of current GI for an ageing Greater Manchester population, considering options to inform decision-making to improve functionality, reduce healthcare costs and improve quality of life.
- **The contribution of domestic gardens to urban ecosystem services or My backyard** project, which examines the ecosystem services of domestic garden space in Manchester, identifying their value and prioritising areas for positive intervention.
- **Green Growth: increasing resilience in cities through the delivery of GI-based solutions**, which explores the challenges in successfully communicating GI benefits to built environment professionals, identifying solutions to the barriers and strengthening the case for GI consideration in future developments.

These projects demonstrate the ability of the GI Strategy to forge strong and valuable relationships between stakeholders, producing high-quality, transferable research to inform future decision-making.

Manchester maintains its commitment to conserve, protect and enhance biodiversity wherever it can, in compliance with the Natural Environment and Rural Communities (NERC) Act 2006. Manchester has eight Local Nature Reserves (LNR) covering 392 hectares, of which Heaton Park is both the city's largest park and its only designated Country Park. Manchester has 38 Sites of Biological Importance (SBI) covering 309 hectares, of which 58% (22) are in active conservation management.

Smaller-scale practical projects continue to be at the heart of the city's GI Strategy – projects that continue to engage and inspire communities and raise awareness of the importance of Manchester's natural environment. The citywide Forest Schools initiative turns school grounds and parks into outdoor classrooms through practical engagement sessions with children. The Lancashire Wildlife Trust (LWT) heads one initiative that to date has engaged more than 600 schoolchildren and their families in outdoor activities across sites in north and

east Manchester. The project has built relationships between children and the natural environment, raising awareness of the benefits that urban GI provides and instilling a sense of understanding and stewardship into the future. The LWT has recently secured a further £50,000 to deliver the initiative in four new schools across the Irk and Medlock Valley.

Trees are a valuable and prominent part of the city's GI and have a key role to play in ensuring Manchester is a healthy, attractive and resilient city. Manchester's Tree Action Plan was approved at the Manchester City Council's Executive on 3 January 2017. It aims to secure a long-term future for our trees and woodlands for generations to come, providing the right management and strong protection, ensuring their positive contribution to a growing world-class city. Working with partners including City of Trees and the Woodland Trust, Manchester's known tree-planting statistics for 2016/17 include the planting of 2,129 trees, 832 hedge trees, six orchards, and ten mini-orchards.

#### Contaminated land

Much of the brownfield land within the city's boundary has a long history that reflects Manchester's industrial heritage. It is recognised that this land provides a

resource and opportunity for the city as part of its ongoing regeneration. An important aim of the Council's Contaminated Land Strategy is to support a strategic approach to regeneration, and to promote and assist with the safe reuse of brownfield sites.

Where necessary, and supported by the Environmental Protection Team, sites identified as requiring detailed assessment can be reviewed and remediated through the planning development process. According to our current records, seven hectares of potentially contaminated land has been remediated under the development control process during the past year (April 2016 to March 2017). This includes land at the former BBC site on Oxford Road and at First Street in the city centre.

The Council's Environmental Protection Service works closely with other Council departments, such as Corporate Property, to provide advice on contaminated land issues, responding to preplanning enquiries from private consultants and developers. Upcoming projects the service has been approached about include the Northern Gateway and New Cross Regeneration areas.



### Air quality

Nitrogen dioxide (NO<sub>2</sub>) pollution is an issue in many towns and cities in the UK and around the world. It is primarily caused by the combustion of fossil fuels, particularly diesel, in transport. NO<sub>2</sub> is harmful to the environment and to human health, causing some 23,500 premature deaths in the UK per annum.<sup>4</sup> The Government has transposed the European Ambient Air Quality Directive (2008/EC/50) into UK law, meaning the NO<sub>2</sub> pollution standards contained in the Directive apply; the Government published the UK plan for tackling roadside nitrogen dioxide concentrations in July 2017.

While there have been improvements in air quality in recent years, parts of Manchester are still exceeding the legal limits for NO<sub>2</sub>, and these areas are declared Air Quality Management Areas (AQMAs). AQMAs are produced using a combination of monitoring station data and computer modelling. There are three permanent monitoring stations in Manchester: Piccadilly, Oxford Road, and Manchester Sharston. Table 5.1 shows NO<sub>2</sub> concentrations monitored by the two city centre locations over the past three years. These are part of a network across Greater Manchester that is supplemented by temporary diffusion tubes in order to give

an accurate picture of pollution levels. The current AQMAs were declared by the Greater Manchester Combined Authority (GMCA) in May 2016, and cover a smaller area than previously, but are still focused on the busiest parts of the road network, including areas where routes converge, such as the city centre. The AQMAs continue to be set at a precautionary 35 microgrammes of NO<sub>2</sub> per cubic metre of air (µg/m<sup>3</sup>), below the legal limit of 40µg/m<sup>3</sup>, to reflect modelling uncertainties.

**Table 5.1**  
Annual hourly mean concentration of nitrogen dioxide (µg/m<sup>3</sup>)

	Manchester Oxford Road	Manchester Piccadilly
2014	68	40
2015 baseline	66	39
2016	66	40

Source: Air Quality England

In order to make further progress in tackling poor air quality, an Air Quality Action Plan (AQAP) for Greater Manchester (GM) was published in December 2016 on the GMCA website.<sup>5</sup> The GM AQAP was subject to public consultation, and a range of actions have been identified to encourage the uptake of low-emission vehicles, motivate behavioural

change and drive technological innovation. The plan is structured around three broad themes: reducing traffic (by encouraging alternative travel modes), increasing efficiency (by making the most appropriate use of roads and vehicles for different tasks), and improving vehicles (by encouraging fewer polluting vehicles to be used). Specific areas of action include Development Control and Planning Regulation, freight and heavy goods vehicles, buses, cycling, travel choices, cars, and information and resources.

The delivery of the GM AQAP is considered an appropriate framework for the improvement of air quality across GM and the city until 2021, although the publication of the National NO<sub>2</sub> Reduction Strategy may change this.

Among these actions is a commitment to undertake an appraisal of the potential effects of Clean Air Zones (CAZs) and, to this end, Transport for Greater Manchester (TfGM) has commissioned a feasibility study into the costs and benefits of different types of CAZ in different

<sup>4</sup> Committee on the Medical Effects of Air Pollutants (COMEAP) 2015

<sup>5</sup> [www.greatermanchester-ca.gov.uk/downloads/download/78/gm\\_air\\_quality\\_action\\_plan\\_2016-21](http://www.greatermanchester-ca.gov.uk/downloads/download/78/gm_air_quality_action_plan_2016-21)

areas. This work is expected to be concluded later in 2017, and will help to inform future decisions about whether a CAZ would be effective in improving air quality and, if so, what form it should take. Another of the important actions in the AQAP concerns raising awareness of air pollution with communities, workplaces and schools.

Annual Status Reports, required to be submitted to Defra each year, will record progress of the implementation of the measures in the AQAP, and resultant air quality improvements.

The Council's Neighbourhoods and Environment Scrutiny Committee recently commissioned a Task and Finish Group to investigate the issue of air quality in Manchester and assess its impact on the health of residents. The committee's reports and recommendations can be viewed at: [www.manchester.gov.uk/meetings/committee/119/air\\_quality\\_task\\_and\\_finish\\_group](http://www.manchester.gov.uk/meetings/committee/119/air_quality_task_and_finish_group).

### Waste and recycling

The Council is committed to increasing the amount of waste recycled by providing services that meet the needs of residents. Following the successful delivery and collection of new refuse bins at over 157,000 households between August and October 2016, recycling rates increased significantly in the five full months of service from November 2016 to March 2017 (provisional figures 2016/17) (see table 5.2). It is currently forecast that over a full year the recycling rate will increase to 40% in 2017/18.

Refuse from households that received the new grey bins has decreased by 30%. This is expected to lead to a cost avoidance of more than £7million per year. In 2017/18 the Council's residential waste collection provider, Biffa, plan to review current rounds to ensure that they are as efficient as possible, as the reductions in refuse and increases in recycling have not been even across the city. The amount of residual waste collected from households has decreased from 519kg per household per year in 2015/16 to 482kg per household per year in 2016/17 (table 5.2).

**Table 5.2**  
Percentage of household waste recycled – refuse produced per household

	Refuse kg per household per year	Recycling rate	Kerbside organic tonnage	Kerbside dry recycling
2006/07	758	19%	7,678	14,814
2007/08	735	22%	9,528	13,170
2008/09	695	20%	9,414	12,872
2009/10	701	19%	11,912	16,506
2010/11	631	26%	16,185	20,900
2011/12	518	34%	24,147	24,290
2012/13	481	37%	24,703	25,446
2013/14	485	35%	24,679	25,473
2014/15	503	33%	24,874	25,752
2015/16 baseline	519	32%	24,776	26,213
2016/17 Provisional	482	36%	28,990	28,491

Source: Waste Data Flow

### Street cleansing

The standard of street cleansing in an area makes a significant contribution to the perception of an area and its appeal as a liveable neighbourhood. An effective and efficient cleansing service is essential to the creation of high-quality neighbourhoods. In order to maintain clean streets, it is also important that residents, businesses and visitors to the city are supported and challenged to take responsibility for their surroundings. During 2016/17, more street recycling bins were installed in some district centres.

One of Manchester's key priorities is to ensure that the city is clean and well maintained, and that residents are supported to take pride in and responsibility for their surroundings. Within this context it is a priority of the city to ensure that all waste is disposed of in a regulated manner via waste disposal and recycling facilities, and to stop all incidents of fly-tipping from occurring.

There are over 1,600km of public highways in Manchester, and the street cleaning service is responsible for the cleansing of public rights of way, passageways, central reservations, open spaces and recycling sites. There is also the challenge of cleansing a busy city centre

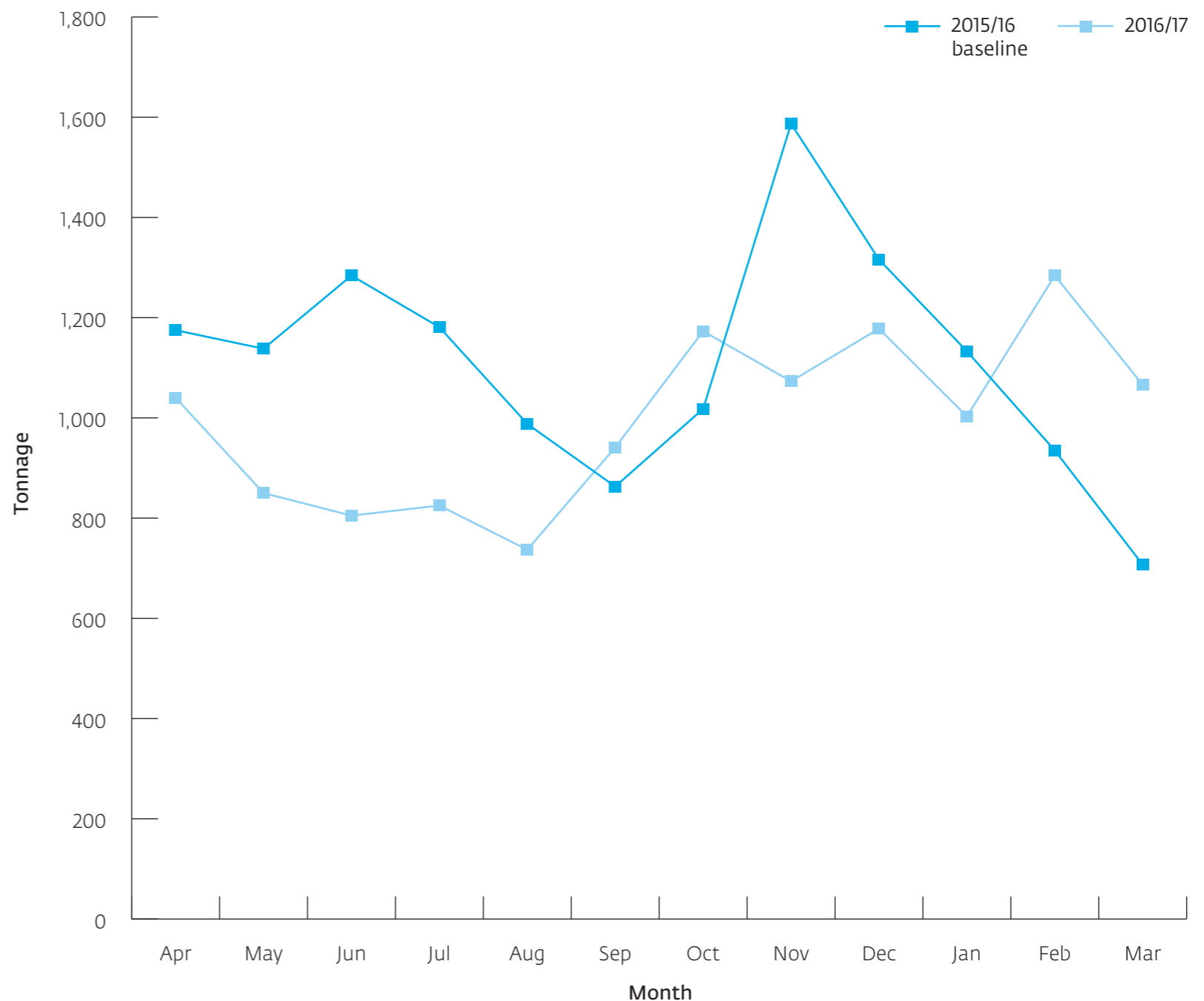
that operates 24 hours a day, seven days a week, in addition to a number of vibrant local district centres.

In the new collection and cleansing contract, the Council's waste collection partner is trying to embed a new working culture to keep streets clean rather than focus on frequency of cleansing. New methodologies for reviewing and cleansing of streets have been introduced, and further changes will take place during 2017/18. Supervisors have their own area they are responsible for that gives greater accountability to Biffa for the cleansing of the city. This could reduce the number of jobs logged, as there will be a more proactive approach.

Figure 5.1 illustrates the tonnage of street cleansing waste collected during 2015/16 and 2016/17. In 2015/16 some mixed loads may have been tipped, so the street cleansing waste could have included some fly-tipping or ground waste. The data from 2016/17 will now be used as a baseline for the Our Manchester strategy, as this data is more reliable than ever before due to separate collection teams rather than generic cleansing teams.

Officers continue to work closely with communities and partners to address littering and fly-tipping hotspots through a process of education and enforcement, together with a programme of direct action in partnership with the local community. Guidance is given to local residents and businesses on their environmental responsibilities, and enforcement notices are issued to those who persist in non-compliance. One of the main aims of this work is to deter fly-tipping. Fly-tipping is a criminal activity and is an immediate offence punishable by prosecution. However, in order to effect a prosecution, very strong evidence is required, including witnesses who must be willing to give a statement informing the Council of who was responsible (or provide a vehicle registration number). Ideally, there should also be evidence in the fly-tipped waste itself to corroborate the statements.

**Figure 5.1**  
Street cleansing tonnages 2015/16–2016/17



Source: Weighbridge data: Viridor and Redgate Holdings

A new fly-tipping enforcement team was set up in late April 2016 consisting of three teams, covering the north, central and south areas of the city. This team is proactively investigating fly-tipping and collecting evidence that is passed to the neighbourhood compliance team so they can take enforcement action against the perpetrators.

