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GREATER MANCHESTER SKILLS ANALYSIS 2013/14

December 2013

Contents

Background and purpose

- The Skills Analysis aims to provide a comprehensive picture of labour market change and skills needs across Greater Manchester.
- The document enables progress tracking against key priorities.
- It aims to outline the latest position on skills supply and demand and is used to inform provider agreements.
- It should be read in tandem with the sector deep dives – the detailed investigations of Greater Manchester’s priority economic sectors.

Summary: Skills Analysis (1)

Labour market

- Unemployment has fallen though it still remains a significant problem with more than 120,000 Greater Manchester residents unemployed.
- The nature of the labour market recovery in GM is skewed towards part-time work and flexible forms of work; full-time work remains 3% below the pre-recessionary level, comparing 2008 and 2013.
- Greater Manchester has over 260,000 people receiving out-of-work benefits
- The median annual wage in Greater Manchester is lower than elsewhere in the UK by £1,852.

Vacancies

- Greater Manchester is the LEP with the largest number of vacancies after London.
- The occupation most in demand in September 2013 is nurses followed by programmers and software developers.

Future Skills Needs

- The Greater Manchester Forecasting Model (GMFM), produced by Oxford Economics, indicates that of the 921,000 jobs due to be created in the years to 2022 in Greater Manchester, half will require skills at least to NVQ level 3, and a quarter to level 4.
- The main sectors experiencing the highest levels of replacement demand (due to retirements, labour mobility and economic growth) are financial and professional services, health and social care, construction, retail and hospitality.

Current Skills Profile

- Greater Manchester has seen significant improvements in skill level since 2004 when the proportion of people with an NVQ Level 4+ was less than 25% and almost 20% of people had no qualifications. Today, just under 30% have a level 4 qualification and 12% have no qualifications.
- However, more people have low or 'no' skills than elsewhere in the UK.
- There has been strong growth in level 4 skills, which has broadly mirrored the pattern elsewhere in the UK. But Greater Manchester still has fewer residents with this qualification level than the whole of the UK.

Priority Sectors

- Greater Manchester has nine priority sectors in terms of output (GVA) and/or employment growth.
- By order of numbers of employees, they are: financial and professional services (235,000 employees); health and social care (152,000); retail (115,000); education (100,000); hospitality and tourism (83,000); construction (54,000); logistics (53,000); advanced manufacturing (51,600); digital and creative (45,000).

Educational Performance

- GCSE performance in Greater Manchester has improved since 2009. For the 2012/13 academic year, 59.8% of students achieved 5+ GCSEs at grades A*-C (including maths and English), compared to 58.9.0% in 2009/10.
- However, there are major variations by local authority in GCSE performance: Trafford's rate was 70.3%; Manchester's was 52.6%.
- A total of 88% of 16 & 17 years olds in Greater Manchester are in post-16 education & training (the national average is 89%).
- Attainment at NVQ level 2 at age 19 (including English and Maths) in 2012 was around 62%, in line with regional and national averages.

Summary: Skills Analysis (2)

Young People –vocational skills

- There were almost 10,000 fewer learning starts among young people in Greater Manchester in 2012/13 than in 2008/9.
- Creative and Health & Social Care have consistently been the two largest high growth categories with almost 55% of the total starts in this category, despite both sectors seeing reductions between 2011/12 and 2012/13.
- The numbers of 16-18 apprentices in Greater Manchester peaked in 2010/11 and have been falling in the last two years.
- 'General business' is by some distance the most popular apprenticeship(1,953 starts). The next most popular course is health and social care (969), then personal services (790).
- Most starts are at intermediate level (5,135) in 2012/13.

Adult Learning

- For adults (19+) there is a sharp difference between the trends on apprenticeship and on other SFA funded learning. The numbers starting SFA funded courses have fallen by almost a fifth between 2008 and 2013. By contrast the numbers beginning apprenticeships have more than doubled. Arguably, this trend reflects trends in finance: apprenticeship budgets are protects, but adult skills funding has seen significant cuts.
- SFA funded adult learning dipped below 200,000 for the first time in 2012/13.
- On apprenticeships, there were just under 21,000 adult apprenticeship starts in Greater Manchester in 2012/13 - a rise of 215% comparing 2008 and 2013.
- Intermediate level apprenticeships accounted for 53% of the total.
- Advanced apprenticeships totalled 9,200 in 2012/13, with higher apprenticeships totalling 496.

Higher Education

- In 2011/12 there were more than 34,000 qualifiers from the four universities in Greater Manchester.
- The University of Manchester accounted for 41% (14,000) of this total.
- Business and administration was the most popular course .
- Social studies, education and 'subjects allied to medicine' each accounted for around 10% (between 3,400 and 3,500 students).
- Mathematics accounted for 2%,

Travel to Learn

- Learners are more likely to travel at higher skill levels
- Travel to learn patterns reflect distinct 'north-south' clusters – Manchester/Stockport/Trafford and Rochdale/Bury/Oldham.

Welfare to Work/Work Programme

- Work programme performance in Greater Manchester is fractionally below the national average (33.9% compared with 34.7%)
- Performance has been better than the minimum for JSA claimants and significantly below the minimum for ESA claimants.

POLICY CONTEXT

National Policy Context

Changing role for local authorities in skills planning	• Local authorities' role in skills planning has been removed in relation to young peoples' education • However, local authorities are still expected to play a role in ensuring system responds to the needs of the economy. • Use labour market intelligence to 'nudge' learning provision to meet economic/social need • Local authority has a role to 'champion a young person', particularly vulnerable young people • Local authorities must track young people's (aged 16-19) participation in education and training on the Client Caseload Management Information System.
Requirement for raising participation	• Raising the Participation Age came into effect summer 2013. Local authorities subject to new duties to support all young people to participate in i) full time study in a school, college or with a training provider or ii) full time work or volunteering combined with part time education or training, or iii) an apprenticeship. Local authorities must also make arrangements to identify young people who are not participating • System will shift from one in which young people were financially incentivised to stay in learning, to one in which young people will be required to participate, albeit not necessarily in full-time education.
Traineeships	• Traineeships were introduced in August 2013 for 16- to 23-year-olds (and young people with learning difficulty assessments up to academic age 25) • They are for young people who want to work, but who need extra help to gain an apprenticeship or job. Traineeships will give young people the opportunity to develop the skills and workplace experience that employers require. They can be offered by a college or work-based learning providers
Academies, Free Schools and UTC's	• Academies programme initiated under the previous government modified and extended • All primary and secondary schools invited to apply for status; priority is given to the best schools • Parents independent groups being encouraged to set up 'Free Schools' with greater autonomy • University Technical Colleges (UTCs) created, including in Wigan, Salford and Oldham. Aimed at diversifying providers.
Responsibility for careers guidance	• New National Careers Service launched 2012: phone line and face-to-face advice for those over 19. • Changes to responsibilities for careers guidance, with a duty on schools, pupil referral units and special schools to secure access to impartial and independent careers guidance for all pupils • Statutory guidance for schools on careers now covers Years 8 to 12
Working with Children's Services	• Schools freed from a statutory duty to work with children's services professionals in children's trusts • Councils instead act as 'champions of social justice', with a strategic function, overseeing admissions, Special Educational Needs (SEN) and school improvement
Changes to qualifications	• By 2014 the number of qualifications affecting a school's 'league table' position will have reduced significantly • Potential for significant fall in achievement of 5 GCSEs (A* to C grades) including English and Maths • Potential for GCSEs scrapped for cohort beginning education 2015, suggested replaced by English Baccalaureate, tbc

National Policy Context

Apprenticeships	• Apprenticeships are paid jobs that incorporate on and off the job training leading to nationally recognised qualifications. • The government has prioritised apprenticeships and funding is protected - but significant cuts elsewhere in the adult skills budget • The Richard review proposes mechanisms for employer funding of apprenticeships in a demand led system • The national target for apprenticeships for 16-19 is 1:5. In GM it is 1:4 • Apprenticeships at Level 3 become the level to which learners and employers aspire • Clear routes from Apprenticeships to higher level training including, but not exclusively, Level 4 Apprenticeships • Expansion of adult Apprenticeships available by up to 75,000 by 2014–15- aim is for 200,000 a year
Study Programmes	• In September 2013, new 16 to 19 study programmes were introduced, supported by changes to post-16 funding • All students in full or part-time education aged 16 to 19 will be expected to follow a study programme tailored to their individual needs, education and employment goals, including students with learning difficulties and/or disabilities • A student without English and Maths GCSE or equivalent at grade C or above will be required to continue these subjects in college
24 plus loans	• From the 2013/14 academic year, loans will be available for learners aged 24 and above studying courses at Level 3 and above, replacing grant funding for this group. The change in policy was confirmed in November 2010 as part of the Government's strategy, 'Skills for Sustainable Growth' • The purpose of introducing loans in FE is to increase capacity in system; focusing available funds on 19-24 year olds who didn't complete their education at school, those without basic skills and those seeking employment
Welfare reform	• Government is aiming to make the benefit system fairer and more affordable to help reduce poverty, worklessness and welfare dependency and to reduce levels of fraud and error • The Welfare Reform Act introduced changes including: introduction of Universal Credit; a cap on the amount of benefits working age people can receive; reassessing incapacity benefits recipients for Employment and Support Allowance; reforming disability benefits towards Personal Independence Payments; improving the Work Capability Assessment; introducing a new 'claimant commitment' showing what is expected of claimants; and making sure housing support is fair and affordable
DWP Commissioning strategy and funding	• Articulates a strategic framework for DWP welfare-to-work commissioning through a series of principles which will guide DWP's commissioning activity • Commissioning and activity is expected to continue via a Prime Payment by Results model, but with a stronger emphasis on local involvement • It will focus on developing market structure and stewarding a large welfare-to-work market to meet wider social and economic priorities; driving performance across all providers, especially groups with the greatest need; and working in partnership with a wider array of organisations to deliver better results
European Social Fund 2014-2020	• LEP allocation of both ESF & ERDF for 2014-2020 • LEPs expected to develop an investment strategy with local partners to identify funding priorities • Activity will be centred around the following strategic activities: Skills, Employment and Social Inclusion

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Greater Manchester Policy Context

Revised Greater Manchester Strategy	• Focus is on delivering an employer-led skills system, whereby employers can develop their own training needs. GM will work collaboratively with employers, employers' organisation and providers at all levels to deliver this • GM aims to ensure that there are opportunities to young people to reduce youth unemployment • GM will create an integrated and flexible employment and skills offer to enable jobless residents to enter work and progress • GM will develop an approach that is focused on encouraging self reliance and reducing demand for public services
City Deal	• GM has established an Apprenticeship Hub and is committed to delivering an extra 6,000 Apprenticeships via small and medium-sized businesses and piloting new incentives for businesses to invest in training • The hub's priorities include increasing the numbers of 16-24 apprenticeship starts, especially at level 3+ • The Government has also agreed a major shift enabling Greater Manchester to link mainstream skills funding with the priorities of the local economy and the GM Local Enterprise Partnership
Public Service Reform	• Activity is primarily based around working age adults not in employment and is focused on helping to address the increasing the number of workless and career-changing adults entering and developing sustainable employment • There is large-scale change, with improvement programmes being led by commissioners and providers in work, skills and education mainstream delivery in GM • The focus is on three issues: the absence of an employment support offer to those exiting the Work Programme after two years without having found a job, labour market underperformance of those receiving support as part of Troubled Families programmes and maximising opportunities presented by the introduction of Universal Credit, to support more GM residents into sustained work and skills progression
Growth and reform plan and growth deals	• The Growth & Reform Plan will serve as the implementation plan for the GMS and will also meet the Government 's requirement for a strategic economic plan and EU investment strategy whilst also incorporating GM's work on PSR. • The strategic economic plan will form the basis of growth deals with LEPs and bids to the national £2bn local growth fund - £500m of which relates to skills. GM will receive a share of this. Growth deals will enable Greater Manchester to influence and shape mainstream funding • LEPs will have responsibility for how £5.3bn worth of European Funds are spent giving GM's LEP and by extension the Skills and Employment Partnership responsibility for shaping significant skills spending. ESF will amount to £178 million across Greater Manchester (£356 million inclusive of match funding)
Skills and Employment Partnership	• Voluntary collaboration of employers, colleges, and training providers, funding agencies and local authorities that aims to maximise the contribution that skills funding can make to growing GM's economy • The partnership delivers the GM Combined Authority's statutory duty around 16-19 and ensures that skills delivery maximises economic growth • Accountable to the GM Combined Authority and GM Local Enterprise Partnership • Works with providers and employers to understand present and future growth, employment and skills needs

LABOUR MARKET CONTEXT

Labour market 'recovery' has seen growth of 'flexible' forms of work

Figure 1: Economic activity in GM, 2008-2013

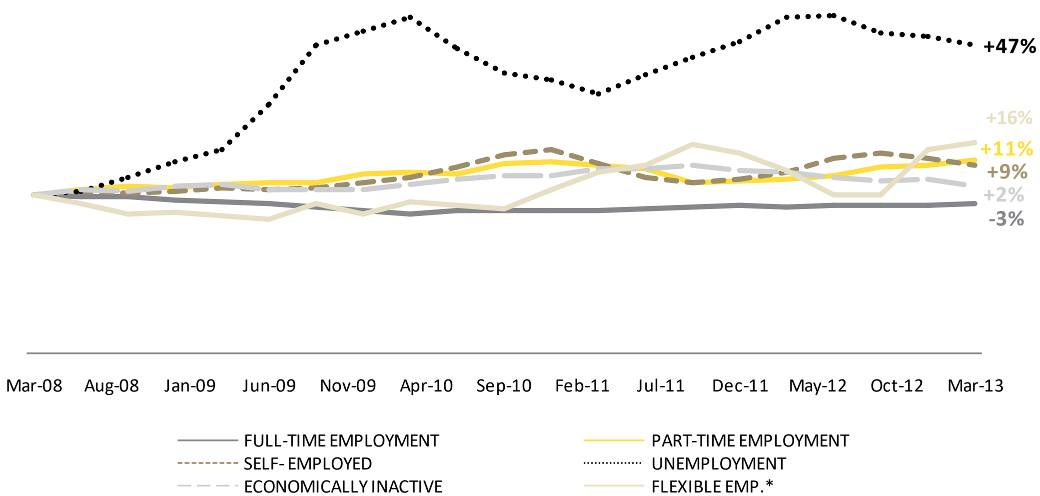
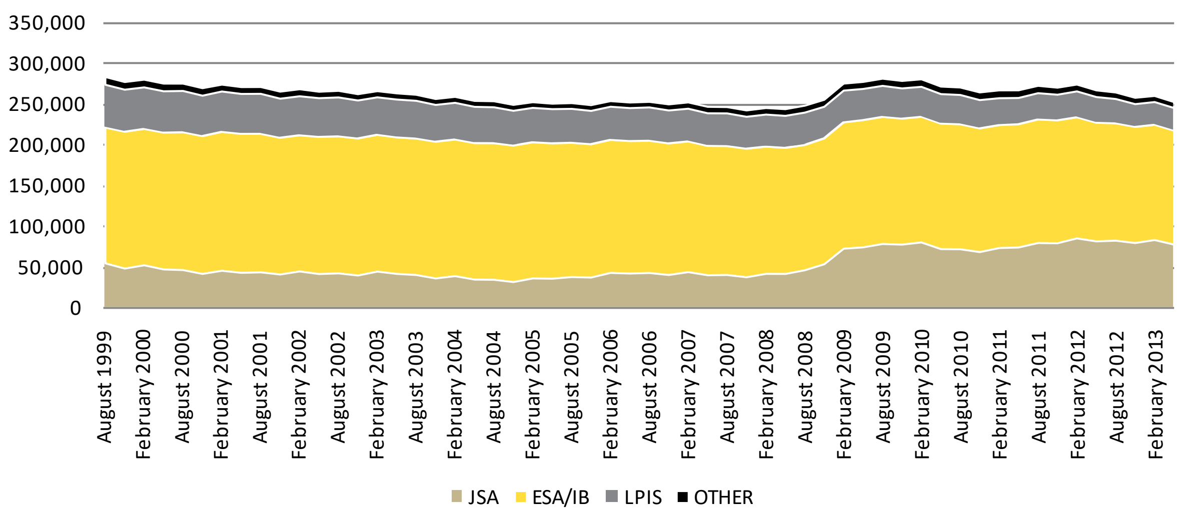


Figure 2: Out-of-work benefit claimants in GM, 2002-2013



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Source: Nomis

** Flexible employment includes temporary employees whose actual job is not permanent, not the respondents intentions about that job. Reasons include seasonal work, fixed-term contracts, agency temping and casual type of work*

- Employment has improved and unemployment has been falling since May 2012. Yet there are still over 120,000 unemployed people in Greater Manchester. Comparing March 2008 and March 2013, unemployment rose 47%.

- Recovery in the labour market is generating a notable growth in 'flexible' forms of work: part-time, temporary and self-employment have all risen.For the three months to March 2013 there were 287,000 people working part-time in the conurbation, an increase of 27,0000 (10.0%) on the 2008 figure. Meanwhile, full-time work remains 3% below what it was.

- Since August 2011 out-of-work benefits paid in GM have been decreasing. ESA/IB accounts for the largest proportion of benefit payments, but reforms to ESA eligibility and the introduction of Personal Independence Payments (PIPs) to replace Disability Living Allowance together aim to save a fifth of the total welfare bill. JSA, by contrast accounts for a larger proportion of out-of-work benefit spending than before the recession, despite recent falls in the claimant count.

Tax credits mostly go to people in work

Figure 3: Families claiming in and out of work tax credits in GM, 2007-2013

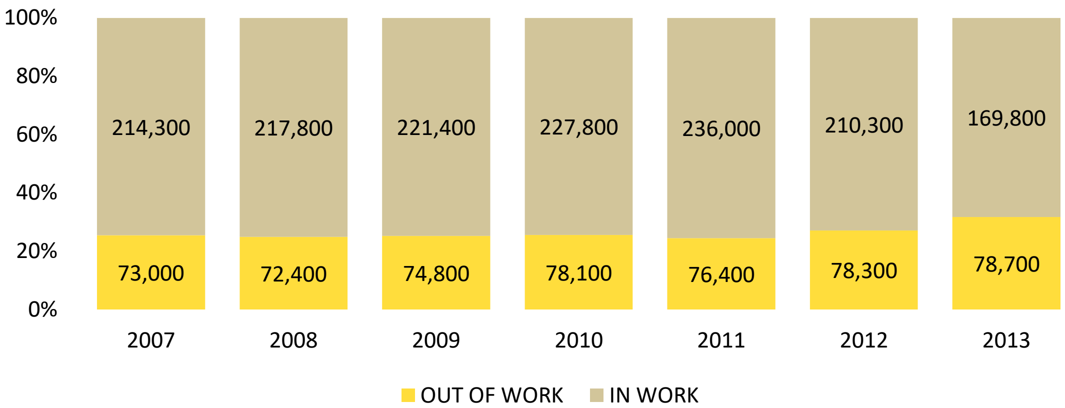
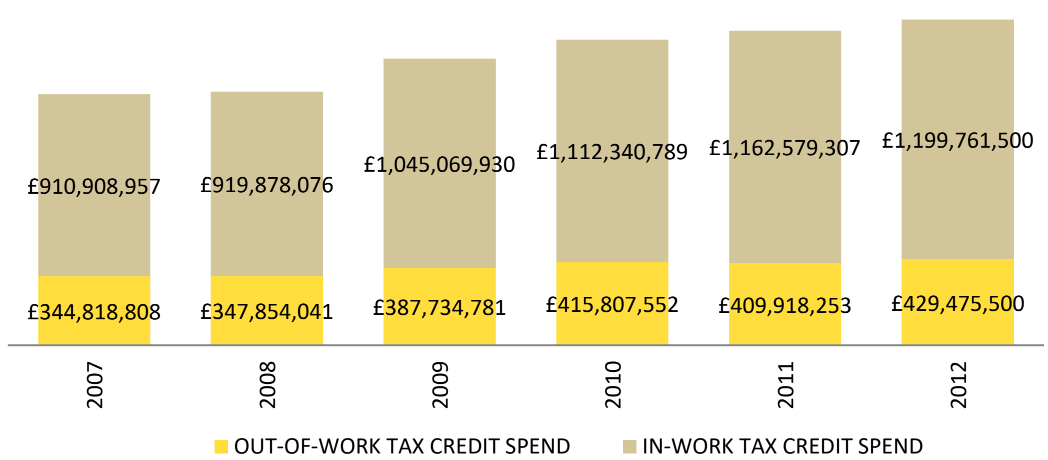


Figure 4: Spend on in- and out-of-work tax credits in GM, 2011/12



- Work is a vital route out of poverty, but merely having a job is clearly not enough to lift people out of social safety nets entirely.
- The great majority of tax credits go to families in work - in effect a subsidy to close the gap between earnings and prices*. Those claiming out of work benefits (just under 80,000) are dwarfed by those claiming in-work benefits (almost 170,000). The in-work figure has been falling in the wake of tightening eligibility for working tax credit.
- Just under £2 billion was spend on in-work tax credits in 2012.

