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GREATER MANCHESTER SKILLS ANALYSIS 2015/16

January 2016

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Background and purpose

- The Skills Analysis aims to provide a comprehensive picture of labour market change and skills needs across Greater Manchester. It forms part of New Economy's 'deep dive' evidence about the local economy.
- The document enables progress tracking against skills priorities.
- The analysis outlines the latest position on skills supply and demand and seeks to inform Greater Manchester's thinking on approaches to developing the skills system in the light of devolution.

Summary: Skills Analysis (1)

Labour market

- Unemployment has continued to fall, but more than 90,000 were unemployed in the 12 months to June 2015. Unemployment remains 9% higher than prior to the recession in 2008.
- The nature of the labour market recovery in GM is skewed towards flexible forms of work. Full-time work is up by 1.7% on pre-recession levels, but self-employment increased by almost 32% and temporary employment by 23.4% comparing June 2015 with March 2008.
- Greater Manchester had over 260,580 people receiving out-of-work benefits in May 2014 – down by approximately 22,000 on May 2013.
- The median annual wage in Greater Manchester is £21,205 , which is £1,202 less than the UK median. GM residents experienced the first pay rise (using median wages) in 2015 in six years.
- Low pay remains a significant issue in GM with 23.3% earning less than a living wage in 2015 (£7.85 outside London in 2014/15; £8.25 in 2015/16).

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, 32% have a level 4 qualification and 10% have no qualifications.
- However, there continues to be a significant gap at level 4+: the UK average is 36%.
- More people have low or ‘no’ skills in GM than elsewhere in the UK: 11% in GM compared with 9% in the UK.
- However, there are problems with skill utilisation. There are more level 4 qualified people than ‘level 4 jobs’ available.

Productivity

- Greater Manchester continues to have a significant productivity lag with the rest of the county. Almost all GM sectors have a low rate of labour productivity.
- GM productivity is 73.4% of UK average.

Sector Growth Areas

- Greater Manchester’s professional services sector has seen the fastest growth in employment of the last three years.
- Other sectors adding employment include property, arts, entertainment and recreation and retail. Manufacturing declined in employment.

Welfare Reform

- Some 31,500 were claiming Universal Credit in October 2015 – up from 8,500 a year earlier.
- 228,100 families received income from the tax credit system in GM. The city region has a relatively high dependence on tax credits.
- Greater Manchester spends £1.14 billion on in-work tax credits. However, the number of families relying on the tax credit system has fallen by 16,500 since 2014. The reason is believed to be tightening eligibility criteria and changing income threshold limits for receipt of credits.

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Summary: Skills Analysis (2)

Educational Performance

- GCSE performance in Greater Manchester was lower in 2014/15. Some 53.9% attained 5 A*-C including English and maths. This compares with 56.1% in 2013/14. The decline in performance was anticipated following reforms to GCSEs aimed at improving rigour, and which removed some qualifications from counting against GCSE attainment. GM GCSE performance is now slightly higher than English levels: 52.8 achieved the standard in England.
- Performance at Level 2 has risen consistently and is now in line with the national average. At Level 3, GM's attainment now tops English and North West levels. 59% of 19 year olds are qualified to level 3.
- 88% of school leavers at KS4 went on to an education destination. This compares with an English average of 90%.
- Some 52% of GM young people go on to higher education after A levels. This compares with 48% in the UK.

Young People –vocational skills

- The numbers of young people pursing learning in the FE system has fallen consistently over recently years In 2012/13 more than 291,500 young people undertook FE courses. By 2013/14 this fell to 211,000. By 2014/15 (using q4 data) the total was down to 202,500.
- By volume, creative courses and employability courses are the most popular.
- Apprenticeships were slightly down on the year before. In 2014/15 there were 8,100 starts, down from 8,220 the year before.
- Apprenticeship frameworks relevant to general business and care were the most popular.
- Youth apprenticeship starts fell at both intermediate and advanced level between 2013/14 and 2014/15 (from 5,592 to 5,412 at intermediate level and from 2,571 to 2,474 at advanced level) However, higher level starts increased from 60 to 95.

Adult Learning

- For adults (19+) undertaking FE and community learning courses, there has been a fall in the number of starts from 281,082 in 2013/14 down to 250,596 in 2014/15.
- The fall was driven by substantial drops at level 2 and below level 2. There was a slight increase at level 3.
- However, adult apprentice volumes recovered sharply. From 19,707 starts in 2013/14 the number of starts in 2014/15 rose to 22,228.
- Health and social care and general business/business service related frameworks are the most popular.
- Advanced and higher level apprenticeships grew most notably. In 2013/14 there were 6,610 advanced starts; these rose to 8,489 in 2014/15. Higher level starts rose from 458 up to 1203 over the same period.

Travel to Learn

- Learners are more likely to travel at higher skill levels
- Learners who leave their home borough to lean are most likely to go to their neighbouring local authority area.

Work Programme

- The Work Programme is due to come to an end in 2017. Successor programmes are currently being negotiated.

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POLICY CONTEXT

National Policy Context

Devolution - Shaping a localised skills strategy	• In a devolution agreement, announced in November 2014, Greater Manchester Combined Authority received powers to shape public services and funding around business support, skills development, complex dependency and health and social care. • The devolution agreements gives GM control over the Adult Skills Budget from 2017. In addition, the Apprenticeship Grant for Employers (AGE) will be directly managed by the GMCA. GM also received a share of the AGE from December 2014 to work towards local rather than national skills priorities and labour market needs.
Raising the Participation Age	• From the summer of 2015 all young people have the duty to participate in education, training or an apprenticeship until their 18th birthday. The Combined Authority has a duty to identify and support young people who are not participating. • This highlights a change from financially incentivising young people to stay in learning to young people being 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) to provide young people with skills to apply for an apprenticeship, a job or further learning. • 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.
Academies, Free Schools and University Technical Colleges	• Local authorities lost the power to create new schools in the Academies Act of 2010. • The academies programme, which seeks to convert schools into high performing academies, was initiated under the previous government and was modified and extended under the coalition government. The Coalition also introduced free schools. Unlike local authority run schools they do not have to teach the national curriculum. • There is a target of 500 free schools by 2020; currently there are just over 400 either approved or open. • There are also four University Technical Colleges (UTCs) that operate in Greater Manchester. These aim to teach scientific and technical subjects in non-traditional ways. They are in Bolton, Wigan, Salford and Oldham.
Responsibility for careers guidance	• A statutory duty has been placed on schools, pupil referral units and special schools to secure access to impartial and independent careers guidance for all pupils from Year 8 to Year 13. • The National Careers Service was launched in April 2012 to offer impartial advice on learning and work.
Changes to qualifications	• Based on recommendations made in the Wolf review, the numbers of qualifications which are considered towards a student's GCSE performance have been reduced since 2013/14 – in effect making GCSEs more difficult. These changes have resulted in falls in achievement of 5 GCSEs (A* to C grades) including English and Maths. • From August 2017, the traditional A-E GCSE marking system will be placed by a numerical ranking from one to 9. • New accountability systems (Progress 8 and Attainment 8) will be introduced for schools from 2016.

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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 for young people under 25 years. It is committed to a target of ‘3 million new apprenticeships by 2020’. • The government has taken steps to improve the rigour of apprenticeships. Minimum standards include a minimum duration of twelve months, employment of at least 30 hours a week, an English and maths requirement and off-the-job training. • New apprenticeships being developed by groups of employers are known as trailblazers. • A new funding system currently being trialled aims to give employers greater control over spending on training delivery. • In the Comprehensive Spending Review of November 2015 a new Apprenticeship levy on larger employers (ever £3 million pay bill) was announced. The levy will be rolled out from April 2017 and aims to raise £3billion. • Government contributions towards the cost of an apprenticeship vary by age. • The grant system for young apprentices of small employers came to an end in December 2015.
Study Programmes	• In August 2013, new 16 to 19 study programmes were introduced, supported by changes to post-16 funding. • All students in full or part-time Further Education aged 16 to 19 will be expected to follow a study programme. • From 2014/15, students without English and Maths GCSE or equivalent at grade C or above will be required to continue these subjects to achieve these grades.
24 plus loans	• From the 2013/14 academic year, loans have been made available for learners aged 24 and above studying courses at Level 3 and above, replacing grant funding for this group. • The purpose of introducing loans in FE was to increase capacity in the 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.
Universal Credit	• Universal Credit roll out is due to be completed by 2017. GM has been among the areas where UC has been introduced first. • In time six types of benefits and credits – including tax credits – will become part of UC.
National Living Wage	• From April 2016 a new ‘national living wage’ set at £7.20 will be introduced. This applies only to 25 year olds. The existing array of rates applying to younger workers and apprentices will remain.
European Social Fund 2014-2020	• LEP allocation of both European Social Fund (ESF) and European Regional Development Fund (ERDF) for 2014-2020 has been identified. • LEPs developed investment strategies with local partners to identify funding priorities and present them to government.

Greater Manchester Policy Context

Revised Greater Manchester Strategy	• Focus is on delivering an employer-led skills system, whereby employers can develop training that meets their needs. GM will work collaboratively with employers, employers' organisations and providers at all levels to deliver this. • GM aims to ensure that there are opportunities for young people in order 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 and Skills Hub and is committed to delivering an extra 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 and above.
Public Service Reform (PSR)	• GM's PSR remit focusses on local services providing public services in new, sustainable and efficient ways to help working age adults to take up and retain employment. • Priorities to address include: 1) the absence of an employment support offer to those exiting the Work Programme after two years without having found a job; 2) labour market underperformance of those receiving support as part of Troubled Families programmes and maximising opportunities presented by the introduction of Universal Credit; 3) to support more GM residents into sustained work and skills progression.
Growth and reform plan and growth deals	• The Growth & Reform Plan serves 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 with the overall aim for GM to become a financially self-sustained city region.
Skills and Employment Partnership (SEP)	• The SEP is a 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 participation, and ensures that skills delivery maximises economic growth. • The SEP is accountable to the GM Combined Authority and GM Local Enterprise Partnership and works with providers and employers to understand present and future growth, employment and skills needs. • The SEP will lead the GM Participation Strategy to support Local Authorities to strengthen the support that young people receive. The four key priorities are: Identification and tracking of those who are NEET and at risk of becoming NEET; Careers Education Information Advice and Guidance; ensuring an appropriate FE curriculum; and Maths and English progression at 16 and 18.

LABOUR MARKET CONTEXT

Unemployment still higher than pre-recession, despite strong jobs growth

Figure 1: Economic activity in GM, 2008 - 2015

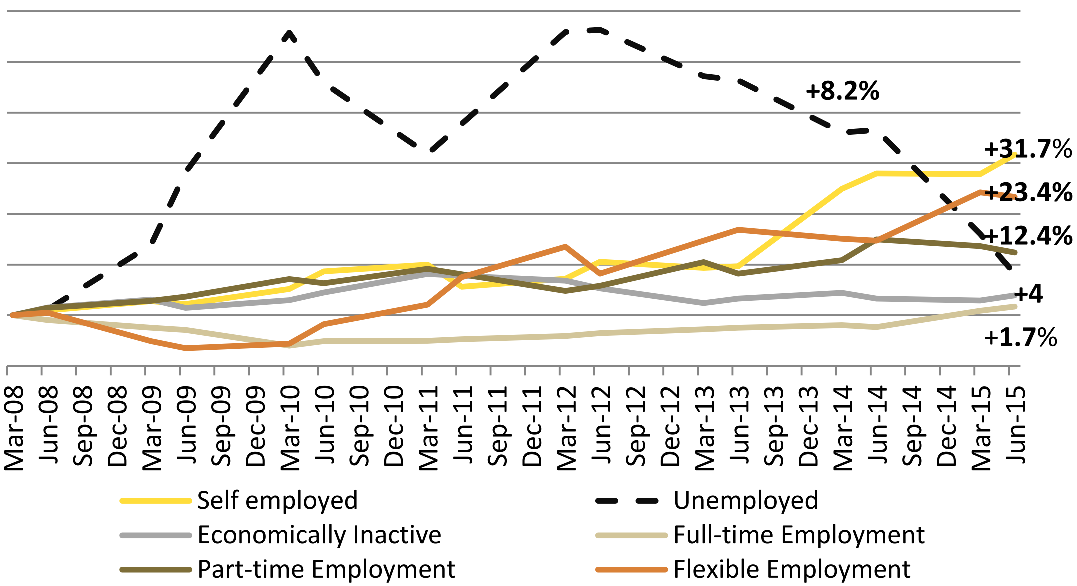
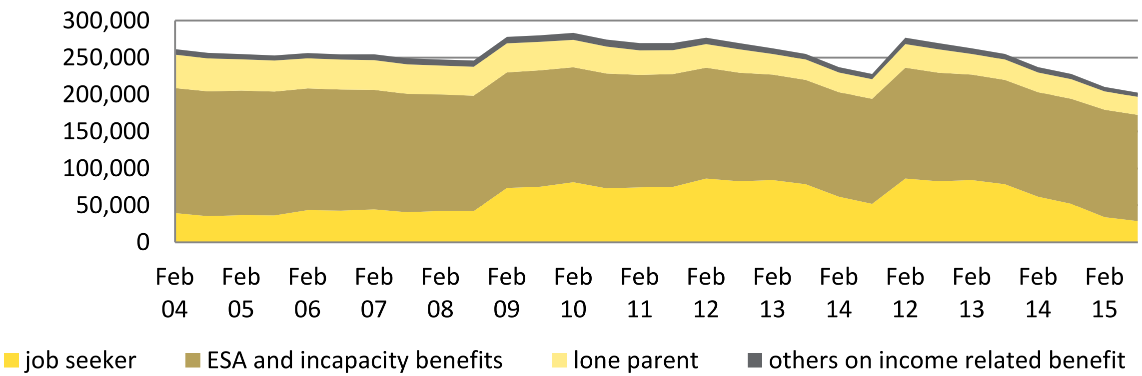


Figure 2: Out-of-work benefit claimants in GM, 2004-2015



Source: Nomis

- Unemployment (ILO compatible measure) in GM has decreased further in 2015 following a steady period of decline. But it remains above the pre-recession level. In June 2015 it was 8% higher than before the recession (90,800 16-64 year olds were unemployed in the 12 months to June 2015 compared to 84,800 in the 12 months to June 2008).

- However, over the same period full-time employment has increased by only 1.7%, whereas self-employment has grown by 32%, flexible employment by 23% and part-time employment by 12%, indicating that the labour market has moved away from full-time employment towards other, more flexible or 'casualised' forms of work.

- The number of claimants of most of the key out-of-work DWP benefits fell in 2015. The largest decrease was in the number of JSA (Jobseeker's Allowance) claimants, which fell by 45% between May 2014 and May 2015 (at least partly due to the expansion of Universal Credit). Lone parent benefit recipients fell by 8% and 'other' claimants by 20%. But the number of recipients of ESA (Employment Support Allowance) and incapacity benefits (the largest claimant group) increased by 1%.

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Numbers of young people claiming JSA and other benefits continue to fall

Figure 3: Benefit claimants aged under 25 in GM by type of benefit, 2004-2015

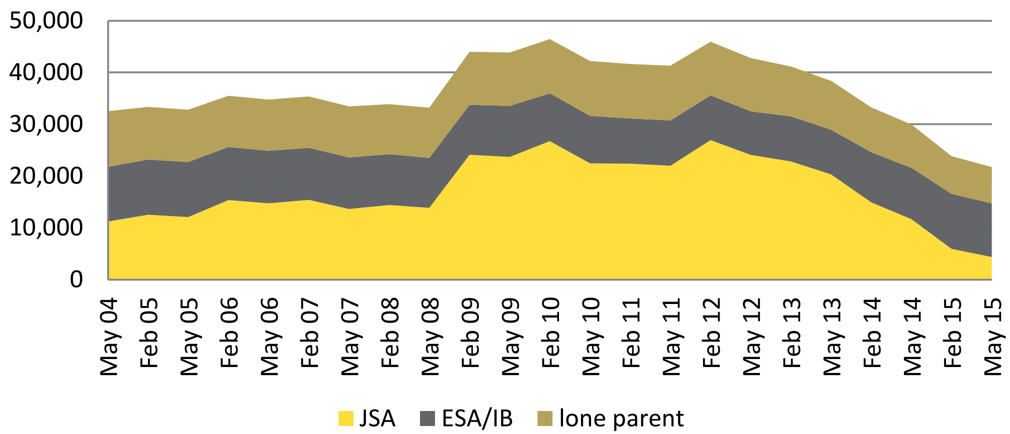
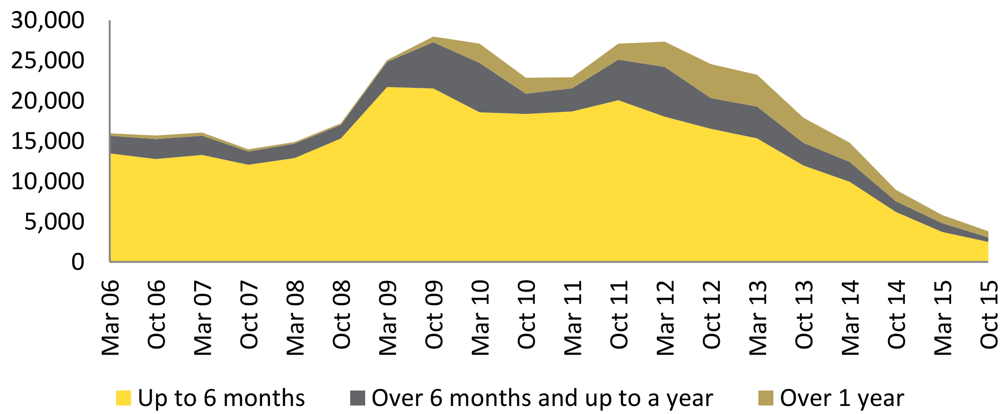


Figure 4: JSA claimants aged 16-24 in GM by duration of claim, 2006 - 2015



- The number of young people (aged under 25) in GM claiming JSA, ESA/IB or lone parent benefits has fallen by 21% between May 2014 and May 2015. Within that, the number of JSA claimants fell by 63% and lone parents by 16%, although the number of ESA/IB claimants increased by 4%.
- The number of JSA claimants aged 16-24 has fallen considerably between October 2014 and October 2015.
- However, this fall has been affected by the introduction of Universal Credit, as people move from the old benefit (JSA) onto the new one (UC). Some 9,343 unemployed people aged 16-24 were claiming UC in GM in October 2015 – see next slide.