The challenges associated with prosecution mean that other interventions are needed to complement the formal enforcement procedures. These measures, undertaken with our agencies and partners, will aim to ensure overall compliance and reduce the incidents of fly-tipping. They include:

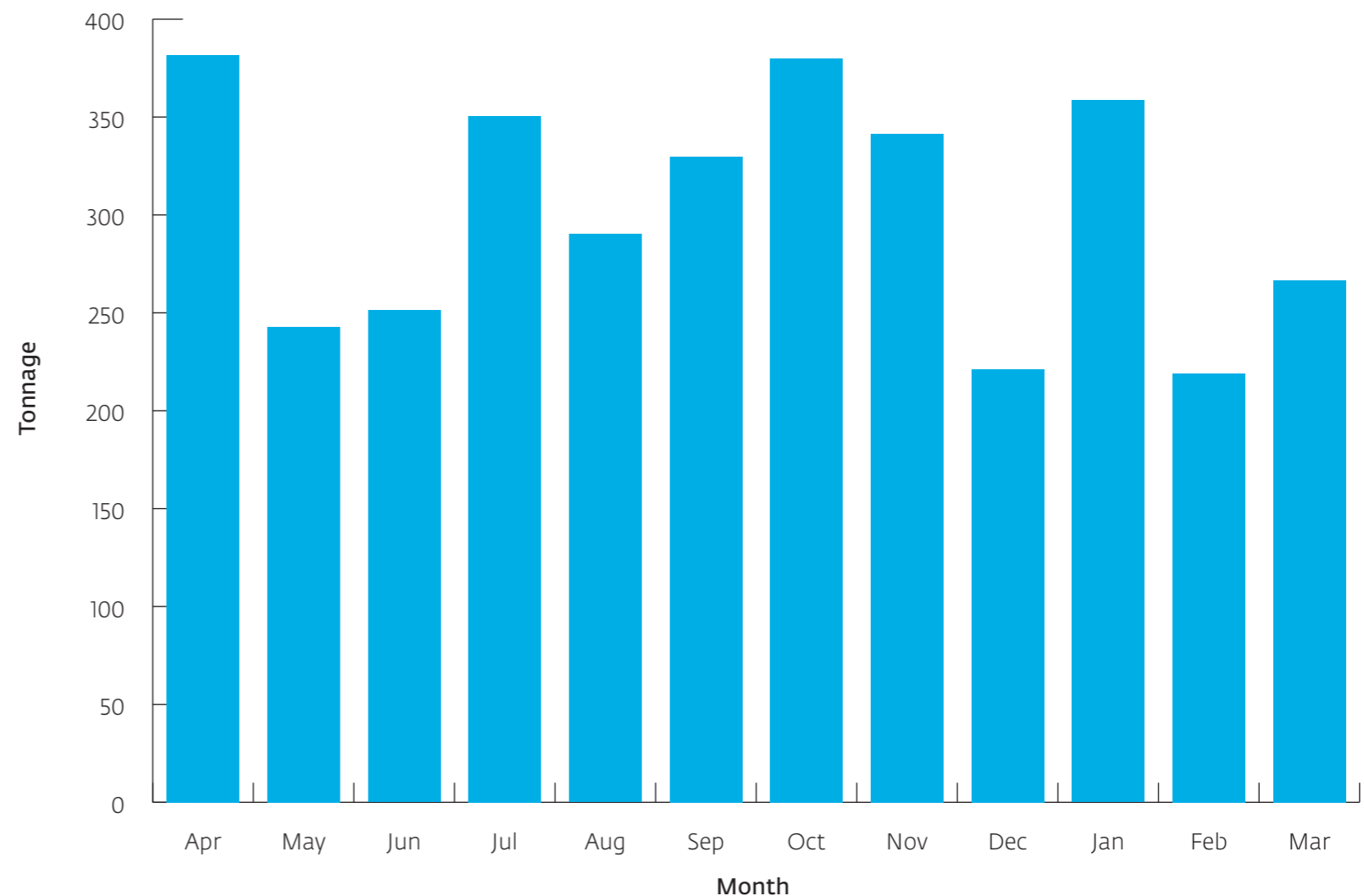
- Regular, intensive monitoring in hotspot areas
- Action days alongside other Council departments and partner agencies to try to reduce dependency on the Council, encourage greater ownership of areas, and achieve behavioural change
- Advice/education and information given across a wide range of topics, including recycling, tenancy advice, responsible dog ownership, and mediation
- Advisory signage, eg. signs on alley-gates warning against fly-tipping

→ Proactive visits to businesses to check they have commercial waste disposal contracts.

Fly-tipping tonnages during 2016/17 have averaged 302 tonnes a month. This year is the first year that accurate data has been

available, as in previous years fly-tipping has been collected with ground waste or other street-cleansing material, such as litter-bin waste. These tonnage figures give us a baseline for future years so we can monitor progress for the Our Manchester strategy.

**Figure 5.2**  
Fly-tipping tonnages 2016/17



Source: Weighbridge data: Redgate Holdings

Fly-tipping remains a constant challenge for the city and there is no simple approach to remedy the issue. Only by acting in partnership with other agencies and partners to deliver a wide range of different compliance and educational interventions will the city achieve its aims of reducing the number of incidents.

During 2016/17, the visual environment will continue to be a key priority for the city. Examples of planned actions for this year include:

- Closer ties and more integrated working with Registered Social Landlords and housing companies
- Increasing the number of businesses with an obligation to have a designated person responsible for waste management, and a clean premises business plan to include the external areas of the building
- Taking enforcement action against those businesses not willing to take responsibility for litter related to their premises and land
- Continuing to investigate fly-tipping in alleyways, and educating and enforcing on the perpetrators of alleyway dumping.

## Housing

The Residential Growth Strategy (2016–2025) has been developed within the context of the Our Manchester strategy and sets out the city's plans to deliver a minimum of 25,000 new homes over the next decade. The Strategy sets out six priorities that will support the city's sustained growth and ensure that there is affordably priced housing for sale and rent. The city's objectives are as follows:

- Increase house-building on existing and new sites
- Improve the quality and sustainability of the city's housing
- Increase opportunities for homeownership
- Expand the family-housing offer
- Professionalise the private-rented sector
- Provide appropriate housing options for retirement living.

Key locations identified by the Residential Growth Strategy for new housing development include the north, east and central areas of Manchester. This relates to the potential for high-density development in the city centre and further opportunities linked to the de-industrialisation of the inner city.

In addition to this, the recently agreed Manchester City Council Housing Affordability Policy Framework sets out the city's determination to ensure a strong supply of decent, secure housing to rent or buy for people earning average household incomes in the city. The new framework strengthens our approach by redefining affordability to include a wider suite of tenure options, including traditional affordable housing, and intermediate and low-cost home ownership housing. To achieve this, it recommends that we aim to deliver between 1,000 and 2,000 new affordable homes in Manchester each year.

## Residential development activity increasing

Manchester is committed to building a minimum of 2,500 new homes each year. Over the past few years there has been increasing evidence that confidence is returning to the market, and the city has begun to see real progress in delivering the quantity of residential development required to meet the demands of a growing population.

There were in excess of 1,600 new homes completed across the city in 2016/17 (a 9% increase on 2015/16). Moreover, the city saw nearly 4,000 units start on-site during this time (a 36% increase in starts on 2015/16), including 15 apartment schemes delivering

more than 100 units each. As a consequence we expect to see completions come close to 3,000 units in 2017/18. Manchester has also seen a significant increase in residential units given planning permission, rising from 5,393 in 2015/16, to 8,445 in 2016/17 (an increase of 57%).

Despite the city being a long way off the peak of residential development in 2007/08 (see table 5.3), the upturn in completions and the spike in developments starting onsite suggests recovery in housebuilding following the recession in 2009 is now well underway. This is in no small part the result of a number of innovative new partnerships designed to increase the supply of new housing, including Manchester Life (six sites in phase 1 totalling 1,015 units) and One Manchester (including two sites in Hulme totalling 167 units).

Through the Greater Manchester Devolution Agreement the city region secured a £300million Housing Fund to invest in residential development over the next ten years. In Manchester this investment addressed funding gaps on six sites during the last year (which will help to deliver in excess of 2,000 units).

In Manchester, the first phase of the Housing Investment Fund (HIF) programme was completed in 2016 through Matrix Homes

(a joint venture partnership between the Council and the Greater Manchester Pension Fund set up in April 2014). This phase invested £24million across five sites in the city, bringing forward 240 new homes for sale or market rent. Phase 2 of the HIF programme will deliver a further five mixed-tenure residential sites (again in partnership with the GM Pension Fund using the Matrix Homes brand of family housing) with construction beginning in early 2018.

**Table 5.3**  
Manchester residential completions by financial year

	Residential completions
2007/08	5,412
2008/09	2,513
2009/10	2,048
2010/11	1,010
2011/12	960
2012/13	1,334
2013/14	1,133
2014/15	1,351
2015/16 baseline	1,524
2016/17	1,654

Source: 2007/08-2012/13 Manchester City Council, Council Tax Register. 2013/14-2016/17 Manchester City Council, Residential Growth Sites monitoring (including all homes across all tenures completed on sites expected to deliver in excess of ten units, as well as Affordable Homes completions on infill sites)

In recent years, better-quality operators and institutional investors have started to professionalise the residential-lettings market through the development of new purpose-built homes for the Private Rented Sector (PRS). The past year has seen various PRS schemes completed in the city centre, including the Assembly on Cambridge Street (282 apartments, of which 157 are managed for rent) and XI Eastbank on Great Ancoats Street (111 apartments).

Recently, progress has also been made in the Northern Gateway. Over the course of a decade this scheme is expected to unlock more than 300 acres of development land for the provision of up to 10,000 new houses on sites north of Victoria Station, including Noma, New Cross, the Lower Irk Valley and Collyhurst. Far East Consortium International (FECI) has been confirmed as the delivery partner for this scheme, which will start with the first phase of some 750 units on Angel Meadow at Noma.

### Demand out of sync with supply

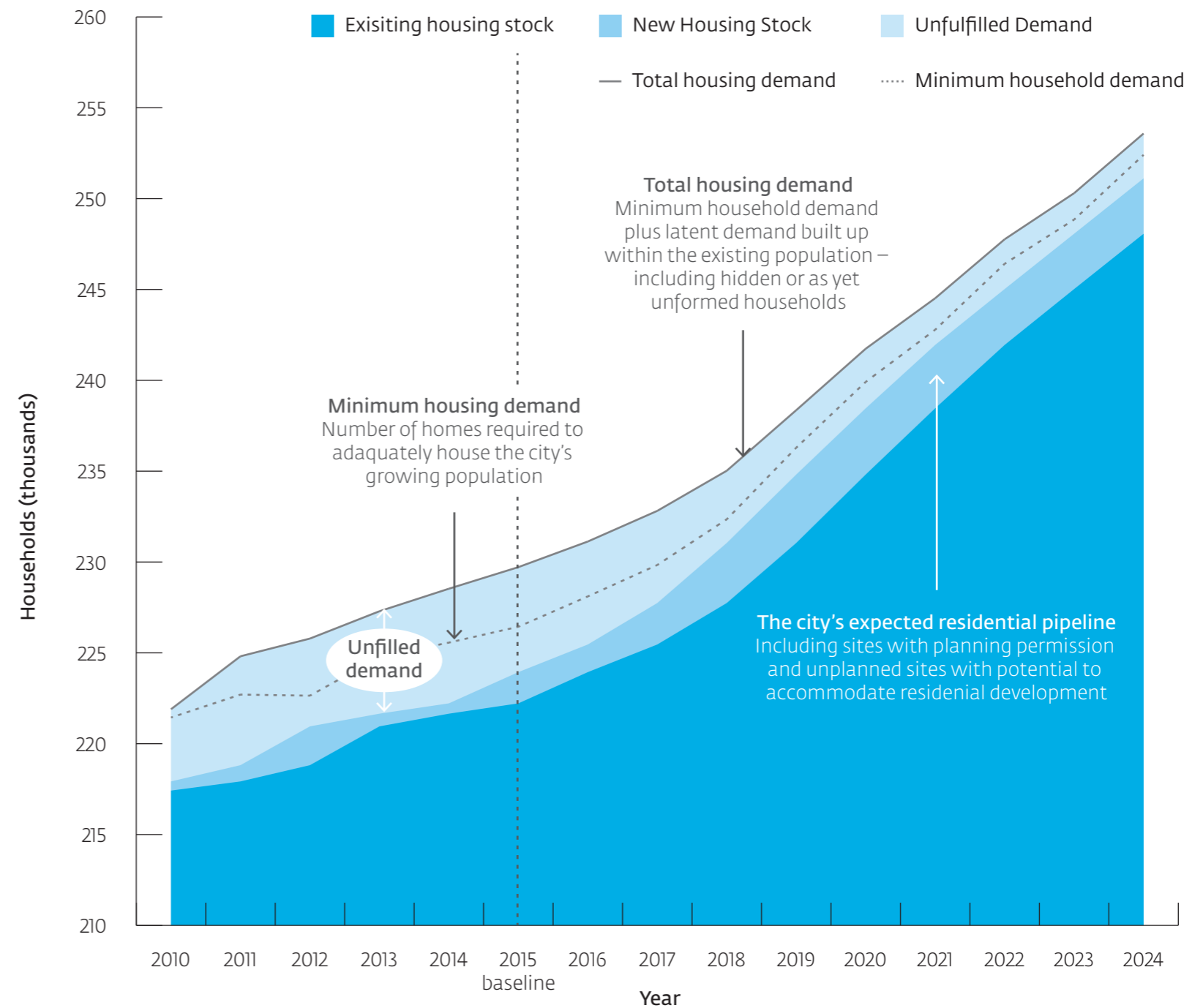
Despite residential development activity increasing and the media's perception of an oversupplied market, there is still much more to do to meet existing and future demand. Historically, low levels of new supply coupled

with rapid population growth has led to demand for housing far outstripping supply over the past ten years. Despite the upturn in activity, there remains a risk that a continued undersupply could become a major impediment to growth.

The Council's Residential Absorption Rate Model, launched at MIPIM 2017,<sup>6</sup> presents an analysis of the extent to which the city's housing market is undersupplied. It was developed to understand how expected new housing supply will be absorbed in the period up to 2025, based upon demographic projections including Manchester City Council's in-house population forecasting model (MCCFM).

This analysis demonstrates that while there has been an upturn in residential development, the city remains consistently undersupplied by more than 2,000 units every year in the period to 2024 (see figure 5.3). This assumes all proposed developments will be built, despite the fact that some two-thirds of the city's expected residential pipeline is currently unconsented. With this in mind, significant capacity remains, and bringing forward large-scale residential development is still a critical priority for the city.

**Figure 5.3**  
Housing demand vs the city's expected residential pipeline



6 An international property market event

Source: Manchester City Council, Residential Growth Sites monitoring (including all homes across all tenures completed on sites expected to deliver in excess of ten units, as well as Affordable Homes completions on infill sites)



### Exceptionally strong market fundamentals

The build-up to 2016/17 saw a surge in the number of sales, as Buy-To-Let (BTL) investors sought to push transactions through in order to avoid the higher rates of Stamp Duty Land Tax (SDLT), which came into effect in April 2016. Consequently, the number of sales significantly reduced from 8,961 in 2015/16 to 7,238 in 2016/17 (a 19% reduction), as BTL investors became liable for the 3% SDLT surcharge, ensuring that most investors completed transactions by the end of the 2015/16 financial year.

Despite this, sales prices are increasing. This is partly due to the new-build premium as the volume of residential completions increases. It is also linked to the number of overseas buyers looking at buying property at a reduced rate following the referendum and subsequent devaluation of the pound. City centre prices averaged £178,445 in 2016/17, up from £164,323 in 2015/16 (a 9% increase). In Manchester (excluding the city centre) prices averaged £168,266 in 2016/17, up from £160,684 in 2015/16 (a 5% increase).

The private-rented sector continues to be the dominant tenure in the city centre. City centre rents have increased over the past five years, but the latest data suggests that the rate of growth has slowed over the past 12 months,

up to £971 in 2016/17 from £969 in 2015/16 (a 0.2% increase). However, in the majority of city centre neighbourhoods (including Ancoats, Castlefield and New Islington) rents remain below the average (£971 for a two-bed) even in areas with large numbers of new-build homes. Citywide rents have also increased to £696 in 2016/17 from £675 in 2015/16 (a 3% increase).

### Changing demand: a driver in the student housing market

After an initial dip, the total student population has now recovered to a position comparable with the pre-fees rise peak in 2012. There are more international and postgraduate students, particularly in the city centre. Students now account for between a quarter and a fifth of all city centre residents following a continuing shift away from the more traditional south Manchester neighbourhoods.