** A point made in State of the Nation 2013: Social Mobility and Child Poverty in Great Britain, 2013, https://www.gov.uk/smcpc*

Source: DWP

Average pay in Greater Manchester is almost £2,000 less than the UK norm

Figure 5: Residence-Based Gross Median Annual Wages (in 2012 prices), 2008-12

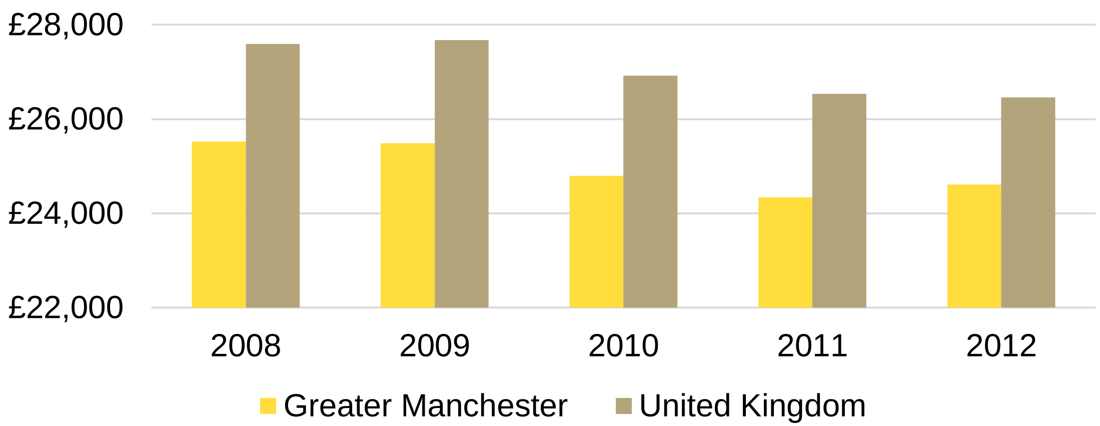
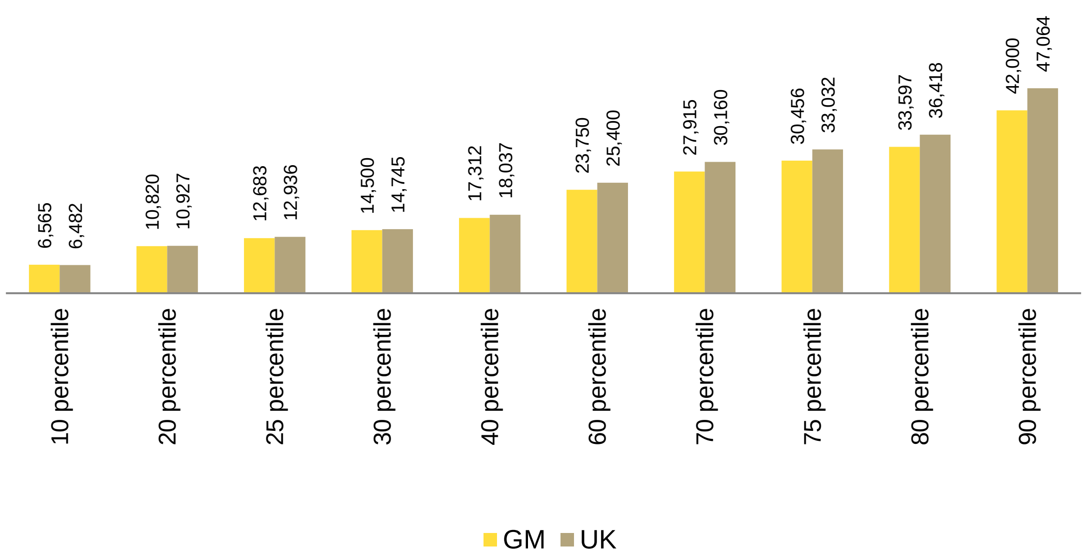


Figure 6: Residence-Based Gross Annual Wages Percentiles in GM, 2012

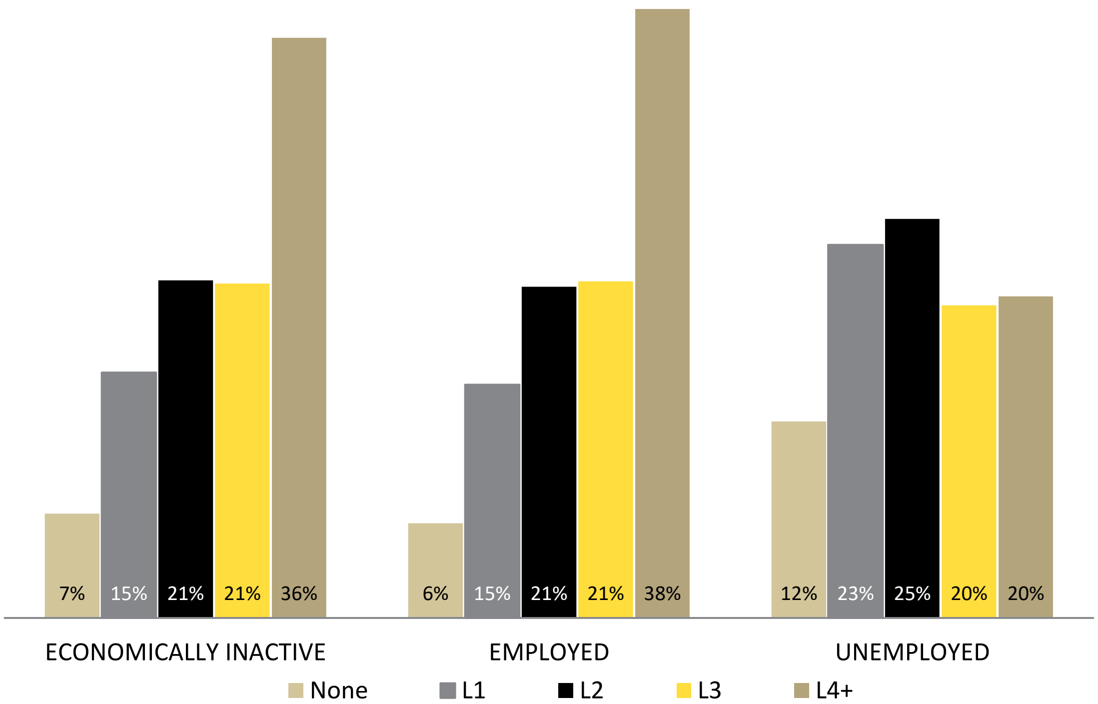


Source: Annual Survey of Hours and Earnings

- Low paid work is more of a feature of the Greater Manchester labour market than elsewhere in the UK. In 2012 the typical wage of a GM resident of £24,610 per annum was almost £2,000 less than the figure for the UK.
- At the bottom end of the pay distribution, pay levels at the 10th percentile are very similar between Manchester and the rest of the UK. However, further up the pay distribution there is a larger gap: at the 90th percentile, there is a £5,000 difference between the 'well-off' in Manchester and elsewhere.
- One of the key labour market challenges around low pay is for people to be able to progress inside organisations as they acquire skills and experience.

Qualifications are a key determinant of labour market success....but 40% of unemployed people have skills above level 3

Figure 6: Qualifications by economic activity in GM, 2012



Source: Nomis

- It is widely accepted that qualifications, acting as an imperfect proxy for skills, are a strong predictor of labour market success: low skilled people are more likely to be unemployed.
- In GM, the employment rate of those with degree level equivalent qualifications is above 80% whereas the employment rate of those with no qualifications is below 40%.
- That said, however, a worrying 40% of unemployed people have level 3 and above skills (20% have a level 4 qualification): graduates clearly have no guarantees about their job prospects.
- Since the peak of the economic cycle in 2004, employment rates have fallen across the skills spectrum but this relationship has held. There is also a correlation between low skills and job insecurity, lower employment quality, lower pay, little work autonomy and fewer opportunities to learn.

Youth unemployment has fallen – but the duration of claims is increasing

Figure 7: Youth (16-24) benefit claimants in GM, 1999-2013

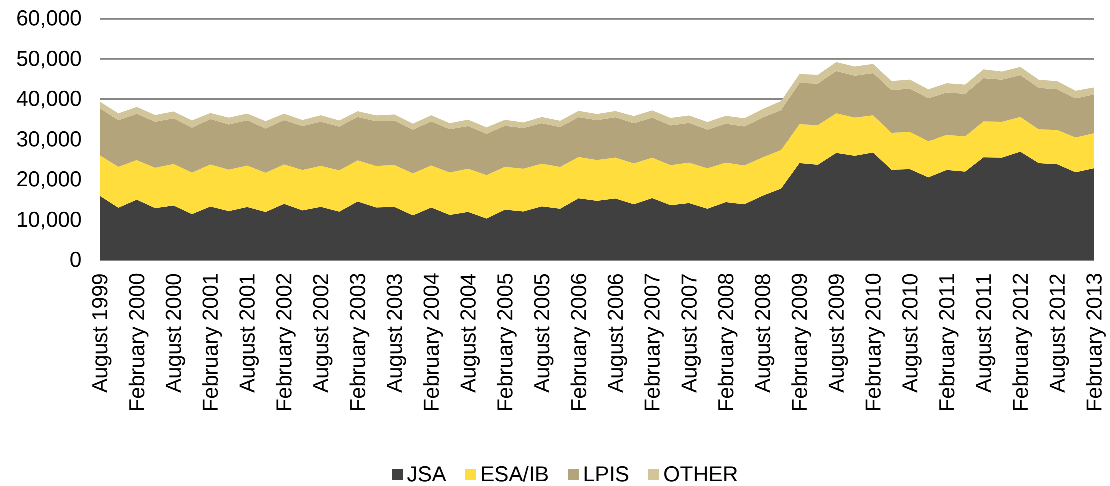
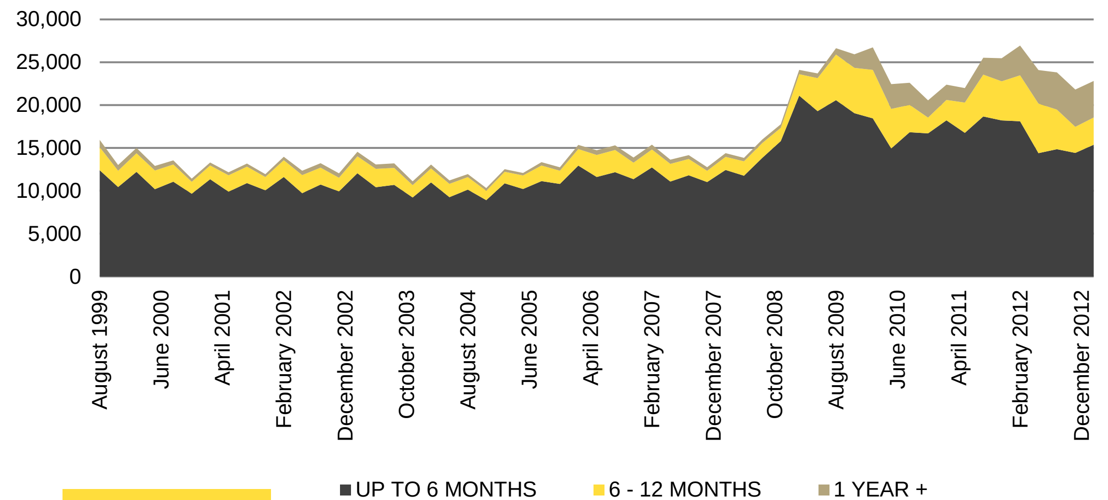


Figure 8: Youth (16-24) JSA claimants by duration of claim in GM, 2002-2013



Source: Nomis/Annual Population Survey

- There has been progress reducing the numbers of unemployed young people over the last year – they have fallen by 15.2% over the most recent year. However, the recession has led to a persistent increase in young benefit claimants. Pre-recession, the numbers of 16-24 year old benefit claimants were consistently below 40,000.

- JSA claimants now represent over half (53%) of out-of-work claimants aged 16-24 in Feb 2013.

- Although most young people spend less than six months on JSA, the recession has expanded the numbers receiving it for more than six months and more than a year. The increase in the duration of unemployment is another consistent long-term trend, with 18.7% of youth JSA claimants now having been claiming for a year or more, compared to 3.0% in 2008.

- Worryingly, of the 7,440 long-term (6 months+) youth JSA claimants, 460 (6.2%) have done it for more than 5 years.

Greater Manchester's skills profile has improved...but low skills remains a feature of the labour market

Figure 9: Qualification profile by district, 2012

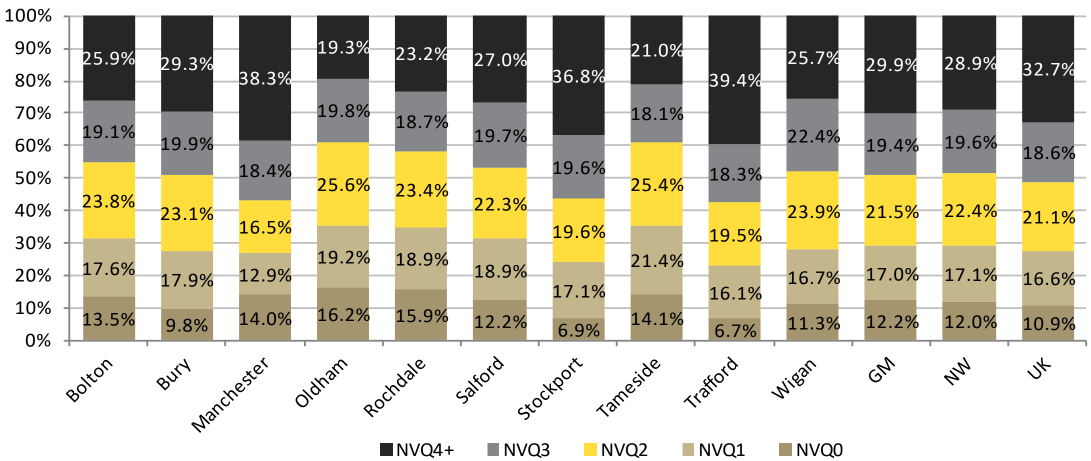
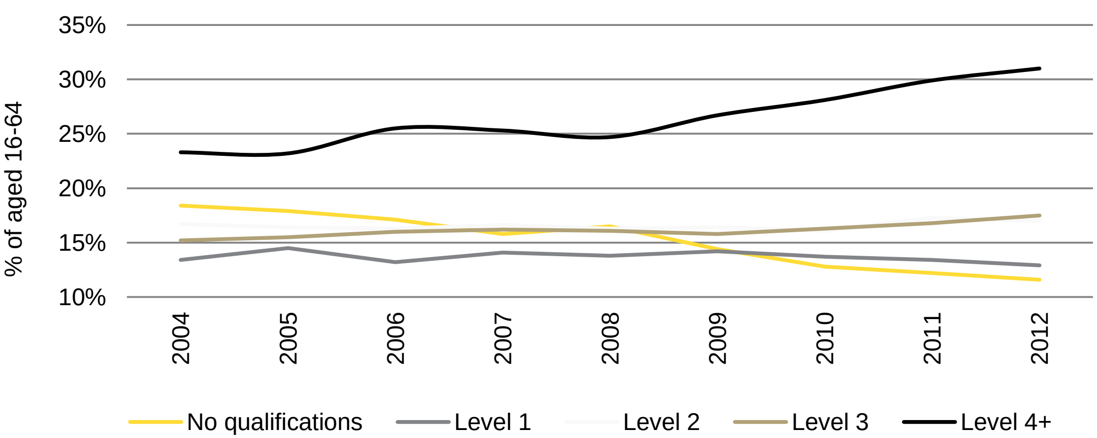


Figure 10: Qualification change over time in Greater Manchester, 2004-2012



- Greater Manchester has seen significant improvements in skill level since 2004 when the proportion of people with an NVQ Level 4+ was less than 25% and almost 20% of people had no qualifications.
- There are variations in skill levels across the conurbation. For example, almost 40% of people in Manchester have an NVQ Level 4+ qualification, compared to 21% in Tameside.
- More people have low skills in Greater Manchester than in the rest of the UK. Rochdale, Oldham, Manchester, Bolton and Tameside all have more than one in eight of their residents without qualifications (though not necessarily without 'skills').
- There has been strong growth in level 4 skills, which has broadly mirrored the pattern elsewhere in the UK. But Greater Manchester still has fewer residents with this qualification level than the whole of the UK. UKCES expects the north west region to have the second strongest growth of level 4 skills in the years to 2020 after London.

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Nomis/Annual Population Survey

There has been only slight change in proportions of NEETs...18 year olds are key age group

Figure 11: Not in Education, Employment or Training, AUG 2012-2013

	AGE 16			AGE 17			AGE 18		
	AUG 2012	AUG 2013	% CHANGE	AUG 2012	AUG 2013	% CHANGE	AUG 2012	AUG 2013	% CHANGE
GM	7.1%	6.0%	**-1.1%**	8.4%	8.6%	**0.2%**	8.8%	9.2%	**0.5%**
NORTH WEST	7.3%	7.0%	**-0.3%**	9.1%	8.6%	**-0.5%**	9.5%	9.8%	**0.4%**
ENGLAND	5.7%	5.6%	**-0.1%**	6.7%	7.1%	**0.4%**	7.6%	8.9%	**1.3%**

Figure 12: Not known, AUG 2012-2013

	AGE 16			AGE 17			AGE 18		
	AUG 2012	AUG 2013	% CHANGE	AUG 2012	AUG 2013	% CHANGE	AUG 2012	AUG 2013	% CHANGE
GM	1.7%	3.2%	**1.4%**	4.0%	9.0%	**5.0%**	10.7%	16.4%	**5.7%**
NORTH WEST	7.5%	8.1%	**0.5%**	12.9%	12.8%	**0.0%**	16.9%	15.9%	**-1.0%**
ENGLAND	6.7%	11.3%	**4.7%**	11.7%	18.5%	**6.8%**	18.1%	19.7%	**1.6%**

- Levels of 16 to 18 year old ‘Not in Employment, Education or Training ‘ (NEET) (excluding class ‘don’t know’) in GM stood at 6.0% (of cohort) in August 2013, representing 4,071 young people. This is lower than the average for the NW (7.0%) but slightly higher than nationally (5.6%).
- Levels of NEET across all ages (16-18) stood relatively constant over the year (Aug12-Aug13), with a small decrease in the proportion of 16-year-olds NEET in GM.
- Proportionately, 18-year-olds have the highest percentage of NEETS within their cohort, and they are also the most likely to be ‘not known’.
- Young people whose activity is ‘not known’ increases dramatically from 3.2% at 16 to 9.0% at 17 and 16.4% at 18.

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Sources: Department for Education (2012)
*September Guarantee: Local authorities have statutory duties in relation to post-16 participation - to secure sufficient suitable education and training provision and to support young people to participate. The ‘September guarantee’ helps local authorities to fulfil these duties.

NEETs are less likely to be from ethnic minority groups

Figure 13: At risk groups in GM, March 2013

		N (Age 16-18)	NEET	NEET %	% OF ALL GM NEET
TEENAGE MOTHERS		1,256	702	55.9%	11.8%
LDD		4,014	515	12.8%	8.7%
WHITE		73,249	5,194	7.1%	87.5%
MIXED RACE	White and Black Caribbean	966	88	9.2%	1.5%
	White and Black African	339	13	3.9%	0.2%
	White and Asian	567	29	5.0%	0.5%
	Other Mixed Background	965	61	6.4%	1.0%
BLACK OR BLACK BRITISH	Black Caribbean	631	38	6.0%	0.6%
	Black African	1,618	35	2.1%	0.6%
	Other Black Background	621	25	4.1%	0.4%
ASIAN OR ASIAN BRITISH	Indian	1,509	22	1.5%	0.4%
	Pakistani	6,043	176	2.9%	3.0%
	Bangladeshi	1,782	61	3.4%	1.0%
	Other Asian Background	1,164	32	2.7%	0.5%
CHINESE		476	5	1.1%	0.1%
OTHER ETHNIC GROUP – ARAB		54	0	0.0%	0.0%
OTHER		1,232	32	2.6%	0.5%
NO ETHNICITY INFORMATION		3,744	123	3.3%	2.1%

Source: NCCIS, 2013

- Teenage mothers account for the largest proportion of NEETs (11.8%), followed by people with learning difficulties (8.7%).
- People of mixed race white and black Caribbean background appear to account for a larger proportion of NEETs (9.2%) that other ethnic groups.
- People who self-identify as 'white' account for a larger proportion of NEETs (7.1%) than other BME groups – with the exception of people of mixed race white and black Caribbean backgrounds.

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Source: NCCIS, 2013

NEETS: Where they come from and where they go to

Figure 14: NEET Joiners analysis, Aug-April 13

April - Aug 13	Total number of NEET Joiners	JOINING FROM									
		Edu.	%	Emp.	%	GST	%	Currency Restablished	%	Others	%
BOLTON	475	149	31%	85	18%	155	33%	-	-	85	18%
BURY	339	128	38%	69	20%	60	18%	23	7%	52	15%
MANCHESTER	664	196	30%	59	9%	122	18%	79	12%	140	21%
OLDHAM	489	154	31%	63	13%	141	29%	34	7%	95	19%
ROCHDALE	722	79	11%	30	4%	57	8%	18	2%	530	73%
SALFORD	948	69	7%	50	5%	98	10%	96	10%	624	66%
STOCKPORT	332	93	28%	66	20%	26	8%	84	25%	47	14%
TAMESIDE	856	96	11%	30	4%	45	5%	93	11%	590	69%
TRAFFORD	206	60	29%	34	17%	33	16%	55	27%	24	12%
WIGAN	438	65	15%	37	8%	93	21%	181	41%	46	11%
GM	**5,469**	**1,089**	**20%**	**523**	**10%**	**830**	**15%**	**663**	**12%**	**2,233**	**41%**
NW	**13,030**	**3,340**	**26%**	**1,480**	**11%**	**2,013**	**15%**	**1,751**	**13%**	**4,192**	**32%**
ENGLAND	**68,500**	**15,004**	**22%**	**7,134**	**10%**	**8,700**	**13%**	**18,877**	**28%**	**17,812**	**26%**

Figure 15: NEET Leavers analysis, Aug-April 13

April - Aug 13	Total number of NEET Leavers	LEAVING TO									
		Edu.	%	Emp.	%	GST	%	Moved Away	%	Other Reason	%
BOLTON	328	21	6%	113	34%	18	5%	18	5%	39	12%
BURY	214	17	8%	80	37%	14	7%	14	7%	21	10%
MANCHESTER	868	25	3%	122	14%	76	9%	76	9%	75	9%
OLDHAM	363	24	7%	86	24%	36	10%	36	10%	61	17%
ROCHDALE	229	8	3%	87	38%	32	14%	32	14%	38	17%
SALFORD	224	11	5%	72	32%	18	8%	18	8%	36	16%
STOCKPORT	331	16	5%	148	45%	23	7%	23	7%	13	4%
TAMESIDE	301	6	2%	75	25%	26	9%	26	9%	122	41%
TRAFFORD	164	11	7%	89	54%	13	8%	13	8%	11	7%
WIGAN	282	11	4%	116	41%	21	7%	21	7%	10	4%
GM	**3,304**	**150**	**5%**	**988**	**30%**	**277**	**8%**	**277**	**8%**	**426**	**13%**
NW	**8,374**	**379**	**5%**	**2,952**	**35%**	**666**	**8%**	**666**	**8%**	**1,165**	**14%**
ENGLAND	**43,894**	**2,489**	**6%**	**16,145**	**37%**	**5,128**	**12%**	**5,128**	**12%**	**4,852**	**11%**

- The largest number of NEETS come from the 'other' category (41%) in Greater Manchester. A total of 20% come from the education system.
- A total of 30% of NEETs leave to begin working (30%). This is below the level both in the north west and in the rest of England. A total of 5% join the education system.
- Tracking of NEETs has become increasingly important.