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Source: Nomis

Increasing numbers of people are claiming Universal Credit

Figure 5: Universal Credit caseload in GM districts, October 2015

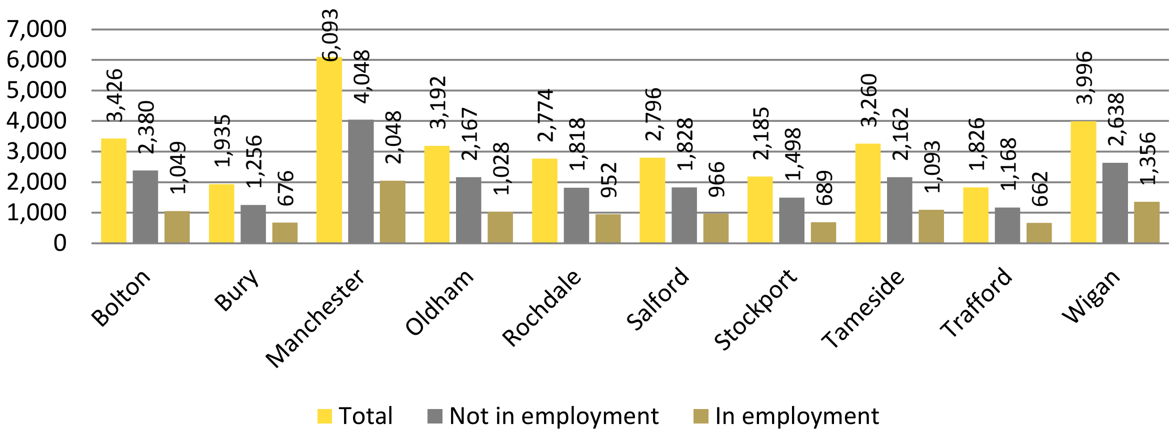
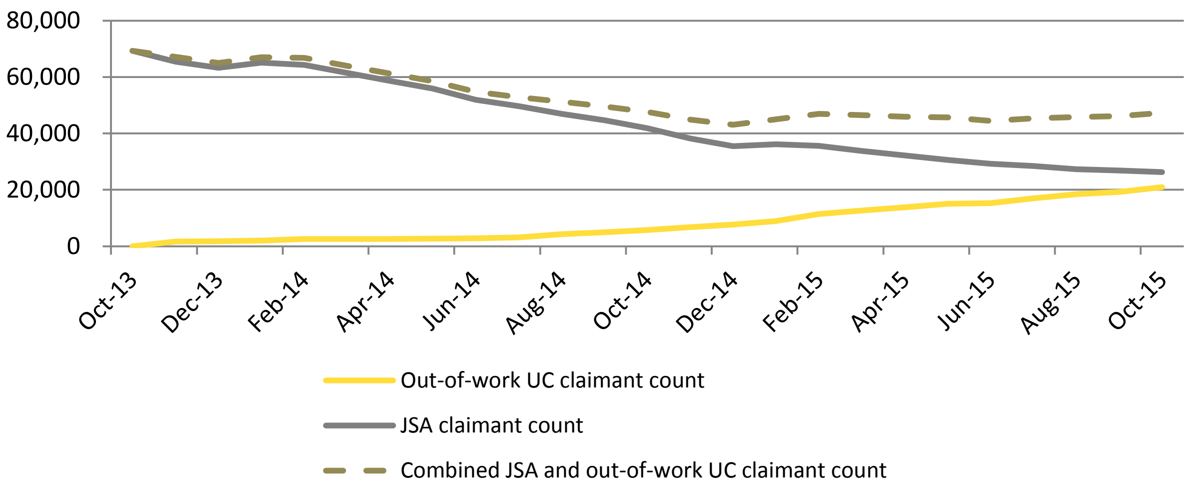


Figure 6: Unemployed benefit claimants (JSA and UC) in GM, Oct 2013-Oct 2015



Sources: DWP Stat-Xplore and Nomis

- The numbers of people claiming Universal Credit, which combines a number of benefits and tax credits under one payment, have been increasing since UC was introduced in GM in late 2013. About 31,500 people were claiming UC in GM in October 2015 (up from 8,500 in October 2014), most of whom (67%) were not in employment.
- Figure 6 shows that the decline in the number of people claiming JSA in GM over the last two years has been offset by the increase in the number of out-of-work claimants of Universal Credit. As a result, the combined JSA and unemployed UC claimant count has levelled off in late 2014 after falling for most of that year, and then remained mostly static in the first half of 2015, but it started to gradually increase again in the second half of the year, up to 47,260 in October 2015.

Average pay in Greater Manchester rises for first time in six years

Figure 7: Residence Based Gross Median Annual Wages (adjusted for inflation), 2009-2015

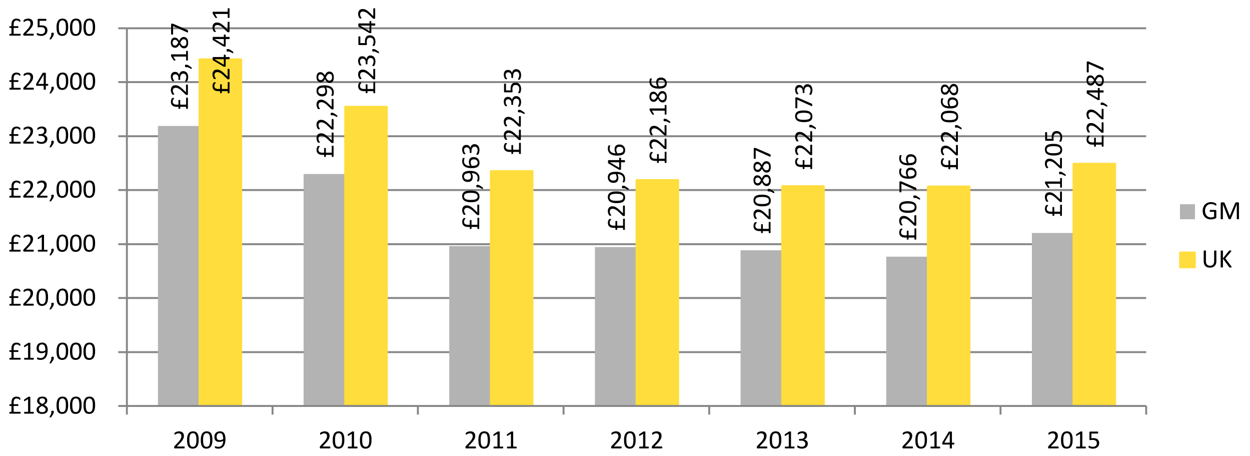
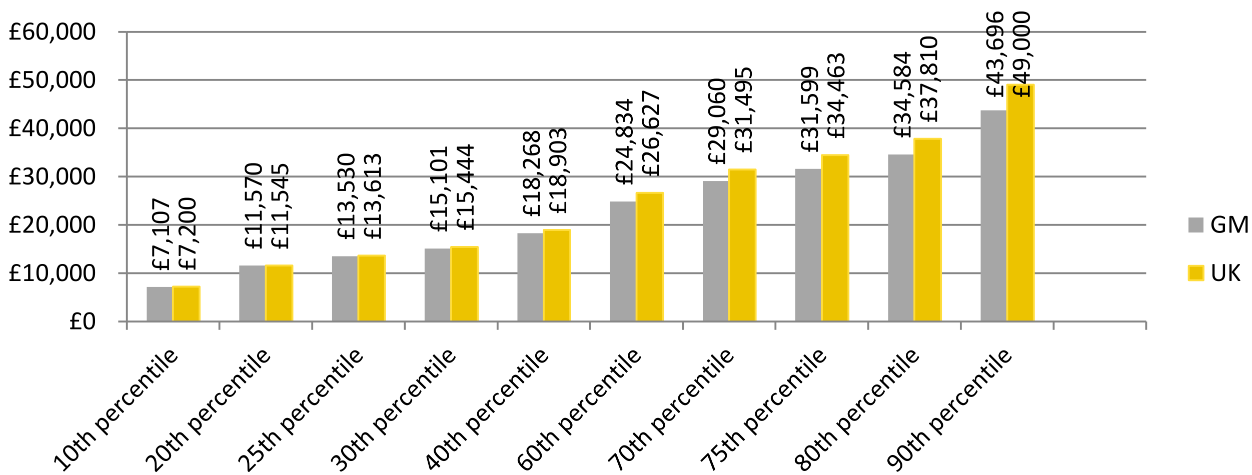


Figure 8: Residence-Based Gross Annual Wages Percentiles in GM, 2014



- Low wages continue to be a feature of the Greater Manchester labour market. In 2014, for example, just over 23% of jobs paid less than a living wage in the city region.
- Allowing for inflation, median pay remains significantly below the level it was prior to the recession, reflecting the long-term pressure on living standards experienced by Greater Manchester residents.
- The data suggests the period of declining average wages may have come to an end.
- Between 2014 and 2015, wages in GM rose by an average of £439 in GM (2.11%) compared with £419 in the UK (1.86%).
- Comparing GM and UK wages, pay gaps are largest among the better paid. The lowest paid workers in GM (10^{th} percentile) earn slightly above the level of their counterparts elsewhere in the UK.

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Source: ASHE, 2015, Provisional

Number of families claiming tax credits has fallen

Figure 9: Families claiming in and out of work tax credits in GM, 2007-2015 (000)

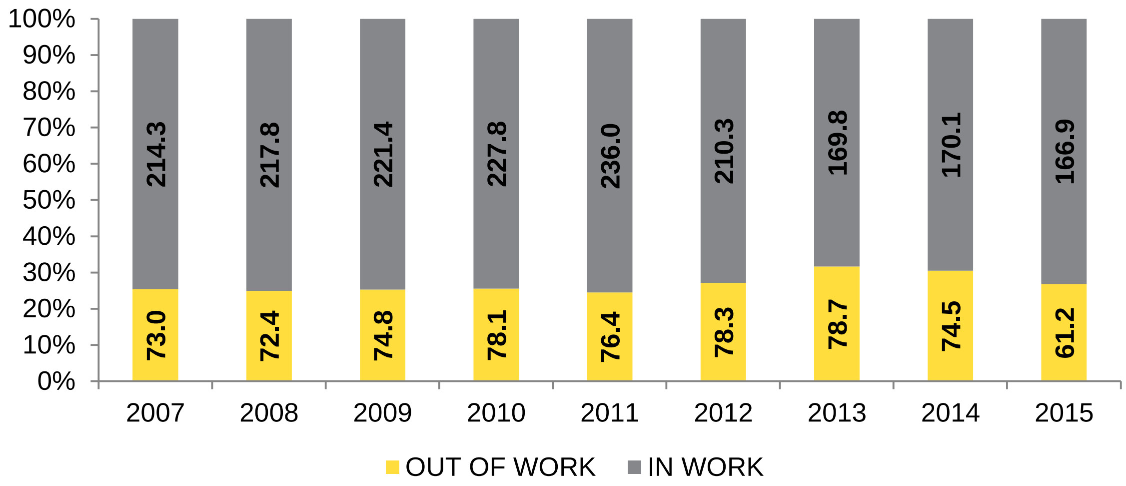
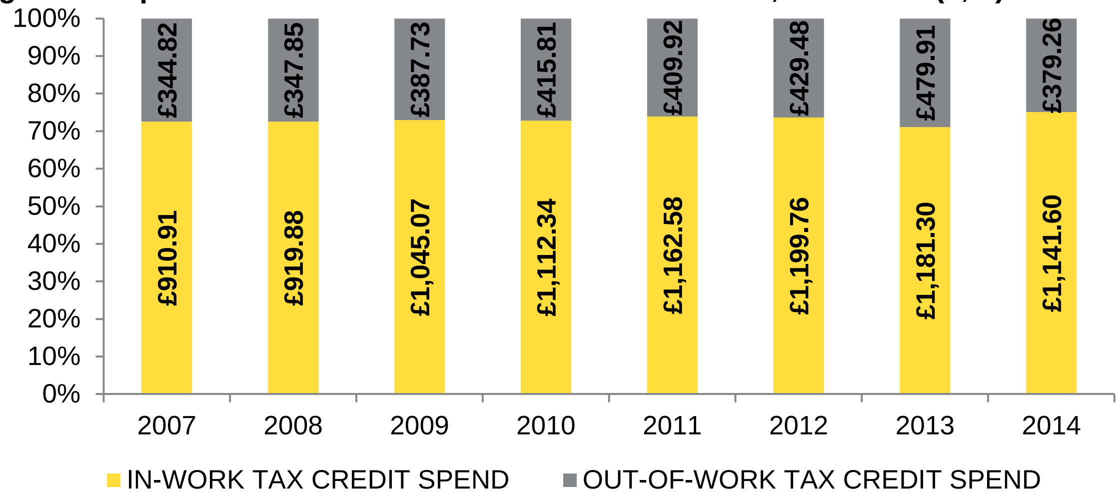


Figure 10: Spend on in- and out-of-work tax credits in GM, 2007-2014 (£,m)



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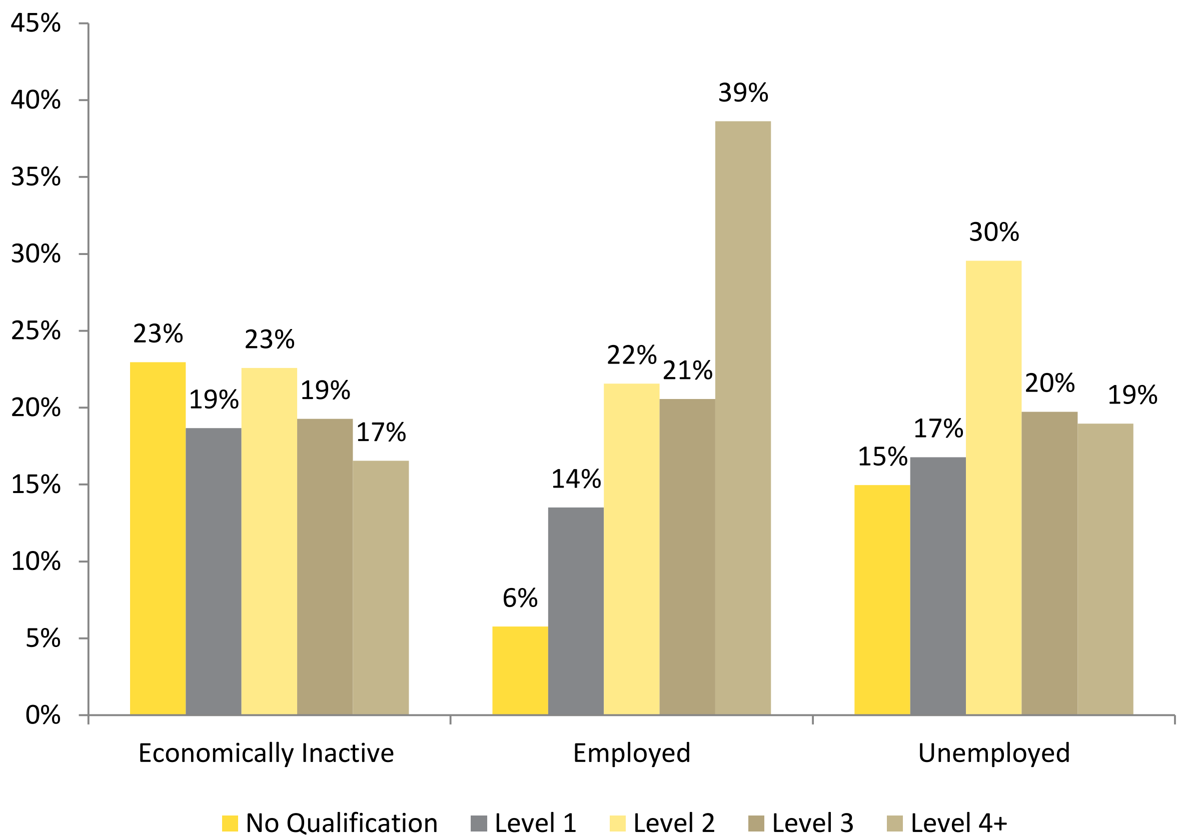
Source: HMRC 2015

- 228,100 families received income from the tax credit system in GM in 2015 – 73% of them in work. This marks a fall of 16,500 (6.75%) since 2014, when the total of recipient families was 244,600.
- The fall has been driven by a 13,300 (18.7%) drop in the number of out-of-work families receiving tax credits over the last year. This compares with a fall of 3,200 among in-work families (1.8%).
- The explanation for the fall is not fully understood. However, a combination of tightening eligibility and thresholds for tax credits, an improving economy, and the introduction of Universal Credit are likely to constitute important strands of the answer.
- In terms of spending, tax credit spending in GM was £1.52bn in 2015, which is £140m less than the year before. Most of this fall (£100m) is explained by the reduction in the number of out of work families.
- GM has a higher dependence on the tax credit system than almost any other city region in the UK (the exception is the Birmingham city region).