Roughly half the city centre's student population lives in mainstream accommodation largely concentrated around Oxford Road and Whitworth Street West. In this area the surge in demand and a lack of supply has created significant price dynamism in the market. Rental inflation in the core student area of the Oxford Road/Whitworth Street Corridor is above the city centre average.

Meanwhile, the student housing market in other areas of the city is largely concentrated in Fallowfield, Withington and Old Moat, where there is evidence that the scope and scale of student tenures are contracting, freeing up former student lets for working families. This is expected to have a positive impact upon longstanding issues such as antisocial behaviour and noise complaints in areas where students are interspersed with working residents.

### Increasing opportunities for low-cost home ownership

Affordable market-housing products remain available for aspiring resident homeowners in various parts of the city, but more work is needed to maintain the balance between income and housing costs. The Council's Housing Affordability Policy Framework links household income to the provision of new homes across the city. The policy recommends that we aim to increase the number of homes affordable to Manchester residents by 1,000 and 2,000 each year.

The Council is currently developing an Affordability Monitoring Model to track the ongoing delivery of affordable sales to owner-occupiers in order to meet, or exceed, the 1,000–2,000 target. In addition, the Affordable

Homes Programme (AHP) funded the delivery of 228<sup>7</sup> homes in 2016/17 (over 20% of all the homes were built outside the city centre): this was a 66% increase on the 137 homes delivered the year before.

In recent years, interest rates have fallen (including those available to first-time buyers) to levels among the lowest on record. Moreover, the Government is committed to increasing home ownership through Help to Buy. This has helped to increase the number of sales to owner-occupiers, including first-time buyers and residents on average household incomes.

### Planning and the Greater Manchester Spatial Framework – the right land in the right spaces

The Local Plan is used for making decisions on planning applications. In Manchester the current Local Plan is the Core Strategy, which was adopted in July 2012. In order to deliver the Our Manchester strategy's vision for well-designed, energy-efficient, sustainable and affordable homes, the Manchester Residential Quality Guidance document was approved in 2016. This is the first time Manchester has

produced a residential design guide and it sets out the key ingredients that should be addressed in designing, building and managing residential development in order to achieve what the city expects. In doing so, the document provides a clear direction on what is required to raise the quality of residential developments across Manchester and deliver sustainable neighbourhoods of choice where people will want to live.

The Greater Manchester Combined Authority devolution deal will allow the Mayor to produce a Spatial Development Strategy (a planning-policy document covering all of Greater Manchester) alongside the districts' own Local Plans. In advance of the Mayoral election, the ten local authorities in Greater Manchester worked together to develop the Greater Manchester Spatial Framework (GMSF), which could become the Mayor's Spatial Development Strategy.

The draft GMSF, which was subject to consultation in autumn/winter 2016/17, includes policies that establish:

- The amount of housing and employment land needed and the distribution between each district up to 2035

- Infrastructure requirements, such as health, education, transport, green spaces and utilities to support neighbourhoods and employment
- Policies to protect and improve the natural environment, and tackle wider environmental problems, such as poor air quality, flood risk and climate change.

### Looking forward

Development activity in the city is increasing and approximately 3,000 new homes are expected to be completed next year. The future pipeline is also now much stronger, as the interventions that have been put in place to encourage and stimulate the market are coming to fruition. In particular, 2016/17 saw many innovative new partnerships start delivering new housing in the city centre and elsewhere.

However, more work is needed to ensure that the residential growth target of 25,000 homes over the next ten years is achieved. In order to direct future residential growth, the Residential Growth Action Plan for 2017–2022 sets out the following priorities:

- Progress the Northern Gateway to contribute up to 10,000 new homes over the next 10–15 years;

<sup>7</sup> Including social rent, affordable rent, shared ownership and rent to buy

- Establish an affordable housing monitoring framework to track progress towards delivering between 1,000 and 2,000 affordable homes each year;
- Progress residential developments in areas of Holt Town, the Lower Medlock Valley and Piccadilly Basin guided by refreshed regeneration frameworks focused on achieving a solid development platform similar to that established in Ancoats and New Islington;
- Work closely with colleagues at Manchester Life to make preparations for phase 2 of the delivery programme to ensure that momentum is maintained.

## Community safety and cohesion

### Community safety: how we work

The Crime and Disorder Act 1998 introduced Community Safety Partnerships (CSPs) in recognition of the need for different agencies to work together to tackle crime and antisocial behaviour. Under the Act, CSPs are required to set out their vision, strategic objectives and performance indicators, against which the Partnership and composite agencies can measure reductions in crime and antisocial behaviour.

Manchester's CSP brings together the Council, Greater Manchester Police (GMP), offender management services, Public Health Manchester, Greater Manchester Fire and Rescue Service, housing providers, the Greater Manchester Police and Crime Commissioner, the universities, and Voluntary and Community organisations. The current three-year Community Safety Strategy contains the following eight priorities:

- Reduce antisocial behaviour
- Tackle alcohol and drug-related crime
- Change offender behaviour
- Support vulnerable people
- Tackle serious and organised crime
- Tackle the crimes of most impact (domestic abuse, violent crime, robbery and burglary)
- Tackle hidden crimes (child sexual exploitation, female genital mutilation, modern slavery, honour-based violence, and forced marriage)
- Make the city centre safer.

Meeting these priorities contributes towards the delivery of the Our Manchester strategy and the vision of clean, safe, attractive and cohesive neighbourhoods.

Since 2012, the CSP has worked closely with the Greater Manchester Police and Crime Commissioner (PCC) to ensure that they are informed about local priorities and can make informed commissioning decisions. The CSP looks forward to working with the newly elected Mayor for Greater Manchester.

Public-sector reform cuts across all areas of work, including community safety. Work is ongoing across Greater Manchester to change the way public services work so they can help people become more independent and connect to jobs and growth. In addition, new and improved ways of working are being developed that aim to identify and address problems much earlier. The Justice and Rehabilitation reform priorities include young offenders, women offenders and Integrated Offender Management.

### Community safety: delivering on our priorities

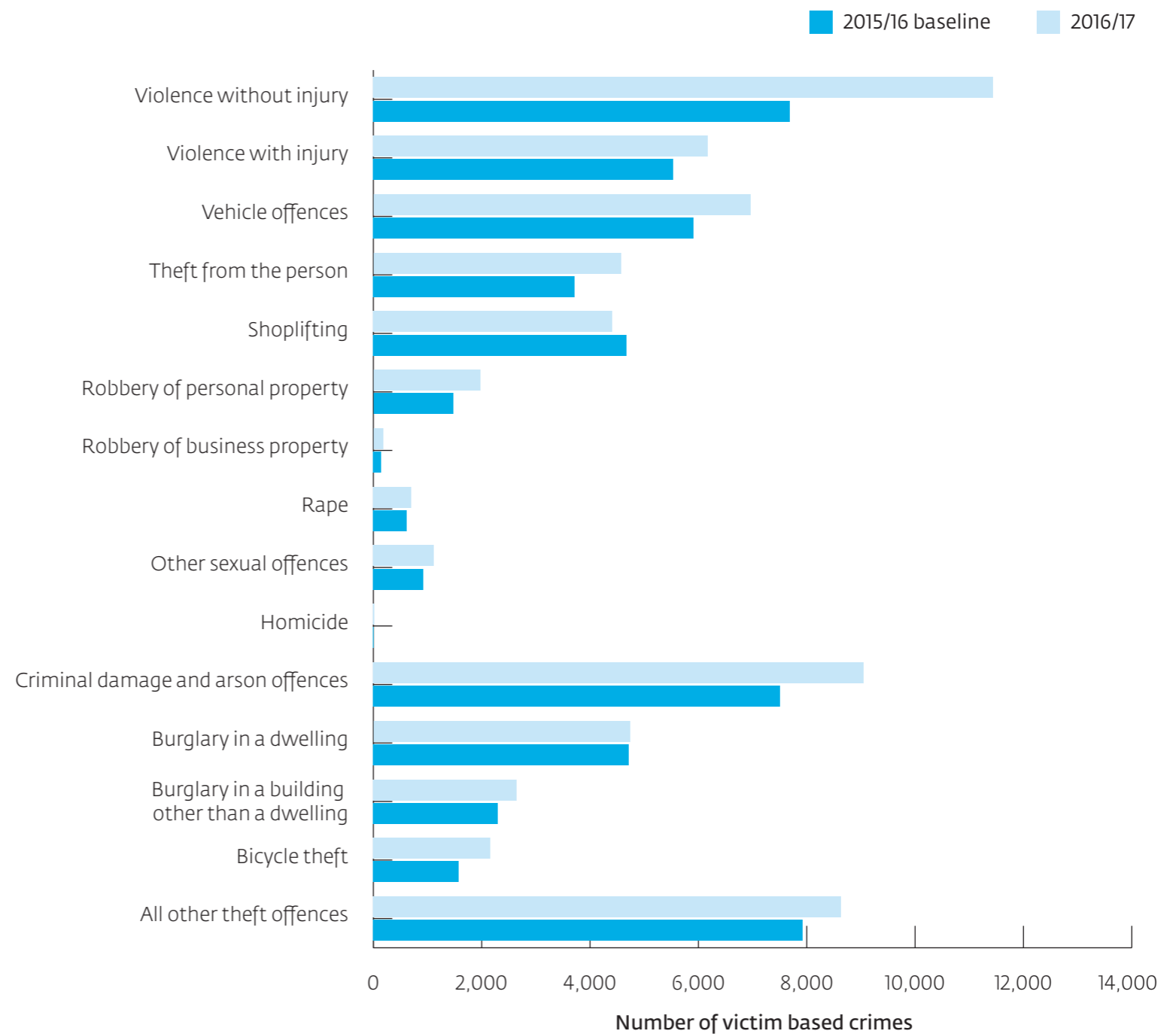
#### Victim-based crime

Victim-based crime is a broad category that includes offences of violence against the person, including homicide, violence with injury, violence without injury, sexual offences (including rape and other sexual offences), acquisitive crime (including robbery, burglary, vehicle crime, shoplifting and theft), and criminal damage.

A total of 64,743 victim-based crimes were reported across Manchester between April 2016 and March 2017: an 18% increase compared to the same period the previous year. In 2014, HM Inspectorate of Constabulary inspections into crime recording encouraged forces across the country to improve their procedures and move to a more victim-centred approach; further changes in recording took place in October 2016. As a result, these improved recording practices have contributed towards some of these increases, and they are not confined to Manchester.

The changes in recording have affected some types of crime more than others. The 12 months from April 2016 to March 2017 saw relatively high increases in violence without injury, bicycle theft and personal robbery, with much smaller increases in domestic burglaries, violence with injury and miscellaneous thefts (figure 5.4).

**Figure 5.4**  
Victim-based crime in Manchester (2015/16 and 2016/17)



Source: GMP Business Intelligence, April 2017

In the longer term over the past ten years, crime types that have seen the biggest reductions are business and personal robberies, criminal damage offences, and non-domestic burglaries. The publicity generated by high-profile offenders over the past three years has encouraged victims of rape and other sexual offences to come forward. As a result, there has been an increase in the reporting of these crimes, including some historic offences.

Higher levels of theft from the person have mainly been caused by an increase in the number of mobile phones being stolen. Technological advances have helped to reduce some acquisitive offences, but in other areas they have opened up new criminal opportunities, with multifunctional, expensive and easily portable gadgets being a particularly attractive target. The Community Safety Partnership continues to work with premises and individuals around personal safety and crime prevention. This has included supplying students with personal safety equipment and advice, providing a Safe Haven in the city centre on a Saturday night for vulnerable people, highlighting insecurities to businesses to reduce shoplifting, and working with licensed premises to improve security and reduce violence and theft in the night-time economy.

#### Antisocial behaviour

Over the past 12 months, the number of antisocial behaviour incidents reported to Greater Manchester Police across Manchester has reduced by 2% (from 33,859 to 33,135). Some of these reductions may be due to changes to recording practices with incidents previously classed as antisocial behaviour now being classed as a crime.

The biggest increase during 2016/17 involved calls about begging and/or vagrancy, which rose from 2,193 in 2015/16 to 2,820 in 2016/17, the majority of these increases being in the city centre. The rise in beggars/rough sleepers and associated issues has been a significant cause for concern and the CSP has worked with colleagues from the voluntary and community sector to address this.

Coffee4Craig working in partnership with Street Support was commissioned to co-ordinate and improve the delivery of safe and effective street-based services to rough sleepers.

The work aims to ensure that street-based services take a consistent approach, that they are better co-ordinated and better connected to other services from both the statutory and voluntary sector, and that people who have experienced homelessness have a voice.

Coffee4Craig has begun to identify and work with various street-based groups to promote the Coalition of Relief and to develop some minimum standards, guidance and training. The website [www.streetsupport.net](http://www.streetsupport.net) has been developed to allow the public to donate money. It also promotes ways people can give help, highlighting the specific types of help needed. Since Manchester's Homelessness Charter was launched in May 2016, 199 pledges of help and support have been received from individuals and organisations.

Antisocial behaviour tools and powers have been used to tackle beggars and rough sleepers where there has been associated antisocial behaviour, such as aggressive begging, litter, or other community-safety issues. A three-stage approach has been developed, which involves approaching and engaging beggars/rough sleepers, providing information and gathering evidence. In cases where problems persist or are serious, enforcement action is pursued, and Community Protection Notice warnings and Community Protection Notices have been issued.

New Psychoactive Substances (NPS) continue to create challenges for the Community Safety Partnership. The use of 'Spice' has been extensive among beggars and rough sleepers.

In 2015, Manchester Metropolitan University was commissioned to conduct a prevalence study of the various uses of NPS among five groups, including beggars and street homeless, students and clubbers. This has helped to inform our approach to dealing with the challenges presented by the use of these substances.

Other issues that also saw an increase included vehicle nuisance and calls about abandoned vehicles. However, reports of neighbour nuisance complaints made to GMP reduced considerably, by 15% (4,198 in 2015/16 compared to 3,558 in 2016/17).

The Community Safety Partnership has commissioned a number of peer-mentoring projects to address crime and antisocial behaviour involving young people. Manchester Young Lives (MYL) have used intensive mentoring and activities to target those disengaged from mainstream activities, working to engage them in positive and engaging activities to reduce the risk of harm to themselves and others. MYL have also addressed a range of issues with the aim of improving aspirations and opportunities in education, employment and training.

#### Domestic violence and abuse

Over the past three years, 13,621 domestic-abuse crimes were reported in Manchester, with 4,673 being reported in the year to March 2017 (table 5.4). This represented a 7% increase on the number reported in the previous 12 months (4,353). Over 80% of domestic-abuse crimes were linked to violence, 9% involved criminal damage and 4% were linked to sexual offences.

**Table 5.4**  
Domestic abuse crimes in Manchester (2014/15 to 2016/17)

	2014/15	2015/16 baseline	2016/17
<b>Violence against the person</b>	3,757	3,461	3,837
<b>Sexual offences</b>	188	218	183
<b>Robbery</b>	24	21	20
<b>Theft offences</b>	197	227	199
<b>Criminal damage</b>	429	426	434
<b>Total</b>	4,595	4,353	4,673

Source: GMP Business Intelligence

Manchester's new Domestic Violence and Abuse Strategy was launched in June 2016. Since then, statutory and voluntary sector partners have been working together to develop an action plan and deliver the five key pledges identified in the strategy. These are:

- preventing abuse
- supporting people to seek help
- managing safety
- training and workforce development
- adapting delivery models in response to changing demand.

Progress has been made in a number of areas, such as:

- 300 professionals have attended specialist so-called honour-based abuse training
- 200 community members have attended female genital mutilation awareness-raising events and 20 women have trained to become peer mentors
- 230 Early Help staff have received domestic-violence and abuse training
- Manchester City Council and the Police and Crime Commissioner have jointly funded an LGBT Independent Domestic Violence Adviser. In April 2017, GMP became the first police force in the UK to record domestic abuse in the LGBT community.