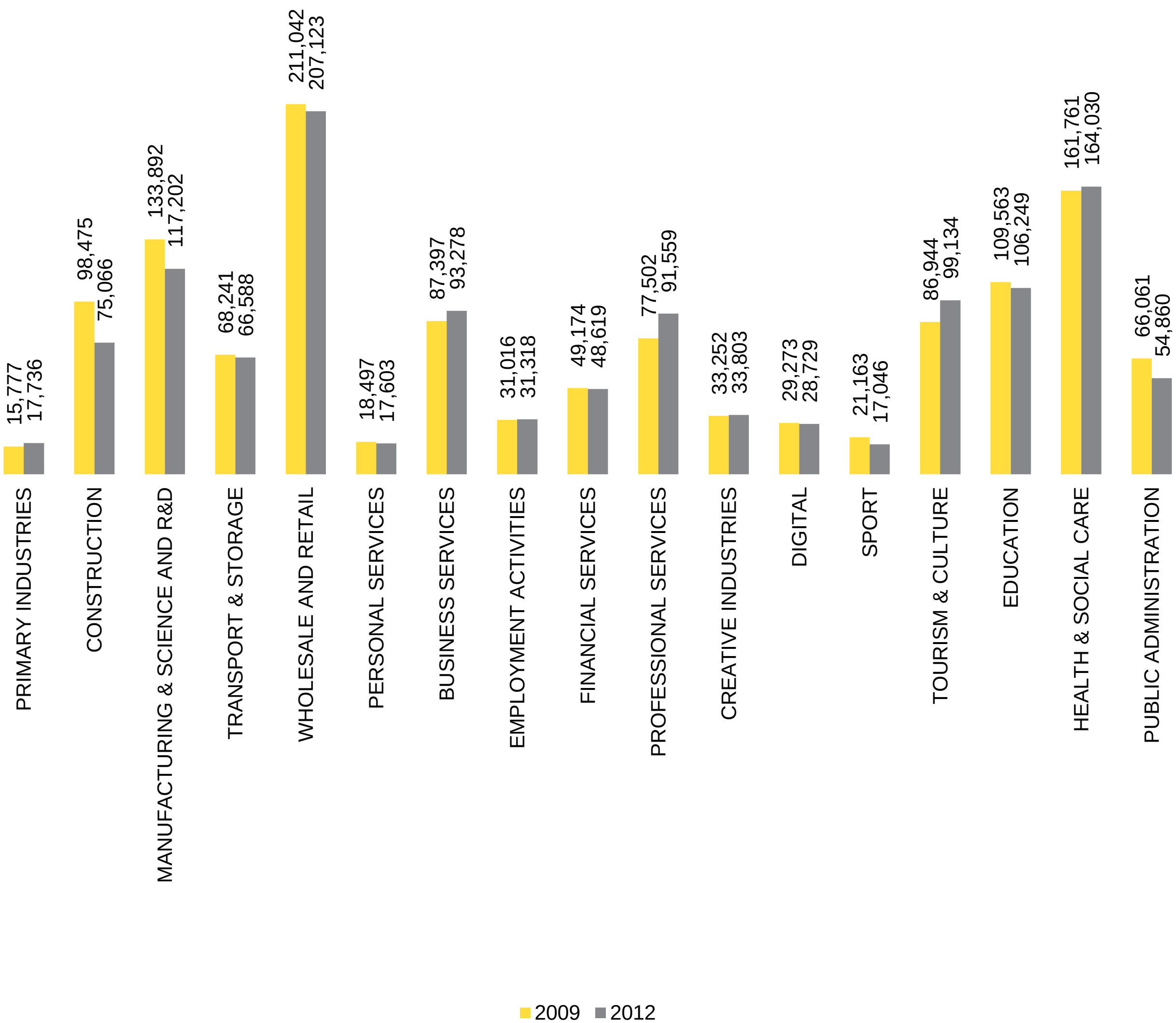
new economy

Source: NCCIS, 2013

EMPLOYER DEMAND

Greater Manchester's changing industrial structure

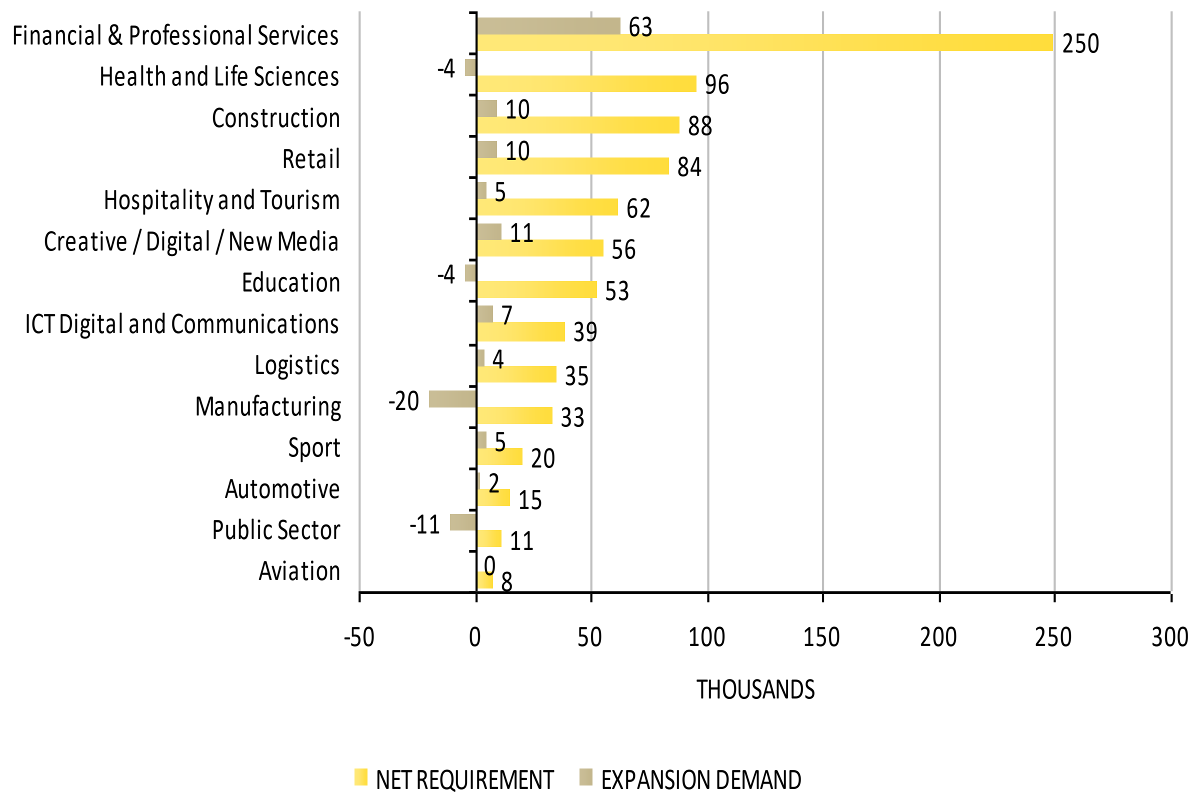
Figure 16: Key employment sectors in Greater Manchester, 2009 to 2012



- The chart suggests that wholesale and retail is the largest employment sector, but much depends on how sectors are grouped. For example, financial, business, professional and employment are normally grouped together in official datasets.
- GM's business services sector employs more than 90,000 people, as does professional services. Financial services employs a further 49,000 people, giving GM a strong financial, professional and business services industry.
- The cultural and creative industries are an important part of the GM economy. In particular, tourism and culture employs nearly 100,000 people and the creative/digital industries support in excess of 60,000 jobs.
- Manufacturing and science/R&D employs more than 115,000 people and while the sector has declined in recent years, it still accounts for more than 10% of all jobs in GM.
- Reflecting the number of schools and HE institutions in GM, education employs more than 105,000 people.

Total replacement demand for jobs in Greater Manchester is over 900k over the next decade

Figure 17: Net requirement by key sector in Greater Manchester over the next ten years

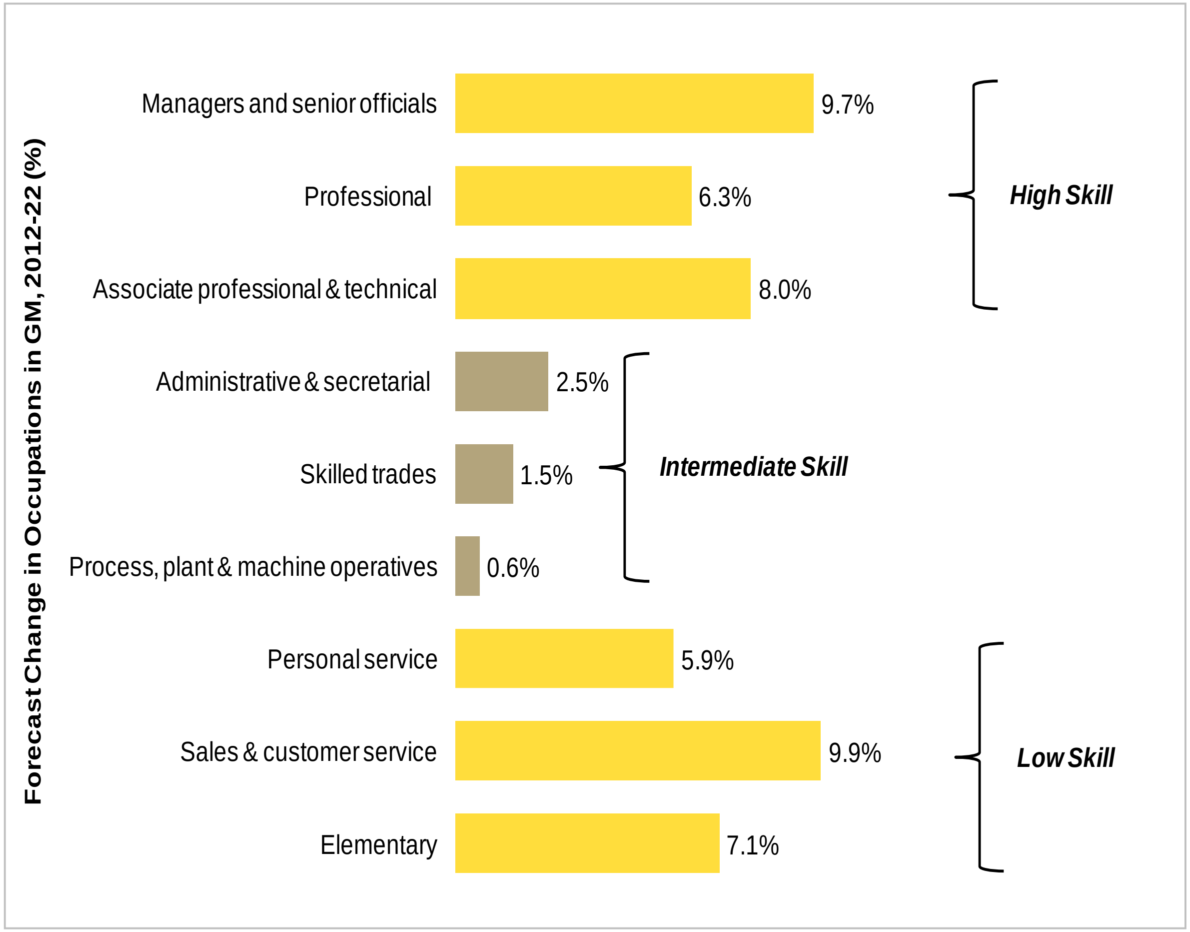


- The Greater Manchester Forecasting Model (2012) (GMFM) shows that new jobs caused by economic change and growth (as opposed to jobs created to replace staff who retire or move on) will be greatest in the financial and professional services sector.
- The main sectors experiencing the highest levels of replacement demand in Greater Manchester (due to retirements, labour mobility, and growth) are financial and professional services, health and social care, construction, retail and hospitality.
- The challenge of an ageing workforce is emerging strongly in sectors such as manufacturing, logistics, health and social care and construction. Conversely, in the retail sector, the fastest growing part of the workforce is among the over 60s.

Source: GMFM, 2012

The 'hourglass' shape of economic change – job growth at the top and bottom skill levels, decline in the middle – is likely to continue

Figure 18: Forecast change in occupations in Greater Manchester over the next ten years



- GMFM suggests Manchester's labour market will increasingly take on a pattern sometimes called 'the hourglass economy' – growth among high skill jobs and low skill jobs with slower growth at intermediate skill levels. The GMFM anticipates this pattern to continue in the years to 2022.
- At the high end of the skills spectrum managers and senior officials are forecast to grow by 9.7%; at the lower end, sales and customer service jobs are forecast to growth by 9.9%.
- Greater Manchester's economy does still generate occupations 'in the middle' of the skills spectrum, but at a notably slower rate of increase. Of these, generally office based administrative work is expected to grow the fastest.

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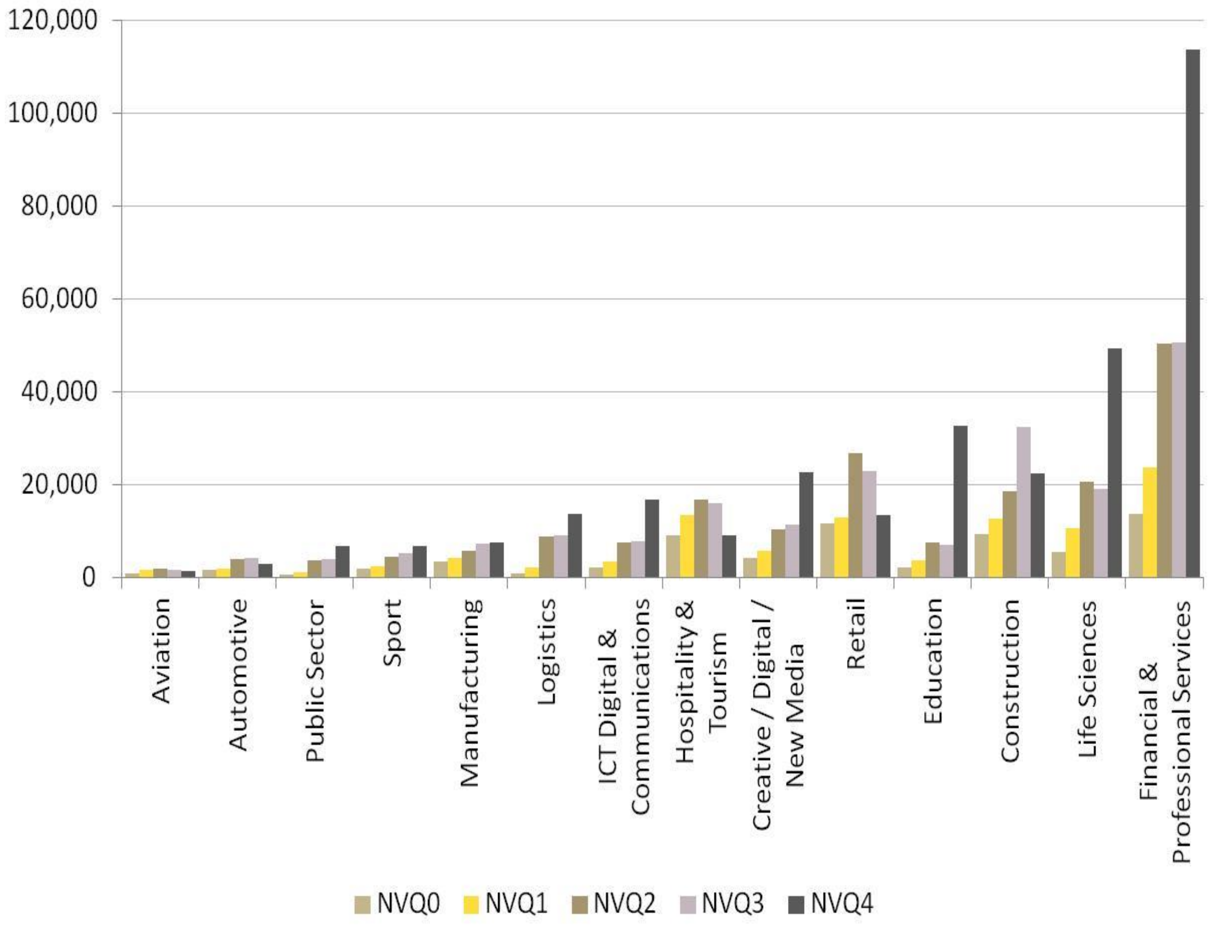
Sources: GMFM, 2012

There is rising demand for higher skill levels....

Figure 19: Net requirement by sector over the next ten years



- GMFM forecasts indicate that of the 921,000 jobs due to be created over the next decade in Greater Manchester, half will require skills at least to NVQ level 3, and a quarter to level 4.
- There is a clear increase in demand for higher level skills across all sectors, in particular within the fastest growing sectors.
- Even sectors in which low skills have traditionally been sufficient (such as construction, logistics, retail and hospitality and tourism) will see a growth in demand for higher skills levels.
- Policies and practices aimed at up-skilling the current and future workforce need to take account of the patterns of employer demand in different sectors.

Sources: GMFM, 2012

...but employers do not always use skills fully: there are more graduates than 'graduate jobs'

Figure 20: Graduate level qualifications and graduate level jobs

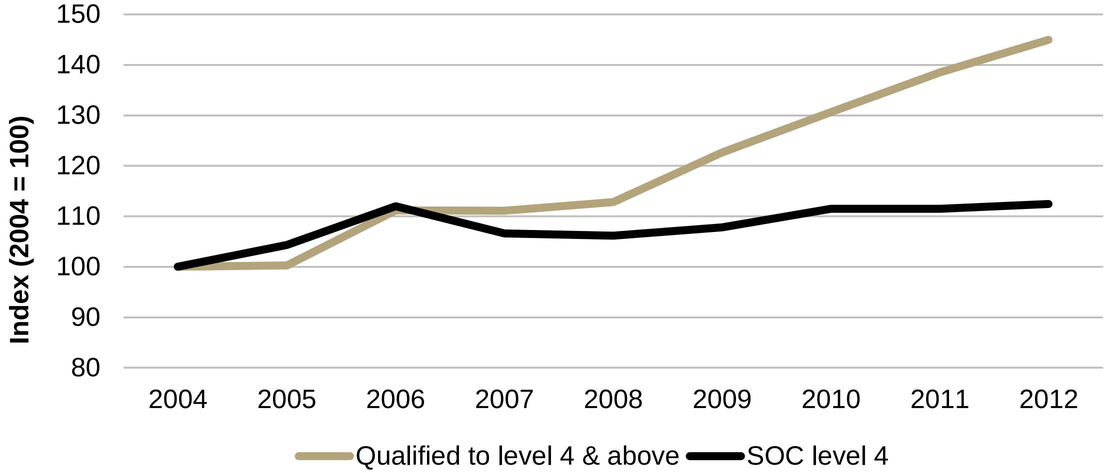
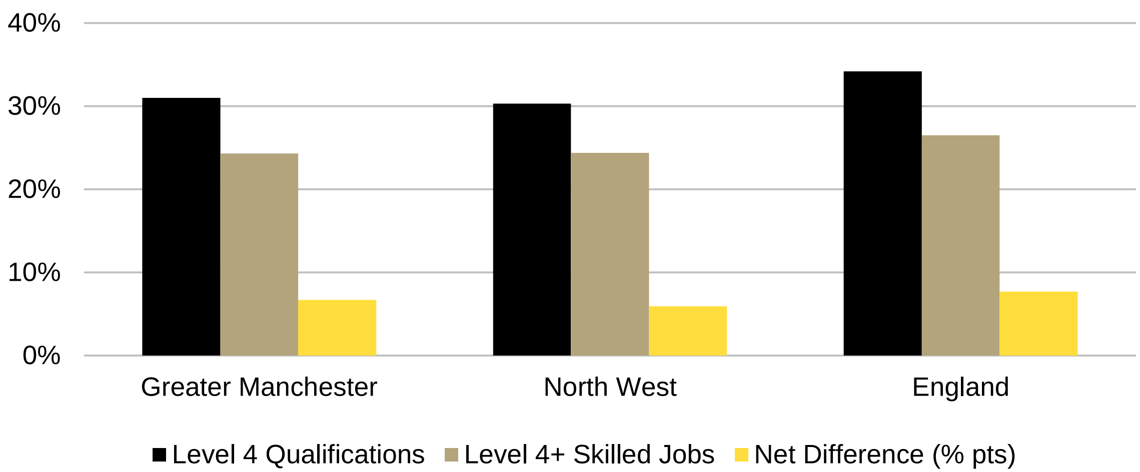


Figure 21: Graduate level qualifications and availability of graduate level jobs



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Source: Annual Population Survey, 2012

- Figure 17 shows that although employers are increasingly demanding higher level skills, they are not always able to use them: there are more graduates than graduate jobs.