Qualifications influence labour market success....but 39% of unemployed people have skills above level 3

Figure 11: Qualifications by economic activity in Greater Manchester , 2014



Source: Annual Population Survey 2014

- 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 higher level equivalent qualifications (L4+) is 84% whereas just over one in three people (or 37%) with no qualifications is in employment.
- Meanwhile, 17% of economically inactive people hold qualifications at L4 and above (i.e. not looking for work) compared with 39% employed people.
- That said, however, a worrying 39% of unemployed people have level 3 and above skills (19% have a level 4 qualification). This is a slight increase compared to 38% in 2013. This shows that qualifications are not necessarily a guarantee of work. Many unemployed people have valuable skills.

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Qualification profile improves in GM, but low skills remain a concern

Figure 12: Qualification change over time in GM, 2004 - 2014

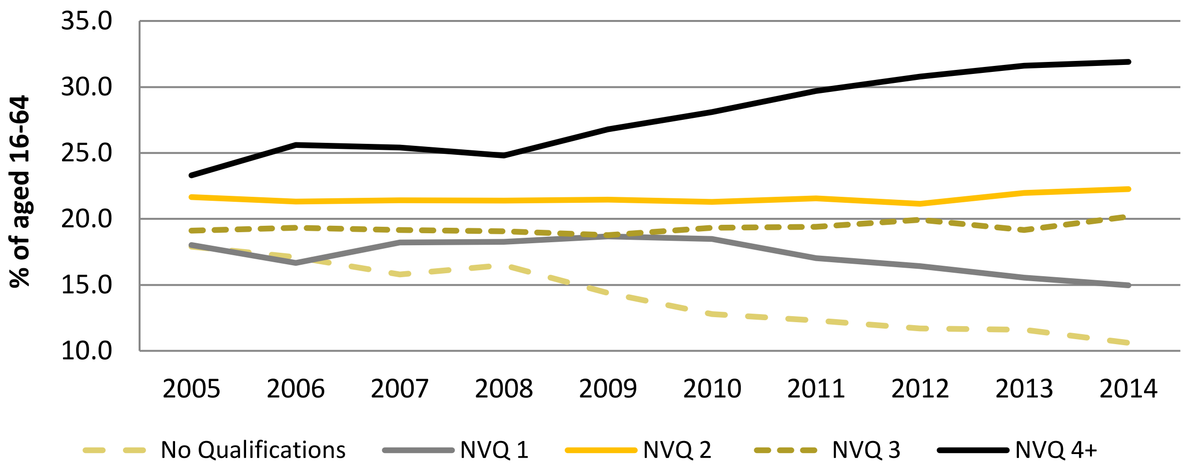
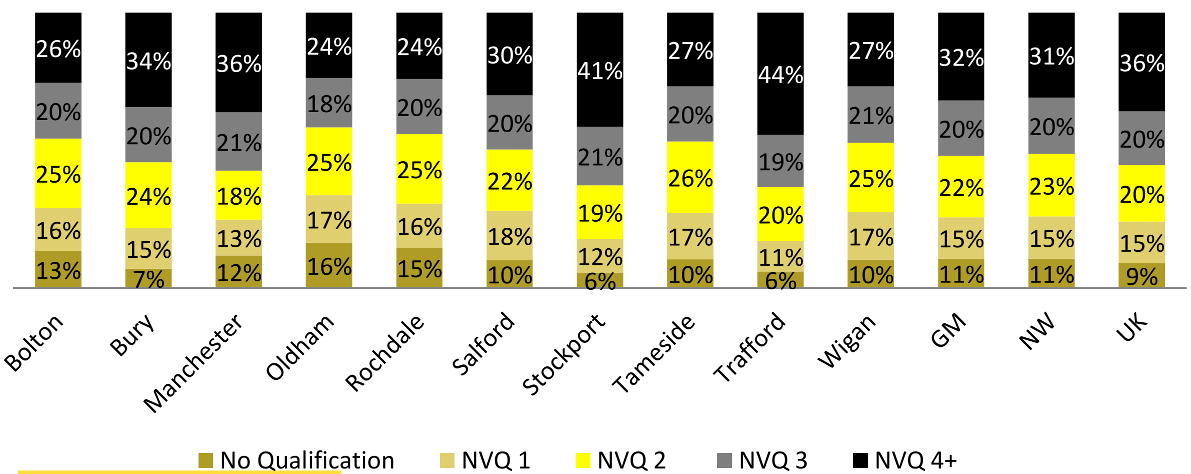


Figure 13: Qualification profile of resident population aged 16-64 by GM district, 2014



Source: Nomis/Annual Population Survey

- The qualification profile of the resident population aged 16-64 in GM has improved considerably over the past decade. The proportion of the population with a L4+ qualification has been increasing consistently since 2008, with a 7.1 percentage point (pp) increase between 2008 and 2014.
- The proportion of those with no qualifications fell by 5.9 pp between 2008 and 2014, and those with Level 1 qualifications fell by 3.3 % points.
- However, GM still lags behind the UK in terms of qualification levels, with 32% of the population qualified to L4 in 2014, compared to 36% in the UK on average. The proportion of residents with no qualifications is also higher in GM (11%) compared to the UK (9%).
- There are variations in the qualification profile of residents across the conurbation, with the highest proportions of L4+ qualified residents in Trafford (44%), Stockport (41%) and Manchester (36%). The highest proportions of residents with no qualifications are in Oldham (16%) and Rochdale (15%).

NEETs declined slightly in 2015 – but 'not knowns' rise

Figure 14: 16-18 year olds 'Not in Education, Employment, or Training' (NEET), Oct 2015

	16-18 Cohort 2015	16-18 Cohort 2014	NEET October 2015	NEET October 2014	% NEET October 2015	% NEET October 2014
Bolton	10,666	10,761	456	449	5%	5%
Bury	6,726	6,758	213	292	4%	5%
Manchester	15,850	16,003	714	808	6%	6%
Oldham	9,159	9,041	345	386	4%	4%
Rochdale	7,862	7,897	311	318	4%	4%
Salford	7,273	7,137	571	492	8%	7%
Stockport	9,751	9,898	420	401	6%	5%
Tameside	7,947	7,971	269	296	4%	4%
Trafford	8,290	8,209	257	233	4%	3%
Wigan	10,882	10,874	405	367	5%	5%
GM	**94,406**	**94,549**	**3,960**	**4,042**	**5%**	**4%**
England	1,760,383	1,726,382	64,026	79,414	4%	5%
North West	244,383	244,039	10,506	11,958	5%	5%

Figure 15: 16-18 Year Olds, Status Not Known, Oct 2015

				Academic Age 16			Academic Age 17			Academic Age 18		
	16-18s not known	% not known	% change in year	Oct-15	Oct-14	% change	Oct-15	Oct-14	% change	Oct-15	Oct-14	% change
Bolton	1,632	15%	-12%	3%	5%	-36%	8%	14%	-40%	33%	33%	0%
Bury	1,525	23%	94%	1%	3%	-71%	5%	9%	-43%	61%	23%	162%
Manchester	3,788	24%	31%	8%	9%	-7%	17%	16%	9%	47%	31%	51%
Oldham	354	4%	-19%	2%	0%	258%	4%	2%	101%	6%	12%	-51%
Rochdale	340	4%	-10%	4%	1%	679%	4%	2%	86%	5%	11%	-54%
Salford	361	5%	48%	1%	1%	71%	4%	2%	131%	10%	8%	25%
Stockport	2,708	28%	38%	6%	4%	65%	16%	15%	4%	59%	42%	41%
Tameside	402	5%	-13%	6%	1%	655%	3%	3%	6%	6%	13%	-57%
Trafford	1,398	17%	-7%	7%	6%	4%	12%	13%	-8%	32%	36%	-10%
Wigan	2,686	25%	-19%	4%	15%	-75%	12%	20%	-39%	56%	57%	-1%
GM	**15,194**	**14%**	**17%**	**4%**	**3%**	**180%**	**8%**	**8%**	**27%**	**29%**	**23%**	**12%**
England	341,895	19%	-1%	8%	9%	-1%	12%	13%	-7%	37%	37%	0%
North West	39,380	16%	22%	7%	6%	12%	10%	10%	7%	31%	24%	29%

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Source NCCIS: Oct 2015

- NEETs are a diverse group. A little under half of them nationally are formally unemployed (i.e.. available and looking for work). The rest are economically inactive (i.e.. not looking or not available).
- GM had about 3,900 NEETs in October 2015 – a slight fall on October 2014 when there were 4,042. As a proportion, NEETs represented 5% of the cohort.
- Under the government policy of Raising the Participation Age, local authorities have a duty to reduce the numbers of NEET young people (just the 16-18s, however, rather than the 19-24s who also qualify as NEET) as well as to track them.
- NEETs tend to increase in numbers at age 18.
- The number of 16-18 year olds with 'unknown status' (recorded as 'not known') is much higher (15,194, up from 13,900 a year earlier) than those identified as NEET. However GM's rate of 'not known' is significantly lower than the national rate. There is variation in the practices of how NEETs and 'not knowns' are recorded among local authorities.

Most young people who are NEET move into the skills system

Figure 16: Number joining the NEET group from the activities listed below, Oct 2015

	Total no. of NEET Joiners	Joining from: Edu. and train*	%	Apprent	%	Employment	%	Re-engagement activities	%	Other	%
Bolton	415.5	9	2%	13	9%	2	0%	130	31%	282	68%
Bury	322	2	1%	3	3%	0		66	20%	113	35%
Manchester	727	8	1%	9	1%	4	1%	145	20%	326	45%
Oldham	384.5	0		8	1%	0		72	19%	170	44%
Rochdale	370	0		4	1%	2	1%	63	17%	135	36%
Salford	611.5	11	2%	23	4%	0		190	31%	309	51%
Stockport	353	5	1%	5	3%	2	1%	46	13%	143	41%
Tameside	384	3	1%	7	0%	0		44	11%	131	34%
Trafford	225	0		1	14%	1	0%	62	28%	80	36%
Wigan	504.5	12	2%	3	4%	1	0%	98	19%	141	28%
GM	**4,297**	**50**	**1%**	**73**	**4%**	**11**	**0%**	**818**	**21%**	**1,689**	**42%**
ENGLAND	**14,616**	**10,927**	**16%**	**662**	**2%**	**1038**	**2%**	**203**	**0%**	**14,349**	**21%**
North West	**2,276**	**1,765**	**15%**	**112**	**3%**	**162**	**1%**	**25**	**0%**	**2470**	**21%**

Figure 17: Number leaving the NEET group from the activities listed below, Oct 2015

Oct-15	Total no of NEET Leavers	Leaving to: Educ and Train	%	Apprent.	%	Employment	%	Re-engagement provision	%	Left cohort	%	Other	%
Bolton	186	138	89%	17	3%	20	7%	3	0%	3	1%	5	1%
Bury	121	59	74%	7	7%	10	13%	0	0%	3	1%	42	13%
Manchester	249	153	79%	11	1%	43	1%	9	1%	12	2%	21	3%
Oldham	198	135	79%	8	1%	26	3%	0		15	4%	14	4%
Rochdale	152	98	74%	14	1%	21	2%	1	0%	12	3%	6	2%
Salford	231	143	69%	15	1%	49	3%	0	0%	15	3%	9	2%
Stockport	112	77	70%	10	2%	15	2%	2	1%	6	2%	2	1%
Tameside	99	70	56%	5	2%	11	3%	1		6	2%	6	2%
Trafford	34	31	80%	1	0%	0	0%	0	10%	2	1%	0	
Wigan	93	61	70%	8	3%	15	19%	3	0%	2	0%	4	1%
GM	**1,475**	**965**	**74%**	**96**	**2%**	**210**	**5%**	**19**	**2%**	**76**	**2%**	**109**	**3%**
England	**19,830**	**12,847**	**73%**	**1,360**	**5%**	**3,612**	**12%**	**315**	**2%**	**797**	**1%**	**899**	**1%**
NW	**3,633**	**2,349**	**75%**	**267**	**6%**	**601**	**11%**	**56**	**1%**	**173**	**2%**	**187**	**2%**

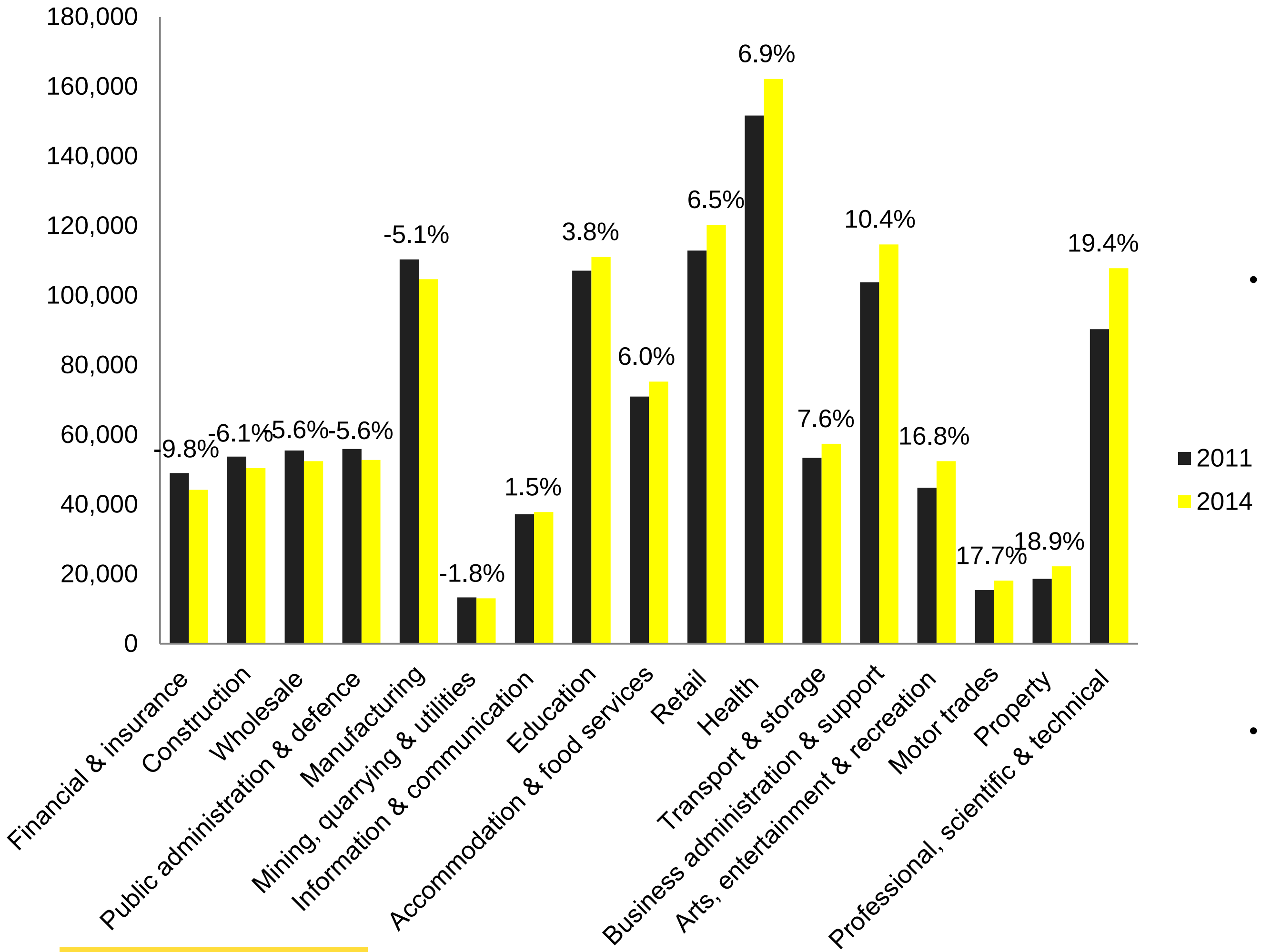
- There are very high fluctuations among NEET joiners and leavers. Almost half of the cohort changes each quarter.
- The tables show where NEETs come from and where they go after leaving NEET status.
- There appears to have been a large drop in the number coming from the education and training system.
- In October 2015 nearly 1,475 16-18 year olds left the NEET group to undertake education or training, found employment or for some other reason.