A series of targeted communication campaigns were used to raise awareness of domestic abuse. These were targeted towards

specific groups, such as young people, and covered topics such as sexting, social media, dating, and unhealthy relationships. Other campaigns were targeted towards Black, Asian or Minority Ethnic (BAME) survivors, family and friends of domestic-abuse survivors, and perpetrators. Alongside this the Police and Crime Commissioner's Office has had a Greater Manchester campaign running to raise awareness of domestic violence and abuse, particularly coercive and controlling behaviours, which became illegal in December 2015.

Investment in IRIS (Identification and Referral to Improve Safety) has continued. IRIS is a programme that provides training for GPs and all staff within the practice to recognise possible signs of domestic abuse. It teaches them how to ask patients whether they are affected and provides ongoing support they can refer victims/survivors to. We aim to have all Manchester's GP practices IRIS-trained by March 2018.

Hidden crimes such as child sexual exploitation, female genital mutilation, forced marriage, so-called honour-based violence, and modern slavery continue to be a challenge for the CSP. People affected by these crimes are less likely to report them to the police or other agencies for a variety of reasons, including fear of

repercussions, a mistrust of agencies, reliance on the perpetrator, because the perpetrator may be a family member, or a lack of understanding of their rights. These types of crimes can have a long-term damaging effect on people's lives, but their hidden nature means it can be difficult to estimate their prevalence, gather intelligence, and prosecute offenders. Over the past two years we have begun to better understand these issues. Through the work we have undertaken with colleagues from voluntary and community organisations we have begun to see an increase in the number of crimes reported; however, we know there is still work to be done in this area.

The CSP is due to refresh its three-year Community Safety Strategy later this year, and will ensure that this reflects the priorities of those who live in, work in and visit Manchester.

### Hate crime

Manchester published its second three-year Hate Crime Strategy in 2016. This strategy contains seven objectives:

- Support victims of hate crime and hate incidents
- Prevent hate crime
- Increase the reporting of hate crime and hate incidents
- Take effective action against perpetrators
- Improve partnership responses
- Continue to build cohesive and resilient communities where hate crime and discrimination are not tolerated
- Target online hate crime.

A total of 596 incidents and 1,877 crimes reported to GMP between April 2016 and March 2017 had links to one or more of the six monitored hate strands. This represented a 21% increase compared to the same period the previous year (table 5.5).

**Table 5.5**  
Hate incidents and crimes linked to monitored strands (Manchester 2014/15 to 2016/17)

	2014/15		2015/16 baseline		2016/17	
	Incidents	Crimes	Incidents	Crimes	Incidents	Crimes
Race	272	1,026	362	1,288	431	1,520
Religion	46	77	86	133	85	217
Sexual orientation	40	140	77	154	90	241
Disability	10	31	18	49	28	47
Transgender	4	15	12	16	25	23
Alternative subcultures	1	0	1	4	1	3
<b>Total links to monitored strands</b>	<b>373</b>	<b>1,289</b>	<b>556</b>	<b>1,644</b>	<b>660</b>	<b>2,051</b>
<b>Total hate incidents and crimes</b>	<b>344</b>	<b>1,228</b>	<b>501</b>	<b>1,540</b>	<b>596</b>	<b>1,877</b>
Anti-Semitic	21	38	13	42	33	35
Islamophobic	16	41	60	94	31	86

Source: GMP Business Intelligence, May 2017

In recent years, the increase in the number of hate crimes reported has generally been seen as a positive trend, as it indicates that victims have the confidence to report to the police or to third-party reporting centres. However, hate crime and xenophobia began to increase across Manchester a few weeks before the EU Referendum on 23 June 2016. The number of hate crimes and hate incidents increased sharply following the Brexit result. This trend was reflected nationally by Home Office figures, which indicated that racially and

religiously aggravated offences increased across all police forces during July 2016: a 41% increase compared to July 2015.

In response to this increase and following consultation for the refreshed Manchester Hate Crime Strategy 2016/19, the CSP ran an additional grant scheme during the summer and autumn. More than forty events were held to raise awareness of hate crime and hate incidents, encourage reporting, celebrate diversity and promote community

cohesion. Hate Crime Awareness Week 2017 took place between 6 and 12 February, with 46 events being held across Manchester.

The CSP continues to develop its work with third-party reporting centres. These centres allow victims to report hate crime, in confidence if required, and receive specialist support. There are now 39 centres across Manchester. Working with the Police and Crime Commissioner and other local authority areas, Manchester is developing a training package and minimum standards for all centres operating across Greater Manchester to ensure that victims receive a consistent service.

### Community cohesion

In addition to addressing all instances of hate crime, the city embraces and works to improve the lives of the minority groups that make up its diverse character. The city's Manchester Day is a showcase for our diversity and cohesion. Festivals such as Manchester Pride and the Mela are major celebrations in the city's calendar, attracting people from the city and far beyond.

We must continue to ensure that the sense of cohesive, integrated communities that forms the lifeblood of our neighbourhoods is retained, and that those communities are empowered



and engaged. Manchester is a diverse, friendly, welcoming place that dares to be different, with a defining 'can do' attitude and community spirit. This is central to what makes the city unique. As the city grows, these values should strengthen and spread, becoming embedded in proud Mancunians and forming a core tenet of the city's identity.

The Our Manchester Survey was commissioned to replace the Manchester Resident Survey when it came to an end in 2015/16. The new online approach has been aligned to the Our Manchester strategy and adopts a more open and strength-based approach, asking questions such as 'What's good about your area?', 'What support would you need to play a more active role in your community?' and 'What's good and what could be better about local public service delivery?' The survey is promoted through various channels, including social media, the customer service centre and mail-outs, and went live in February 2017. Owing to the short time the survey has been running, the number of responses are lower than required to make it representative of all Manchester residents. Once a representative sample has been achieved, analysis of the responses will be published on the Council's website and made available in future State of the City Reports.

### Libraries, culture, leisure, sport and volunteering

The city's key cultural, sport and leisure spaces, including our libraries, parks and galleries, play an integral role in creating an attractive and liveable city for residents and visitors alike. A key 'we will' is to invest in cultural and sports facilities for the benefit of the city's residents and to improve the city's international attractiveness.

Table 5.6 below gives the total number of visits to the city's main cultural and recreational facilities over the 12-month period to April 2017. Overall, there has been a 10% increase in visits between 2015/16 and 2016/17, with leisure and galleries each seeing an exceptional above 15% rise in visits.

**Table 5.6**  
Number of visits to Manchester City Council's cultural and recreational facilities

	2005/06	2015/16 baseline	2016/17	Annual change %
<b>Galleries</b>	273,717	534,682	618,656	16%
<b>Leisure</b>	N/A	2,961,586	3,408,147	15%
<b>Libraries</b>	3,009,500	2,801,136	2,917,688	4%
<b>Central Library</b>	N/A	1,480,941	1,474,655	-0.4%
<b>Total</b>	3,283,217	6,296,922	6,944,815	10%
<b>Parks: attendance at activities and events</b>	N/A	486,216	669,163	38%

Source: Manchester City Council

Table 5.7 shows continued growth in attendance at activities, events and educational sessions at leisure and cultural venues across the city, with an overall increase of 5% across the year.

Table 5.8 provides details of the top 10 most visited free attractions in Manchester, compiled from those submitting data to the annual STEAM<sup>8</sup> process. As is shown, our galleries, museums and cultural venues continue to attract substantial numbers of visitors, helping to confirm Manchester's role as the nation's second cultural centre outside of London.

**Table 5.7**

Number of attendances to activities, events and educational sessions through Manchester City Council's cultural and recreational facilities

	2005/06	2015/16 baseline	2016/17	Annual change
<b>Galleries</b>	14,394	97,888	101,455	4%
<b>Sport, leisure and parks</b>	N/A	1,116,205	1,136,747	2%
<b>Libraries</b>	30,600	136,926	182,864	34%
<b>Total</b>	44,994	1,351,019	1,421,066	5%

Source: Manchester City Council

**Table 5.8**

Top visitor attractions in Greater Manchester that are located in Manchester

	Attraction	2015 baseline	Admittance
1	Museum of Science and Industry	695,275	Free**
2	HOME	619,658*	Free**
3	Manchester Art Gallery	593,169	Free
4	Manchester Museum	453,970	Free
5	National Football Museum	411,991	Free**
6	The Whitworth	400,257*	Free
7	Runway Visitor Park	360,500	Free**
8	The John Ryland's Library	178,453	Free
9	Manchester Cathedral	153,209	Free
10	The People's History Museum	86,595	Free

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

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

Source: STEAM

## Libraries

In 2016/17, there were more than 2.9million visits to libraries across the city, with just under 1.5million of these being to Central Library. Our neighbourhood libraries, including the six community partnership libraries, are hubs of activity for all ages, providing access to computers, employment and business information and advice, early years, health and wellbeing, and reader engagement activity. Increasingly, they are becoming embedded as accessible neighbourhood cultural centres in partnership with the city's creative organisations.

This cultural role was exemplified when eight of our neighbourhood libraries were turned into Fun Palaces for a day in early October 2016. Fun Palaces are a national initiative, and can take place anywhere at any scale over the first weekend each October. The goal is to make the arts and sciences accessible to everyone. Over 3,000 people visited Fun Palaces at the eight libraries, which offered a special free celebration of the arts and sciences for the whole community to enjoy. Supported by library staff, more than seventy volunteers shared their skills with the wider community, and between them they were able to offer something for everyone. The activities offered included cake decorating, creative writing,

jewellery making, computer coding, kite making, embroidery, robot design, origami, slime making, mehndi dance, and drama.

As integral hubs of their communities, libraries also offer an opportunity for people to volunteer in a range of different roles. In 2016, 18,600 volunteer hours were provided within our libraries, reflecting the commitment of 315 unique individuals.

Central Library's resurgence as a major player on the city's cultural landscape has continued to encourage a diverse range of people through its doors. In 2016, it attracted nearly 1.5million visitors, and has a certificate of excellence from Trip Advisor given the consistently good reviews it receives from travellers. Key events at Central Library in 2016 included the DNA – Oasis exhibition by acclaimed photographer Jill Furmanovsky, and the massively popular Harry Potter Day in February 2017, which summoned up over 4,000 wizards – both young and old – and kept them spellbound for a day.

In 2016, the Council, in partnership with the National Literacy Trust, launched Read Manchester, a campaign to promote reading and boost literacy across the city; this will have a positive cultural impact and ensure that our residents have the required skills

for jobs created across the city. The Read Manchester campaign features as a case study within the Highly Skilled City chapter. 2016 also saw the introduction of six Wolfson children's libraries across the city, making new technology and digital activities available for children in our most deprived communities.

In recognition of its vital role in advancing literacy and cultural engagement, Manchester continues to invest in its libraries. In 2017 there are plans for more ICT and printing facilities, the refurbishment of Withington Library (now in its 90th year), and a new library in Gorton as part of an innovative multi-partnership community hub.

## Culture

Manchester has a dynamic creative scene and a vibrant history of cultural innovation, with major cultural institutions sitting alongside a rich mix of smaller organisations. The sector's year-round offer includes permanent attractions, annual and one-off events, as well as many learning, training, participation, volunteering and employment opportunities. The sector plays a key role in delivering both economic and social impacts in Manchester.

Between 2013/14 and 2015/16 the increase in visitors to cultural attractions was just below

24%, with data collected indicating that audiences came from all areas of the city; there was also a high level of engagement with the city's schools.<sup>9</sup>

Many of Manchester's cultural partners are at the forefront of developing best practice to increase and improve the social impact of culture, including areas such as project co-design with communities, health and wellbeing, youth leadership and inclusive practice. They engage with a wide range of participants, including parents and babies, children and teenagers, disabled people, adults with health or skills needs, and older people, including those living with dementia. This significant work has been recognised nationally and internationally, with representatives from cultural organisations across the city giving keynote speeches, delivering workshops and publishing research on their work around the world.

Despite the progress the sector has made in connecting and engaging with residents, there is recognition that there is still much to be done. This continuing challenge to publicly funded cultural organisations to reach more people, reflect diversity and work with rather than provide for communities is part of their major partners' thinking, eg. the city's Our Manchester, as well as Arts Council

England's and the Heritage Lottery Fund's strategic direction.

To drive forward this change and maximise the sector's impact on public sector reform and liveability agendas, the city's cultural leaders are working together to identify collective action to make the best use of their assets and resources. There are three key pieces of work they will begin to take forward in the coming year:

- Partnering the Council's Widening Access and Participation to Culture, Leisure and Libraries work stream, which is a political priority for these services. Improve data collection, engage residents in Our Manchester conversations about services, and collaborate strategically to ensure good city centre and neighbourhood provision.
- Working together to realise the cultural ambitions they have identified to be achieved by 2026, including ensuring that culture makes a bigger difference to more people, with a focus on ageing, education, health, and areas of deprivation.
- Delivery of Stronger Together, which is supported by £1.5million from Arts Council England, Heritage Lottery Fund and Historic England's Great Places grant scheme,

secured in partnership with colleagues from across Greater Manchester and the Greater Manchester Combined Authority. This is a pilot scheme and Greater Manchester will lead the way nationally in developing innovative approaches to culture and placemaking.<sup>10</sup>

### Manchester City Galleries

Manchester Art Gallery and Platt Hall continued the upward trend in visitor numbers seen in recent years, welcoming 619,000 visitors in 2016/17 – a 16% increase on the previous year's total of 534,000.

Our vision to present internationally important art continues to bring economic benefit to the city. In the past year our combined GVA (Gross Value Added) contribution to the local economy was £13.1million.<sup>11</sup>

<sup>9</sup> The Impact of Manchester's Cultural Organisations, Ekosgen, April 2016 (primary schools – 81%; secondary schools – 74%; special schools – 59%)

<sup>10</sup> Placemaking is a multifaceted approach to the planning, design and management of public spaces, capitalising on a local community's assets, inspiration and potential, with the intention of creating public spaces that promote people's health, happiness, and wellbeing

<sup>11</sup> Analysis from Ekosgen, September 2016

Visitor analysis indicates that just over 10% of our visitors are Black, Asian or Minority Ethnic (BAME). As overall visits to the gallery have increased this year by 17%, this represents growth in the gallery's BAME audience and reflects the changing demography of Greater Manchester. Young people aged 16–24 now make up 26% of our visitors – an increase on previous years, demonstrating the success of our programme in attracting this younger audience.

Our priority for 2017/18 is to build on this further and increase the diversity of our visitors and participants, engaging with more people from BAME backgrounds and Manchester residents who are less likely to engage with culture.

The vision is for Manchester Art Galleries to be accessible cultural spaces for Mancunians and visitors to the city, opening minds and inspiring everyone through great art. We will deliver this vision through the following objectives:

- Improving the scale, quality and international standing of our artistic programme to support cultural tourism to our city region
- Improving the quality of life of local residents through active engagement with the gallery, especially those people least likely to engage with culture

- Developing and caring for our collection and buildings, making the best possible use of our unique cultural resource to excite and inspire people today and in the future
- Developing Manchester Art Gallery and Platt Hall as important cultural and social spaces
- Making Manchester Art Gallery a more sustainable and resilient organisation.

The gallery's exhibition highlights of 2016 were two exhibitions that focused on fashion. Vogue 100, a major photographic exhibition in partnership with the National Portrait Gallery, marked the centenary of Vogue Magazine. Fashion and Freedom was an ambitious, multifaceted exhibition that examined the fashion legacy of the First World War. The overlap of these two exhibitions led to a spike in visitors to the gallery of 72,100 in October.

Fashion provided a great hook for the gallery's learning, and health and wellbeing programme, with programmes created for adults, families, young people and school children. A new Future Creatives programme offered opportunities for the city's sixth-form students to explore the world of fashion. After a competitive selection process, the work of 30 students was selected for a fashion event

at the gallery, attended by 1,000 fellow students, parents and tutors.