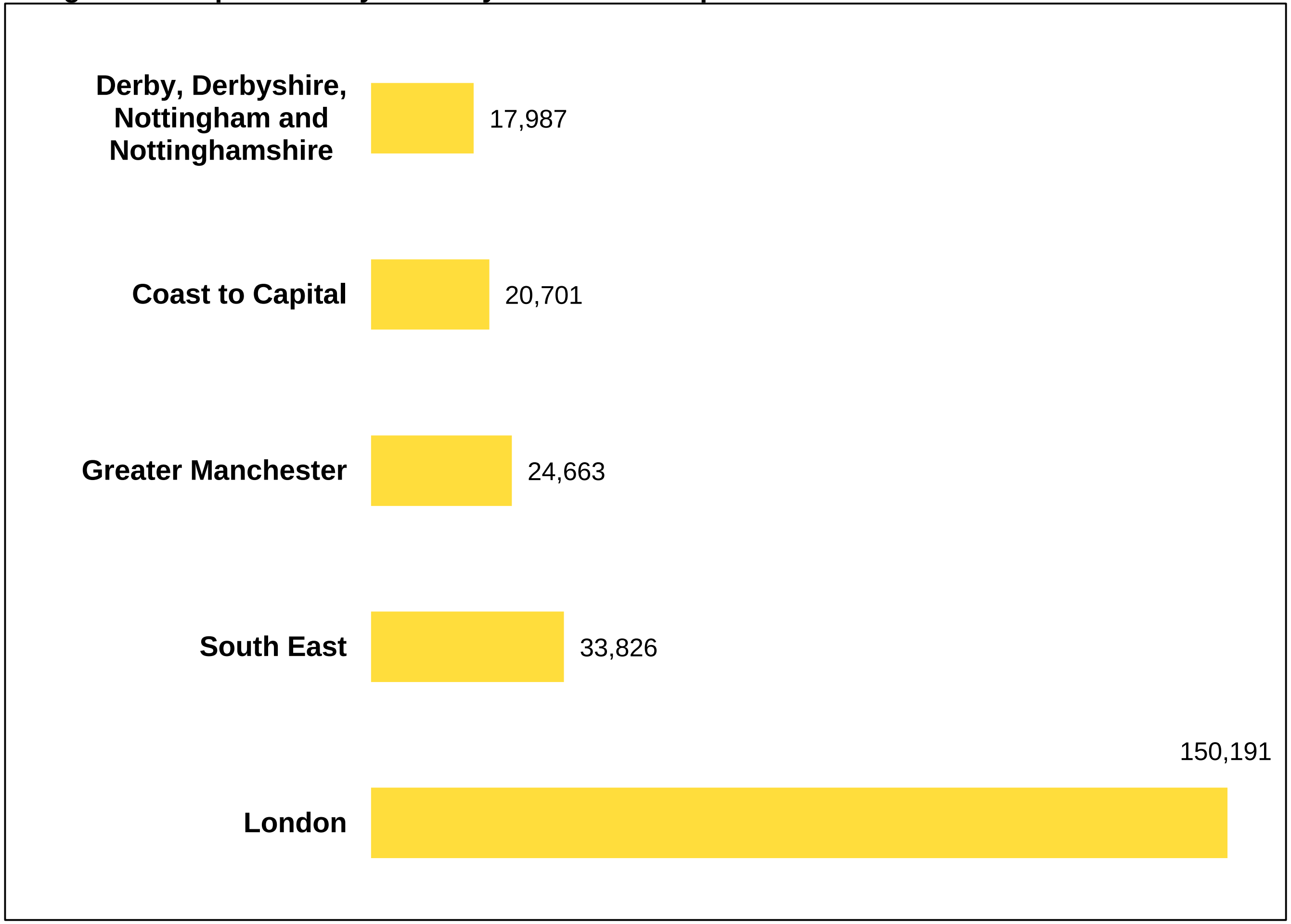
- Although demand for skills at level 4 is growing, there remains a mismatch between demand and supply with the numbers of people qualified to level 4 growing faster than the numbers of graduate jobs. In 2011, the Coalition abandoned the previous Labour government's target of sending 50% of young people to university.

- The proportion of people in Greater Manchester aged 16-64 with a level 4+ (degree or higher) has grown significantly over time. From 2004-12 it increased by 45% (from 370,000 to 537,000 people). However, over the same timeframe the stock of graduate level jobs in the conurbation did not increase at the same rate (12.5%, from 257,000 to 289,000).

- Figure 18 shows that at a sub-regional, regional and national level there are more graduate qualified residents seeking work than there are graduate level jobs available.

Greater Manchester is top northern LEP for vacancies

Figure 22: Top 5 LEPs by Vacancy numbers in September 2013*



- Labour Insight is an online database of job postings (including those at Jobcentre Plus) across England. It provides statistics on vacancies broken down into areas such as occupation type and skills requirements.
- According to Labour Insight, there were just under 25,000 job postings in Greater Manchester in September 2013, which was the highest number for any LEP area outside London and the South East.
- There was an increase of 11.9% in job vacancies, comparing September 2013 data with the same month in 2012 – an additional 2,500 jobs. However, represents a slower rises than that at national level over the same time period (35.8%).

The majority of job postings in London do not provide specific detail on where the employment will be located, therefore the geography relates to Greater London

new economy

Labour Insight, 2013

Most vacancies are in ‘professional’ occupations

Figure 23: Distribution of vacancies by occupational group – Labour Insight, Sept 2013

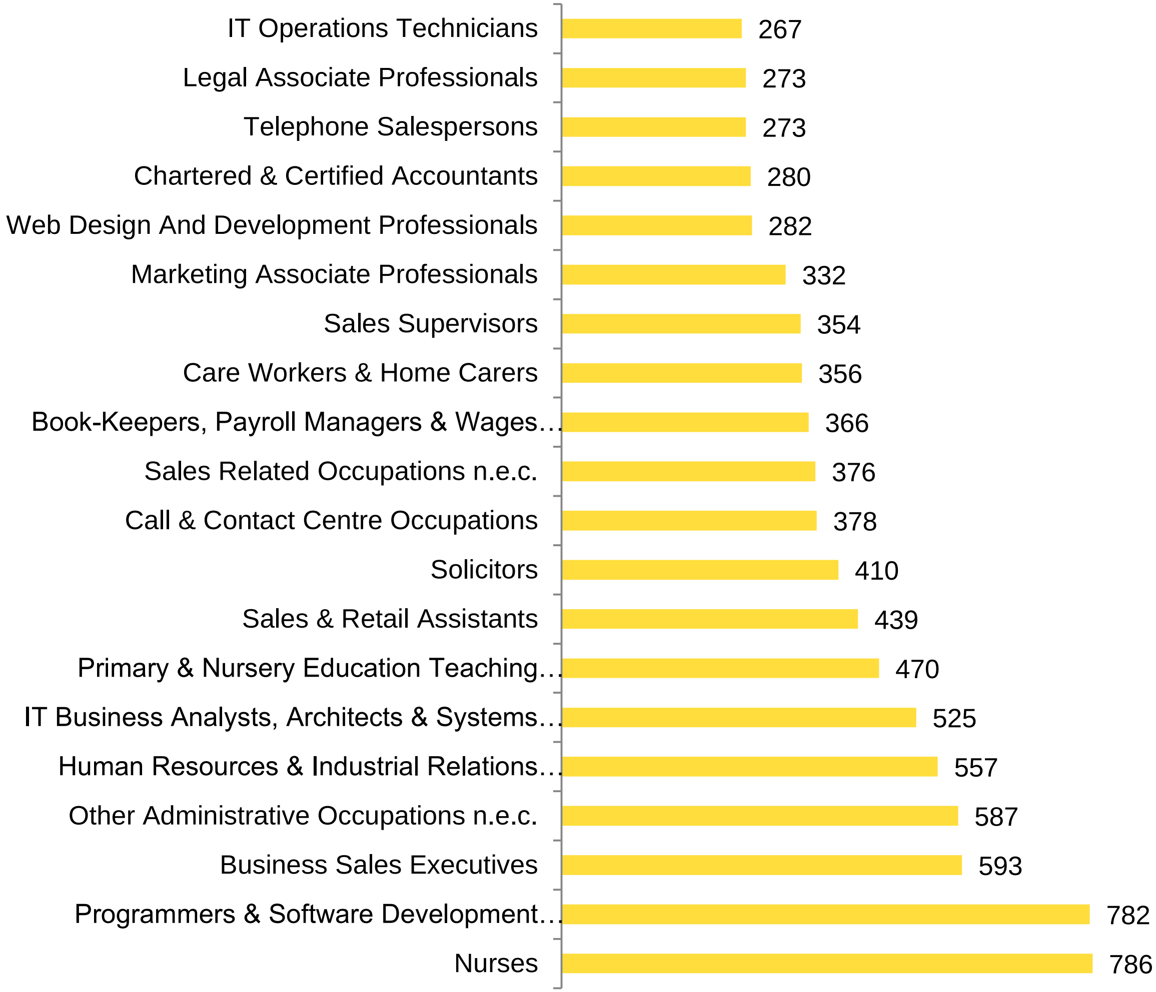
Occupation Group	Total Number of Jobs Sept 2013	% of Total Jobs Sept 2013	% of Total Jobs Sept 2012
Professional	6,863	28.0%	33.6%
Associate Professional & Technical	5,133	20.9%	21.4%
Sales & Customer Service	2,759	11.3%	10.0%
Administrative & Secretarial	2,720	11.1%	11.1%
Managers, Directors & Senior Officials	1,507	6.1%	7.2%
Caring, Leisure & Other Services	1,482	6.0%	4.3%
Skilled Trades	1,375	5.6%	5.1%
Process, Plant & Machine Operatives	1,357	5.5%	3.6%
Elementary	1,314	5.4%	3.7%

- Labour Insight shows that most vacancies exist in professional occupations in Greater Manchester, despite a drop of 5.6 percentage points between September 2012 and September 2013.
- The greatest gain has been in process, plant and machine operatives – a change of 1.9pp.
- Professional occupations and associate professional and technical occupations account for just under half of the total GM LEP vacancies in September 2013.

Labour Insight, 2013

The highest number of vacancies are in nursing and programme/software development

Figure 24: Top 20 vacancies in GM by detailed occupation, September 2013

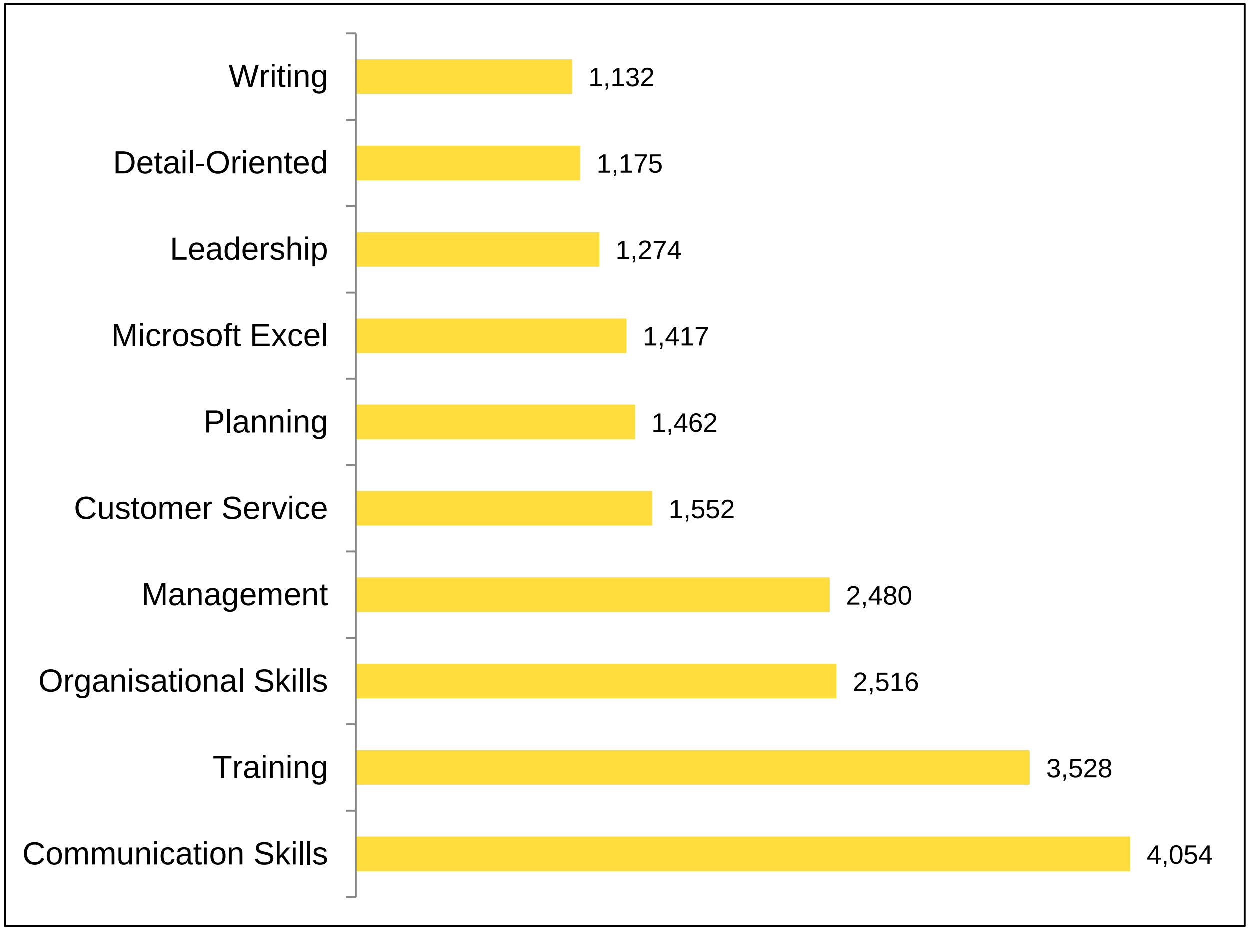


Labour Insight, 2013

- According to Labour Insight, the detailed occupation with most vacancies in GM in September 2013 was nurses with 786, closely followed by Programmers and Software Development Professionals at 782. Both these accounted for over 18% of the top 20 GM LEP vacancies.

Communication skills are the top baseline requirement of vacancies

Figure 25: Top 10 baseline skills requirements in GM vacancies, September 2013

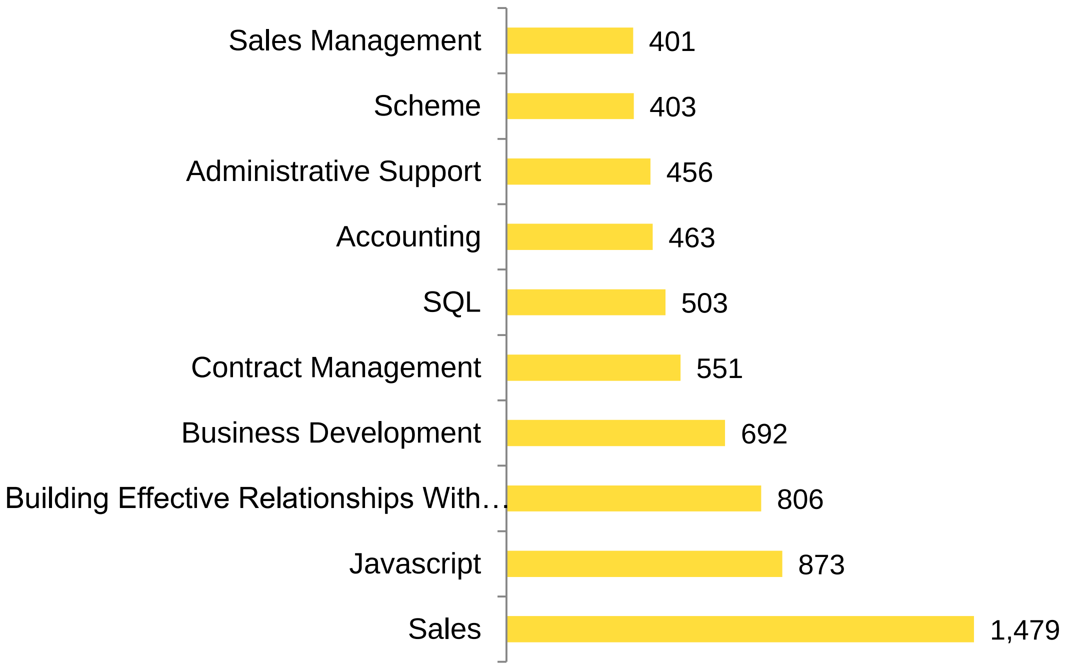


- Labour Insight shows that for occupations where baseline skills were provided on job specifications, communication skills and training were the top two requirements in Greater Manchester in September 2013.
- Organisational skills and management skills were third and fourth respectively, with customer service skills completing the top 5 requirements listed in job postings.
- More than one skill may be listed as a requirement for a job vacancy.

Labour Insight, 2013

Sales and Javascript lead the list of specialist skills that employers need

Figure 26: Top 10 specialist skills for job requirements in the Greater Manchester LEP area – September 2013



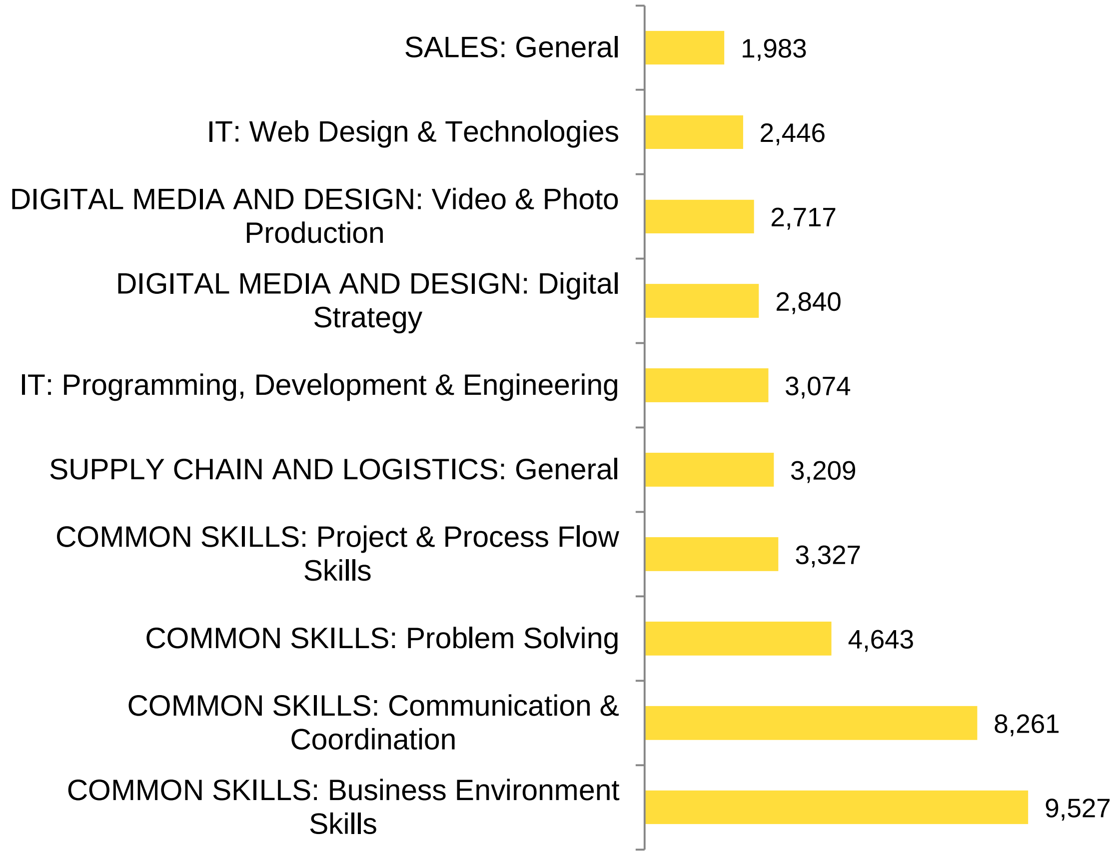
- Labour Insight shows that where occupations demanded specialist skills on a job specification, sales and javascript were the top to requirements.

- It is important to remember that more than one skill may be listed as a requirement for a vacancy.

Labour Insight, 2013

Common skills are the cluster most in demand in GM

Figure 27: Top 10 skills clusters for GM vacancies, September 2013*

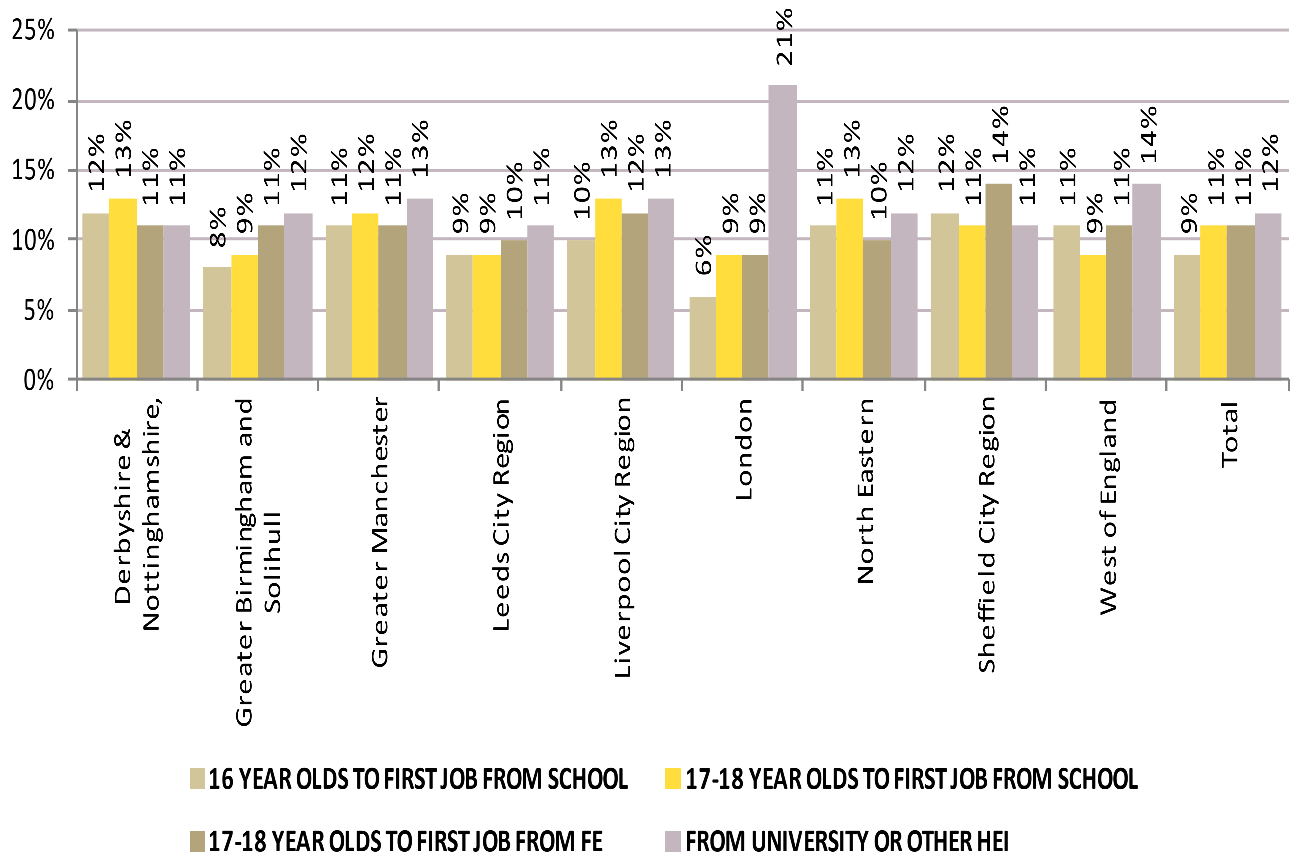


- According to Labour Insight, the most sought-after skill cluster in Greater Manchester is 'common skills', which accounted for 61% of the Top 10 skills cluster requirements in the area in September.
- Digital, media and design accounts for 13.2% and IT 13% in the Top 10.
- * It is important to remember that Labour Insight captures the more frequently mentioned skills: communication skills will be bundled with others that the jobs require.