Source: NCCIS

EMPLOYER DEMAND

Professional services tops list of growing employment sectors

Figure 18: Recent employment growth, and total employment by sector, 2011-2014



- Sectors experiencing double digit employment growth between 2011 and 2014 in Greater Manchester include professional services (+19.4%), property (+18.9%), motor trades (+17.7%), arts & entertainment (+16.8%), and business administration (+10.4%).
- Employee numbers in financial & insurance services – where particularly insurance can be considered a specialisation of GM – are down by almost 10% over the past three years. This seems to be due to decreases in both finance (-6.1%), and activities auxiliary to finance (-19.7%; which includes back office support to banks and insurance companies), while employee numbers in insurance increased by 6.2%
- Within business, administration and support services, employment agencies have been growing especially quickly (by 27.7%). The explanation for this is uncertain, but may be due to employers' desire for flexibility, lack of business confidence, or labour supply quality.

Source: NOMIS BRES

Care and leisure occupations are middle skilled - not low skilled - jobs

Figure 19: Highest formal attained qualification per occupational group in GM 2014

Highest qualification per occupation	Degree or equivalent	Higher education	GCE, A-level or equivalent	GCSE grades A*-C or equivalent	Other qualifications	No qualification
Managers & Directors	32.5%	17.6%	26.3%	13.7%	4.0%	4.2%
Professional	66.0%	13.3%	6.7%	10.9%	3.0%	0.0%
Associate Professional	44.2%	15.1%	26.4%	10.1%	1.2%	3.1%
Administrative & Secretarial	23.9%	9.2%	29.7%	31.3%	2.9%	1.6%
Skilled Trades	2.3%	6.1%	42.2%	25.2%	18.2%	6.0%
Caring, Leisure & Other	11.5%	11.2%	42.5%	23.5%	7.8%	3.5%
Sales & Customer Service	11.6%	3.2%	26.4%	35.4%	12.4%	11.0%
Process, Plant & Machine	3.4%	0.0%	17.5%	20.4%	37.0%	16.3%
Elementary	11.1%	3.1%	36.4%	22.3%	14.8%	12.4%
Total	**29.4%**	**9.8%**	**26.8%**	**20.1%**	**8.2%**	**5.2%**

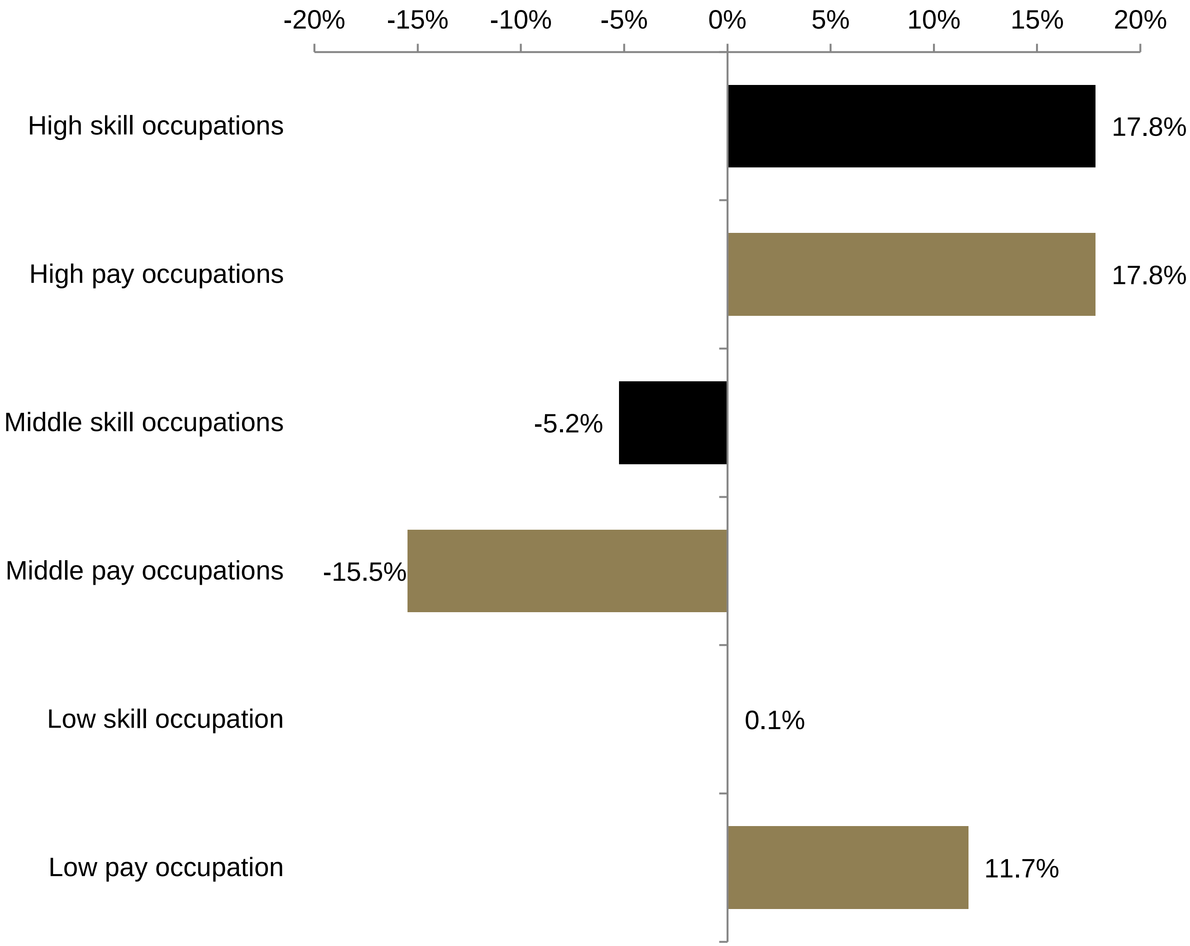
Sources: ONS, Labour Force Survey

- The table shows the distribution of educational attainment per broad occupational group in Greater Manchester.
- Although caring and leisure occupations are often categorised by analysts as a 'low skill' occupation, the table suggests this is mistaken: just under two thirds are qualified to level 3/A level and over a fifth have either a degree or a higher education qualification.
- Around half of workers in the administrative & secretarial occupational group have attended institutions of higher education, as have ¼ caring, leisure & other services workers – in contrast this is the case for less than one in ten workers in the skilled trades sector.
- The process plant and machine operatives have the lowest concentration in level 3 or above of any group – proportionately lower than even elementary occupations. This could be related to the age profile of the workforce and the recent expansion of upper secondary and tertiary education.

new economy

Skills and pay have exhibited different patterns of change

Figure 20: % change of employment in occupations by skills and pay in GM 2004-2014



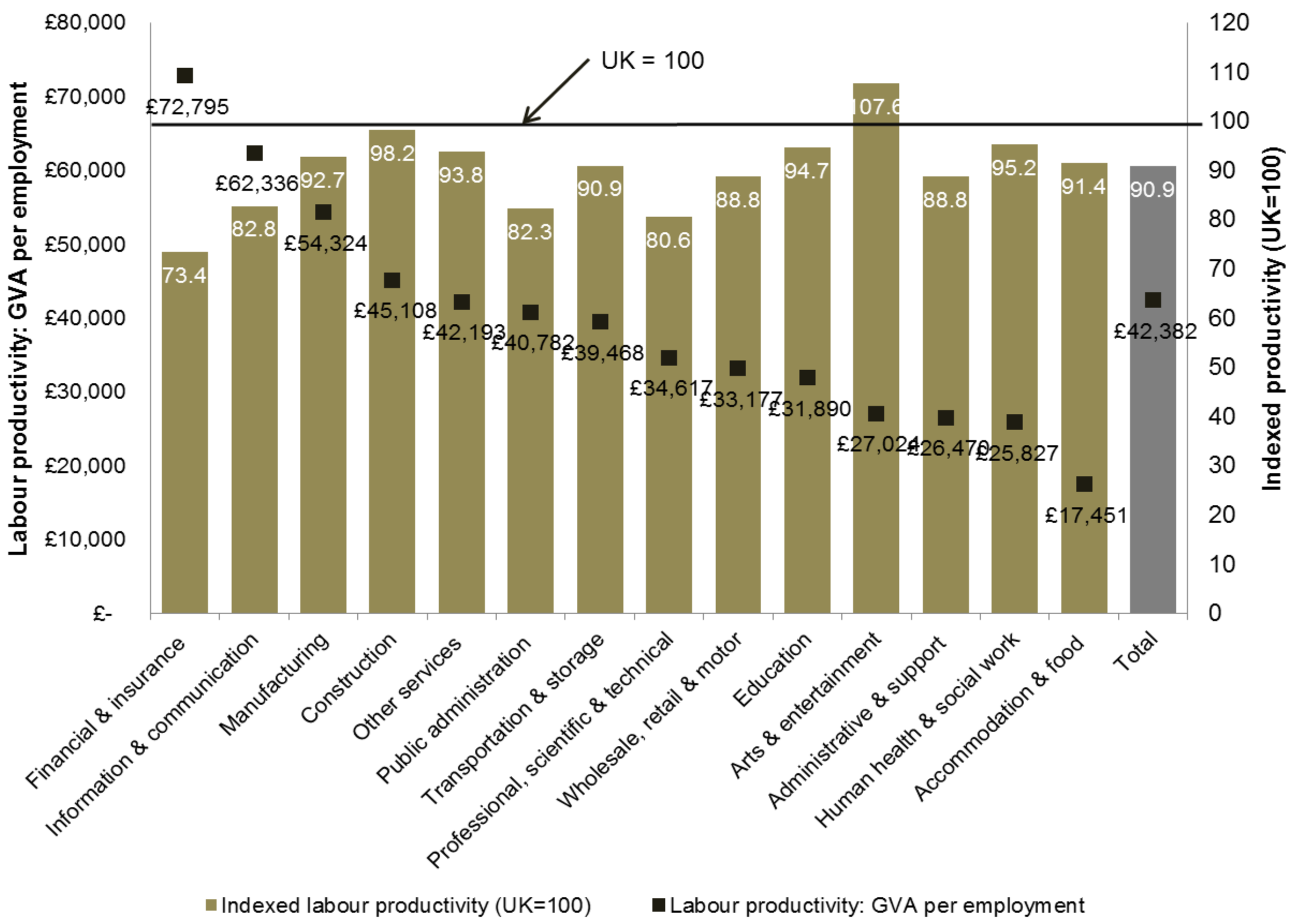
Sources: ONS, Labour Force Survey

- The chart shows employment change over the decade between 2004 and 2014, broken down by skill and pay. High skilled work (managerial, professional and associate professional) and high paid work have both grown substantially by 17.8%. But at other levels of the labour market, skill and pay have a more complicated relationship.
- Jobs which pay ‘middling’ kinds of salaries have declined by 15.5% while jobs paying low salaries have grown – reflecting the problems of low pay in Greater Manchester. Not far off a quarter of jobs pay less than a living wage.
- Meanwhile, jobs which require middle skill levels have also declined – but by a far smaller margin. The proportion of low skilled work is almost completely unchanged over the decade.
- The chart suggests that how occupational groups are categorised in terms of skill level (note previous slide) and pay can greatly affect interpretations of labour market change. There is an ‘hourglass’ shape to change in pay, but less so in skill.

new economy

Greater Manchester labour productivity lags UK across almost all sectors

Figure 21: Labour productivity as in GVA per employment in GM ranked from most to least productive and difference to corresponding figure for the UK



Sources: GMFM, 2015

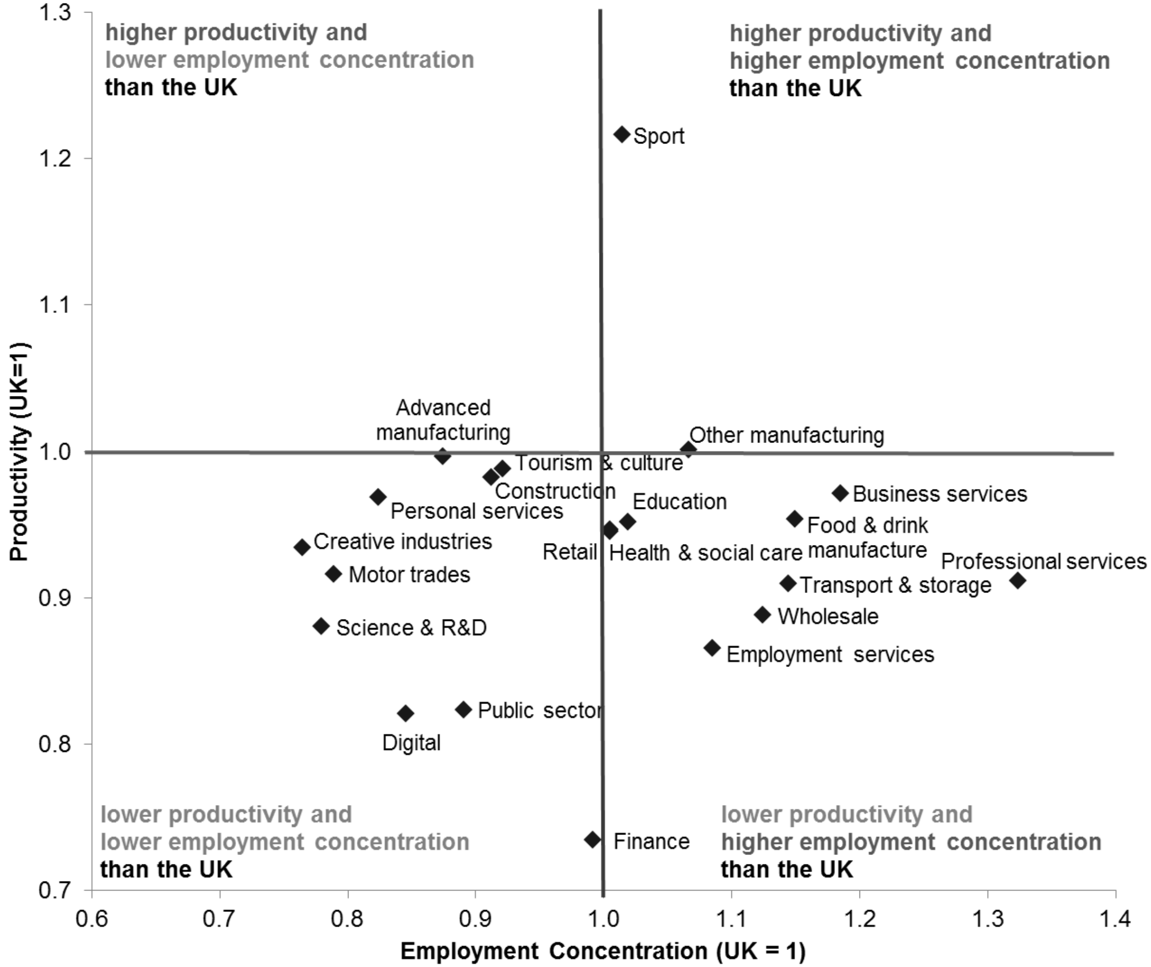
- The chart shows how output in Greater Manchester is lower in almost all sectors (excluding the primary sector, energy and water, and real estate, which are outliers) than the UK average. They are grouped on the left vertical axis by GVA per employment – i.e. labour productivity – and shown in the chart by black dots, from most productive (financial & insurance on the left; £72,795) to least productive (accommodation & food on the right; £17,451.

The bars compare GM's labour productivity with the UK, the latter indexed at 100. The bar shows GMs sector productivity as proportion of the corresponding national figure. I.e. in the Financial and insurance sector, every worker in GM contributed only 73.4% of the value added compared to the national average – a major productivity gap.

While this 'productivity gap' between GM and the country as a whole is well-evidenced, the gap is not at its widest in the low productivity sectors. Instead, the more knowledge intensive sectors of professional services, information & communication, financial services, are the sectors with the greatest gap where the need for productivity catch-up is at its most acute. In these sectors the gap is well into double digits.