### Sport and leisure

The Council continues to work closely with the three leisure-based trusts to provide high-quality leisure opportunities and provide first-class facilities in the heart of the city's neighbourhoods. The continual investment into indoor leisure has seen more than 3.4million visits in the past year: an increase of 15% compared to 2015/16 data. Secured capital investment of £24million will see Moss Side Leisure Centre refurbished in 2017/18, and the rebuild of Abraham Moss Leisure Centre the following year will enhance the leisure offer and lead to increased participation by residents.

This year has seen the partnership with the trusts develop further, with them taking on responsibility for the delivery of a number of programmes, thus creating sustainability and reducing pressure on the Council's budget. An example of this is the transfer of the Active Lifestyles aquatic programme to the Better Active Aqua programme, and the athletics development programme at the Regional Arena.

The new Physical Education, School Sport and Physical Activity Strategy (2016–2021) was launched in Manchester. The vision is to have ‘more active and successful young people across our city’. Key stakeholders and partners helped inform and shape the strategy and there is a live action plan that all providers are working towards. The Active Schools programme continues to deliver high-quality swimming and multisports activities to 9,600 pupils in 145 schools across the city. Once again the school swimming programme was delivered by an external company, GLL,<sup>12</sup> and achieved an 83% pass rate for 25 metres, one of the best in the country.

Community activity programmes continue to go from strength to strength; Manchester Community Games continues to get the inactive active, linking residents from diverse communities to participate in activities, volunteering opportunities and events. Sport and Activity forums supported by Community Games have sourced additional funding opportunities, and over the past 12 months further work with Manchester’s parks, ParkLives, Debdale Outdoor Centre, LGBT Northwest and Manchester Metropolitan University (MMU) enabled Community Games to expand its offer throughout Manchester. ParkLives continues to deliver activity in

Manchester’s parks and green spaces, and confirmed external funding for a further three years will allow further expansion of activities and volunteer opportunities.

Manchester has also continued to be a hotbed of sporting talent and development, demonstrated at the 2016 Rio Olympics and Paralympics, where 62 medals were won in Manchester; highlights included GB Taekwondo’s Jade Jones retaining her Olympic Title, and the British Cycling team’s continued success.

The success of British Cycling has helped to secure naming rights to the Velodrome, which is now officially the HSBC UK National Cycling Centre. Engagement with the national governing bodies of sports has continued to strengthen, with highlights including England’s Water Polo squad training in Manchester and a new online booking system in place for tennis courts in four Manchester parks. Fletcher Moss Tennis Courts have secured over £200,000 of investment for floodlights, which were installed in May 2017, and resurfacing.

Etihad Campus is the largest concentration of sporting venues in Europe and the most successful games site in the world. The Campus works alongside the new Manchester

Institute of Health and Performance to support and offer enhanced services to elite athletes in the region. Over the past ten years the Campus has developed a portfolio of major sporting and cultural events – a major part of east Manchester’s regeneration and the wider renaissance of the city. New developments in the past few years have included the opening of City Football Academy, the first purpose-built indoor BMX Centre in Europe, the opening of the East Manchester Leisure Centre, and the new south stand at Etihad Stadium, which provides an additional 6,000 seats.

### Events

The past year has seen Manchester consolidate its approach to the development of an annual events programme that continues to deliver the position and profile that supports the city’s growth agenda. This prioritises events where public-sector funding can attract investment, and where strategic commercial partnerships can add strength to the portfolio of events, developing commercial revenue platforms that will support future sector investment. We also work to ensure that the event offer is connected back to our communities and partners, so that the economic and social benefits can be effectively realised.

<sup>12</sup> Greenwich Leisure Limited

In the past 12 months, Manchester has partnered 45 event organisations to deliver or facilitate 54 calendar events, attracting more than 1.1million people across 158 days of live events. In the same period, our commercial event partners have directly funded major festivals and events in the city’s licensed parks and public spaces that have attracted over 400,000 additional attendees. Our core-funded programme of sports, cultural and community events has attracted 700,000 people, providing a platform for more than 55,000 public participants, 1,600 volunteering opportunities, and a showcase for 10,000 athletes, artists and performers.

The annual Great Manchester Run, Parklife Festival, Manchester Pride, and Sounds of the City continued to promote the city’s national profile in the calendar, while the 2016 Monster Energy FIM Speedway World Cup Race Off and Final, AJ Bell World Squash Grand Prix, and the inaugural Dodgeball World Cup (with teams drawn from ten nations and five continents) were major international events. Manchester’s events sector strength and organisational capabilities were acknowledged and profiled as the city was requested by the UK Government to host three one-off major national events in 2016: Somme 100 (the national commemoration of the centenary of the Battle of The Somme);

the national collation and declaration of the results of the EU Referendum; and the 2016 Olympic and Paralympic Heroes Parade.

### Parks

The Council is responsible for the overall strategy for our parks and green spaces across the city, including 160 parks and open spaces, 42 allotments and three river valleys. Parks continue to deliver high levels of participation with over 500,000 participants at organised events in parks, and strive to improve value for money every year. Key to this has been the continued redevelopment at Heaton Park, investment across a number of smaller parks through Clean City investment from the Airport dividend, and the consultation and development of the new ten-year Park Strategy.

Shaped by consultation, the ambitious parks vision has been tested through conversations with more than 2,000 residents, stakeholders and Parks Service staff: “Together, we want our parks and green spaces to be the heart, lungs and soul of Manchester by providing the conditions for our city, environment and people to flourish.”

This vision will be realised by ensuring that parks are fully accessible, welcoming and visually appealing, and that communities

are provided for with truly world-class destinations, as well as horticultural and tourist attractions with a great heritage.

The new strategy will focus on five key themes: Parks at the Heart of Neighbourhoods; Vibrant Parks, Vibrant Communities; A Manchester Quality Standard; and Productive Parks and Green Spaces in Partnership.

### Voluntary sector

One of the key ‘we wills’ in the Our Manchester strategy is to increase volunteering across the city. To progress this, the Council invests in the Volunteer Centre Manchester (VCM), which is managed by MACC – the voluntary, community and social enterprise (VCSE) sector support organisation for the city. Its purpose is to encourage, support and develop voluntary and community groups and individuals that have a real influence over the places and communities in which they live.

VCM has achieved the national Volunteer Centre Quality Accreditation (VCQA)<sup>13</sup>, which is the quality mark for Volunteer Centres. Its core aims for 2015–2020 are to improve

<sup>13</sup> VCQA - [www.ncvo.org.uk/practical-support/quality-and-standards/volunteer-centre-quality-accreditation](http://www.ncvo.org.uk/practical-support/quality-and-standards/volunteer-centre-quality-accreditation)

access to volunteering, support the development of quality volunteering opportunities and experiences, evaluate and reflect on volunteering in Manchester, and introduce a Reward and Recognition programme for volunteers.

Between January and December 2016, 3,277 Manchester residents registered with VCM, and 1,408 were referred directly to Manchester VCSE organisations as volunteers. Within the same period, 177 volunteer induction sessions were organised and run in the city, 723 Manchester residents attended induction sessions, and a further 352 took part in digital inductions.

Volunteering and/or social action in Manchester demonstrates a sizeable contribution to civil society in the city. People who volunteer in Manchester represent great diversity in terms of their background, age, culture, skills, hobbies, interests and motivation to volunteer. In line with this diversity, volunteer-involving organisations are increasingly embracing a model that builds volunteering opportunities and programmes around the individual or need. The case study on Tree of Life illustrates the broad range of benefits that strong community-based voluntary-sector organisations can bring to the city.

The prominence of Corporate Social Responsibility (CSR) and Employer Supported Volunteering (ESV) also offers an opportunity and platform to form a strong and dynamic relationship between the VCSE sector and the private and statutory sectors. VCM has been working closely with the Council's Human Resources and Organisational Development (HROD) department since 2016. It supports the development and introduction of the Council's ESV policy and an IT system to enable its employees to access and engage in local ESV activities. It is hoped the system and approach will be launched in summer 2017.

There is increased weight and value placed on volunteering as a pathway to securing employment, especially among people with a limited or no history of work to refer to, and as a step towards good health and wellbeing. This feeds into a wider vision for Manchester's voluntary sector: the city as a more caring place where everybody has a decent job and understands their duty to reduce inequity, and where no one is hard to reach.

VCM continues to support volunteer-involving organisations and volunteers, ensuring they consider the differences between volunteering, social action, work experience, work placement or internship when involving people or offering

their time, skills and effort. A fundamental definition or enduring 'spirit of volunteering' remains at the core of work to support this: "An activity that involves spending time (unpaid) doing something that aims to benefit the environment or individuals or groups other than (or in addition to) close relatives."

The updated City of Manchester – State of the Voluntary, Community and Social Enterprise Sector 2017 report's key findings include:

- 87,400 volunteers in the VCSE sector's workforce in the city of Manchester in 2016/17 – 16% of the city's total population and 25% of the estimated total for Greater Manchester organisations
- 23,500 committee/board members in the VCSE sector's workforce in 2016/17
- 278,600 hours of time provided by volunteers and committee/board members each week, representing 26% of the estimated number of volunteer and committee/board-member hours for all Greater Manchester organisations.
- An estimated £252.1million annual economic contribution of volunteers and committee/board members in Manchester organisations.



## Case study: the Tree of Life Centre, Wythenshawe

The Tree of Life Centre in Wythenshawe is a thriving community hub that aims to relieve the effects of deprivation and improve the health, wellbeing and long-term sustainability of local residents and families. This is achieved through seven integrated projects, including a work club and IT learning centre, a community café, a food bank, furniture reuse, as well as health and wellbeing activities.

Items are donated by individuals and businesses. Donated items are then made available to low or no-income families on a referral basis, or sold at affordable low prices to discourage debt and borrowing. The Tree of Life Centre primarily responds to those in immediate crisis, as well as those with longer-term needs, providing a constant source of support. Through the Centre's projects it raises living standards and helps to build the long-term capacity, environment and cohesion of the community. The Centre supports families and individuals with limited or no income: older people, those with physical and mental-health challenges for whom there are few alternatives, ex-offenders, the homeless, and those setting up home for the first time in the community who have limited or no resources. The Centre also works with people looking for training and volunteering experience, unemployed people of all ages who want to get back into work, and the wider community, who benefit from the health and wellbeing activities.

All projects are volunteer and community-centred, and each year the Centre works with some 100 volunteers of all ages with various abilities (mostly from the local community). Coming from a range of backgrounds, they work together to contribute over 30,000 hours to create and support their community.

In particular, the Centre's volunteering project supports furniture reuse, offering furniture of all types, white goods, household goods, children's equipment and toys, books and clothing.

Volunteering opportunities at the Centre include:

- Retail
- Food bank
- IT assistant
- Café assistant
- Waitress
- Stockroom support
- Administration.

Through training and mentoring, volunteers are able to develop new skills and experience not only to support their route back into work, but also to improve their health and wellbeing, experience of belonging and sense of purpose.

The furniture reuse not only addresses the issues of poverty and deprivation, but also has a positive effect on environmental sustainability, diverting tonnes from landfill each year by reusing and recycling for a practical and real effect on the carbon footprint.

The secret of the Tree of Life Centre's 20+ years of success is that it recognises the need to work closely with partners and stakeholders, thus building the capacity and assets of the community it serves. The strength of its partnerships has enabled the Centre to continually increase its external investment.

In addition to building community assets, investing in a sustainable service with volunteers at the heart of what it does is a key mechanism for growing stronger individuals, families and neighbourhoods.

## Conclusion

Stakeholders from across Manchester are working hard to improve the quality of the city's environment and make progress towards becoming a zero-carbon city. Significant challenges remain, not least the continued growth in the economy and population, and the more intensive use of the city centre.

Manchester's carbon emissions are reducing, the latest data showing a 37% decrease in emissions against the 2005 baseline. However, there is still much work to be done by the Council, organisations and individuals.

The Our Manchester strategy recognises the right mix of housing is needed to support Manchester's growth and ensure that the growing population can live and work in the city and enjoy a good quality of life. To achieve this, Manchester will continue to prioritise high-density development in the conurbation core and on sites adjacent to well-connected transport hubs in district centres. Across the rest of Manchester a broader housing mix will be prioritised, including on sites in the north and east Manchester suburbs.

While Manchester has made significant reductions in crime and antisocial behaviour over recent years, 2016/17 has seen an increase in a number of crime types, particularly some types of acquisitive crime. Welfare reforms and reductions in public resources have been cited as contributing towards these increases. Welfare reforms are having an impact on some of the city's most vulnerable residents.

While the exact nature of this impact is difficult to measure, there are signs of concern, including an increase in homelessness presentations and incidents of begging.

Economic pressures continue to have an impact on public services through recent reductions in funding and resources. These reductions have meant that public-sector organisations have had to become increasingly efficient and effective, eg. co-location of services. Partners have also identified a number of areas, such as domestic abuse and homelessness/begging, where greater collaboration through sharing information and resources can contribute towards making a more positive impact. The funding reductions also mean it is important that Manchester reduces demand on services, while still providing a good-quality service, continuing to tackle crime and antisocial behaviour, and supporting vulnerable people. To achieve this

we need to continue to change behaviour and address the issues related to offending, such as accommodation, education, training and employment, life skills, and substance misuse. Linking to existing programmes such as Early Help will allow for multi-agency information-sharing and planning, and lead to more integrated support.

Against an often difficult funding landscape, service improvements in libraries, galleries and sporting facilities demonstrate a clear commitment to ensure a high-quality and accessible cultural, leisure and sporting offer for the people of Manchester.

At a neighbourhood level, maintaining high-quality local facilities and services is important in supporting residents to be resilient and to have happy, healthy, stable and engaged lifestyles. This includes helping residents to gain skills, and providing the opportunities for them to become actively involved in running services, particularly in developing sustainable solutions to deliver cultural and leisure activities. The city's voluntary sector has a critical role to play in helping residents to develop their skills, reducing social isolation, and helping people to use skills developed through volunteering to find work.

## A connected city

### Strategic overview

Connectivity is a crucial quality for successful cities. Strong connections across and beyond Manchester ensure that people are able to fully access all the opportunities the city can offer. The Our Manchester Strategy emphasises the importance of connectivity in terms of transport, international connections and digital connectivity.

Manchester's transport network plays a vital role in the lives of people who live and work in the city. Continued improvements to our transport system will support our ambitions to boost the economic performance and environmental wellbeing of the city as a whole. An integrated, attractive and affordable transport network is needed to enable residents to access jobs and improve their health through increasing levels of active travel. Improving Manchester's connectivity, across the city region, the UK and internationally, will make the city an increasingly attractive place for people to live, for businesses to invest and for visitors.

The city's international connections, afforded primarily by the airport, are also key to its success. International connectivity is important to enable the city to function effectively within global networks for both business and leisure. The Our Manchester Strategy emphasises the importance of sustaining and developing international connections to ensure that Manchester is able to use these relationships to support the growth of the city and exert influence on the world stage.

Maintaining and enhancing Manchester's digital infrastructure to ensure high levels of connectivity is critical to sustaining the city's ambition to be a leading international city. Fast and reliable digital connectivity is needed not only to support and underpin growth across all sectors of the economy, but also to address socio-economic problems, transform public services and promote social inclusion.

The increased use of everyday digital technology through smart phones and smart meters to measure and deliver real-time information can provide opportunities to pioneer innovative and connected solutions to improve the overall functioning of the city. The introduction of

super-fast broadband (30Mbit/s) and, where possible, ultrafast broadband (100Mbit/s) across the city and the creation of free Wi-Fi zones will extend the many benefits of the city's digital connectivity for all.

As part of its journey to meet these goals and become a connected city the Our Manchester Strategy has committed that the city will:

- Develop an integrated, smart and clean transport network that reflects the changing shape of the city and the way people need to move around
- Increase the proportion of cycling and walking journeys and provide improved infrastructure and signing
- Position the city at the centre of first class networks – locally, nationally and internationally
- Use the momentum created by High Speed 2 (HS2) developments to drive growth and investment
- Work as part of Transport for the North to secure long-term investment to radically improve transport connections across the North

- Capitalise on the increased capacity at the airport and the connectivity and logistics benefits of Airport City to boost the economy
- Create a framework for action as a digital city
- Use digital technology to transform the way we use energy in order to help reduce energy bills and carbon emissions.