Labour Insight, 2013

National Employers' Skills Survey: summary of key messages

Figure 28: Proportion of employers who had recruited anyone to their first job on leaving school, college or university in the last 2-3 years



- The most recent National Employer Skills Survey shows that Greater Manchester compares reasonably well in terms of the proportion of employers recruiting young people aged 17-18 to their first job from school, with 12% of employers doing so, compared to 11% nationally.
- For the other groups Greater Manchester performs towards the middle of the range. On recruitment of 16 year olds straight from school, it performs better than nationally by 2 percentage points, and for higher education leavers by 1 percentage point.

UKCES, National Employers Skills Survey

National Employers Skills Survey: Summary of Key Messages

Figure 29: Percentage very well prepared/well prepared for work in England's Core LEP areas and London

	16 YEAR OLDS TO FIRST JOB FROM SCHOOL	17-18 YEAR OLDS TO FIRST JOB FROM SCHOOL	17-18 YEAR OLDS TO FIRST JOB FROM FE	FROM UNIVERSITY OR OTHER HEI
Derbyshire & Nottinghamshire,	61%	66%	74%	86%
Greater Birmingham and Solihull	59%	69%	72%	84%
Greater Manchester	54%	68%	76%	83%
Leeds City Region	59%	69%	80%	89%
Liverpool City Region	61%	72%	70%	87%
London	60%	64%	70%	81%
North Eastern	60%	65%	72%	85%
Sheffield City Region	55%	64%	77%	89%
West of England	55%	71%	73%	85%
Total	59%	66%	74%	83%

• On the other hand, when compared to employers in other Core City LEP areas and London, employers in GM are less likely to think that young people leaving school at 16 and leaving university are well prepared for work. The perception of employers for those young people recruited from college fared better by comparison.

•GM compares poorly to other areas for those 17-18 year olds recruited to their first job from school and also for higher education leavers.

UKCES, National Employers Skills Survey

Key Messages from Sector Deep Dive Analysis: Summary (1)

Deep Dive Outline	• As part of the analysis of current and future skills needs, detailed analysis was commissioned of Greater Manchester's nine priority economic sectors. • Research undertaken included: a sector profile; a survey of employers and a survey of learning providers. • By order of employment, the sectors are: financial and professional services (235,000 employees); health and social care (152,000); retail (115,000); education (100,000); hospitality and tourism (83,000); construction (54,000); logistics (53,000); advanced manufacturing (51,600); digital and creative (45,000).
Skills Mismatches	• There appears to be a mismatch between expected skills demand and the levels that providers are currently training most of their starters at. • In financial and professional services, 60% of courses are at level 2, but expected demand will be mostly at level 4. • In digital and creative, 50% of courses are at levels 1 and 2, but demand is expected mostly at level 4; • In construction, most demand is forecast at level 3, followed by level 4; 60% of starts in GM are at level 2 or below.
Learner numbers	• Some sectors appear to have few learners relative to the size and economic importance of the sector. • Estimated total learners are: financial and professional service (33,000); health and social care (22,000); retail (7,500); education (12,500); hospitality and tourism (25,230); construction (3,200); advanced manufacturing (24,000); and digital and creative (40,000). • Conversely, some sectors (such as digital and creative and advanced manufacturing) have relatively large numbers of learners.
Specific Skills Shortages	• GM faces a number of specific skill shortages including fork-lift truck drivers; mechanics; biomass engineers; joiners; dry-lining specialists; sales and marketing specialists; nurses and dementia specialists; dental practitioners; pharmacists; qualified, experienced education staff; insurance specialists. • More courses on management and leadership were highlighted as a specific need by retail, digital and creative and financial and professional services. • Employability-type skills are also prized highly across most sectors, especially around customer service, communication and inter-personal skills.
Information, Advice and Guidance	• Poor quality (or in some cases the absence of) information, advice and guidance is a significant issue. • Sectors that highlighted this included construction, financial and professional services and the digital and creative sector. • According to some employers, providers need to stress the importance of learning progressing to higher levels.

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Key Messages from Sector Deep Dives: Summary (2)

Age and gender issues	• Stark gender imbalances continue to feature in some sectors – and could be set to worsen. o In advanced manufacturing trainees are 97% male against 91% male employment o In education, below level 4, 96% of learners are female against 69% within the existing workforce • GM faces some notable challenges surround the ageing of its workforce: o The over 60s are the fastest growing group of the retail workforce (though 25% of the workforce are under 25) o Health and social care needs to replace tens of thousands of employees who are expected to retire, move or leave o In construction, 19% of construction workers will reach retirement by 2020
Skills Mismatches	• There appears to be a mismatch between expected skills demand and the levels that providers are currently training most of their starters at. o In financial and professional services, 60% of courses are at level 2, but expected demand will be mostly at level 4. o In digital and creative, 50% of courses are at levels 1 and 2, but demand is expected mostly at level 4; o In construction, most demand is forecast at level 3, followed by level 4; 60% of starts in GM are at level 2 or below.
Apprenticeships	• Strong enthusiasm for apprenticeships is yet to be converted into actual apprentices in several sectors o In digital and creative, 84% said apprenticeships were suitable, but 20% reported employing an apprentice. o In hospitality and tourism, 85% said apprenticeships are suited to the sector, but approximately 5% of employers offer them. o In education, 87% said apprenticeships were suitable, but apprenticeship starts are very modest (1,689).
Young people	• A near-universal theme across all sectors is the lack of work-readiness among young people. • The work ethic, punctuality, interpersonal skills and communication abilities were highlighted. • Poor standards of basic English and maths continue to frustrate employers. • The need for greater work experience opportunities was also prominent (with the exception of the construction industry).
Drivers of learning	• Mandatory training remains a very powerful driver of learning in logistics, financial and professional services, hospitality and tourism, construction, education, health and social care, and advanced manufacturing. • Sectors which have lower 'licence to practice' requirements appear to do less training. • Although a great deal of training takes place in-house, much of this is at a basic or introductory level (and often to do with internal processes rather than transferable skills).

SKILLS SUPPLY: YOUNG PEOPLE

GCSE performance across has improved slightly

Figure 30: % of 15 year olds with 5+ GCSE's A*-C or equivalent including English and Maths, 2010/11-2012/13

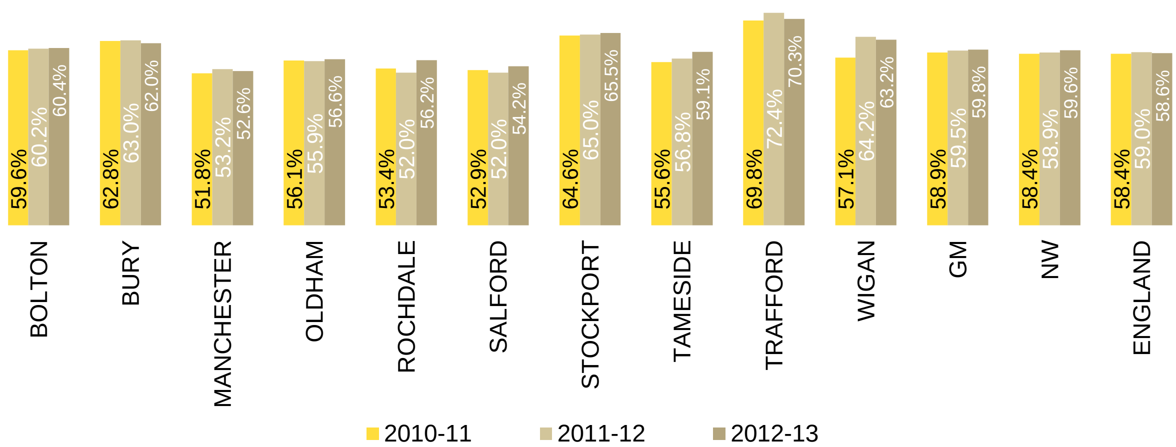
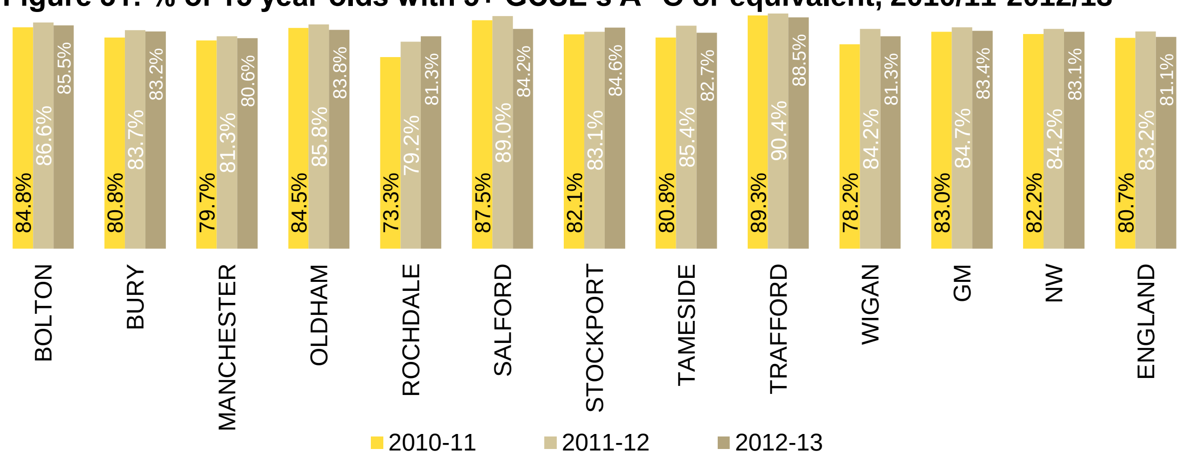


Figure 31: % of 15 year olds with 5+ GCSE's A*-C or equivalent, 2010/11-2012/13



- GCSE performance in Greater Manchester has improved since 2009, albeit marginally. For the 2012/13 academic year, 59.8% of students achieved 5+ GCSEs at grades A*-C (including maths and English), compared to 58.9.0% in 2009/10 (see Figure 20). The conurbation average is higher than the latest figures for the North West (59.6%) and England (58.6%).

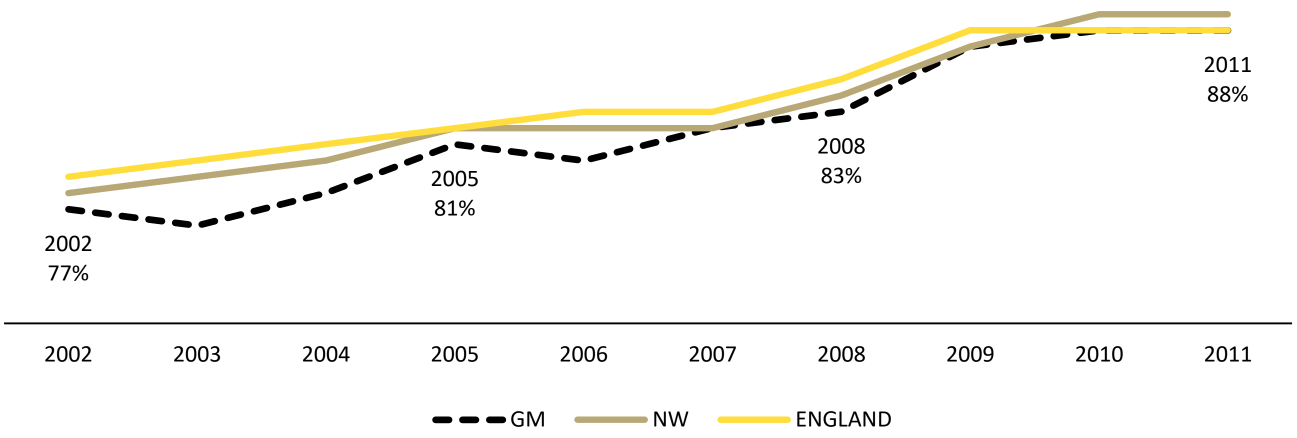
- At a district level there are variations in GCSE performance. In Trafford for example, 70.3% of pupils in 2012/13 achieved 5+ GCSE at grades A*-C (including maths and English), while in Manchester the figure was 52.6%.

- Excluding maths and English, 83.4% of pupils in Greater Manchester achieved 5 or more GCSEs at grades A*-C in 2012/13 (see Figure 21) – this was down slightly on the previous year's figure of 84.7%, but above the latest regional (83.1%) and national averages (81.1%).

Source: Department for Education (2012); Official 2013 GCSE data by Local Authority

Participation rates among 16 and 17 year olds are below national and regional averages

Figure 32: Participation in education and work based learning, 16 and 17 year olds 2002-2011*



- Year 11 is a crucial point of transition, and 88% of 16 & 17 years olds in Greater Manchester are in post-16 education & training, in line with the regional average and only slightly below the national figure of 89%.
- Participation rates have increased by 11 percentage points in Greater Manchester since 2002.

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Source: Department for Education, Participation in education, training and employment by 16- to 18-year-olds in England, 2012
* data for local authorities are only available up to 2011)

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Attainment at level 2 has risen consistently...

Figure 33: Percentage of young people who attain Level 2 by age 19, 2005-2012

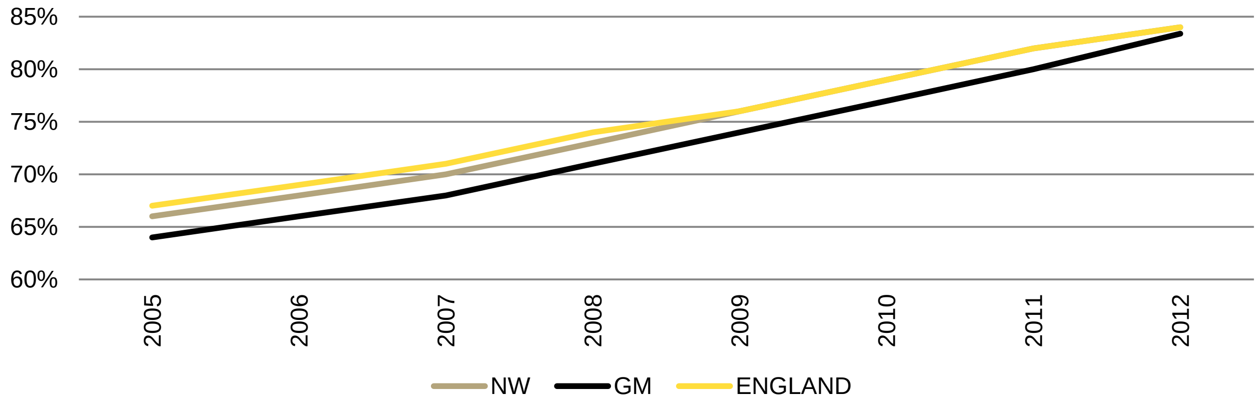
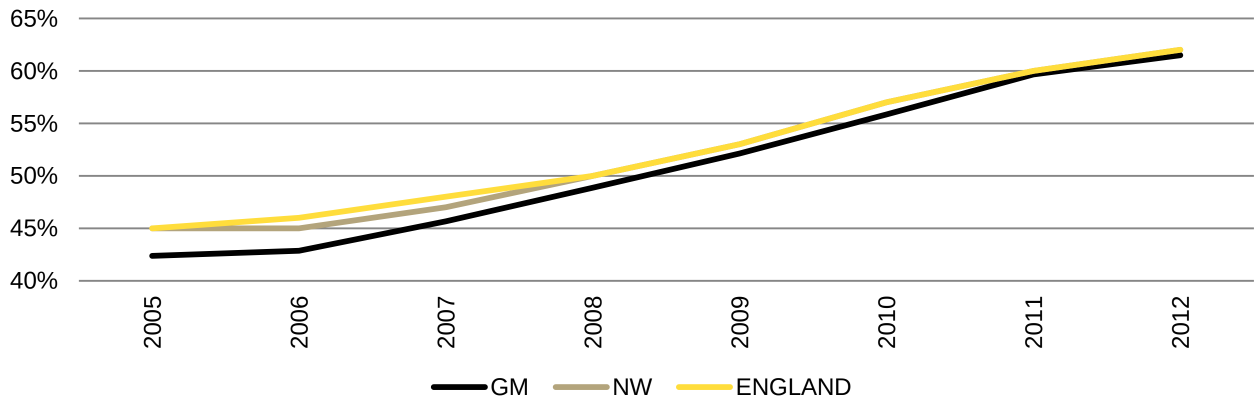


Figure 34: Percentage of young people who attain Level 2 by age 19, including English & Maths, 2005-2012



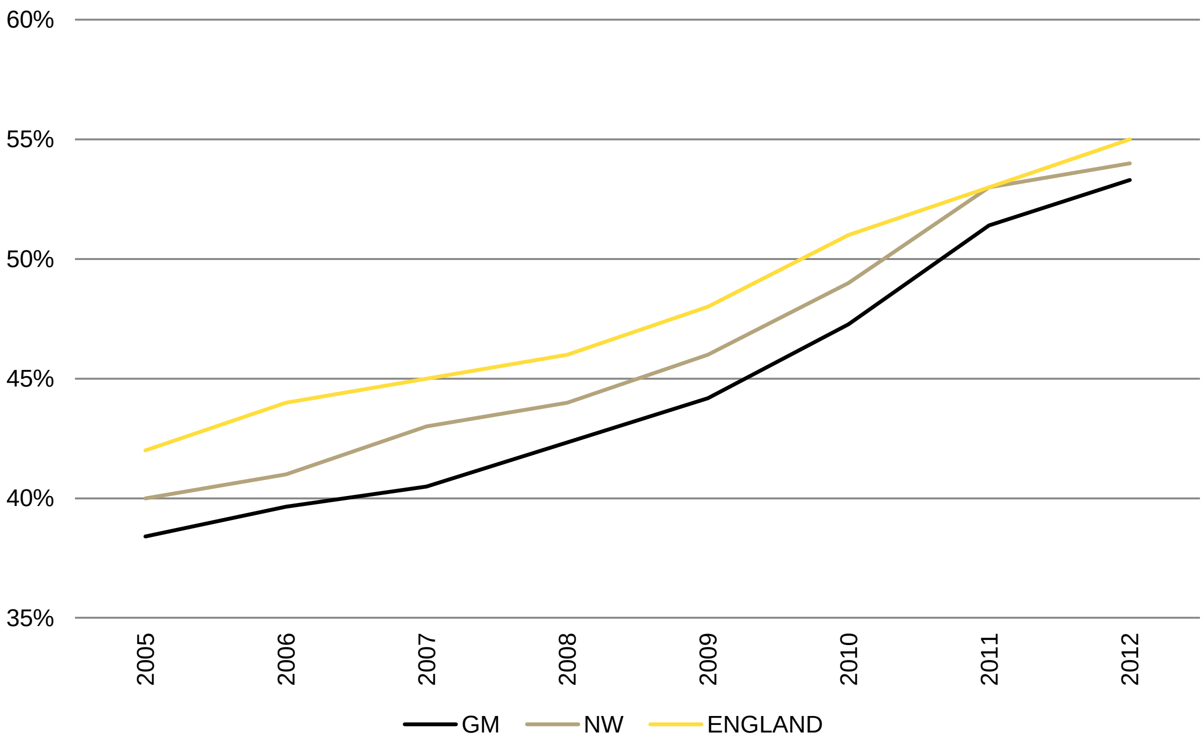
- Attainment at Level 2 by age 19 has risen consistently in GM since 2005. In GM the figure in 2012 was around 83.0%, compared to approximately 84.0% in England and the North West. While the conurbation is therefore still below regional and national averages, the 2012 figure for GM is a significant improvement on 2005 when it was below 65.0% (see Figure 23).

- Attainment of Level 2 by age 19 with English & Maths in 2012 in GM was around 62.0%, virtually in line with the national and regional figures. GM has closed the gap since 2005, when it was behind both benchmark areas (see Figure 24).

Source: Department for Education, Level 2 and 3 Attainment by Young People in England Measured Using Matched Administrative Data: Attainment by Age 19 in 2012

...as has attainment at level 3...but it remains below regional and national levels

Figure 35: Percentage of young people who attain Level 3 by age 19



- Attainment at Level 3 amongst 19 year olds has consistently risen since 2005 in Greater Manchester.
- In 2012, attainment in the conurbation by 19 year olds was around 53.0%, up from less than 40.0% in 2005. Despite the increase, GM is still behind the North West and England, which had figures of 53.0% and 55.0% respectively in 2012.