Local labour market has few stand-out jobs sectors

Figure 22: GM employment location quotient and indexed productivity compared to the UK in different sectors in GM 2014 (excluding primary sector)



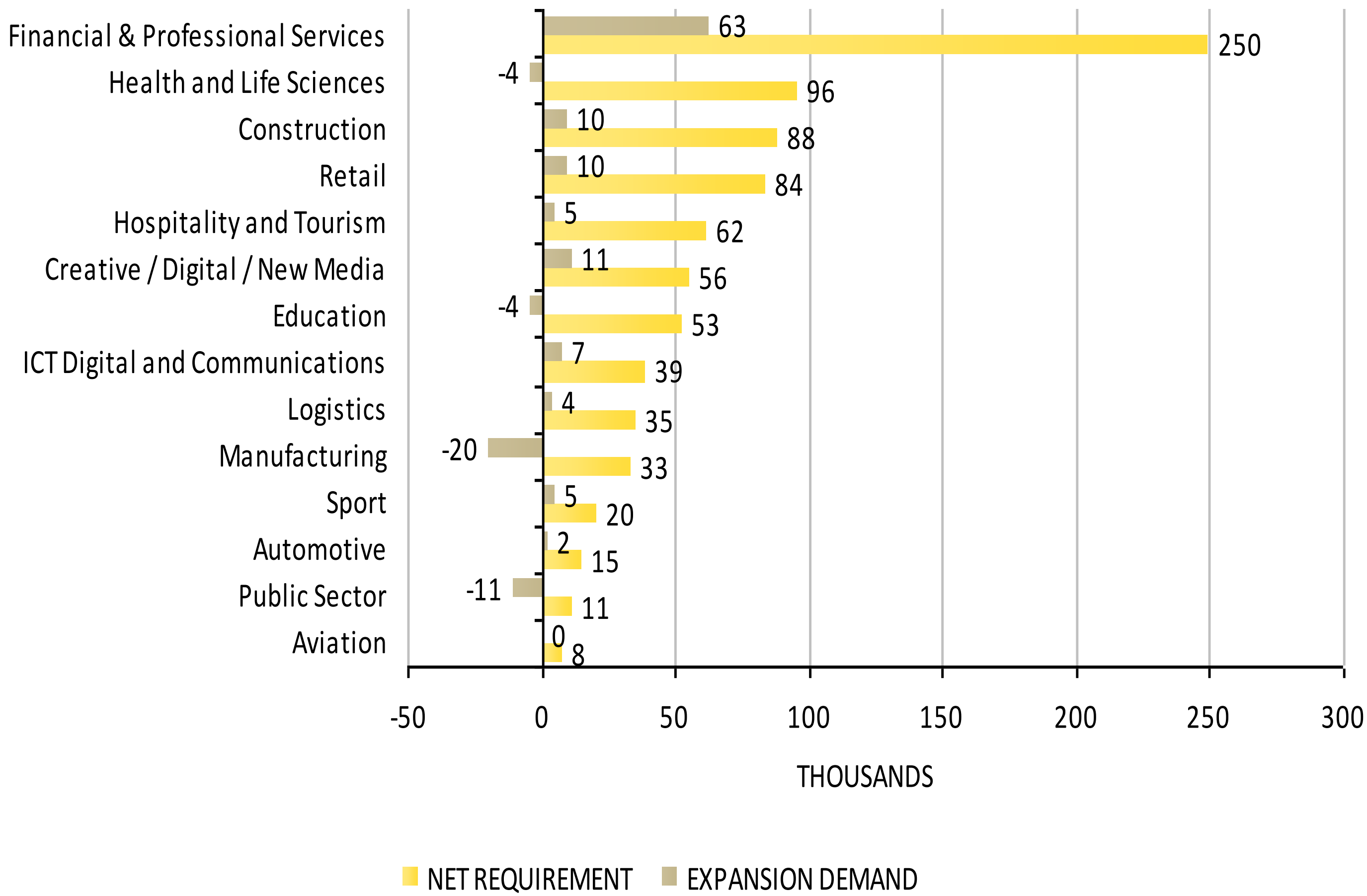
Sources: GMFM, 2015

- The chart shows GM's most significant employment sectors as a 'location quotient' (LQ) as well as comparing its sectoral labour productivity to the UK.
- The LQ shows the regional concentration of employment – ie the sectors where GM has a higher percentage of jobs than the UK (on the right of the line) and those where it is lower (left of the line).
- The LQ is calculated by dividing the share of a particular sector in GM by its share of the UK. An LQ below 1 means that there are relatively fewer jobs in GM than in the UK in the sector, while a LQ higher than 1 shows a concentration. A high LQ can be an indicator for the existence of agglomeration, as firms benefit from co-location (eg by skills matching, sharing of infrastructure, and knowledge spill overs).
- Additionally the sectors are plotted along the vertical axis as indexed labour productivity for the sectors, where the UK represents 1. Sectors plotted below the horizontal line exhibit a lower labour productivity than the UK, those plotted above are more productive.

new economy

Professional services, health, construction and digital likely to add jobs

Figure 23: Net and expansion demand in Greater Manchester, 2014-2022



- The chart shows job forecasts to 2022 for Greater Manchester, using the Greater Manchester Forecasting Model, developed for New Economy by Oxford Economics.
- There are two causes of a job opening – staff moving on due to retirement or labour force churn, and economic growth in a sector prompting a need for labour. The 'net requirement' figure represents the total jobs needed. The yellow bars ('expansion demand') are the jobs caused by growth.
- The chart shows the sectors likely to add labour due to growth to be digital and creative, business, financial and professional services, retail and construction.
- Across all sectors, the majority of expansion demand will be for those qualified to level 4 and above.

new economy

Source: GMFM/Oxford Economics, 2012/13

Mismatch between graduates available and ‘graduate jobs’

Figure 24: Change in level 4 qualifications and level 4 jobs in GM 2004- 2014

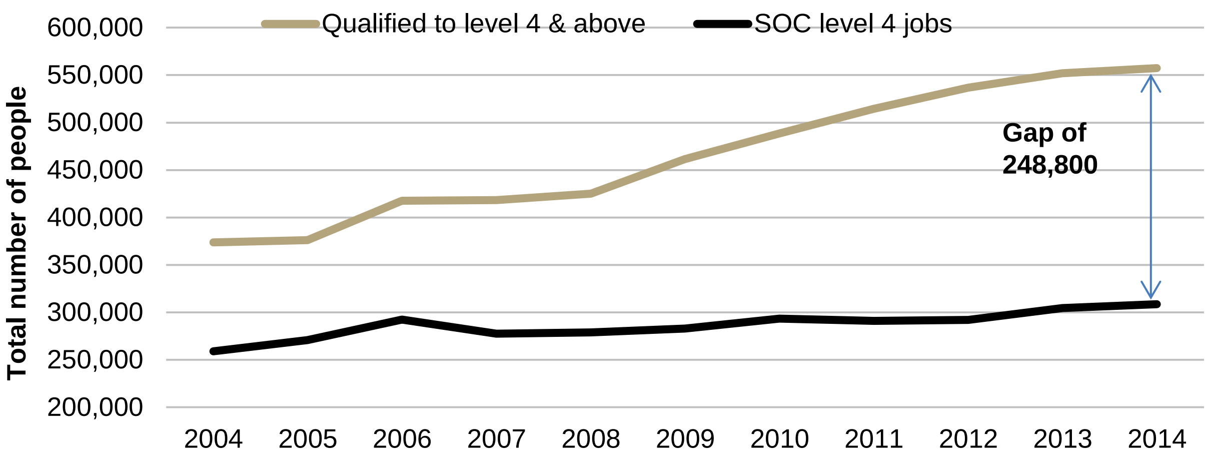
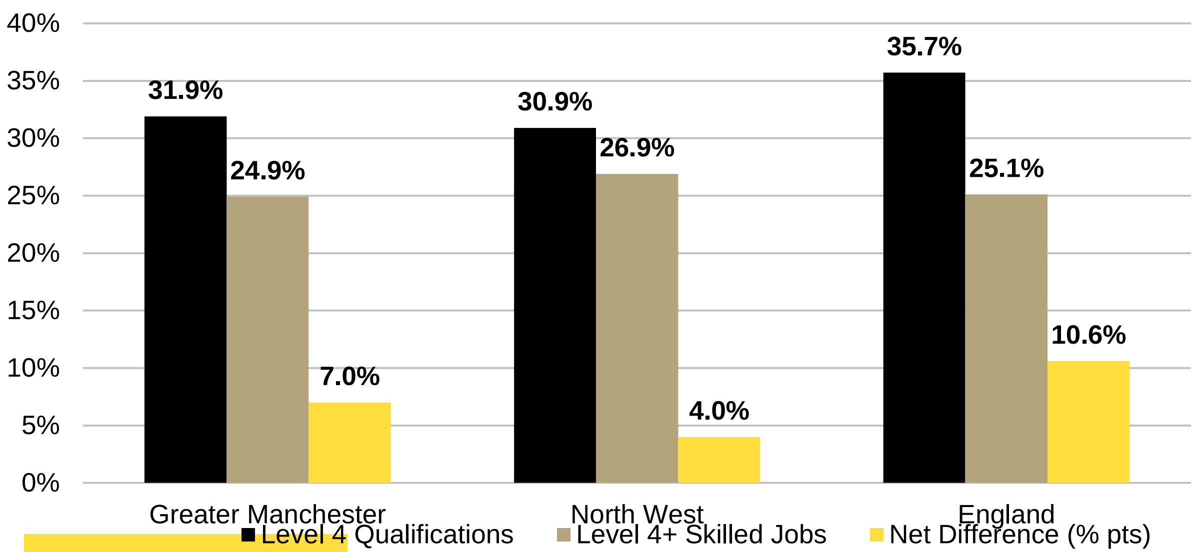


Figure 25: Level 4 qualifications and jobs in GM in 2014



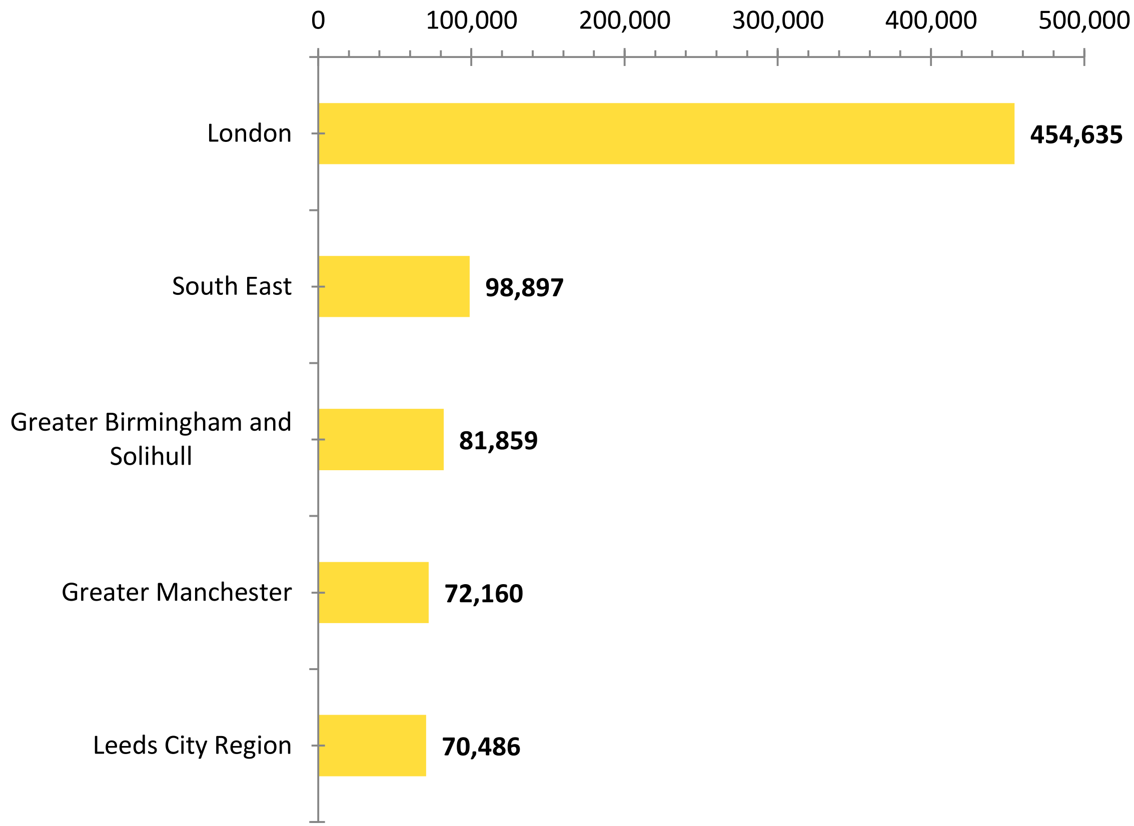
Source: Annual Population Survey, 2014

- The chart identifies one of the paradoxes of the skills formation system: although employers continue to demand higher skill levels, there continue to be issues of poor utilisation once those skills are created.
- The number of people qualified to level 4 has risen considerably faster than the numbers of ‘level 4 jobs’ in the economy.
- The proportion of people in Greater Manchester aged 16-64 with a level 4+ (a higher level qualification, foundation degree or higher) has grown by 49% between 2004 and 2014 (from 374,000 to 557,000 people). However, over the same timeframe the stock of graduate level jobs in the conurbation did not increase at the same rate (19%, from 259,000 to 309,000).
- While the gap between jobs at level 4 and above and the number of people qualified at those levels has increased nationally (from a net difference of 7.9% in 2013 to 10.6% in 2014), the gap at a Greater Manchester level is very similar (6.7% in 2013 compared to 7% in 2014). At a North West level, the gap has considerably decreased from 6.2% in 2013 to 4% in 2014 – the smallest gap out of the three regions.
- It should be noted, however, that there is no formal definition of a ‘level 4 job’. The definition used here combines the following roles: corporate managers and directors; science, research, engineering, and technology professionals; health professionals; teaching and education professionals; and business media and public service professionals.

new economy

GM LEP has fourth highest number of vacancies in Q3 2015

Figure 26: Top 5 LEPs by number of vacancies in Q3 2015 (July-Sept 2015)



- Labour Insight is an online database of live job postings which provides job vacancy data that can be analysed by occupation type and skills requirements.
- According to Labour Insight, GM LEP had the fourth highest number of job vacancies (72,160) during Q3 2015 compared to other LEPs in England, maintaining its position from the same period last year. This was an increase of 19% on the number of job vacancies in Q3 2014 (60,586).
- Manchester Travel-to-Work-Area (2001 definition) had the second highest number of job vacancies after London TTWA in the 12 months to November 2015 (225,189).