## Analysis of progress

### Transport

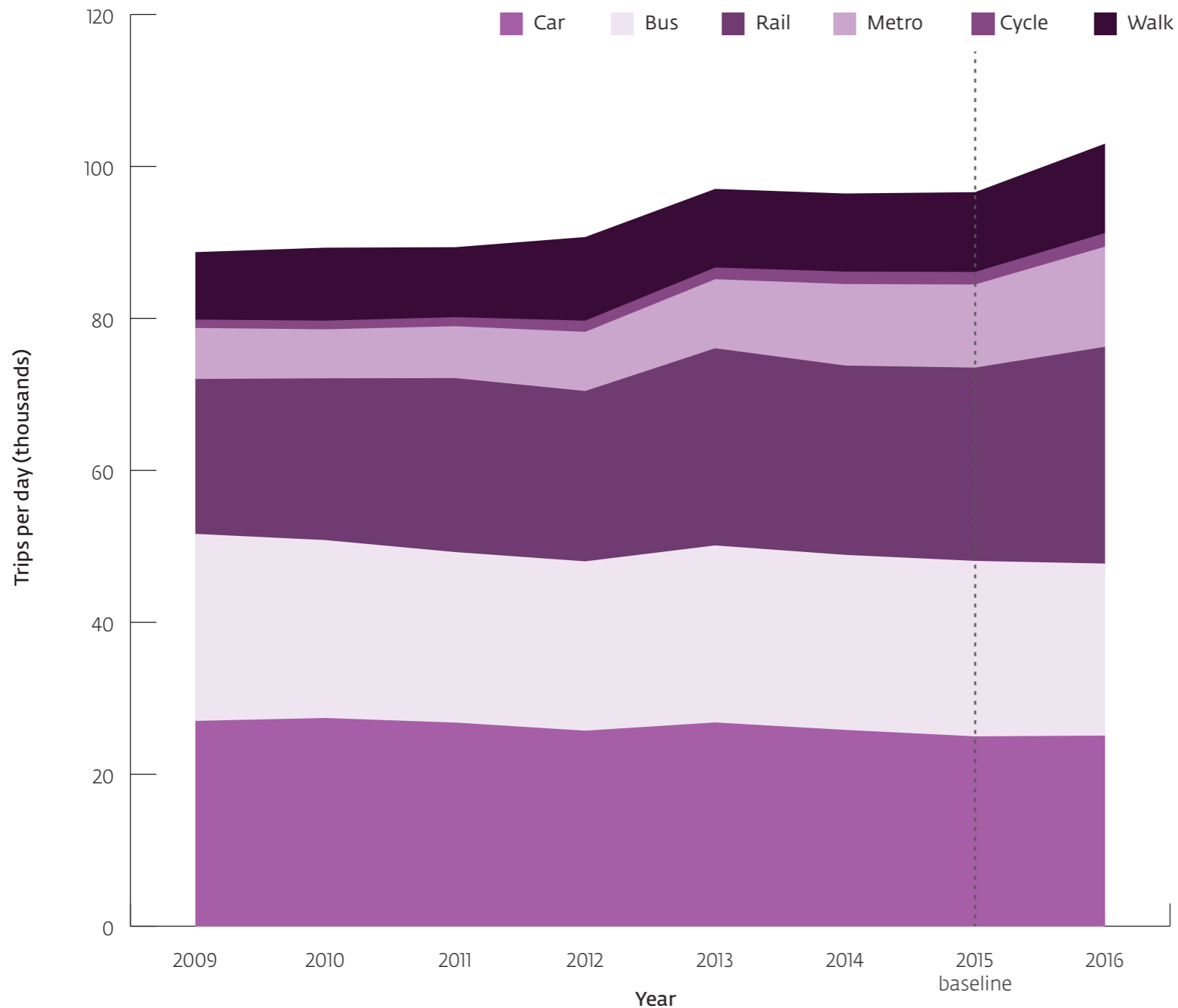
Significant steps forward in the development of Manchester's transport network were made in 2016, seeing the final construction stages of major infrastructure schemes, such as the Second City Metrolink Crossing and the bus and cycling infrastructure works on the Oxford Road Corridor. Ongoing increases in demand for travel, particularly into the city centre, illustrate the strong growth in the city's economy and population and the challenge of accommodating further growth on our network. However, the fact that these increases are being met by sustainable, non-car modes of transport suggests that progress is being made to reduce the environmental impact of our transport network and make better use of transport infrastructure capacity.

Working collaboratively with Transport for Greater Manchester (TfGM), we are taking a strategic approach to planning our city's transport network. In 2016, residents and businesses were consulted on the Greater Manchester 2040 Transport Strategy, and a great deal of useful feedback was received that has informed and shaped the final strategy, which was adopted in 2017. We are continuing this strategic approach with the development of a refreshed City Centre Transport Strategy, which is planned to be published for consultation in 2017.

### Transport demand and travel change

Travel demand has seen significant growth in recent years, particularly in the city centre, reflecting increases in the number of jobs and the resident population (see Chapter 2 – A thriving and sustainable city). The number of trips into Manchester city centre has grown by around 1% per year on average since 2006, but the majority of that growth has taken place since 2012, with an increase of 7% between 2015 and 2016. Trends in trips into the city centre vary across different modes of transport (Figure 6.1).

**Figure 6.1**  
Trips into Manchester key centre (7.30–9.30am) by various modes of transport



Over the past ten years, 2006–2016, the following trends have been noted:

- **Car travel** has seen the most significant decline, with the number of trips falling by 3% per year on average. Car travel’s share of city centre trips has fallen from 36% to 24%.
- **Bus travel** has also declined, although less significantly than car travel. On average the number of trips has fallen by 1% per year, with a 2% fall in 2016. Bus travel’s share of city centre trips has fallen from 28% to 22%.
- **Metrolink and rail** accounted for the majority of the growth in trips over this period, growing by 8% per year and 4% per year on average. This has accelerated in recent years, with a 20% increase for Metrolink and a 12% increase for rail in 2016. In 2016 Metrolink travel had a 13% share and rail travel had a 28% share of city centre trips.
- **Walking and cycling** have also seen strong growth. Walking has increased its share of city centre trips from 8% to 11%, with cycling increasing from 1% to 2%. Although starting from a low base, cycling has grown rapidly in the past ten years, with almost four times as many trips into the city centre in 2016.

Source: TfGM © Crown Copyright 2016 Note: Data shown from 2009 as data not available for 2007 and 2008.

These changes are likely to have been driven by a range of factors, including:

- **Improvements in public transport**, particularly in the Metrolink network, which has expanded significantly in the past 10 years. The decline in bus travel is of concern, but recent investments in Manchester's Bus Priority infrastructure should go some way to reversing this trend in future (see case study).
- **Changing patterns of where people live and work**, with increases in the city centre workforce and population and more people living in locations where public transport or active travel are an attractive commuting option.
- **Increasing journey times on the road network**, which are likely to have made commuting by car and bus a less attractive option. While car traffic into the city centre has reduced in the past ten years, elevated journey times may be due to increases in construction and infrastructure works in the city centre, alongside the rise of online deliveries, which will have added to congestion. TfGM data shows that there have been increases in freight traffic in the past five years, which saw a 10% increase in van and HGV trips into the city centre.

### Supporting active travel

There is a strong case to support walking and cycling in Manchester, as an increased share of trips for these active modes has the potential to simultaneously increase the capacity of our transport network and free up space on public transport, which in turn will provide the capacity to support further sustainable growth. In addition, active modes improve the mental and physical health of our residents and reduce our carbon and air pollution emissions.

Walking and cycling levels have been growing significantly in recent years and are beginning to become attractive alternatives to motorised transport for increasing numbers of residents. This may explain in part why we are seeing fewer motorised vehicles on Manchester's streets especially in the city centre, which is helping to improve the feel of our public spaces, helping to make the city more liveable and more accessible on foot and by bike.

**Walking** is promoted through a variety of programmes overseen by the Council and TfGM:

- **Maintaining and improving our network** of pavements, crossings, footpaths and street lighting, ensuring that they are in good order, and investing in street cleansing.

- **Using the development management process** to plan places that encourage walking and cycling as much as possible.

- **Travel change programmes** including Manchester's Walk to School programme, run by Living Streets, which has enrolled 45 primary schools across the district to increase walking levels by 14% in the past year. TfGM also offers a travel change service to businesses that promotes a range of sustainable transport options to staff, which provided advice for 287,000 staff at 617 businesses in 2016.

**Cycling** is promoted through a variety of programmes undertaken by the Council and TfGM:

- **Investing in infrastructure:** There have been a number of cycling infrastructure programmes in Greater Manchester in recent years, the most significant of which is the £41million of investment secured through the Government's Cycle City Ambition Grant (CCAG). Within Manchester, a number of major cycleways have already been delivered through this programme, including the flagship Oxford Road/Wilmslow Road Cycleway, which was largely completed during 2016 and is already helping to increase cycling levels. Design of schemes for the second phase of this programme is already

underway, including the Chorlton Cycleway and a route through the Northern Quarter.

- **Cycle parking and facilities:** 2016 has seen significant investment in new cycle parking across Manchester, with the Council's Clean City programme funding around 1,000 cycle stands across the city. The CCAG programme has also funded new cycle parking on streets near new cycleways in addition to new cycling facilities at a number of Manchester's schools.
- **Cycle training:** Local primary schools are offered Bikeability training for their pupils, with 5,075 Manchester children taking part in over 500 courses in the past year. The number of children riding to school at least once a week has increased from 4% to 10% on average after receiving the training. In addition TfGM offers cycle training and bike maintenance courses for adults, with 2,185 and 980 Greater Manchester residents benefiting from these training courses respectively in 2016. In addition, TfGM's Safe Urban Driving course has been delivered to 721 drivers of commercial vehicles to increase their awareness of cyclists.

In partnership with TfGM, we are also exploring options to introduce a large-scale cycle hire scheme for Greater Manchester, to make it easy and affordable to access a bike without having to own one.

### Case study: Oxford Road Bus Priority Package and Cycleway

The Bus Priority Package and Cycleway along Oxford Road and Wilmslow Road were largely completed in 2016. These schemes were designed to:

- Allow a high volume of rapid, reliable bus services on a key route into the city centre. This is supported by removal of general traffic from key sections of Oxford Road to improve journey time reliability for buses
- Provide a transformative improvement in the quality of cycling infrastructure on the most heavily used cycling corridor in the city
- Minimise the interaction between buses and cyclists
- Balance the needs of all users of the corridor, including pedestrians, motorists and local businesses.

It is too early to assess the impacts of the full scheme, but in April 2016 when the Wilmslow Road section of the scheme was completed, a six-month monitoring review was undertaken. The full report is available [here](#) and the key points are summarised below:

- **The number of cyclists has more than doubled** when counted in October 2016 compared to data from March 2015. Even accounting for unseasonably warm weather in October 2016, levels of cycling on Wilmslow Road were still 50–80% higher than would have been expected without the introduction of the cycleway.

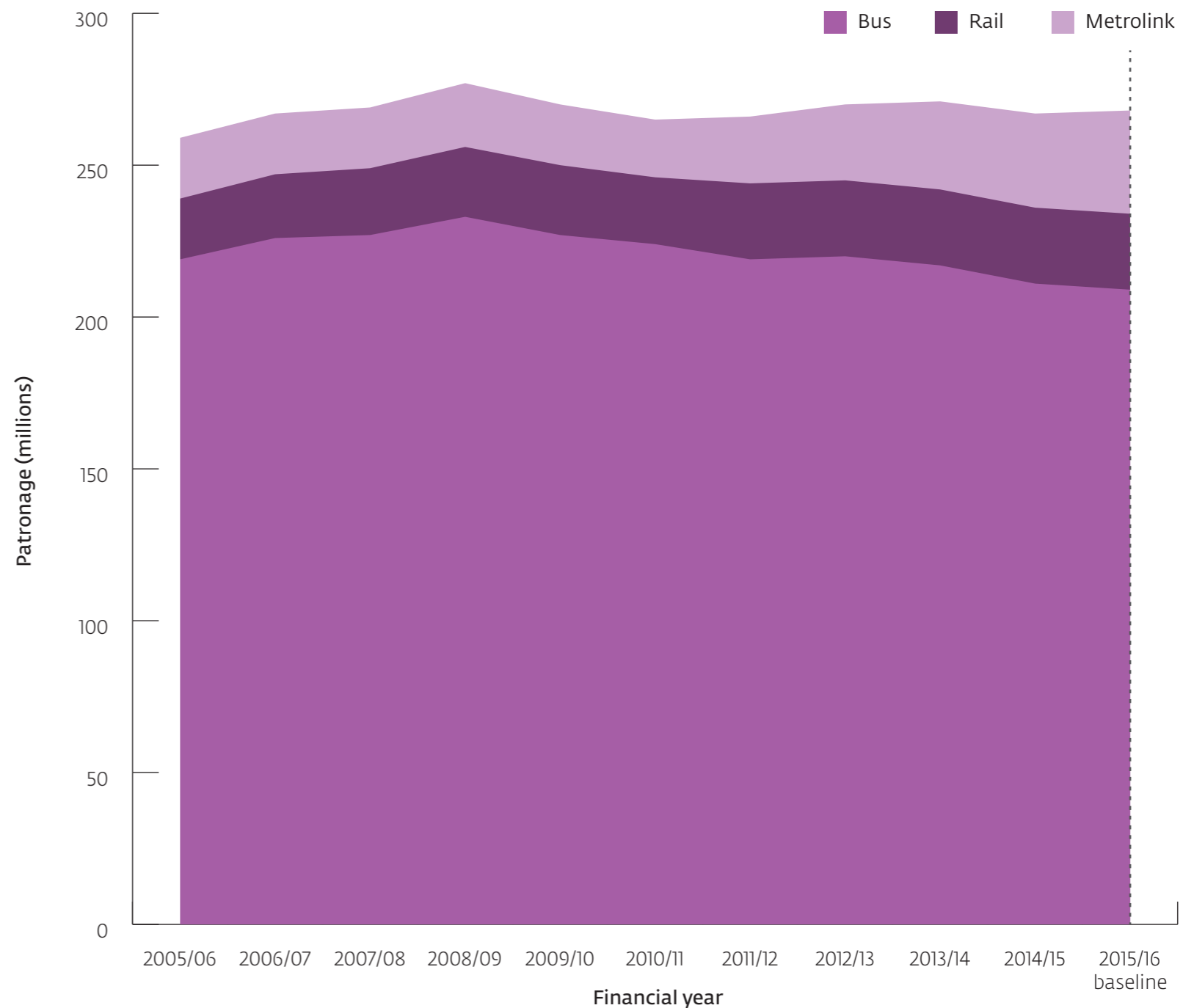
- Although the construction phase affected **journey times**, traffic flow is now returning to pre-construction levels. The impact of the ongoing works on Oxford Road is likely to have increased journey times, but this effect should be temporary.
- **Perceptions** of the scheme vary, with cyclists responding positively to the introduction of segregated cycleways, and bus users, motorists and pedestrians responding more cautiously. Retailers raised concerns over conflict between cyclists and pedestrians near the cycleway but reports of such incidents stopped shortly after scheme completion.
- **Recommendations** on specific remedial improvements to the Wilmslow Road scheme and general recommendations to inform development of future infrastructure schemes are also included within the full report.

### Improving our local public transport network

Attractive and affordable local public transport networks are an essential part of any thriving and growing city. Car ownership in Manchester is lower than average, with only 0.3 cars per person<sup>1</sup> in 2015, compared to the UK average of 0.5 cars per person. This makes it even more vital that we have a reliable public transport network that connects people to jobs and the places they want to go.

Figure 6.2 shows that public transport patronage across Greater Manchester<sup>2</sup> was 4% higher in 2015/16 than it was in 2005/06, despite declining for several years after the 2008 financial crisis. As noted above, growth has largely been driven by increases in Metrolink and rail patronage, which have increased by 72% and 28% respectively since 2005/06. Bus patronage has declined by 5% since 2005/06. Measures to support the continued growth of Metrolink and rail travel, and reverse the decline in bus travel, are described below.