Source: Department for Education, Level 2 and 3 Attainment by Young People in England Measured Using Matched Administrative Data: Attainment by Age 19 in 2012

There is a 20% difference in the performance of children who receive free school meals and those who do not

Figure 36:Attainment of Level 2 including English and maths by those aged 19 by FSM eligibility in GM, 2005-2012

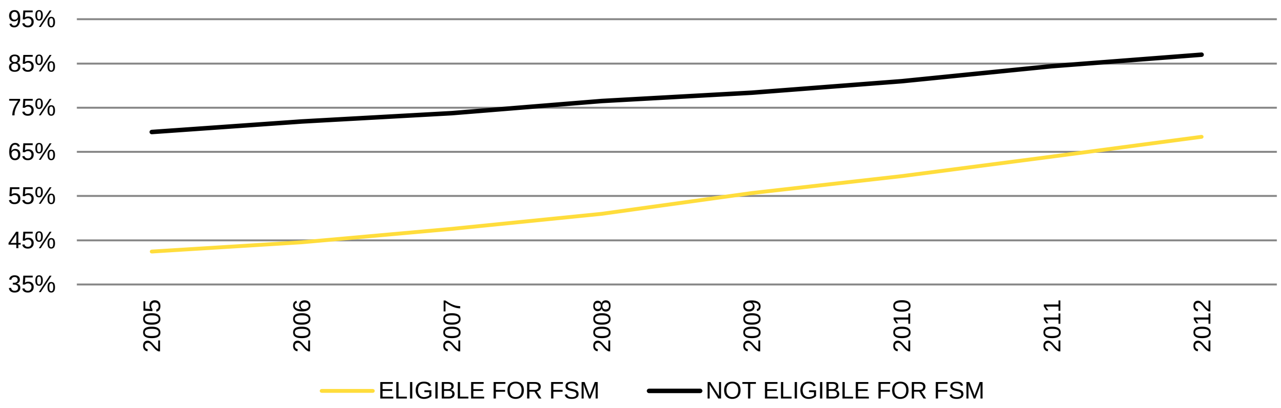
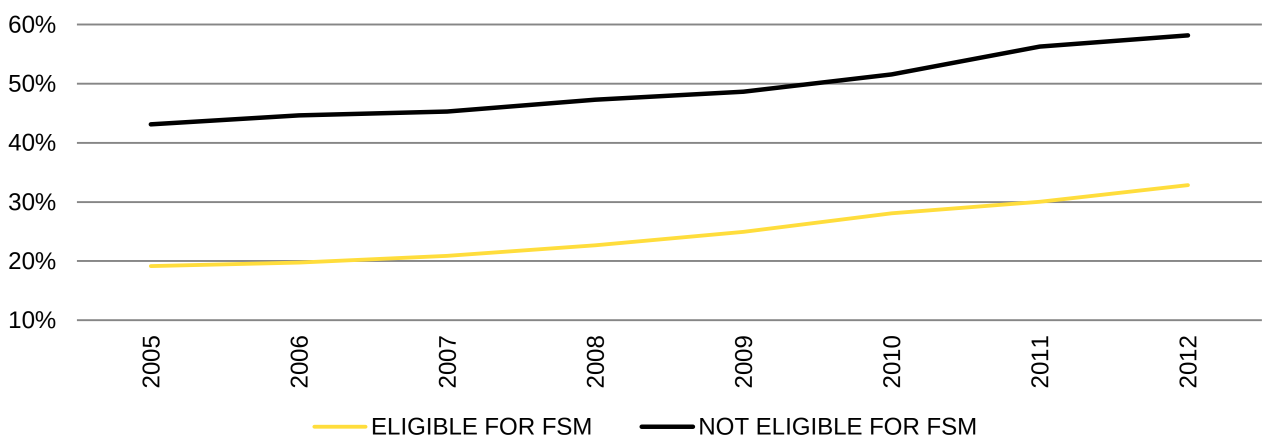


Figure 37: Attainment of Level 3 by those aged 19 by FSM eligibility in GM, 2005-2012



- Comparing attainment levels at Level 2 between 19 year old students eligible for free school meals (when they were 16 years old) and those not eligible for free school meals (see Figure 26) shows a disparity between the groups of almost 20 percentage points (pp) in GM in 2011, with around 87% who were not eligible for FSM compared to 68% who were.
- At Level 2 the difference narrowed by approximately 8pp between 2005 and 2012.
- Comparing the attainment levels at Level 3 between 19 year old students eligible for free school meals (when they were 16 years old) and those not eligible for free school meals (see Figure 27) shows a disparity between the groups of 25 percentage points (pp) in GM – slightly smaller than the national average of 24pp.
- At Level 3 the gap between FSM and Non-FSM achievement in GM has widened slightly, having stood at 24pp in 2005.

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Source: Department for Education, Level 2 and 3 Attainment by Young People in England Measured Using Matched Administrative Data: Attainment by Age 19 in 2012

Just under 80% of young people go on to education after GCSEs

Figure 38: 2008/09 KS4 cohort going to, or remaining in, an education destination in 2009/10

	NUMBER OF STUDENTS	ANY EDUCATION DESTINATION	FE COLLEGE	OTHER FE PROVIDER	SCHOOL SIXTH FORM	SIXTH FORM COLLEGE	APPRENTICESHIPS	EDUCATION DESTINATION NOT SUSTAINED	NOT CAPTURED IN DATA
Bolton	3,580	2,832	1,404	168	693	568	167	381	200
Bury	2,200	1,782	1,042	87	21	637	100	211	102
Manchester	4,580	3,569	1,725	638	430	776	181	535	295
Oldham	3,000	2,438	1,025	152	435	824	126	306	131
Rochdale	2,560	2,002	1,267	100	326	308	111	281	168
Salford	2,290	1,723	1,411	207	88	17	154	310	103
Stockport	3,000	2,356	645	113	135	1,463	157	310	177
Tameside	2,940	2,253	891	173	184	1,005	200	312	175
Trafford	2,840	2,401	940	297	1,020	144	89	221	130
Wigan	3,860	2,970	1,498	259	249	963	281	434	175
GM	30,850	24,343	12,139	2,077	3,486	6,644	1,576	3,291	1,636
England	569,110	461,615	179,143	23,716	194,616	64,112	23,809	51,314	32,092

Figure 39: 2008/09 % of KS4 cohort going to, or remaining in, an education destination in 2009/10

	NUMBER OF STUDENTS	ANY EDUCATION DESTINATION	FE COLLEGE	OTHER FE PROVIDER	SCHOOL SIXTH FORM	SIXTH FORM COLLEGE	APPRENTICESHIPS	EDUCATION DESTINATION NOT SUSTAINED	NOT CAPTURED IN DATA
Bolton	3,580	79.1%	39.2%	4.7%	19.3%	15.9%	4.7%	10.6%	5.6%
Bury	2,200	81.0%	47.4%	3.9%	1.0%	29.0%	4.6%	9.6%	4.6%
Manchester	4,580	77.9%	37.7%	13.9%	9.4%	17.0%	3.9%	11.7%	6.4%
Oldham	3,000	81.3%	34.2%	5.1%	14.5%	27.5%	4.2%	10.2%	4.4%
Rochdale	2,560	78.2%	49.5%	3.9%	12.8%	12.0%	4.3%	11.0%	6.5%
Salford	2,290	75.2%	61.6%	9.1%	3.8%	0.7%	6.7%	13.5%	4.5%
Stockport	3,000	78.5%	21.5%	3.8%	4.5%	48.8%	5.2%	10.3%	5.9%
Tameside	2,940	76.6%	30.3%	5.9%	6.3%	34.2%	6.8%	10.6%	6.0%
Trafford	2,840	84.5%	33.1%	10.5%	35.9%	5.1%	3.1%	7.8%	4.6%
Wigan	3,860	76.9%	38.8%	6.7%	6.4%	25.0%	7.3%	11.3%	4.5%
GM	30,850	78.9%	39.3%	6.7%	11.3%	21.5%	5.1%	10.7%	5.3%
England	569,110	81.1%	31.5%	4.2%	34.2%	11.3%	4.2%	9.0%	5.6%

- The vast majority (24,343 or 78.9% of learners) went on to education. Broken down by type of provision: 12,139 (39.3%) went to FE colleges; 6,644 (21.5%) went to sixth form colleges; 3,486 (11.3%) went to a school sixth form; and 2,077 (6.7%) went to another FE provider. There were also 1,576 (5.1%) who left into Apprenticeships. However 3,291 (10.7%) did not sustain an education destination and 1,636 (5.3%) were not captured in the data – this is because they were either in employment, Not in Employment Education or Training (NEET), or had left England (including to Wales or Scotland, as well as those taking gap years or moving abroad).
- The highest number of KS4 students were in Manchester (4580) but the highest percentage progressing to education was 84.5% in Trafford.

The numbers of 16-18 year olds starting courses has been falling recently

Figure 40: Youth (16-18) SFA-funded starts by sector and year 2008/09 to 2012/13*

		2008 / 2009	2009 / 2010	2010 / 2011	2011 / 2012	2012 / 2013
High growth sectors	Creative	17,263	17,433	17,254	16,851	15,208
	Digital	5,247	5,991	5,867	5,279	4,710
	Education	11	6	8	19	8
	Financial & Professional	5,604	5,362	5,091	5,127	4,770
	General business	8,241	7,286	7,311	7,418	9,250
	Health and Social Care	8,899	9,366	11,053	12,301	11,139
	Manufacturing	2,166	2,193	2,279	2,609	2,390
Risk of undersupply sectors	Construction	3,388	4,026	4,037	3,645	3,480
	Retail	299	444	449	444	335
	Tourism	3,269	3,417	3,486	3,848	3,292
	Transport and storage	1,238	1,456	1,676	1,881	1,742
Other sectors	Environment	207	83	191	884	594
	Personal services	3,494	3,202	3,241	3,721	3,119
	Primary industry	735	891	795	819	919
	Public administration	1,416	1,842	1,833	2,164	1,667
	Sport	5,684	5,815	5,807	7,531	7,396
Non-sector specific	Employability	67,334	76,026	79,255	78,676	55,297
	Academic	56,155	57,268	58,151	59,737	60,466
	Not Applicable	523	65	1,648	10,964	8,726
	Unknown	59,976	60,872	53,167	48,839	46,812
	Grand Total	251,149	263,044	262,599	272,757	241,320

- In 2012/13 there were just over 240,000 youth (16-18) Skills Funding Agency (SFA) starts in Greater Manchester, almost 10,000 fewer than 2008/9. Starts among 16-18 year olds peaked in 2011/12.
- Creative and Health & Social Care have consistently been the two largest high growth categories with almost 55% of the total starts in this category, despite both sectors seeing reductions between 2011/12 and 2012/13.
- Construction and Tourism remain the two sectors with the largest number of starts where a risk of undersupply exists, with 3,480 and 3,292 starts respectively in 2012/13. The number of starts was down slightly in both sectors on an annual basis.

Source: SFA Datacube
* 2012/13 data are partial full-year data

new economy

Creative courses are the most popular at level 3 among 16-18 year olds

Figure 41: 16-18 SFA Funded starts by level and sector 2011/12 and 2012/13*

		Entry and Level 1		Level 2		Level 3		Level 4, 5 or Higher		Other	
		2011 / 2012	2012 / 2013	2011 / 2012	2012 / 2013	2011 / 2012	2012 / 2013	2011 / 2012	2012 / 2013	2011 / 2012	2012 / 2013
High growth sectors	Creative	914	677	1,857	1,388	14,039	13,088	15	20	26	35
	Digital	627	356	815	658	3,837	3,687		7		2
	Education	0	1	12	4	1				6	3
	Financial & Professional	169	125	400	416	4,529	4,217	20	10	9	2
	General business	1,513	3,688	1,064	1,021	4,816	4,516	5		20	25
	Health and Social Care	5,823	4,287	2,507	3,006	3,711	3,695		10	260	141
	Manufacturing	537	414	1,007	912	1,042	1,046	7	11	16	7
Risk of undersupply sectors	Construction	2,301	2,205	905	863	408	407	1		30	5
	Retail	288	192	127	129	1				28	14
	Tourism	1,400	956	1,438	1,463	797	758			213	115
	Transport and storage	1,038	866	752	753	88	122			3	1
Other sectors	Environment	618	337	190	181	75	76			1	
	Personal services	1,092	674	1,878	1,814	743	623		7	8	1
	Primary industry	204	194	294	400	290	313		1	31	11
	Public administration	193	167	1,115	640	851	858			5	2
	Sport	1,572	1,809	2,630	2,313	3,323	3,250	2	4	4	20
Non-sector specific	Employability	58,514	37,054	11,844	9,871	7,375	7,231			943	1,141
	Academic	4,880	5,175	9,401	10,156	45,315	45,129			141	6
	Not Applicable	8	45	1						10,955	8,681
	Unknown	0	1,188		117		496			48,839	45,011
	Grand Total	81,691	60,410	38,237	36,105	91,241	89,512	50	70	61,538	55,223

The highest number of starts across all levels and sectors were at Level 3 in both 2011/12 and 2012/13. Progression to Level 4 is extremely low in all sectors. For example, only 5 of the 7 high growth sectors shown in the table above have any form of progression from level 3 to level 4 (creative, digital, education, financial & professional, health & social care and manufacturing), while it is non-existent in the other two high growth sectors (general business and education, although the latter has very low starts across every level at ages 16-18).

Source: SFA Datacube
* 2012/13 data are partial full-year data

There has been a drop in youth apprenticeship starts

Figure 43: Apprenticeship starts & achievements, 16 to 18 year olds in GM, 2005/6 to 2012/13

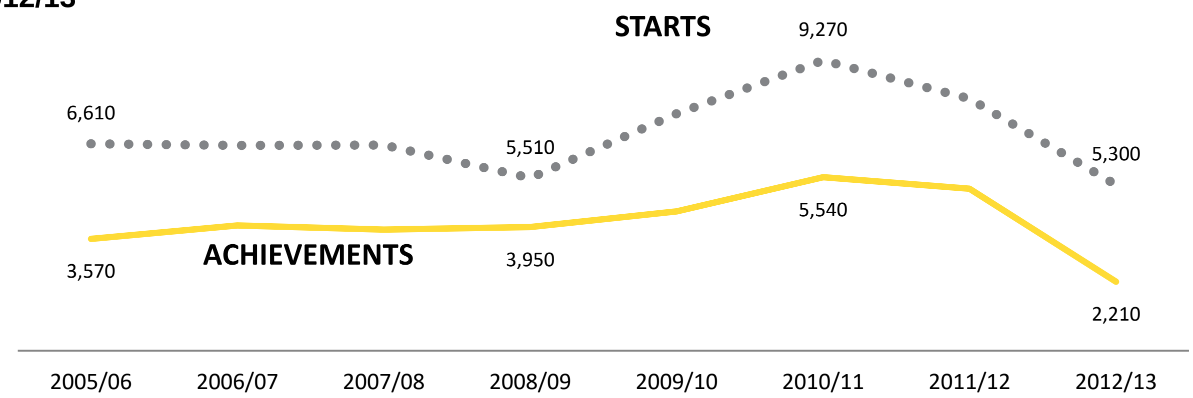
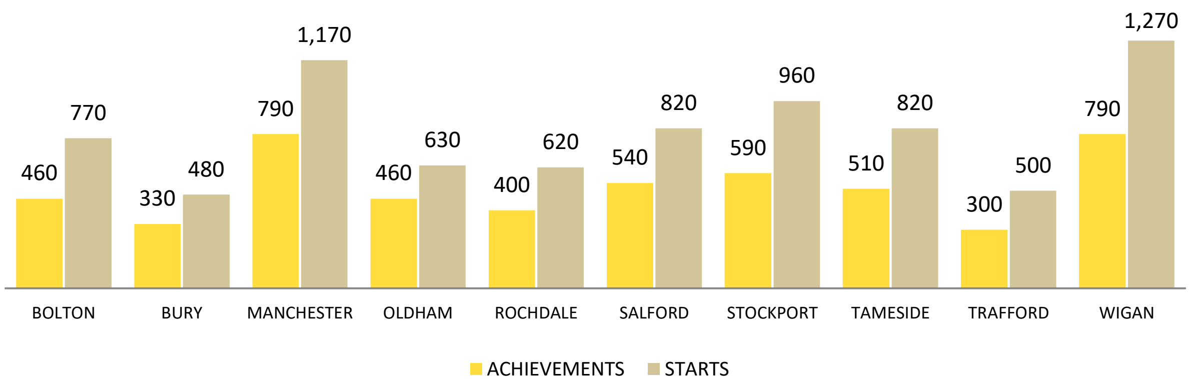


Figure 44: Apprenticeship starts & achievements by district, 16 to 18 year olds, 2011/12 (latest full year)



Sources: Department for Education, 2012
http://data.gov.uk/dataset/apprenticeship-success-rates-in-england-2011-2012

- The success rate for 16-18 year olds across all Apprenticeships was 75.8% - higher than the statistical neighbour average (72.2%).
- There has been a significant improvement since 2009, with the rate increasing by 10 percentage points since 2008/09 – faster than all other comparators.
- Level 2 Apprenticeships success rates were particularly strong in 2011/12, with a rate of 77%, compared to 71.8% across statistical neighbours.
- Changes to the definitions and rules of apprenticeship – especially the removal of ‘programme-led’ apprenticeships – account for at least some of the apparent fall.
- *The data used in these charts is from the Department for Education

‘General business’ is the most popular course among young people

Figure 45: Youth Apprenticeship starts by sector and year 2008/9-2012/13*

		2008 / 2009	2009 / 2010	2010 / 2011	2011 / 2012	2012 / 2013
High growth sectors	Creative	11	15	13	1	10
	Digital	80	284	353	294	254
	Education	1	6	40	43	96
	Financial services	0	2	4	10	17
	professional services	119	162	183	253	211
	Business services	35	200	99	102	79
	General business	895	1,451	2,888	2,052	1,953
	Health and social care	878	1,267	1,123	962	969
	Manufacturing	434	418	554	512	537
Risk of undersupply sectors	Construction	1,205	949	965	675	684
	Retail	227	323	228	207	131
	Tourism and culture	222	469	372	379	164
	Transport and storage	664	876	1101	779	557
Other sectors	Environment	0	0	0	0	3
	personal services	864	996	867	812	790
	Primary industry	30	46	38	90	61
	Public administration	7	7	1	9	9
	Sport	238	743	1336	989	397
	Missing	0	0	0	43	328
	Total	5,910	8,214	10,165	8,212	7,250

- The numbers of 16-18 apprentices in Greater Manchester peaked in 2010/11 and have been falling in the last two years.
- ‘General business’ is by some distance the most popular course (1,953 starts). The next most popular course is health and social care (969), then personal services (790).
- Some sectors at risk of skills under-supply have seen particularly sharp falls in the numbers of apprentices. For example, in transport and storage, there were 1101 in 2010/11, but only 557 in 2012/13.
- Sport has seen a particularly steep fall (1336 in 2010/11 down to 397 in 2012/13).

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Source: SFA Datacube
*2012/13 data are partial full-year data

Most apprenticeship starts are at intermediate level

Figure 46: Youth Apprenticeship starts by sector and year 2008/9-2012/13*

		Intermediate		Advanced		Higher	
		2011 / 2012	2012 / 2013	2011 / 2012	2012 / 2013	2011 / 2012	2012 / 2013
High growth sectors	Creative	0	4	1	6	0	0
	Digital	53	64	241	190	0	0
	Education	30	62	13	34	0	0
	Financial services	8	15	2	2	0	0
	professional services	137	109	88	80	28	22
	Business services	94	57	8	22	0	0
	General business	1,755	1,628	297	325	0	0
	Health and social care	619	604	343	365	0	0
	Manufacturing	277	271	235	261	0	5
Risk of undersupply sectors	Construction	457	461	218	223	0	0
	Retail	194	113	13	18	0	0
	Tourism and culture	355	149	24	15	0	0
	Transport and storage	682	469	97	88	0	0
Other sectors	Environment		3			0	0
	personal services	597	623	215	167	0	0
	Primary industry	70	30	20	31	0	0
	Public administration	9	8		1	0	0
	Sport	712	271	277	126	0	0
	Missing	3	194	35	121	5	13
	Grand Total	6,052	5,135	2,127	2,075	33	40

- A total of 71% of apprenticeship starts among Greater Manchester's 16-18 year olds are at intermediate level. Apprenticeships at advanced and higher level accounted for 29% ni 2012/13.
- Starts at intermediate and advanced level fell in 2012/13; the only level to show a rise (33 up to 40) was higher level apprentices, but the numbers involved are extremely low as a percentage of the total. Professional services accounts for most of the higher level apprenticeships at age 16-18.
- Among the sectors at risk of under-supply of skills, construction increased its apprentices at both intermediate and advanced level. However, the general trend among in this group is towards fewer apprentices.

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SFA Datacube
*2012/13 data are partial full-year data

Private providers lead the table of providers of apprenticeships, though colleges are a growing presence

Figure 47: Youth Apprenticeship (16-18) starts by provider*

	Intermediate	Advanced	Higher	Total
Economic Solutions Limited	531	202	7	740
Total People Limited	167	109		276
Bury College	192	83	0	275
The Oldham College	153	72	2	227
Wigan and Leigh College	147	75		222
The Manchester College	159	38	2	199
Damar Limited	136	38	2	176
Stockport College	105	47	1	153
Salford City College	109	42		151
Trafford College	97	51		148
Alliance Learning	92	52	1	145
Tameside College	100	40	2	142
Michael John Training Limited	109	20		129
Hopwood Hall College	97	29		126
JHP Group Limited	96	28		124
Michael McCormack	98	20		118
North Lancs. Training Group Limited	105	7		112
Bolton College	76	35		111
Unknown	93	15		108
Newcastle College	87	19		106
Wigan Metropolitan Borough Council	87	11		98
Stockton Riverside College	85	4		89
Central Training UK Limited	86	1		87
ESG (Skills) Limited	78	9		87
Babcock Training Limited	55	22		77
Babington Business College Limited	68	8		76
Proco NW Limited	54	22		76
Rochdale Training Association Limited	46	27		73
Kaplan Financial Limited	43	19	10	72
Elmfield Training Ltd	23	48		71

- The market for apprenticeships is dominated by private providers. Comparing totals, private providers accounted for 4594 apprenticeship starts compared to 956 accounted for by colleges. Colleges have relatively recently entered the apprenticeship market.

- Economic Solutions Limited accounted for 464 more apprenticeships at age 16-18 than the second biggest provider, Total People Limited.