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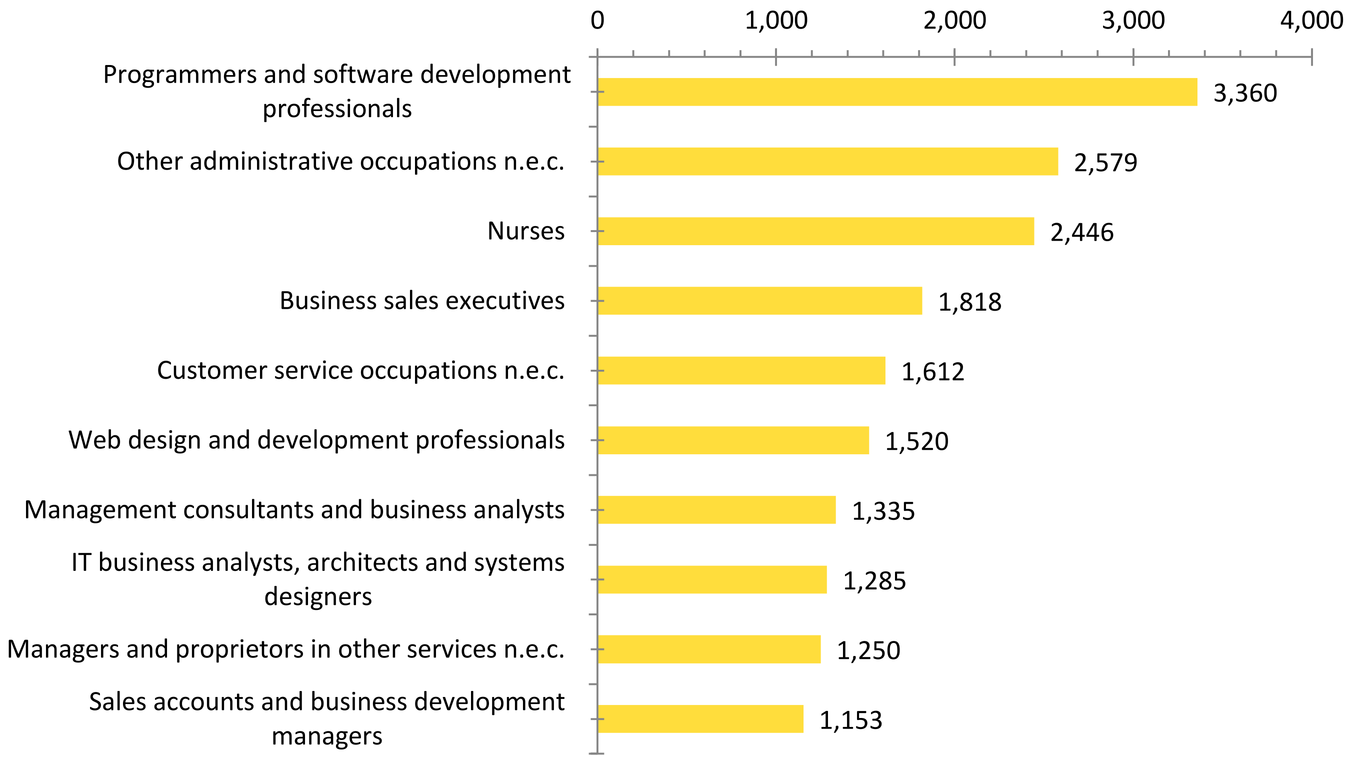
Source: Labour Insight

Continued high demand for programmers and software developers, administrative occupations and nurses

Figure 27: Job vacancies by detailed occupation in GM in Q3 2015 (July-Sept 2015)



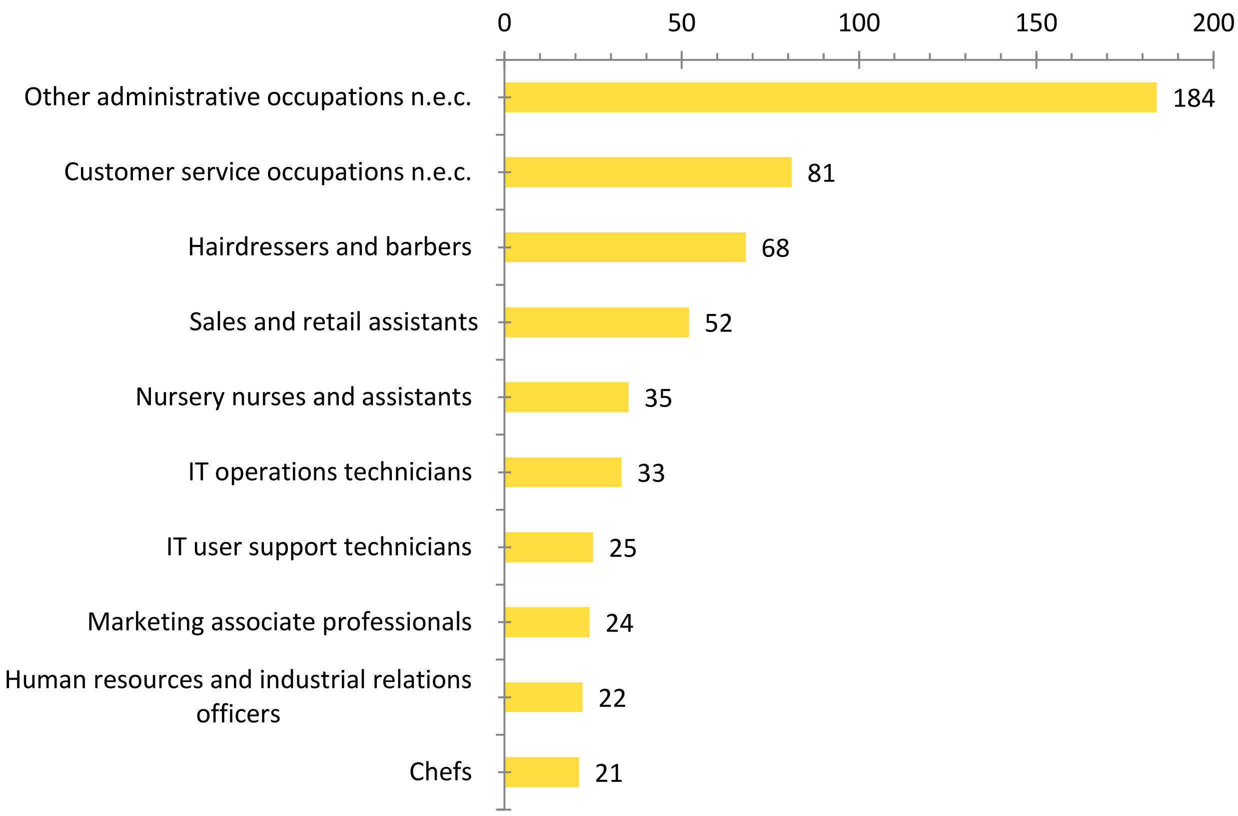
- According to Labour Insight, the highest number of vacancies in GM in Q3 2015 was for programmers and software developers (3,360), administrative occupations (2,579) and nurses (2,446).
- These are the occupations that consistently come out as the most in-demand, however, compared to the same period last year programmers have now replaced administrative occupations in the top spot.

Source: Labour Insight

new economy

Administrative, customer service and hairdressing occupations most in-demand for apprenticeship vacancies

Figure 28: Apprenticeship vacancies by detailed occupation in GM in Q3 2015 (July-Sept 2015)

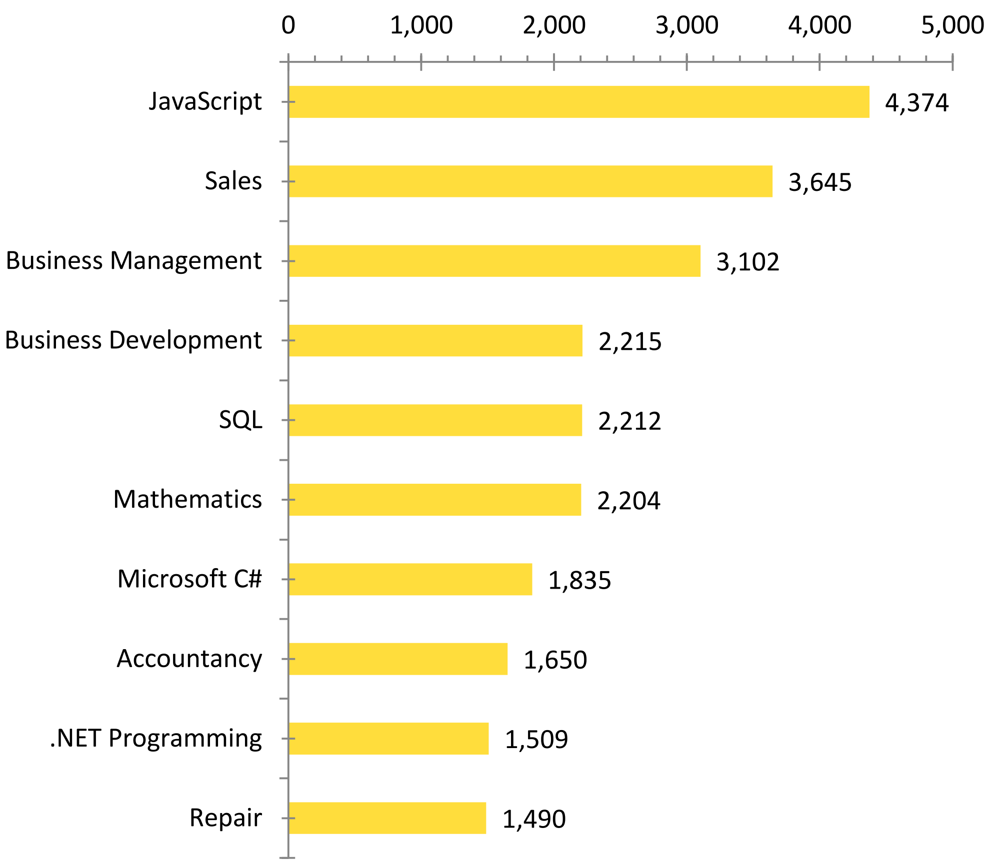


- The largest number of advertised apprenticeship vacancies in Q3 2015 in GM was in administrative occupations, followed by customer service occupations and hairdressers and barbers.
- Sales and retail assistants, nursery nurses and assistants and IT technicians were also in demand.

Source: Labour Insight

Digital skills are in demand among Greater Manchester employers

Figure 29: Specialist skills in greatest demand by number of vacancies in GM, Q3 2015 (July-Sept 2015)



- According to Labour Insight, four of the top ten specialist skills most frequently cited in job vacancies are specific IT skills such as Java Script, SQL, Microsoft C#, and .NET Programming (together accounting for almost 8,500 vacancies in the time period).
- However, it's important to note that IT skills are sometimes over-represented as job postings for IT roles. The reason for this is that in the IT/digital sector, job adverts are often more specific about skills required compared to other postings.
- Sales, business management, business development, mathematics and accountancy are also some of the skills that employers seek the most.

Source: Labour Insight

new economy

Professional occupations continue to account for the majority of advertised job vacancies

Figure 30: Number and proportion of vacancies by occupation family in GM in Q3 2015 (July-Sept 2015)

Occupation Family	Number of vacancies in Q3 2015	% of vacancies in Q3 2015	% of vacancies in Q3 2014
PROFESSIONAL OCCUPATIONS	22,490	31.34%	30.21%
ASSOCIATE PROFESSIONAL AND TECHNICAL OCCUPATIONS	15,782	21.99%	21.04%
ADMINISTRATIVE AND SECRETARIAL OCCUPATIONS	7,297	10.17%	11.20%
MANAGERS, DIRECTORS AND SENIOR OFFICIALS	5,841	8.14%	8.05%
SALES AND CUSTOMER SERVICE OCCUPATIONS	5,564	7.75%	7.57%
SKILLED TRADES OCCUPATIONS	4,220	5.88%	6.12%
ELEMENTARY OCCUPATIONS	3,745	5.22%	5.97%
CARING, LEISURE AND OTHER SERVICE OCCUPATIONS	3,520	4.90%	4.98%
PROCESS, PLANT AND MACHINE OPERATIVES	3,313	4.62%	4.86%

- The majority of job vacancies in GM are for professional occupations (22,490 in Q3 2015) and associate professional and technical occupations (15,782).
- Compared to Q3 2014, the proportion of vacancies for professional occupations has increased from 30.2% to 31.3%. The proportion of vacancies for associate professional and technical occupations, managers and directors, and sales and customer service occupations also increased slightly, while the proportion of vacancies for all other occupation groups declined slightly.

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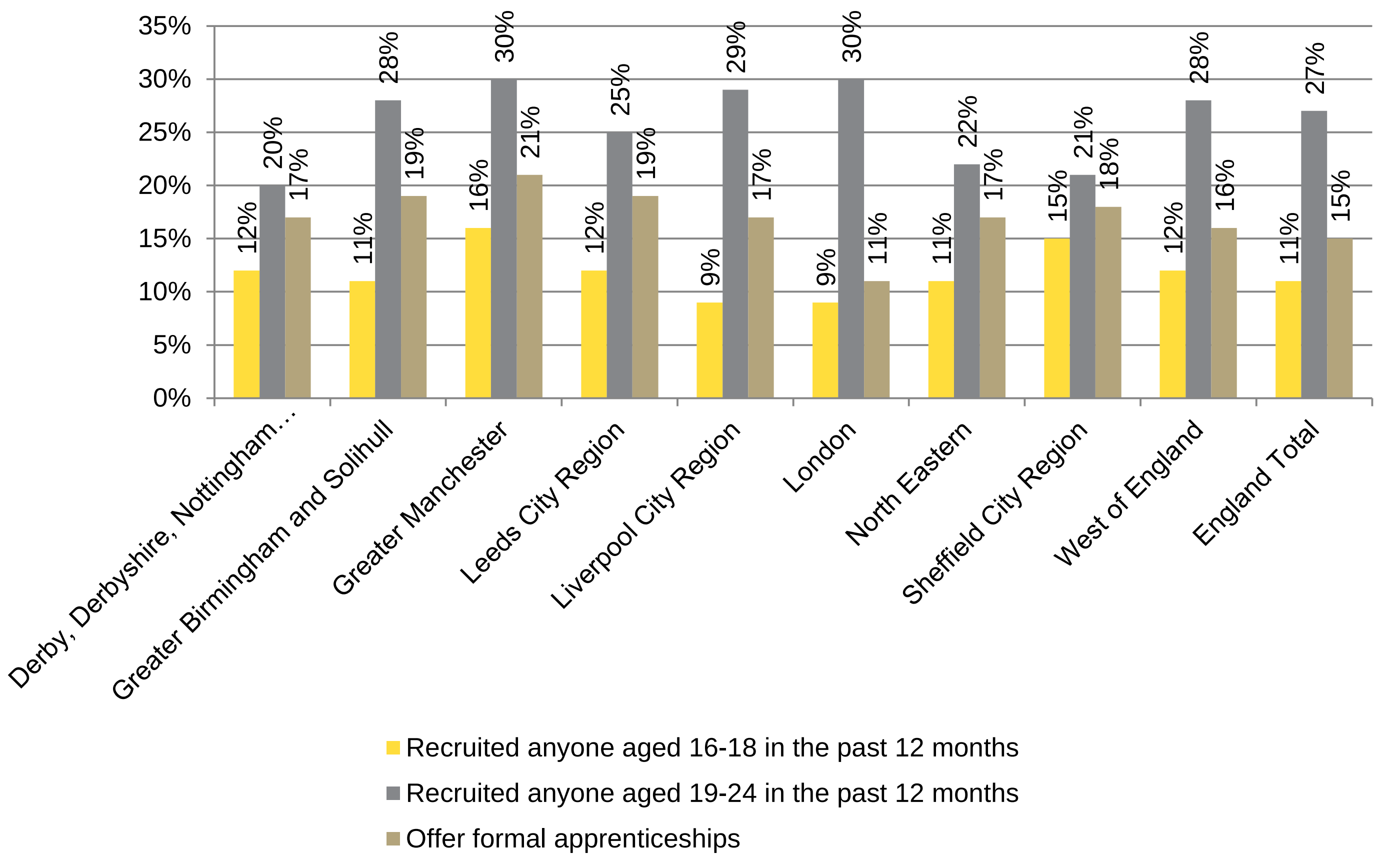
Source: Labour Insight

Greater Manchester employers are most likely to offer apprenticeships

Figure 31: Recruitment habits of employers in selected LEP areas, 2014



- The 2014 Employer Perspectives Survey (UKCES) shows Greater Manchester employers are more likely to offer apprenticeships than employers in other LEP areas (21% - joint highest with Tees Valley LEP).
- In addition, GM employers are more likely to hire 16-18 year olds (only the Dorset LEP area is more likely).
- By contrast, they are less likely to hire the over 50s (data not shown on chart) than the national average.

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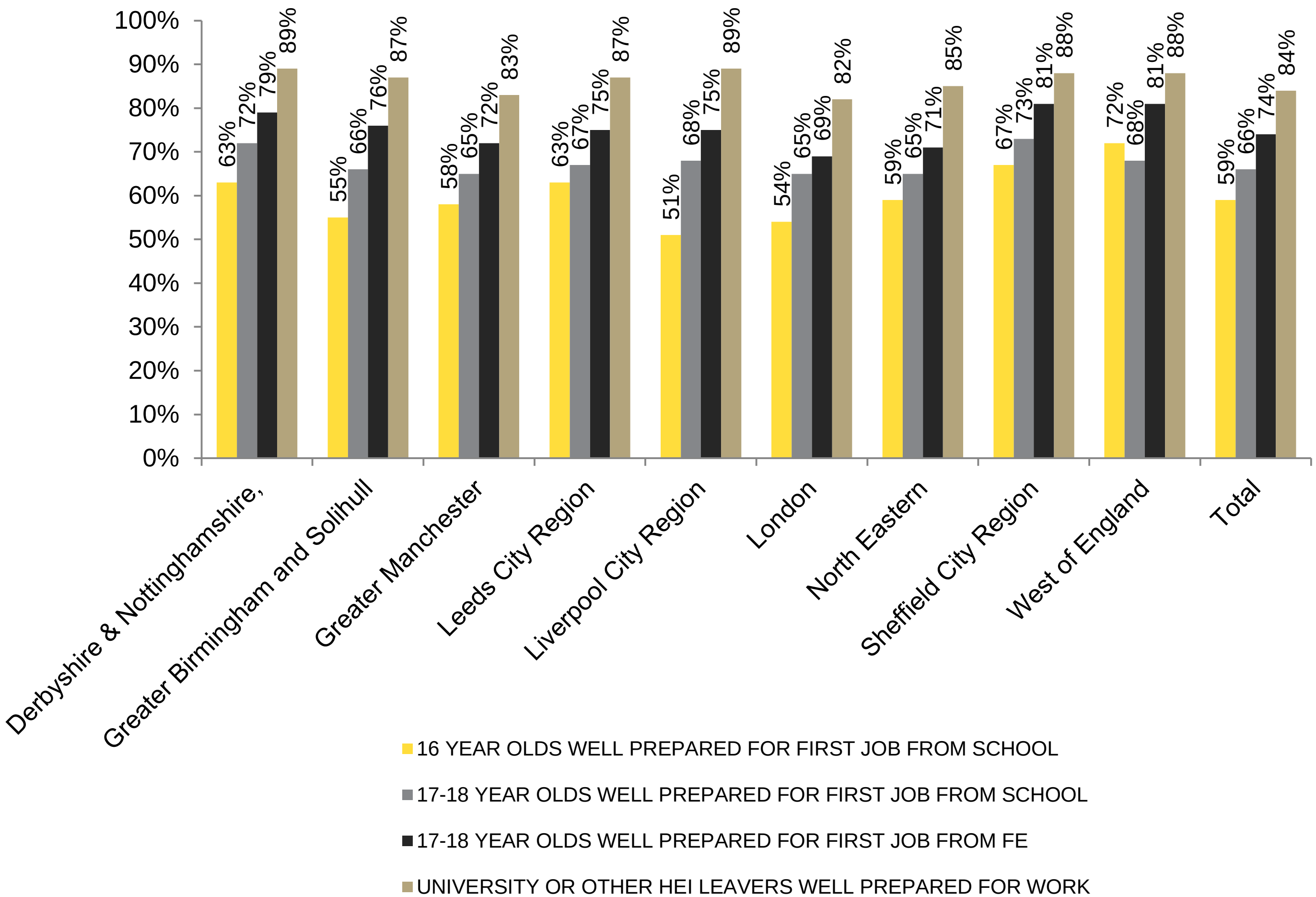
UKCES, National Employer Perspectives Survey, 2014

Employers think GM school and college leavers worse prepared for work than national average

Figure 32: Percentage very well prepared/well prepared for work in selected English LEP areas and London



- The perception of employers in GM regarding how well prepared 16 year old school leavers are for work increased by 4 percentage points since the previous Employer Skills Survey. However, GM still lags the national norm by a small margin (58% to 59%).