**Figure 6.2**  
Public transport patronage across Greater Manchester



1 DVLA data quoted in Manchester Evening News, 19 February 2017.

2 Greater Manchester data used because bus patronage data is not available for individual districts.

Source: TfGM © Crown Copyright 2016



**Bus travel** is supported by the Council and TfGM in the following ways:

- **Investment in Bus Priority infrastructure** on key corridors into the city centre, including the Leigh Guided Busway, Rochdale Road and the Oxford Road Corridor. These schemes provide quicker and more reliable bus journeys. Opening in April 2016, the Leigh Guided Busway has proved extremely popular with users of the service, carrying over two million passengers in its first year of operation.
- **Quality Bus Partnerships** with bus operators, such as on the A6 corridor between Stockport and Manchester city centre, which offer bus users improved quality of service, reliability and buses with higher vehicle standards.
- **The CityPLAN agreement** between the Council, TfGM and bus operators, which is designed to ensure that bus services entering the city centre are managed to minimise impacts on congestion, safety and the environment.
- **The Bus Services Bill** became law in April 2017. This will enable the potential introduction of franchising for city regions with elected mayors, such as Greater Manchester, in order to deliver improved bus services through measures such as smart ticketing and enhanced information provision, which

could help increase bus patronage. This will also give more control to make use of lower emission buses in future.

**The Metrolink network** has undergone significant improvements in the past year, with further improvements in development:

- **The Second City Crossing** has been introduced to increase the capacity, flexibility and reliability of all of the network's new lines and enable them to operate to their fullest. The scheme is now complete, connecting St Peter's Square to Victoria Station, allowing onward travel through to Oldham and Rochdale.
- **The Trafford Park extension** will run from the existing Pomona stop through the Trafford Park business area and on to the Trafford Centre. Works have started on the extension and are anticipated to take approximately four years to complete.
- **Airport extension.** Funding has also been agreed to extend the Metrolink to Terminal 2 of Manchester Airport when it is relocated.

### The highway network: Management, maintenance and safety

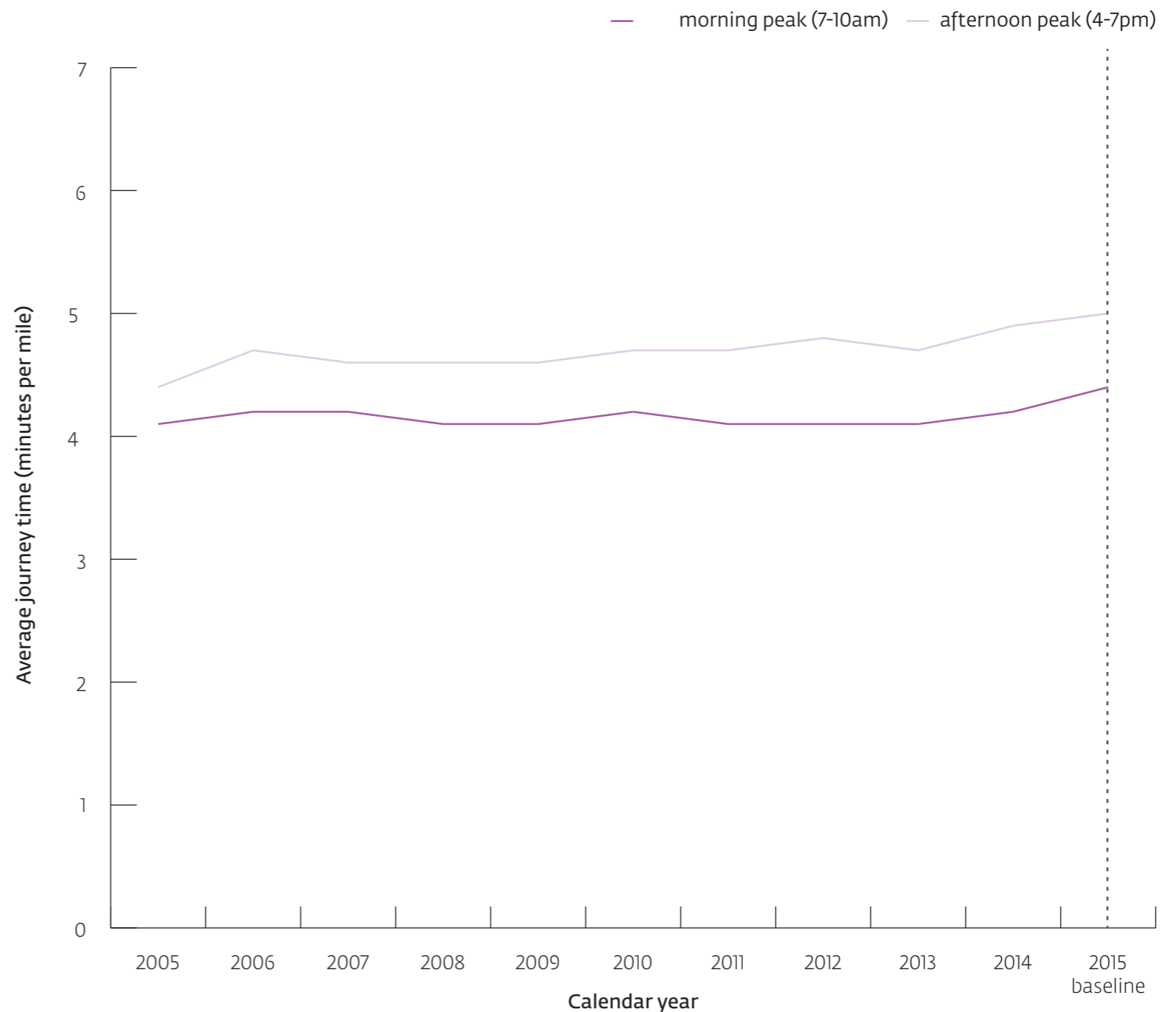
It is essential that Manchester's highway network is well maintained and efficiently managed to allow our residents to reliably move around by bike, walking, bus and car, as well as to support our economy and our growth by enabling goods and construction vehicles to efficiently access the city. It is recognised that for many, the car remains an important mode of travel for at least part of journey, with cars making up over 80% of traffic on Manchester's roads.

Figure 6.3 shows that average journey times on our network of A and B roads have been gradually increasing since 2005, with journey times having increased by 6% for the morning peak and 15% for the afternoon peak by 2015 (more recent data is not yet available). As general traffic across Manchester increased by less than 1% in each of those years, other factors may be influencing journey times. In particular, major roadworks during those years may be a significant contributing factor to those journey time increases. Since 2013, the Greater Manchester Road Activities Permit Scheme (GMRAPS) has been in place to help manage the timing of roadworks and minimise the impacts on journey times in future. Between 2012/13 and 2015/16, GMRAPS

recorded a continued increase in the number of major works with traffic management on major roads, up to a peak of 124 in 2015/16. Average journey times have continued to increase over this same period. However, in 2016/17, the number of such works dropped to 80; unfortunately, the average journey times are not yet available for this same period. Given this reduction in road activity, it will be important to see if there is a corresponding decrease in average journey times as this may assist with informing how GMRAPS is developed into the future.

Improving the quality of Manchester road surfaces is a major priority for the Council. In 2016, an extra £100million was allocated to improve and maintain the condition of the city's roads. Around £80million of this funding will be devoted to a comprehensive programme of resurfacing and other maintenance designed to tackle potholes and other repairs. The remaining £20million will support other roads and maintenance schemes designed to help support the city's continuing growth. This comes on top of £2million a year being added to the Council's highways budget.

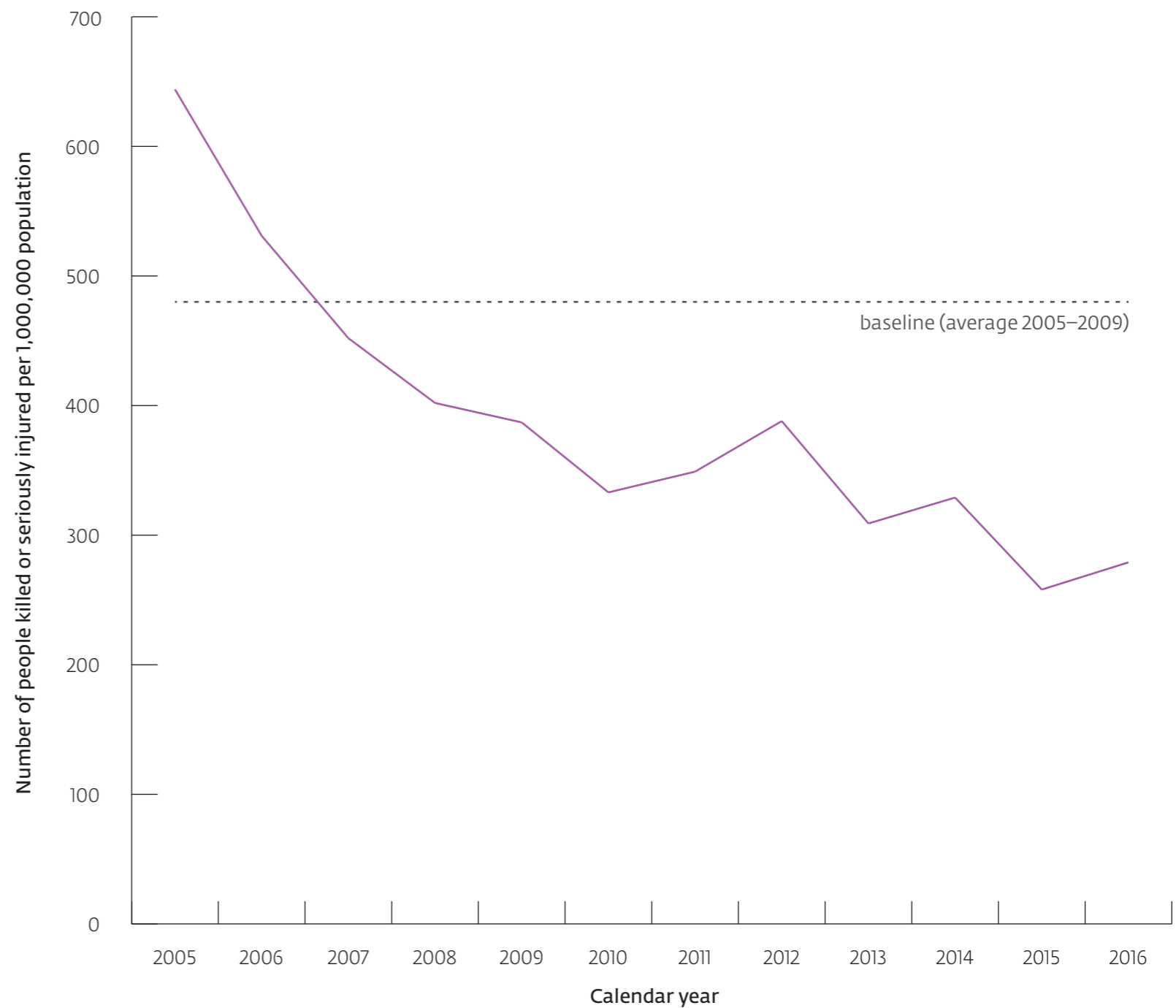
**Figure 6.3**  
Journey time rates for A and B roads (average minutes per mile)



Source: TfGM © Crown Copyright 2016

The Council works in close partnership with TfGM and Greater Manchester Police to improve the safety of our highway network, including investment in infrastructure to reduce accidents, and targeted enforcement operations to prevent dangerous driving. The data shown in Figure 6.4 suggests that road safety in Manchester is moving in the right direction, with the long-term trend showing a decrease in the rate of people being killed or seriously injured on our roads. This has seen the rate of KSIs per 100,000 population almost halve over the past decade between 2006 and 2016. However, between 2015 and 2016 the rate of people killed or seriously injured on our roads did increase. It is not uncommon to occasionally see an increase on the previous year while the long-term trend still shows improvement, although any increase is clearly very disappointing. The Council will obviously continue to work with its partners to ensure that the long-term trend sees injuries and deaths on our roads reduce.

**Figure 6.4**  
Killed or seriously injured casualty rate on roads (per 1,000,000 population)



Source: TfGM © Crown Copyright 2016.

The average over the five year period from 2005 to 2009 is used as a basis for comparison when considering road safety trends.

In 2012, the Council embarked on a programme of making non-major residential streets 20mph to help reduce speeds and improve road safety, initially across central, south and east Manchester. An evaluation of this programme carried out by the Council in 2016/17 suggested that the impacts of the first phase of the scheme have been smaller than anticipated. Further investment in 20mph zones has been paused while a Council review of road safety policy is carried out to understand how our available budget can provide the best value for money in delivering the most significant safety improvements.

### Innovation in our transport system

Manchester has always been an innovative city, at the cutting edge of science and industry. There are a number of ways in which Manchester is continuing to channel this spirit of innovation into the development of its transport system to make it smarter, cleaner and more efficient:

→ **CityVerve** is Manchester's 'Internet of Things' demonstrator, where buildings, vehicles, bus stops and a range of other things along the Oxford Road Corridor will be turned into sensors, connected to the internet to gather data to improve the

experience of people living and working in the area. This includes improving the transport and travel experience through new apps and information services.

→ **Car Club:** Car Clubs allow residents to choose to not own a car, encouraging more walking, cycling and use of public transport rather than using the car. Manchester's Car Club currently has over 1,600 members. The Council is supporting TfGM to develop plans to expand Car Club provision in Manchester.

→ **Autonomous vehicles:** A consortium including the Council and TfGM recently secured funding to trial a driverless electric shuttle service at Manchester Airport and trial the use of autonomous vehicles between Stockport Train Station and Manchester Airport. The project will help to reduce the congestion, air quality and climate change impact of Manchester Airport and deliver a novel and improved passenger experience, helping to boost Manchester's reputation as a leader in technology and transport innovation.

### Protecting our environment

Our transport system is a major source of emissions, which damage our health by polluting the air we breathe and the planet by

contributing to dangerous climate change. Reductions in these emissions are subject to both UK and EU targets, and measures are being taken by the Government at a UK level, but Manchester is playing an important role in introducing local measures to accelerate these reductions:

→ **Active travel and public transport:** As noted above, through measures to reduce car dependence and promote low emission public transport and zero emission walking and cycling, we are supporting reductions in harmful emissions.

→ **Low-emission buses:** Greater Manchester's buses are continuing to improve. Although the proportion of hybrid diesel electric vehicles has fractionally declined to 17.8%, the proportion of Euro VI vehicles has continued to improve and now stands at 15.6% (2016/17 Q2). Forty-one buses have been fitted with a retrofit package to reduce emissions to Euro VI levels.

→ **Electric vehicle recharging network:** Increasing the use of electric vehicles (EVs) is a key way in which we can reduce our carbon and air pollution emissions. This is currently supported by provision of the Greater Manchester EV (GMEV) public recharging network. The GMEV network

went live in July 2013, with GMEV membership growing from a very low base to 1,422 GMEV members by December 2016. It is also heavily utilised with over 4,000 individual charging sessions registered each month from February to April 2017. The Council is working with TfGM to develop plans to expand the network to support a range of vehicles, including taxis.

### Connectivity beyond the city

To realise our ambitions for economic growth and prosperity, Manchester must have world class connections within the UK and internationally. Manchester is already a well-connected city, with three major train stations and the only two-runway airport outside the south east of England, and this connectivity is continuing to improve rapidly with major investments in our rail infrastructure and growth in passengers and routes at our airport.

**Rail connectivity** is being supported through a number of schemes and programmes:

→ **The Ordsall Chord** will link Piccadilly and Victoria stations, transforming the connectivity of the city and Manchester Airport by allowing more routes from the north. These works are now well underway, with the landmark installation

of the Ordsall Chord Bridge over the River Irwell in February 2017.