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SFA Datacube
* 2012/13 data are partial full-year data

SKILLS SUPPLY: ADULTS

Adult learner numbers are falling overall

Figure 48: Adult (19+) SFA-funded starts by sector and year 2008-2013*

		2008 / 2009	2009 / 2010	2010 / 2011	2011 / 2012	2012 / 2013
High growth sectors	Creative	17,538	17,844	17,424	16,509	14,998
	Digital	2,157	3,224	2,633	3,829	3,441
	Education	1,881	1,670	1,529	1,021	1,505
	Financial & Professional	3,994	3,235	2,335	2,450	1,544
	General business	27,242	25,534	22,456	21,990	22,855
	Health and Social Care	20,900	16,254	14,047	14,525	12,485
	Manufacturing	4,564	3,130	3,830	2,386	1,981
Risk of undersupply sectors	Construction	7,104	7,329	6,403	7,260	4,847
	Retail	2,235	2,541	1,367	2,325	1,801
	Tourism	5,095	5,310	4,826	4,841	4,877
	Transport and storage	6,262	5,917	6,853	4,006	4,032
Other sectors	Environment	230	279	231	336	151
	Personal services	5,685	4,814	4,933	5,201	4,605
	Primary industry	1,393	1,498	1,052	1,609	1,203
	Public administration	2,453	2,272	2,216	2,100	4,161
	Sport	8,163	6,058	5,849	7,217	5,199
Non-sector specific	Employability	79,006	89,469	96,425	112,477	84,495
	Academic	12,776	12,889	11,641	11,864	11,973
	Not Applicable	29,946	569	677	654	1,941
	Unknown	3,021	3,783	3,387	3,514	8,750
	Grand Total	241,645	213,619	210,114	226,114	196,844

SFA Datacube
*2112/13 data are partial full-year data

- In 2012/13 there were just under 197,000 Skills Funding Agency (SFA) adult starts in Greater Manchester. This was 18.5% down on 2008/09, representing 44,800 fewer starts. The number of starts actually started to decline 2009/10 but recovered somewhat in 2011/12, but the 2012/13 figure was the first time in five years the number had fallen below 200,000.
- Looking at high growth sectors (see adjacent table), digital industries saw an increase in SFA-funded starts between 2008/09 and 2012/13, rising by 1,300 (60%) to reach more than 3,400. All other high growth sectors saw declines in SFA-funded starts over the same period, notably financial & professional (61% fall, or 2,450), manufacturing (57%, or 2,600) and health & social care (40%, or 8,400).
- In addition to high growth sectors, industries where there is a risk of undersupply – including construction and transport & storage – all suffered decreases in the number of SFA-funded starts from 2008-13.

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Two thirds of adult starts are at level 1 and 2....just 1% at level 4

Figure 49: Adult (19+) SFA-funded starts by sector, level and year*

		Entry and Level 1		Level 2		Level 3		Level 4, 5 or Higher		Other	
		2011 / 2012	2012 / 2013	2011 / 2012	2012 / 2013	2011 / 2012	2012 / 2013	2011 / 2012	2012 / 2013	2011 / 2012	2012 / 2013
High growth sectors	Creative	2,326	3,095	608	797	689	655	24	17	12,862	10,434
	Digital	2,239	2,245	978	705	369	202	4	2	239	287
	Education	11	39	101	53	266	463	509	609	134	341
	Financial & Professional	674	437	867	509	525	369	207	140	177	89
	General business	5,278	7,347	5,960	6,090	1,093	566	45	41	9,614	8,811
	Health and Social Care	2,174	3,055	4,115	4,240	3,725	2,948	62	51	4,449	2,191
	Manufacturing	444	455	1,506	1,052	275	285	19	22	142	167
Risk of undersupply sectors	Construction	1,630	1,691	4,262	2,394	734	422	100	15	534	325
	Retail	1,221	870	763	716	41	37	1		299	178
	Tourism	393	534	1,380	1,576	144	136			2,924	2,631
	Transport and storage	659	2,014	2,956	1,811	306	97	1		84	110
Other sectors	Environment	120	59	128	53	12	12			76	27
	Personal services	673	1,479	2,865	1,811	878	716		44	785	555
	Primary industry	434	239	380	322	95	90		4	700	548
	Public administration	130	64	1,462	3,327	75	64	2	2	431	704
	Sport	1,158	615	2,276	1,285	392	400	9	7	3,382	2,892
Non-sector specific	Employability	74,826	58,808	19,806	9,835	632	649	88	43	17,125	15,160
	Academic	940	919	3,122	4,779	1,389	1,163	1		6,412	5,112
	Not Applicable	116	251	129	84	63	22	1		345	1,584
	Unknown	0	2,608		3,141	0	236		13	3,514	2,752
	Grand Total	95,446	86,824	53,664	44,580	11,703	9,532	1073	1010	64,228	54,898

Of the 197,000 adult SFA-funded starts in 2012/13, 44% (circa 87,000) were for entry and level 1 starts. A further 23% (44,600) were at level 2. There were only 1,000 starts (1% of the total) at level 4, 5 or higher in 2012/13, of which education (a high growth sector) accounted for 600 of them. Across all levels, the number of starts declined on an annual basis – the largest absolute fall came in the number of level 2 starts, which fell by 9,100 between 2011/12 and 2012/13. 'Employability' accounts for a large proportion of starts.

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SFA Datacube
*2012/13 data are partial full-year data

Oldham and Tameside colleges provide the most starts at level 3+

Figure 50: Adult (19+) SFA-funded starts by provider*

	Entry and Level 1	Level 2	Level 3	Level 4, 5 or Higher	Other	Grand Total
Manchester City Council	4,554	769	29		9060	14412
Oldham Metropolitan Borough Council	4,857	452	78		8649	14036
The Manchester College**	9,487	3,879	143	0		13509
Bolton Metropolitan Borough Council	3,046				8115	11161
Salford City College	4,842	2,315	498	133	2893	10681
LearnDirect Limited	6,999	1,546	38		831	9414
Hopwood Hall College	3,975	1,861	777	52	2549	9214
Wigan and Leigh College	3,293	1,992	726	146	2700	8857
The Oldham College	3,971	2,295	980	134	695	8075
Bolton College	4,293	1,544	524	23	482	6866
Trafford College	1,829	1,766	784	103	2049	6531
Bury Metropolitan Borough Council	2,501	425	30		3484	6440
Workers' Educational Association	4,815	1,204	154		229	6402
Stockport Metropolitan Borough Council	1,386	415	115		3194	5110
Stockport College of Further and Higher Education	1,864	1,577	679	107	197	4424
Tameside College	1,239	1,486	887	74	597	4283
Salford City Council	1,246	14			2367	3627
Bury College	1,313	944	407	14	731	3409
Wigan Metropolitan Borough Council	634	71	2		2455	3162
Economic Solutions Limited	1,410	1,003	43	1	8	2465
Tameside Metropolitan Borough Council	537	94	1		849	1481
Mantra Learning Limited	1,413	67	0			1480
Rochdale Training Association Limited	1,077	328	40	0	3	1448
Start Training Ltd	234	1,150	30	31		1445
System Group Limited	1,066	39				1105
Joint Learning Partnership Limited	331	757				1088
Derby College	386	590	2			978
Cheadle and Marple Sixth Form College	83	448	199	0	140	870
Kaplan Financial Limited	825	0	0			825
Aquinas College	41	108	38		620	807
South Nottingham College	157	484	136	1		778
Preston College	156	403	75	15	60	709
West Nottinghamshire College	398	268	20	1	1	688
Havering College of Further and Higher Education	545	113				658
Warrington Collegiate	273	263	33	12	74	655
Stephenson College	1	395	204			600

- In 2012/13 there were 459 providers delivering adult SFA-funding starts to Greater Manchester residents. Providers with more than 600 starts are listed. The top 10 providers alone accounted for 54% of all starts.
- By total number of courses Manchester City Council was the largest provider, with just over 14,400, but it is important to remember that these many of these courses are classified as ‘other’ – ie. community learning an leisure courses that may or may not be relevant to the labour market.
- Oldham Metropolitan Borough Council was the second highest provider, just behind at 14,000.
- **Figures relating to The Manchester College supplied by the Skills Funding Agency are subject to some known discrepancies in the data

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SFA Datacube
*2012/13 data are partial full-year data

Adult apprenticeships have increased since 2008

Figure 51: Adult (19+) Apprenticeship starts by sector and year*

		2008 / 2009	2009 / 2010	2010 / 2011	2011 / 2012	2012 / 2013
High growth sectors	Creative	6	12	21	14	10
	Digital	37	63	107	412	394
	Education	10	38	338	606	691
	Financial services	16	0	35	65	160
	professional services	270	367	400	519	357
	Business services	239	279	249	325	384
	General business	2,339	3,028	6,681	7,537	7,345
	Health and social care	880	1,367	3,708	4,876	4,867
	Manufacturing	186	294	654	939	788
Risk of undersupply sectors	Construction	630	630	790	601	546
	Retail	505	790	2,262	1,617	916
	Tourism and culture	550	877	1,140	1,203	639
	Transport and storage	329	443	769	971	965
Other sectors	Environment	0			165	34
	personal services	298	344	496	565	645
	Primary industry	47	67	160	190	107
	Public administration	8	19	45	89	63
	Sport	236	434	852	641	300
	Missing	0	0	0	198	1,524
	Total	6,586	9,052	18,707	21,533	20,735

- In 2012/13 there were just under 21,000 adult (19+) apprenticeship starts in Greater Manchester (see adjacent table). This represented a significant increase on 2008/09, when the figure was 6,600. This means that adult apprenticeships rose by 215% (14,100) from 2008-13.
- In terms of high growth sectors, "General Business" apprenticeships saw the highest absolute rise over the period, growing by 5,000. This was followed by care apprenticeships which increased by 4,000.
- For sectors where there is a risk of undersupply in Greater Manchester, apprenticeships in three industries (retail, tourism & culture and transport & storage) grew between 2008 and 2013. Construction, which is also a sector at risk of undersupply, saw a slight fall from 630 to just under 550 apprenticeships.

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SFA Datacube
*2112/13 data are partial full-year data

Most adult apprenticeships are at level 2

Figure 52: Adult (19+) Apprenticeship starts by sector, level and year*

		Intermediate		Advanced		Higher	
		2011 / 2012	2012 / 2013	2011 / 2012	2012 / 2013	2011 / 2012	2012 / 2013
High growth sectors	Creative	10	2	4	8	0	0
	Digital	232	164	180	230	0	0
	Education	114	157	492	534	0	0
	Financial services	13	46	52	114	0	0
	professional services	168	92	188	116	163	149
	Business services	241	227	84	157	0	0
	General business	4,635	4,050	2,902	3,295	0	0
	Health and social care	2,082	2,137	2,794	2,730	0	0
	Manufacturing	696	514	237	269	6	5
Risk of undersupply sectors	Construction	300	280	301	266	0	0
	Retail	1,219	684	398	232	0	0
	Tourism and culture	891	470	312	169	0	0
	Transport and storage	796	821	175	144	0	0
Other sectors	Environment	103	30	62	4	0	0
	personal services	254	335	311	310	0	0
	Primary industry	123	59	67	48	0	0
	Public administration	39	13	50	50	0	0
	Sport	467	288	174	12	0	0
	Missing	9	623	121	559	68	342
	Grand Total	12,392	10,992	8,904	9,247	237	496

Source: SFA datacube
* 2112/13 data are partial full year data

- Intermediate level apprenticeships accounted for the highest proportion of adult apprenticeship starts in Greater Manchester in 2012/13 at just under 11,000 – accounting for 53% of the total. On an annual basis, intermediate level starts fell by 11% (1,400).

- Advanced apprenticeships totalled 9,200 in 2012/13, with higher apprenticeships totalling 496. Both figures were higher when compared with 12 months previously.

- Intermediate and advanced adult apprenticeships are largely concentrated within the general business and health & social care sectors (both classed as being high growth industries).

- Retail, which is one of the sectors where there is a risk of undersupply, saw the number of intermediate and advanced adult apprenticeships decline on an annual basis. A similar trend was evident in tourism & culture, another sector at risk of undersupply.

Greater Manchester has 420 adult apprenticeship providers

Figure 53: Adult (19+) Apprenticeship starts by provider*

	Intermediate	Advanced	Higher	Total
ESG (Skills) Limited	518	458	0	976
Economic Solutions Limited	488	464	12	964
GP Strategies Training Limited	279	441	0	720
Bury College	298	382	9	689
Newcastle College	302	324	1	627
Elmfield Training Ltd	218	395	0	613
Babcock Training Limited	368	206	1	575
JHP Group Limited	274	248	12	534
Unknown	300	219	0	519
Joint Learning Partnership Limited	212	265	18	495
Trafford College	203	244	0	447
North Lancs. Training Group Limited(	231	178	0	409
The Manchester College	259	124	6	389
The Oldham College	170	171	22	363
Total People Limited	144	161	35	340
Lifetime Training Group Limited	215	117	2	334
Damar Limited	165	136	23	324
Bolton College	80	181	9	270
Wigan and Leigh College	108	118	24	250
Hull College	220	13	0	233
Rochdale Training Association Limited	122	97	0	219
Training for Travel Limited	63	139	15	217
Salford City College	106	93	3	202
Michael John Training Limited	118	80	1	199
Intec Business Colleges Plc	102	84	4	190
Tesco Stores Limited	187	0	0	187
Tameside College	90	77	11	178
Hopwood Hall College	90	83	0	173
Alliance Learning	80	89	1	170
Wigan Metropolitan Borough Council	104	65	0	169

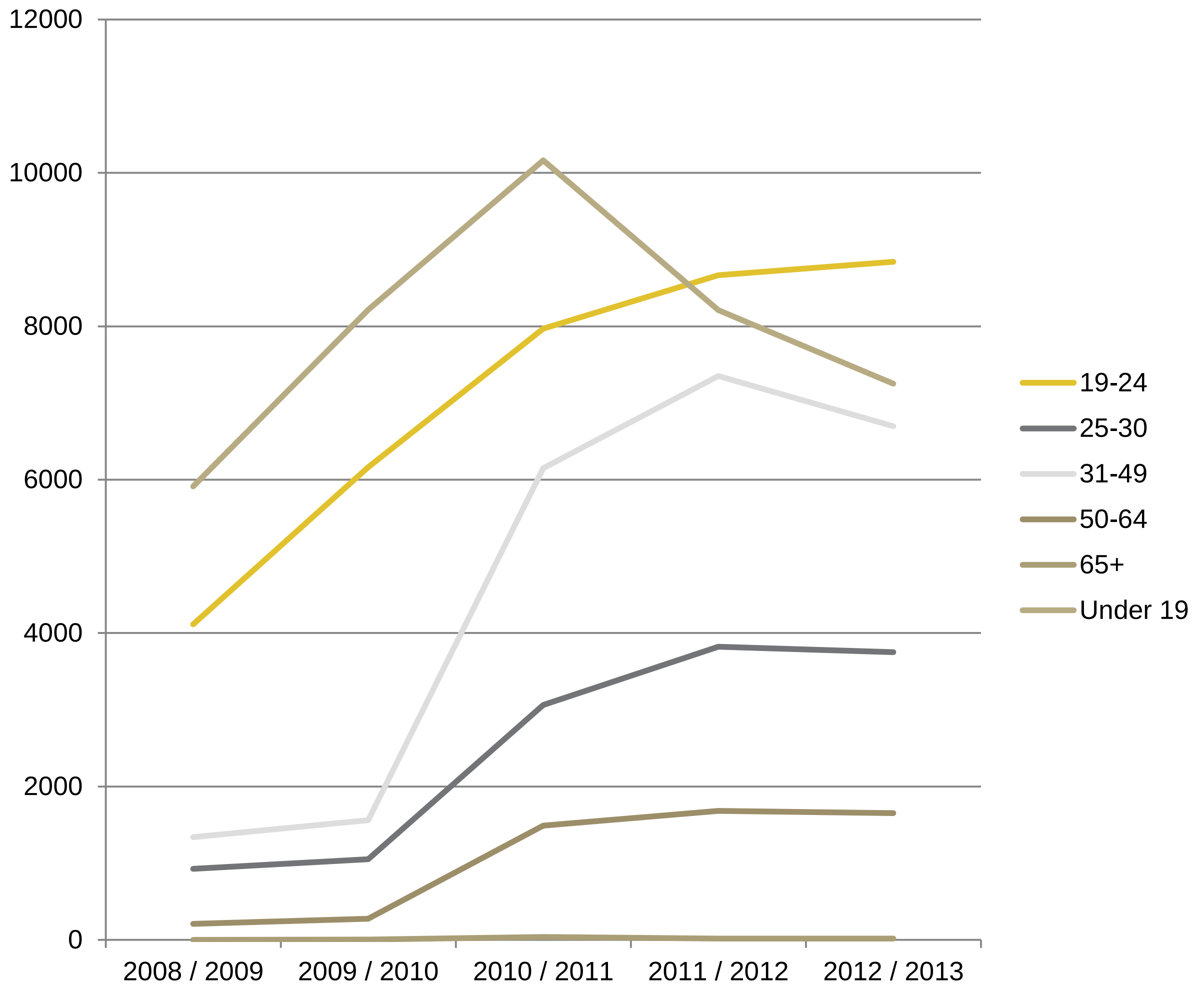
- In 2012/13 there were 420 adult apprenticeship providers in Greater Manchester. The top 30 (see adjacent table) accounted for 57% of all starts.
- ESK (Skills) Limited and Economic Solutions Limited were the two largest providers, with just under 1,000 starts each. The vast majority of these were either intermediate or advanced level.

new economy

Source: SFA datacube
* 2112/13 data are partial full-year data

Apprentices are getting older....adults in their 30s and 40s have been the fastest growing cohort of apprentices

Figure 54: All GM apprentices by age group, 2008/9-2012/13



Source: SFA datacube
* 2112/13 data are partial full-year data

- The age profile of Greater Manchester's apprentices shows that the growth of apprenticeships has been driven by adults in their 30s and 40s – not the school leavers the concept has traditionally been aimed at. Apprenticeships among the 31+ year old cohort have risen by 400% since 2008/9.

- Apprentices aged under 19 peaked in 2009/10 and have fallen sharply since. By contrast 19-24 year olds and 30+ year olds are the age cohorts rising most notably. Apprenticeships appear to be less attractive to people in their late 20s.

- Apprenticeships are today dominated by women. In 2008/9, 6532 women of all ages began an apprenticeship. By 2012/13, this total had risen to 16,143 (a 147% increase). By contrast, in 2008/9, 5964 men began an apprenticeship and by 2012/13, this figure had increased to 12,066 (a rise of 102%).

Business and administration is the most common higher education subject

Figure 55: All HE qualifiers by institution and subject, 2011/12

	BOLTON	MMU	MANCHESTER	SALFORD	GM TOTAL
Medicine & dentistry	0	0	865	10	875
Subjects allied to medicine	230	685	1445	1170	3,530
Biological sciences	210	785	875	365	2,235
Veterinary science	0	0	0	0	0
Agriculture & related subjects	0	35	15	0	50
Mathematical sciences	15	90	490	15	610
Computer science	135	355	435	255	1,180
Engineering & technology	425	365	1900	490	3,180
Architecture, building & planning	120	255	230	660	1,265
Social Studies	225	1025	1575	660	3,485
Law	30	580	550	150	1,310
Business & admin.	380	2505	2255	1315	6,455
Mass communications & documentation	30	280	50	365	725
Languages	40	320	935	290	1,585
Historical & philosophical studies	15	255	755	50	1,075
Creative arts & design	245	850	220	865	2,180
Education	680	2060	570	55	3,365
Combined	0	0	5	0	5
Total	2,785	10,750	14,070	6,860	34,465

Source: Higher Education Statistics Agency

- In 2011/12 there were more than 34,000 people who qualified from four universities in Greater Manchester. The University of Manchester accounted for 41% (14,000) of this total, followed by Manchester Metropolitan University at 31% (10,750).
- Looking at the different subject areas that higher education students are becoming qualified in, business and administration was the most common. This subject area accounted for almost 1 in 5 HE qualifiers (6,455) in 2011/12.
- After business and administration, three subject areas of social studies, education and 'subjects allied to medicine' each accounted for around 10% (between 3,400 and 3,500) of qualifiers).
- At the other end of the scale, subjects such as mathematical sciences accounted for only 2% of all HE qualifiers at 610. The majority of these (80%, or 490) were from the University of Manchester.

new economy

TRAVEL TO LEARN PATTERNS, WORK PROGRAMME, APPRENTICESHIP VACANCIES

Young learners at level 1 are most likely to learn close to home

Figure 56: Learner travel flows – Level 1 and below*, % who live and learn in borough, GM

PROVIDER LOCATION ------------>

LEARNERS POSTCODE

ADULT- L1 and below	BOLTON	BURY	MANCHESTER	OLDHAM	ROCHDALE	SALFORD	STOCKPORT	TAMESIDE	TRAFFORD	WIGAN	OUTSIDE GM	TOTAL
BOLTON	83.8	2.0	0.4	0.4	0.2	2.0	0.4	0.2	0.5	2.4	7.5	100.0
BURY	2.3	75.1	3.0	4.1	3.3	2.4	0.2	0.1	0.3	0.1	8.9	100.0
MANCHESTER	0.4	0.7	63.0	5.9	1.5	3.8	5.4	0.5	4.1	0.1	14.6	100.0
OLDHAM	0.1	0.3	1.3	88.1	2.8	0.4	0.3	0.8	0.2	0.1	5.5	100.0
ROCHDALE	0.2	3.5	1.3	13.0	71.6	0.3	0.2	0.3	0.1	0.1	9.4	100.0
SALFORD	1.4	0.7	9.0	2.5	0.2	68.2	0.5	0.1	6.2	0.5	10.6	100.0
STOCKPORT	0.1	0.3	3.8	0.7	0.1	0.8	83.5	0.8	1.4	0.0	8.6	100.0
TAMESIDE	0.1	0.2	3.4	3.8	0.7	0.4	6.4	71.4	2.5	0.7	10.4	100.0
TRAFFORD	0.3	0.2	21.1	1.7	0.9	2.8	2.7	0.2	58.8	0.1	11.3	100.0
WIGAN	1.8	0.1	0.5	0.3	0.8	1.1	0.2	0.0	0.0	72.5	22.7	100.0
TOTAL	9.8	5.5	18.2	15.3	8.6	8.9	7.0	4.8	4.3	6.4	11.2	100.0

PROVIDER LOCATION ------------>

LEARNER POSTCODE

YOUTH - L1 and below	BOLTON	BURY	MANCHESTER	OLDHAM	ROCHDALE	SALFORD	STOCKPORT	TAMESIDE	TRAFFORD	WIGAN	OUTSIDE GM	TOTAL
BOLTON	84.7	4.8	0.2	0.0	0.1	5.0	0.0	0.0	0.2	2.7	2.4	100.0
BURY	7.4	78.3	1.1	0.1	2.0	5.0	0.0	0.3	0.3	0.5	5.1	100.0
MANCHESTER	0.6	4.7	48.9	3.3	5.4	3.1	13.2	2.9	12.9	1.9	3.2	100.0
OLDHAM	0.0	0.1	0.9	84.2	6.5	0.4	0.1	5.6	0.1	0.5	1.7	100.0
ROCHDALE	0.2	13.6	1.3	11.8	67.9	0.8	0.1	0.2	0.1	1.4	2.6	100.0
SALFORD	1.8	1.7	3.9	0.1	0.1	83.9	0.1	0.6	4.3	0.7	2.7	100.0
STOCKPORT	0.0	0.0	7.8	0.4	0.0	0.6	82.9	1.6	0.7	0.3	5.6	100.0
TAMESIDE	0.0	0.0	2.9	2.6	0.0	0.8	2.8	88.1	0.3	0.7	1.7	100.0
TRAFFORD	0.2	0.1	10.4	0.0	0.4	3.8	1.3	0.0	81.5	0.1	2.2	100.0
WIGAN	2.3	0.1	0.0	0.0	0.0	3.6	0.0	0.0	0.1	82.8	11.0	100.0
TOTAL	9.1	6.6	8.4	14.4	7.9	10.2	8.2	10.3	7.1	13.8	4.1	100.0

- Adults tend to be more mobile than young learners.
- The least self-contained areas of Greater Manchester are Trafford (travelling either to Manchester to or to outside the Greater Manchester area; Manchester (to outside Greater Manchester) and Salford (to Manchester or outside Greater Manchester.
- The most self-contained local authorities are Bolton, Oldham and Stockport.
- For young people at level 1, provision is mostly self-contained – especially in Tameside, Bolton and Stockport. It is least contained in Manchester (with learners most likely travelling to Stockport or Trafford) and Rochdale (travelling to Bury and Oldham).