- School, college and university leavers were also judged to be poorly prepared for work by GM based employers compared with other LEP areas (72% in GM compared with 74% in England). In each case, the degree of difference was relatively modest.

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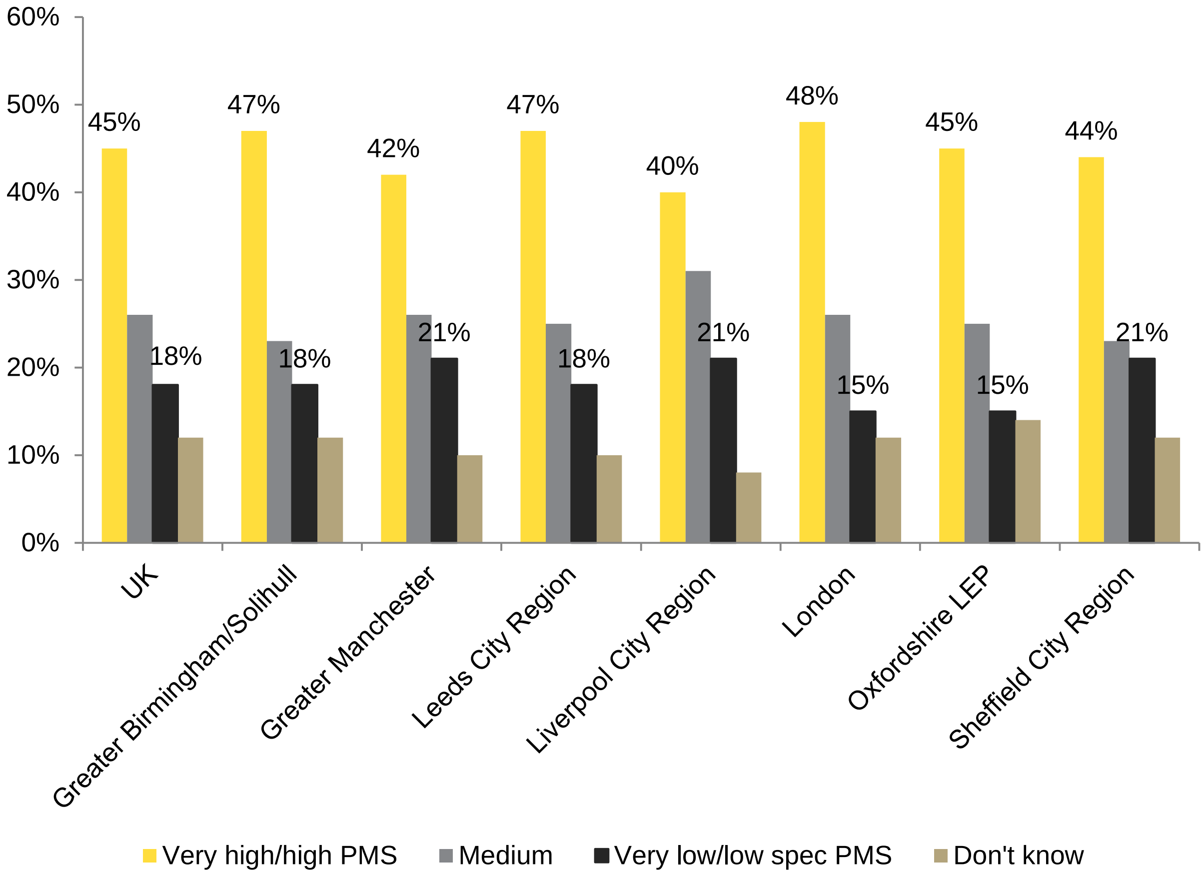
UKCES, National Employers Skills Survey, 2013

GM employers' strategies imply restrained demand for skills

Figure 33: Product Market Strategies of GM employers, 2013



UKCES, National Employers Skills Survey, 2013

• A 'product market strategy' refers to the way that employers choose to compete – for example, if they compete on selling cheap goods and services.

• Here we adapt a method devised by UKCES for measuring the PMS of employers in LEP areas. The measure is a combination of five different aspects of strategy: price dependence; customisation; 'premium or basic quality'; whether a business sees itself as 'leading the way'; and attainment of the Investors In People Standard.

• GM employers are oriented towards the 'low price, low skill, low pay' end of the PMS spectrum.

• For example, in the UK, 45% of employers adopt high or very specification PMS. In GM, the proportion is 42%.

•The significance of PMS for skills is that a low PMS score implies lower demand for skills. Research has generally validated the link between a high spec PMS and higher demand for skills.

SKILLS SUPPLY: YOUNG PEOPLE

GCSE performance lower following reforms aimed at boosting rigour

Figure 34: % of 15 year olds with 5+ GCSEs A*-C or equivalent, 2012/13-2014/15

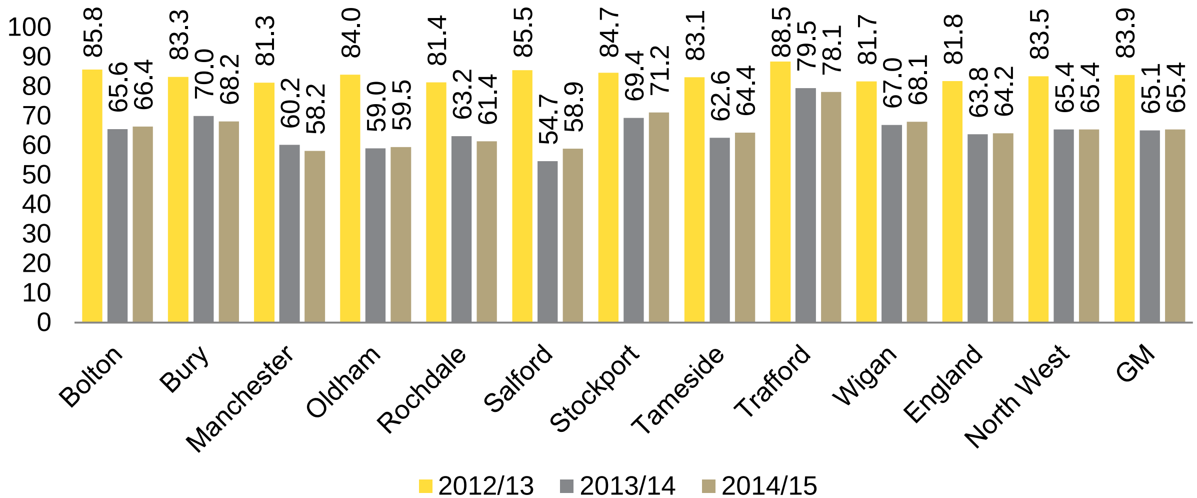
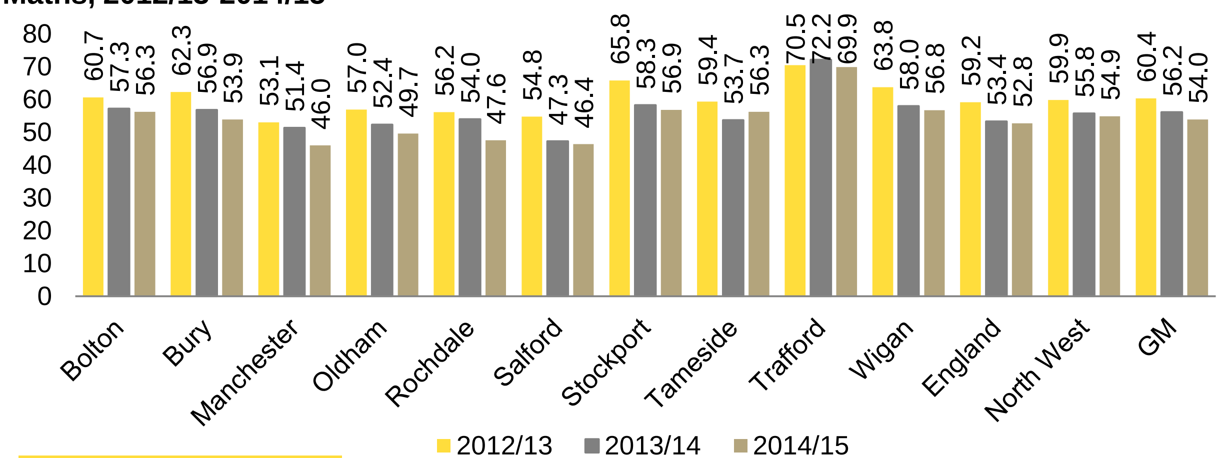


Figure 35: % of 15 year olds with 5+ GCSE's A*-C or equivalent including English and Maths, 2012/13-2014/15



- GCSE performance in Greater Manchester has levelled after the changes in 2013/14 which reduced the numbers of qualifications counting towards the GCSE performance measure. Some 65% of GM learners achieved 5 A*-Cs in 2014/15. Trafford (78%) and Stockport (71%) local authorities reported the highest percentage within the area.

- However, the benchmark measure which includes maths and English shows there has been a 2 percentage point (p.p)% drop compared with the year before: 54% of pupils in Greater Manchester achieved 5 or more GCSEs at grades A*-C in 2014/15 (see figure 34) including English and maths. This is below the regional average and slightly above the national average of 53%.

- The historic variations in GCSE performance are still apparent at a district level. In Trafford for example, 70% of pupils in 2014/15 achieved 5+ GCSE at grades A*-C (including maths and English), while in Salford the figure was 46%.

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Source: Department for Education (2014); Provisional 2013/14 GCSE data by Local Authority.

Greater Manchester's 16 and 17 year olds are education oriented, but less likely to be in employment

Figure 36: Participation of 16 and 17 year olds across different progression options in GM, Nov 2015

	16-18 Cohort November 2015	Full Time Education	Training	Apprentice-ships	Work based learning*	Part time education	Employment with Training	Other	Total
Bolton	10,661	72.5%	1.9%	5.4%	1.6%	0.1%	0.3%	0.3%	80.2%
Bury	6,706	76.7%	1.1%	7.1%	1.0%	0.1%	0.1%	0.1%	85.1%
Manchester	15,782	69.4%	1.6%	3.8%	1.5%	0.0%	0.2%	0.1%	75.1%
Oldham	9,192	83.5%	1.9%	3.8%	1.6%		0.3%	0.3%	89.4%
Rochdale	7,869	83.0%	2.2%	4.3%	1.6%	0.1%	0.3%	0.7%	89.9%
Salford	7,275	69.0%	2.8%	7.7%	2.8%		2.4%		82.0%
Stockport	9,745	66.5%	1.0%	6.8%	1.0%	0.3%	0.4%		75.1%
Tameside	7,976	82.7%	3.0%	3.8%	2.6%	0.0%	0.4%	0.4%	90.0%
Trafford	8,290	72.5%	0.9%	5.3%	0.9%	0.0%	0.1%		78.7%
Wigan	10,885	66.2%	4.0%	8.9%	4.0%	0.1%	0.5%	0.1%	79.7%
GM	**94,381**	74.2%	2.0%	5.7%	1.9%	0.1%	0.5%	0.2%	82.5%
North West	**244,694**	**71.7%**	**1.7%**	**6.7%**	**1.7%**	**0.1%**	**1.60%**	**0.2%**	**82.0%**
England	**1,771,765**	**72.3%**	**1.1%**	**6.0%**	**1.1%**	**0.2%**	**1.3%**	**0.2%**	**81.0%**

Source: NCCIS

- 'Participation' refers to the duty of young people to participate in education, training, employment with training, or an apprenticeship – a requirement under the government's Raising the Participation Age policy – up to the age of 18.
- Greater Manchester's 16 and 17 year olds are more likely to participate in education than others in the rest of England (74.2% compared to 72.3%) .
- GM has a lower rate of apprenticeship participation (5.7%) compared to the North West (6.7%) and England (6.0%).

new economy

Attainment at level 2 has risen consistently…

Figure 37: Percentage of 19 year olds qualified to level 2 or higher (2005-2014)

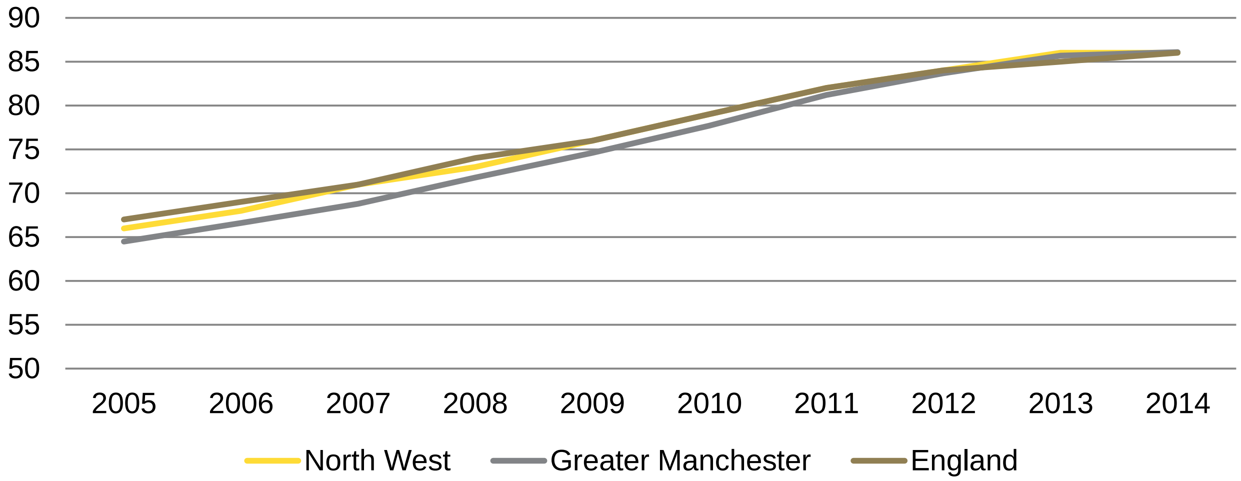
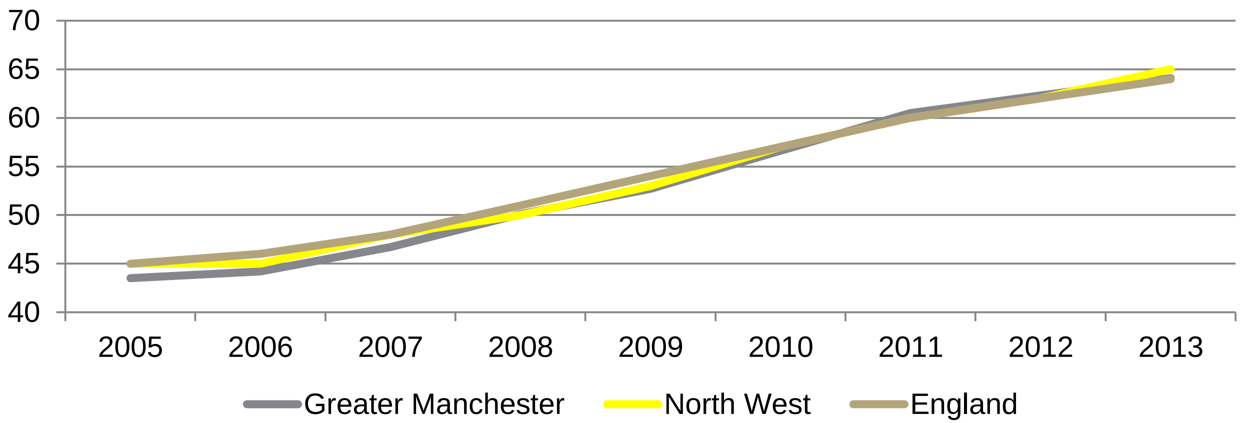


Figure 38: Percentage of 19 year olds qualified to level 2 or higher, including English & Maths (2005-2013)



- Attainment levels at Level 2 and higher by age 19 has risen consistently in GM since 2005. In GM the figure in 2014 was 86%, with the same level in the North West and in England.
- Attainment of Level 2 by age 19 with English & Maths in 2012 in GM was at 66% - also in line with national and regional averages.
- GM has closed the gap since 2005, when it was behind both areas.