→ **High Speed 2:** The second phase of the High Speed 2 line, connecting Manchester and the Airport with Birmingham and London, was approved in November 2016. The route will approach Manchester through a ten-mile tunnel, emerging at Ardwick where the line will continue to its terminus at Manchester Piccadilly. It is planned that a major new station will be constructed in the vicinity of Piccadilly, alongside regeneration of the surrounding areas. A further station is planned to serve Manchester Airport. Completion of the scheme is expected in 2033.

→ **Northern Powerhouse Rail:** Plans for High Speed rail links connecting Manchester to the cities of the north of England are being developed by Transport for the North (TfN). Manchester City Council has been a leading partner in developing proposals to make TfN the UK's first statutory sub-national transport body. These proposals were submitted to the Government in October 2016 and accepted in March 2017.

**Improvements to our major road network** are vital to ensure we manage traffic jams and allow efficient travel into and across the region.

→ **M60:** During 2016, works progressed to improve the M60 by making it a smart motorway between junction 8 of the M60 and junction 20 of the M62. Smart motorways allow active traffic management, using variable speed limits and running in the hard shoulder to create freer flowing traffic with less congestion. The M60 carries significant volumes of traffic, supporting local travel within Greater Manchester, national travel between Merseyside and Yorkshire, as well as international freight routes from the region's ports and airports. These improvements are expected to complete in September 2017.

→ **Future investments:** Further improvements to the region's major roads are being actively considered by the Department for Transport, including capacity improvements for the north west quadrant of the M60, and the potential for a tunnel under the peak district to enhance connectivity between Manchester and Sheffield.

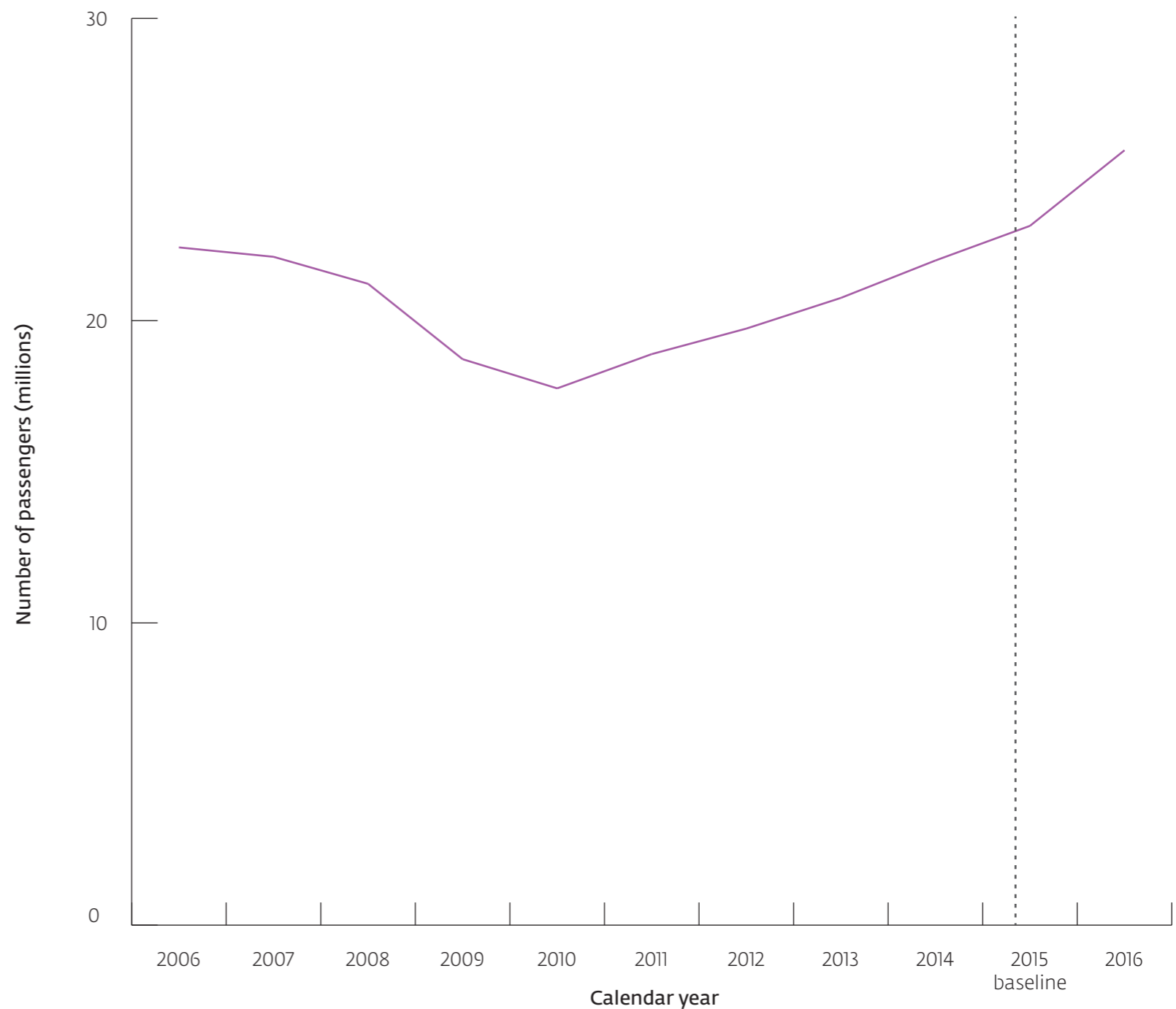
### International and national connections

International connections continue to improve through investments at Manchester Airport:

- **Passenger numbers** at Manchester Airport have seen very strong growth in recent years, with passenger numbers increasing by 11% between 2015 and 2016 to over 25million passengers (see Figure 6.5), beating its pre-recession peak to attract the highest number of passengers since it opened in 1938.
- **Transformation programme:** Announced in 2015, Manchester Airport is undertaking a £1billion transformation programme to its terminals and facilities, taking place over the next ten years.
- **New routes:** In addition to attracting record passenger numbers, the Airport has recently launched two major new international routes to Beijing and San Francisco.

Manchester's thriving visitor economy is discussed in more detail in Chapter 2 – A thriving and sustainable city.

**Figure 6.5**  
Number of passengers travelling through Manchester Airport



Source: Civil Aviation Authority © Crown copyright 2017

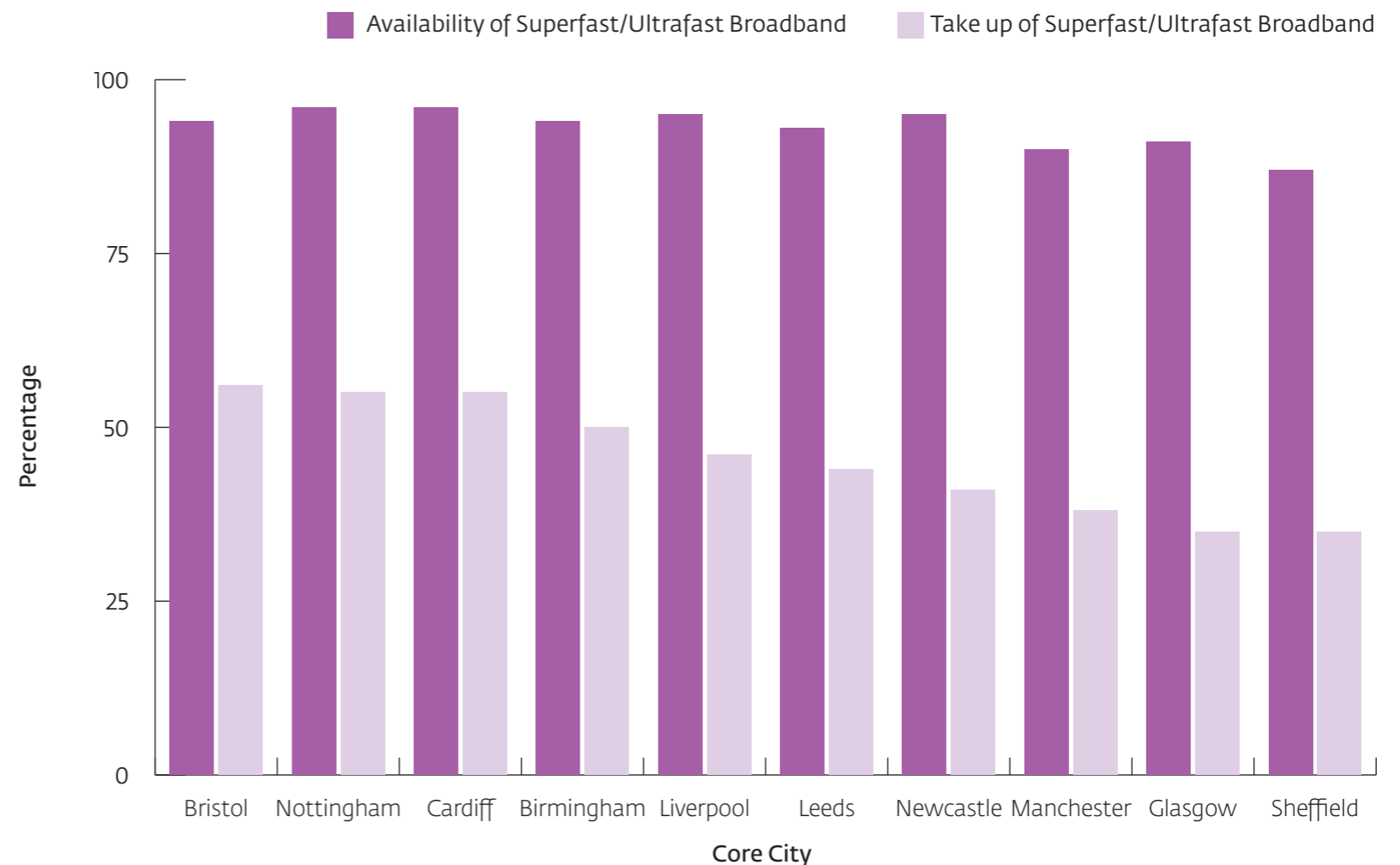
## Digital connectivity

Progress is being made towards improving the coverage of digital connectivity to both residential and small and medium-sized enterprise (SME) premises throughout the city. The availability of superfast/ultrafast broadband (over 30Mbits/s) to residential and SME premises has risen from 88% in 2015 to 90% in 2016. In relation to this, the take-up of superfast/ultrafast broadband by residential and SME premises has increased from 33.6% in 2015 to 37.7% in 2016. Average download speeds have also improved in this period by 5Mbit/s (28.6Mbit/s in 2015; 33.6Mbit/s in 2016), but there were only five connections in the city which had the capacity to receive over 300Mbit/s.<sup>3</sup>

However, these rates are lower than most of the Core Cities<sup>4</sup> (see Figure 6.6). In terms of the availability of superfast/ultrafast broadband to residential and SME premises, only Sheffield has a lower rate than Manchester and four Core Cities (Cardiff, Liverpool, Newcastle and Nottingham) have 95% or above. Take-up of

superfast/ultrafast broadband by residential and SME premises is also disappointing with Manchester's rate only higher than Sheffield and Glasgow. Four Core Cities (Birmingham, Bristol, Cardiff and Nottingham) have take-up rates of at least 50%.

**Figure 6.6**  
Core Cities digital connectivity comparison (residential and SME premises), 2016



Source: Ofcom Connected Nations Report

<sup>3</sup> All data from this section is taken from Connected Nations 2016, Ofcom and Connected Nations 2015, Ofcom

<sup>4</sup> The other Core Cities are Birmingham, Bristol, Cardiff, Glasgow, Leeds, Liverpool, Newcastle, Nottingham, and Sheffield.

It is evident that there is a need to quicken the pace to secure faster and wider broadband coverage in order to keep up with the other Core Cities and to maintain Manchester's status as an up and coming digital city. There may be opportunities to accelerate this process by switching from superfast broadband (which currently satisfies short-term demands) and refocusing on developing the much faster fibre-to-the-premises (FTTP) infrastructure required to become a global leader in the digital economy.

### Digital innovation

Efforts to lead connected and transformative digital innovation, including transforming how energy is used in order to help reduce energy bills and carbon emissions, have been enhanced by the development of the 70,000 sq ft Bright Building on Manchester Science Park, which opened in May 2017. This will be the nerve-centre of digital innovation in the north west housing Mi-IDEA (a post accelerator and open innovation centre for fast-growth technology businesses, operated in partnership with Cisco) and CityVerve (the UK's Internet of Things city demonstrator).

Mi-IDEA will foster and nurture digital innovation in four key areas: digital health, digital creative, smart cities, and Internet of

Things. It will offer a targeted growth programme for start-ups providing an environment and the opportunity of long term partnerships where business can grow in confidence and capability as they scale up from promising technology to sustainable business. It will also seek to showcase the latest in collaboration technologies.

The CityVerve programme, which was given £10million by the Government in December 2015 to fund work into smart city research and development (especially around health, energy, environment, transport and culture), made its first installation of data monitoring equipment at Manchester Science Partnership's Citylabs 1.0. This will produce data for lighting, security and power usage in the building to help maintain it more efficiently. In the next two years it is planned to connect up to a minimum of nine buildings in the Oxford Road area, where CityVerve is based, with similar equipment.

In addition to this CityVerve is also working on a number of other projects:

→ Setting up a 'biometric sensor network' to help improve responses to patients' conditions and improve how local healthcare services work

- Talkative bus stops with location-based services, sensors/beacons and intelligent digital signage so that information can be shared between passengers and bus operators
- Smart lighting and connected street lighting will operate more efficiently while also making places more attractive
- Developing Internet of Things enabled bikes to create a crowd-sourced and maintained secure bike sharing service including the provision of 'e-cargo' bikes to make deliveries along the Oxford Road Corridor
- Developing street furniture and connectivity infrastructure such as lampposts on the Oxford Road Corridor to monitor air quality at different heights and locations to provide health information.

If these pilots are successful the aim is to replicate them not just elsewhere in the city but throughout the country.



## Conclusion

The year 2016 has been a landmark year for the completion of major transport infrastructure projects in Manchester, and further significant improvements to our transport system are on the horizon. These improvements will transform connectivity both within and beyond Manchester, helping to make it easier for our residents to seamlessly travel for work and leisure and to attract new businesses and investment to our growing city.

With this growth and investment come challenges. We must ensure that the roadworks required to improve our transport network do not continue to increase journey times on our roads, which could hamper growth and exacerbate the decline in bus travel. We must also ensure that the growth in demand for travel, generated by population and economic growth, is met by sustainable travel and lower emission vehicles, so that we can reduce our impact on climate change, improve the quality of the air we breathe and make the fullest use of the city's transport infrastructure. Walking and cycling will continue to receive our strong support, as they will help us to meet these challenges, while also improving the health of our residents and making our city a more pleasant place to live

The city's reputation as a hub for the digital and technology sector continues to attract established firms and be a magnet to entrepreneurs. This means the city is at the forefront of work to research, pilot and implement the use of digital technology to transform connectivity and how the city functions. The early work of the CityVerve project and the other facilities associated with Manchester Science Partnerships has been encouraging and will need properly nurturing to ensure its potential transformative impact is realised.

The recent opening of the Bright Building as a home for CityVerve and Mi-IDEA demonstrates the city's commitment to this. However, the city's credentials as an aspiring global digital city and the continuing strength of the digital and tech sector is dependent on the rates of availability and take-up of superfast/ultrafast broadband by residential and SME premises which, although improving, are still lower than many other major UK cities.

The ambition to enhance Manchester's digital infrastructure and ensure high levels of connectivity means that the city must constantly adapt to the fast changing developments and new technology available within the sector. To do this the city will look

to adopt a clear framework of action within a new digital strategy for Manchester.

The new digital strategy will need to address the city's broadband availability and take-up issues and respond to other current challenges identified since the previous strategy was developed in 2012. Beyond this the strategy will need to chart a path for the city which enhances its position as a leading tech business hub, places it at the cutting edge of digital technology, helps to transform public services and improve wellbeing, and ensures that all residents benefit from living in a truly connected city.