Source: SFA datacube
* 2112/13 data are partial full-year data

Learners are more mobile at level 2

Figure 57: Learner travel flows – Level 2, % who stay live and learn in borough, GM

PROVIDER LOCATION

LEARNER POSTCODE

ADULT- L2	BOLTON	BURY	MANCHESTER	OLDHAM	ROCHDALE	SALFORD	STOCKPORT	TAMESIDE	TRAFFORD	WIGAN	OUTSIDE GM	TOTAL
BOLTON	52.8	3.8	2.0	0.8	0.3	5.3	0.2	0.2	1.6	5.1	27.9	100.0
BURY	3.9	50.5	5.6	1.3	6.1	2.9	0.3	0.3	2.9	0.2	25.9	100.0
MANCHESTER	0.4	0.9	46.1	2.7	2.8	3.6	6.5	1.3	10.0	0.3	25.6	100.0
OLDHAM	0.1	0.7	4.5	60.6	6.1	1.5	0.8	3.0	0.6	0.2	21.9	100.0
ROCHDALE	0.1	4.4	4.8	9.5	57.1	0.7	0.2	0.4	0.5	0.1	22.2	100.0
SALFORD	1.6	1.0	13.1	1.2	0.7	52.5	0.6	0.4	8.9	0.6	19.4	100.0
STOCKPORT	0.1	0.4	5.2	0.4	0.0	1.0	69.3	1.7	2.9	0.0	19.1	100.0
TAMESIDE	0.2	0.9	4.4	3.9	0.3	2.2	4.7	53.4	5.0	0.1	25.0	100.0
TRAFFORD	0.4	0.5	18.9	0.8	0.7	5.2	3.0	0.2	47.4	0.3	22.6	100.0
WIGAN	1.3	0.5	0.7	1.0	0.0	2.3	0.0	0.0	0.8	58.3	34.9	100.0
TOTAL	5.2	4.0	15.5	8.6	7.4	7.9	7.8	5.1	7.4	6.6	24.6	100.0

PROVIDER LOCATION

LEARNER POSTCODE

YOUTH – L2	BOLTON	BURY	MANCHESTER	OLDHAM	ROCHDALE	SALFORD	STOCKPORT	TAMESIDE	TRAFFORD	WIGAN	OUTSIDE GM	TOTAL
BOLTON	67.5	9.5	0.6	0.0	0.0	12.3	0.0	0.0	0.3	4.0	5.8	100.0
BURY	2.6	83.8	1.7	0.0	2.7	4.4	0.2	0.0	0.3	0.1	4.0	100.0
MANCHESTER	0.1	7.3	38.4	4.1	7.8	6.4	18.9	1.9	11.5	0.7	2.9	100.0
OLDHAM	0.0	0.2	1.2	79.8	13.8	0.3	0.1	3.1	0.2	0.2	1.0	100.0
ROCHDALE	0.1	20.7	1.1	10.9	64.2	0.6	0.0	0.2	0.2	0.2	1.9	100.0
SALFORD	1.2	2.0	4.2	0.1	0.2	86.5	0.2	0.4	3.3	0.3	1.7	100.0
STOCKPORT	0.0	0.0	7.9	0.6	0.1	1.0	84.4	1.0	1.2	0.1	3.6	100.0
TAMESIDE	0.1	0.3	7.2	4.3	0.2	1.0	7.6	75.5	1.2	0.1	2.4	100.0
TRAFFORD	0.2	0.1	14.3	0.0	0.1	10.2	1.9	0.0	70.1	0.1	2.9	100.0
WIGAN	2.8	0.2	0.1	0.1	0.0	10.3	0.0	0.0	0.2	75.1	11.1	100.0
TOTAL	6.7	9.8	8.3	13.9	10.9	13.4	11.3	5.4	6.7	9.8	3.8	100.0

- Level 2 provision is much less self-contained geographically than Level 1 (learners more mobile across and outside) – though mostly still adults.
- For adults, the most self-contained local authorities are Stockport, Oldham, and Wigan. The least are Manchester (to Trafford or outside Greater Manchester); Trafford (to Manchester or outside Greater Manchester); and Bury (outside Greater Manchester).
- Among young people at level 2, the most self-contained are Salford, Stockport and Bury. The least self-contained are Manchester (travelling to Stockport or Trafford; Rochdale (travelling to Bury or Oldham); and Bolton (travelling to Salford).

Source: SFA Datacube
* 2112/13 data are partial full-year data

Young learners are more likely to travel at level 3

Figure 58: Learner travel flows – Level 3*, % who live and learn in borough, GM

PROVIDER LOCATION

LEARNER POSTCODE

ADULT- L3	BOLTON	BURY	MANCHESTER	OLDHAM	ROCHDALE	SALFORD	STOCKPORT	TAMESIDE	TRAFFORD	WIGAN	OUTSIDE GM	TOTAL
BOLTON	54.8	5.7	1.3	0.5	0.3	3.6	0.5	0.3	0.6	7.8	24.6	100.0
BURY	9.3	50.9	2.0	2.2	5.1	3.7	0.4	4.5	2.6	0.2	19.1	100.0
MANCHESTER	1.3	1.6	15.3	6.5	4.3	2.6	18.4	5.1	16.9	0.1	27.9	100.0
OLDHAM	0.2	0.7	2.5	66.1	9.2	0.4	0.9	9.0	0.3	0.0	10.8	100.0
ROCHDALE	0.5	6.7	1.4	15.4	63.5	0.5	0.2	0.8	0.5	0.1	10.6	100.0
SALFORD	4.5	1.6	5.8	3.2	1.0	50.2	1.8	1.5	7.9	2.1	20.4	100.0
STOCKPORT	0.2	0.1	3.6	0.5	0.0	0.2	75.1	4.5	2.0	0.2	13.5	100.0
TAMESIDE	0.0	0.3	3.7	5.2	1.7	0.9	5.2	64.5	1.9	0.1	16.6	100.0
TRAFFORD	0.0	2.9	5.6	1.5	0.0	4.0	2.3	1.6	53.7	0.2	28.1	100.0
WIGAN	3.1	0.1	0.7	0.4	0.0	2.6	0.0	0.0	0.2	63.3	29.7	100.0
TOTAL	6.7	4.8	4.4	11.8	9.6	5.2	11.1	9.3	8.3	8.5	20.1	100.0

PROVIDER LOCATION

LEARNER POSTCODE

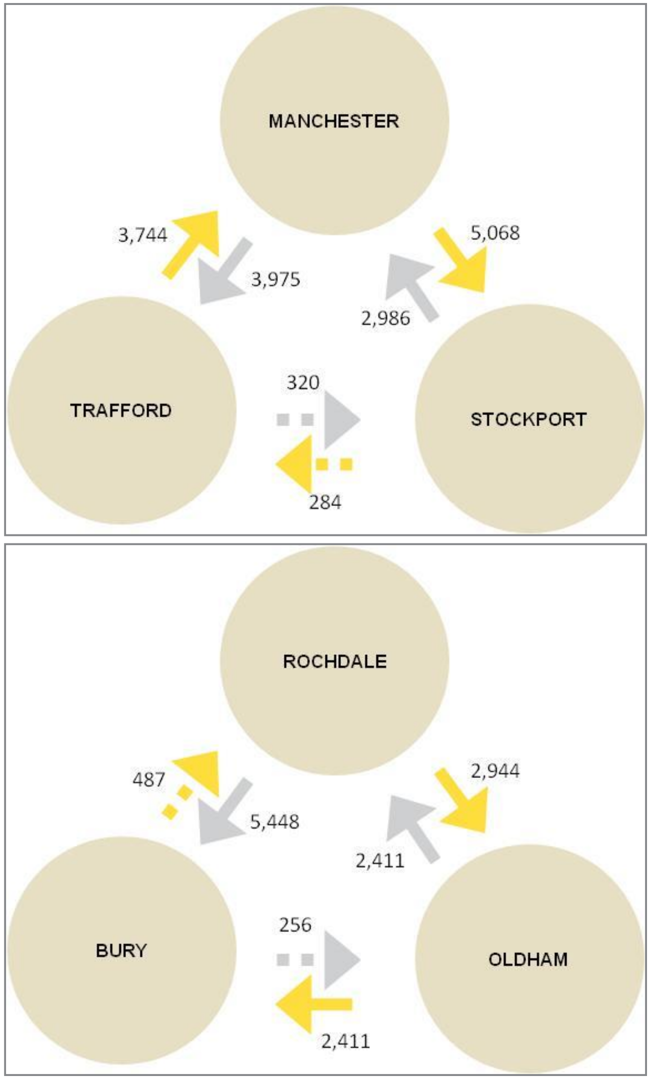
YOUTH – L3	BOLTON	BURY	MANCHESTER	OLDHAM	ROCHDALE	SALFORD	STOCKPORT	TAMESIDE	TRAFFORD	WIGAN	OUTSIDE GM	TOTAL
BOLTON	50.3	18.9	0.4	0.0	0.1	8.0	0.0	0.0	0.0	5.8	16.5	100.0
BURY	0.9	96.4	0.8	0.0	0.4	0.9	0.0	0.0	0.2	0.0	0.3	100.0
MANCHESTER	0.2	11.8	63.2	3.3	1.8	3.3	10.0	2.4	3.8	0.1	0.4	100.0
OLDHAM	0.0	0.6	3.2	83.6	5.0	0.2	0.2	3.9	0.0	0.0	3.1	100.0
ROCHDALE	0.2	37.6	0.9	12.6	47.6	0.4	0.0	0.1	0.0	0.0	0.6	100.0
SALFORD	2.0	4.5	15.5	0.0	0.1	70.3	0.3	0.0	0.7	5.2	1.3	100.0
STOCKPORT	0.0	0.0	15.2	0.0	0.1	0.3	82.6	0.7	0.2	0.0	0.8	100.0
TAMESIDE	0.1	0.1	10.8	2.6	0.0	0.3	8.1	77.2	0.1	0.0	0.8	100.0
TRAFFORD	0.0	0.4	43.8	0.1	0.1	10.3	1.1	0.1	39.6	0.0	4.5	100.0
WIGAN	2.7	0.0	0.1	0.0	0.0	7.1	0.0	0.0	0.1	78.2	11.8	100.0
TOTAL	5.1	17.0	15.4	9.9	5.4	7.9	14.1	7.5	2.5	11.3	3.9	100.0

Source: SFA Datacube
* 2112/13 data are partial full-year data

- Level 3 is the least self-contained level of provision, on average. For example, young learners are most likely to leave Greater Manchester than at any other level.
- Among adults, the most self contained local authorities are Stockport, Oldham, and Tameside. The least self-contained are manchester (travelling to Stockport, Trafford or outside Greater Manchester); Salford (travelling outside Greater Manchester and Bury (also travelling outside Greater Manchester.
- Among young people, the most self-contained are Bury, Oldham, and Wigan. And the least self-contained are Trafford)travelling to Manchester or Salford); Rochdale (travelling to Bury or Oldham); and Bolton (travelling to Bury or Salford).

Greater Manchester has ‘north-south clusters’ in learning patterns

Figure 59: Learner travel flow patters – number of learners (all levels/youth & adults)



- The travel-to-learn analysis reveals two travel-to-learn clusters that reflect a north-south GM pattern.
- There are high numbers of learners travelling to and from Manchester-Trafford and Manchester-Stockport, though not necessarily between Trafford and Stockport.
- In the northern districts, there is a large volume of learners travelling from Rochdale to Bury to get training provision, to and from Rochdale and Oldham, and from Oldham to Bury.

new economy

Source: SFA Datacube
* 2112/13 data are partial full-year data

Work Programme performance remains below expectations

Figure 60: JSA referrals and outcomes in Greater Manchester

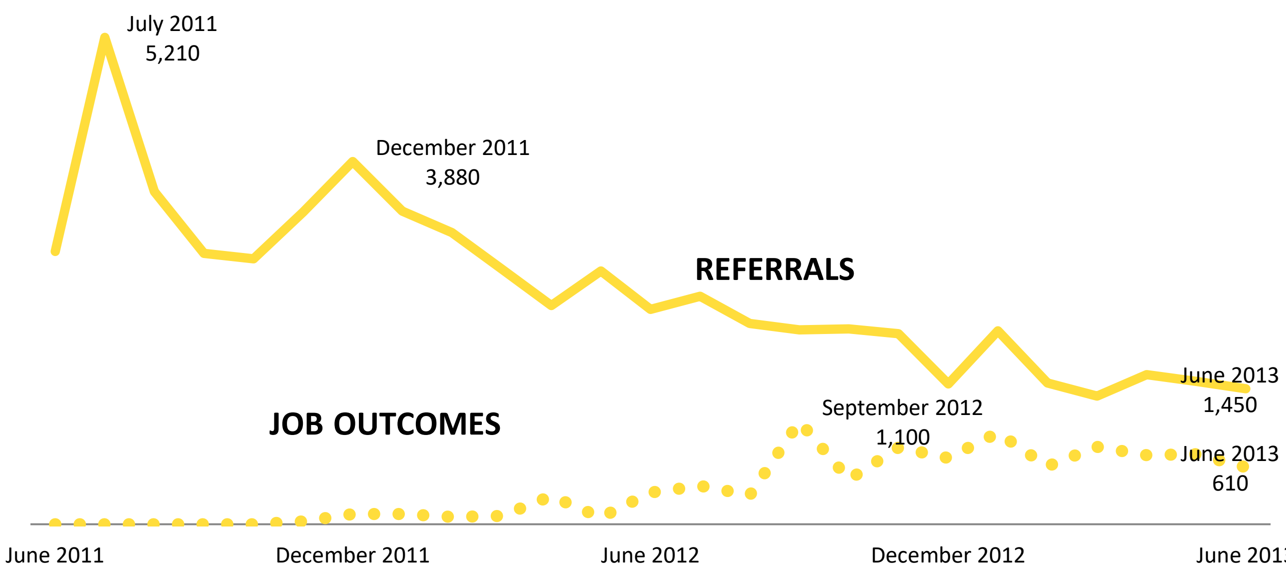
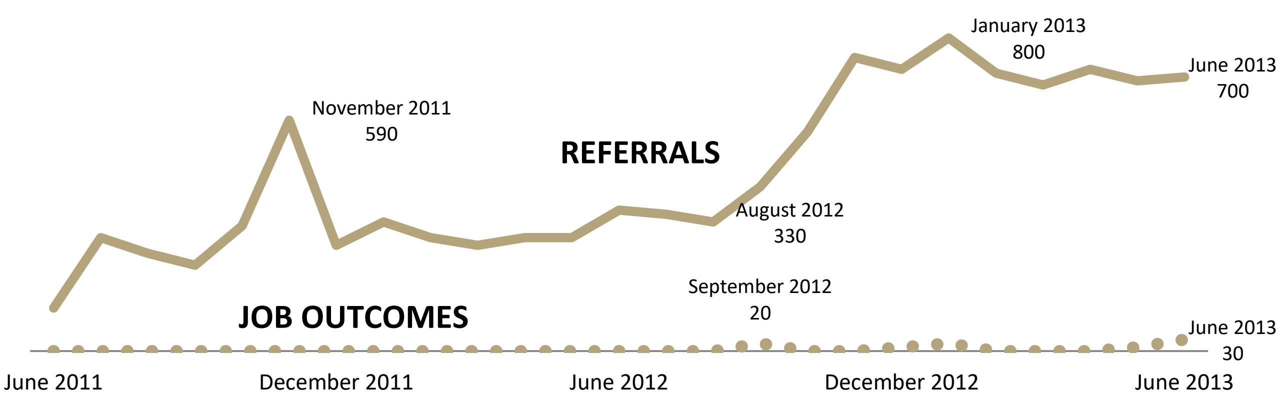


Figure 61: ESA referrals and outcomes in Greater Manchester

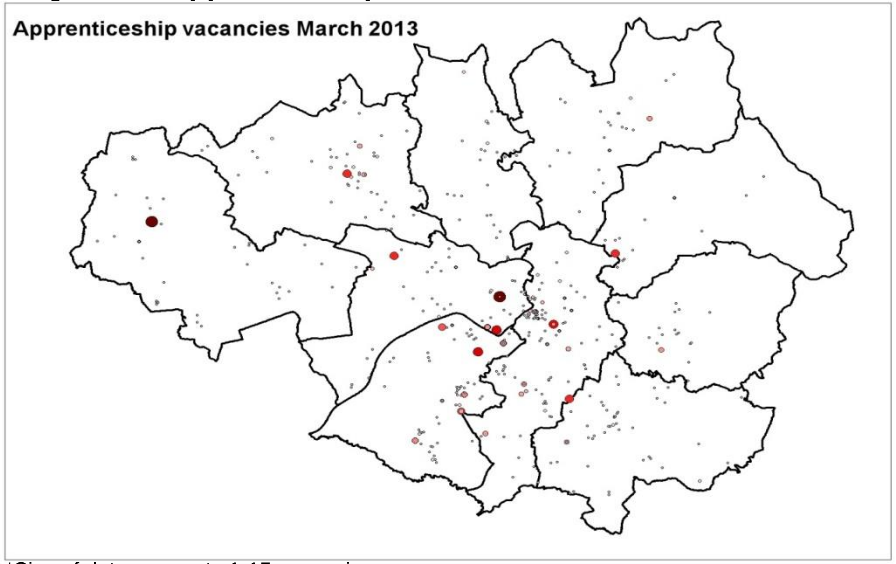


Source: DWP

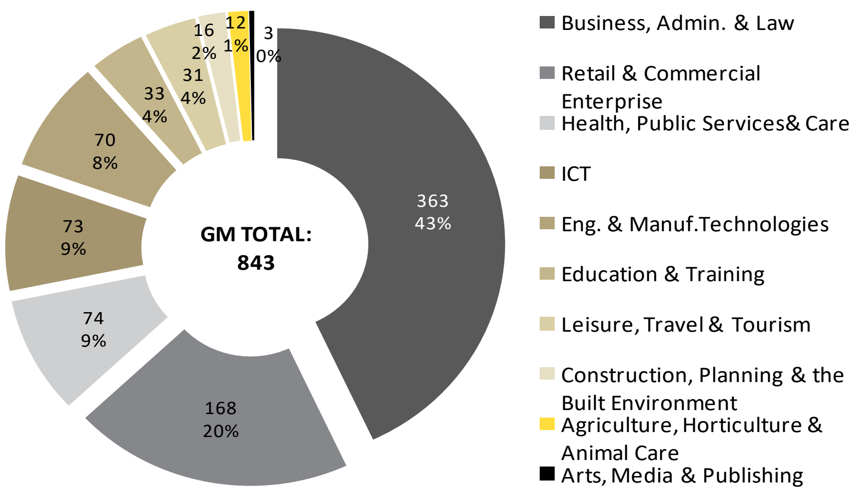
- Work programme impact provides a flow of people into labour market. Referrals to the Work Programme have fallen significantly over the past few months, though ESA referrals have been rising
- Looking at all referrals and outcomes so far this year, there has been a performance rate of 33.9% in GM (34.7% nationally). This compares to a rate of 23.8% in the last financial year (23.6% nationally).
- For each of the three main priority groups this financial year, the performance levels were: 61.0% for 18-24 year old JSA claimants (compared to 35.5% last year); 42.7% for JSA claimants aged 25+ (compared to 21.2% last year); and 3.1% new ESA claimants (compared to 1.4% last year). The minimum performance levels for these groups in year 3 are 40%, 30% and 15% respectively.
- ESA flow performance levels remain below expectations.

Where are the apprenticeship vacancies?

Figure 62: Apprenticeship vacancies



*Size of dot represents 1-15 vacancies



- There are strong clusters of vacancies in Manchester/Salford city centres, as well as Salford Quays. The area around Trafford Park, and the Town Centres of Wigan and Bolton also feature strongly, whilst there are also notable concentrations in Walkden (Salford) and Sale (Trafford).
- 43% of apprenticeship vacancies were in 'business, admin. & law', followed by 'retail & commercial enterprise' (20%). 'Arts, media & publishing' had the fewest vacancies, followed by 'agriculture, horticulture & animal care'. Compared to the total number of GM apprenticeship starts in 2012/2013, the sectoral spread of vacancies matches that of starts.
- The vast majority (83.4%) of advertised vacancies were at the 'intermediate' level (Level 2), while only 0.7% were at 'higher' level (Level 4), and 15.9% 'advanced' (Level 3).

Source: NAS

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