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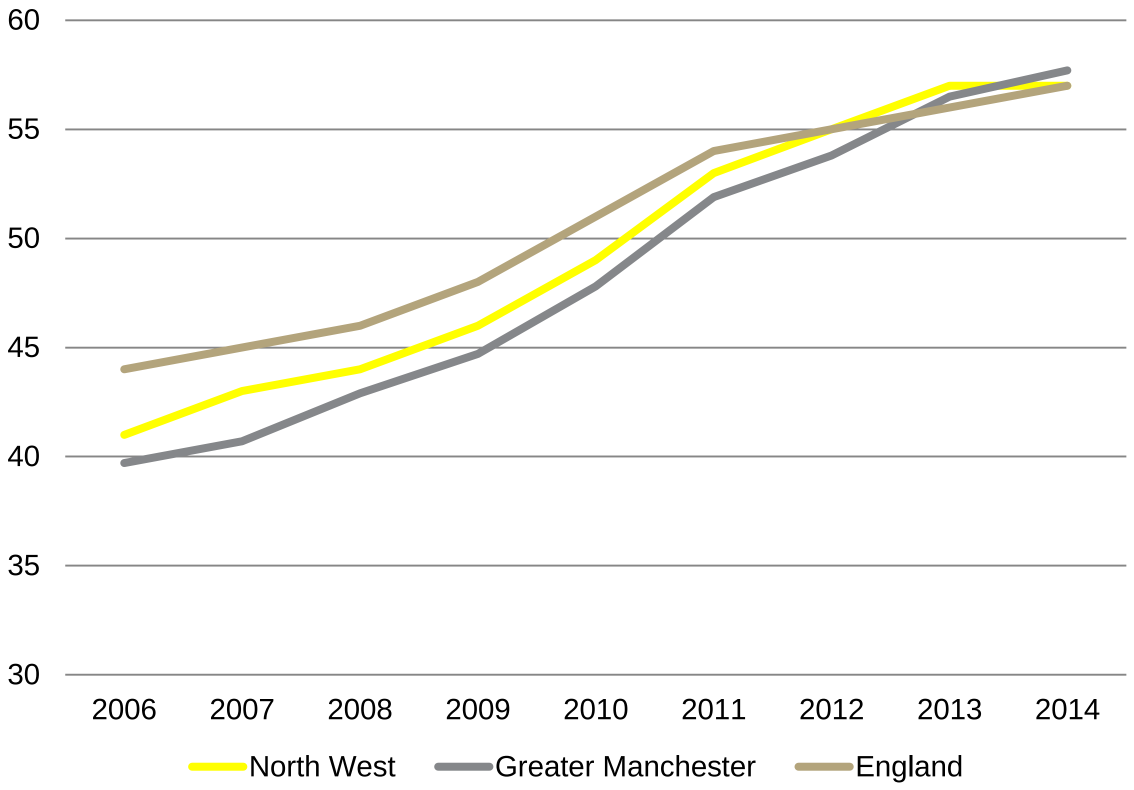
Source: Department for Education, Level 2 and 3 Attainment by Young People in England Measured Using Matched Administrative Data: Attainment by Age 19 in 2013

...as has attainment at level 3, which now sits above regional and national levels

Figure 39: Percentage of 19 year olds qualified to level 3 or higher (2006-2014/15)



- Attainment at Level 3 amongst 19 year olds has consistently risen since 2005 in Greater Manchester and has recently overtaken regional and national averages.
- In 2014, attainment in the conurbation by 19 year olds at Level 3 was around 57%, up from less than 39% in 2005.

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Source: Department for Education,

Inequality continues to affect educational performance

Figure 40: Attainment of Level 2 including English and maths by those aged 19 by FSM eligibility in GM, 2005-2014/15

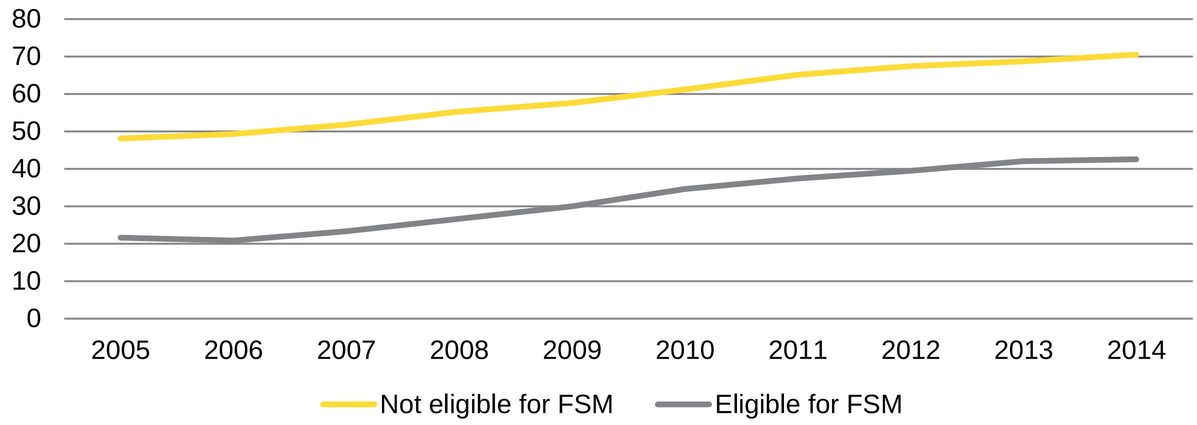
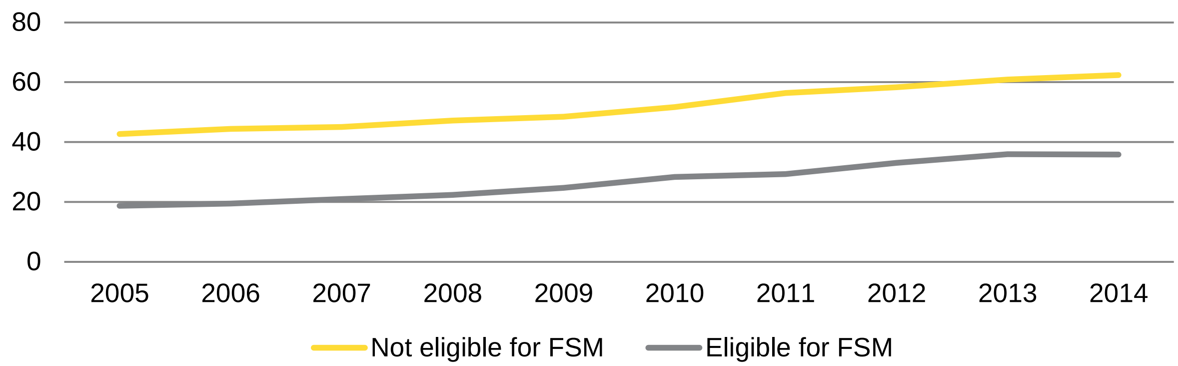


Figure 41: Attainment of Level 3 by those aged 19 by FSM eligibility in GM, 2005-2014



Source: Department for Education

- Comparing attainment levels at Level 2 between 19 year old students who were eligible for free school meals when they were 16 years old and those not eligible shows a large disparity between the groups. Some 43% of pupils who receive free school meals attain a level 2 qualification by age 19. Among non FSM pupils, 71% do so.
- There has been little significant narrowing of the gap since 2005. However, the number of pupils receiving free school meals has increased.
- Comparing the attainment levels at Level 3 between 19 year old students eligible for free school meals and those not eligible shows a disparity between the groups of 25%p.p. in GM – slightly higher than the national average of 24%p.p.
- At Level 3 the gap between FSM and Non-FSM achievement in GM has remained mainly unchanged,

88% of school leavers at KS4 go on to education after GCSEs

Figure 42: % KS4 cohort going to, or remaining in, an education destination in 2013/14

Local Authority	Number of students	Any Education/Employment/ Training	Any education destination	Further Education College	Other FE Provider	School Sixth Form	Sixth Form College	Apprenticeships	UK HEI	Destination not sustained	Activity not captured in data
Bolton	3530	91%	89%	42%	3%	23%	20%	5%	0%	6%	2%
Bury	2200	92%	90%	52%	2%	3%	33%	5%	0%	5%	1%
Manchester	4510	87%	85%	34%	4%	13%	32%	4%	x	8%	2%
Oldham	3100	91%	89%	38%	3%	13%	33%	4%	0%	6%	1%
Rochdale	2440	90%	87%	44%	3%	7%	32%	5%	0%	7%	1%
Salford	2240	90%	87%	64%	6%	6%	9%	6%	0%	7%	2%
Stockport	3010	91%	89%	23%	5%	8%	53%	6%	0%	6%	1%
Tameside	2710	91%	89%	34%	5%	8%	41%	7%	0%	6%	1%
Trafford	2930	93%	91%	32%	3%	42%	13%	5%	0%	5%	1%
Wigan	3760	90%	88%	38%	7%	7%	34%	7%	0%	8%	1%
GM	30430	91%	88%	40%	4%	13%	30%	5%	0%	6%	1%
England	571810	92%	90%	34%	3%	38%	12%	5%	-	5%	1%

Figure 43: Numbers of KS4 cohort going to, or remaining in, an education destination in 2013/14

Local Authority	Number of students	Any employment/education/ training	Any education destination	Further Education College	Other FE Provider	School Sixth Form	Sixth Form College	Apprentice-ships	UK HEI	Destination not sustained	Activity not captured in data
Bolton	3,530	3,212	3,142	1,483	106	812	706	177	0	212	71
Bury	2,200	2,024	1,980	1,144	44	66	726	110	0	110	22
Manchester	4,510	3,924	3,834	1,533	180	586	1,443	180		361	90
Oldham	3,100	2,821	2,759	1,178	93	403	1,023	124	0	186	31
Rochdale	2,440	2,196	2,123	1,074	73	171	781	122	0	171	24
Salford	2,240	2,016	1,949	1,434	134	134	202	134	0	157	45
Stockport	3,010	2,739	2,679	692	151	241	1,595	181	0	181	30
Tameside	2,710	2,466	2,412	921	136	217	1,111	190	0	163	27
Trafford	2,930	2,725	2,666	938	88	1,231	381	147	0	147	29
Wigan	3,760	3,384	3,309	1,429	263	263	1,278	263	0	301	38
GM	30,430	27,570	26,900	12,202	1,248	3,956	9,129	1,643	0	1,948	396
ENGLAND	571,810	526,065	514,629	194,415	17,154	217,288	68,617	28,591		28,591	5,718

Source: Department for Education

- The vast majority of learners in GM (27,570 or 88%) went on to education. This means that GM has now caught up with the national norm. Broken down by type of provision: 40% went to FE colleges (similar proportion as last year); 30% went to sixth form colleges (up 8 p.p. in two years); 13% went to a school sixth form. Apprenticeship starts were slightly down on last year 9 - by 1p.p – to 5% or 1,643 young people.

Over half of young people at KS5 go on to University after A-Levels

Figure 44: % of KS5 cohort 2012/13 going to, or remaining in, an education destination in 2013/14

Local Authority	Number of students	Any education destination	Further Education College	Other FE Provider	School Sixth Form	Sixth Form College	Apprentice -ships	UK Higher Education Institution	Destination not sustained	Activity not captured in data
Bolton	1,550	67%	7%	3%	2%	x	5%	55%	9%	11%
Bury	2,420	64%	7%	3%	-	-	4%	53%	14%	15%
Manchester	3,200	71%	13%	3%	1%	6%	3%	50%	8%	16%
Oldham	1,960	75%	20%	3%	-	-	5%	51%	7%	11%
Rochdale	890	60%	9%	5%	0%	x	8%	46%	14%	20%
Salford	1,500	57%	4%	3%	0.01	0%	5%	49%	11%	12%
Stockport	2,000	67%	7%	5%	x	3%	7%	52%	12%	15%
Tameside	1,500	62%	7%	4%	x	1%	6%	50%	10%	21%
Trafford	1,800	69%	9%	4%	-	0	5%	55%	9%	16%
Wigan	2,080	73%	9%	4%	-	2%	6%	58%	9%	10%
GM	18,900	67%	9%	4%	1%	2%	5%	52%	10%	15%
ENGLAND	358,970	65%	11%	3%	2%	1%	5%	48%	9%	15%

Figure 45: Numbers of KS5 cohort 2012/13 going to, or remaining in, an education destination in 2013/14

Bolton	1,550	1,039	109	47	31	x	78	853	140	171
Bury	2,420	1,549	169	73	x	x	97	1,283	339	363
Manchester	3,200	2,272	416	96	32	192	96	1,600	256	512
Oldham	1,960	1,470	392	59	x	x	98	1,000	137	216
Rochdale	890	534	80	45	-	x	71	409	125	178
Salford	1,500	855	60	45	15	-	75	735	165	180
Stockport	2,000	1,340	140	100	x	60	140	1,040	240	300
Tameside	1,500	930	105	60	x	15	90	750	150	315
Trafford	1,800	1,242	162	72	x	-	90	990	162	288
Wigan	2,080	1,518	187	83	x	42	125	1,206	187	208
GM	18,900	12,569	1,739	699	189	378	1,021	9,809	1,947	2,778
ENGLAND	358,970	233,331	39,487	10,769	7,179	3,590	17,949	172,306	32,307	53,846

Source: Department for Education

- Despite a slight fall in the number of young people who have recently completed their A-levels in GM going on to university (52%), provisional data for the 2012/13 cohort shows this proportion remains above the national average (48%). While the proportion of A-level students in GM moving onto an apprenticeship rose slightly among the 2012/13 cohort (5%), this is now matched by national figures, which has grown at a slightly faster rate. Data collection practices may explain very large variance in FE College data – for example about 20% go on to FE in Oldham, but 4% in Salford.

Young learner starts in further education system fall again

Figure 46: Youth (16-18) /EFA-funded starts by sector and year 2012/13 to 2014/15, excluding apprenticeships

	Sector	2012/13	2013/14	2014/15,Q4
High job growth	Business Services	10,276	7,521	7,129
	Construction	4,478	4,366	4,523
	Creative	19,019	18,040	17,210
	Digital	5,240	4,885	4,468
	Finance	2,111	2,346	2,046
	Personal Services	4,093	3,378	2,772
	Professional	3,119	3,256	3262
	Sport	8,221	6,569	5,575
Modest job growth	Health and Social Care	12,769	8,567	7,613
	Hospitality and Tourism	4,045	3,162	2,890
	Retail	418	792	347
	Transport/Storage/Logistics	117	48	18
Declining jobs	Agriculture	772	703	899
	Education	13	9	28
	Environment	608	64	25
	Manufacturing	2,884	2,028	1,848
	Motor Trades	2,133	2,148	2,165
	Public Administration	1,920	1,956	1,770
Non-sector specific	Academic	66,061	65,711	67,927
	Employability	73,126	66,150	59,528
	Not Applicable	17,241	8,986	10,399
	Unknown	52,928	391	129
Total		**291,592**	**211,076**	**202,571**

- Provisional 2014/15 data shows that the volume of starts in the further education system fell again. This means that since 2012/13, there are about 89,000 fewer young people entering the further education system (this excludes apprenticeships, for which see subsequent slides) – a fall of 31%.
- Academic courses and courses related to work-readiness remain the most popular overall, accounting for 63% of starts among 16-18 year olds.
- Regarding vocational courses, creative (17,210), construction (4,523 starts), sport (5,575) and business services (7,129) related courses have consistently been the largest high growth categories with 17% of total starts.
- In the slide and in all subsequent slides sourced from the SFA 2014/15 In Year Datacube, a 'start' refers to the number of learning aim or apprenticeship frameworks.

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Source: SFA Data Cube, 2014/15 Q4

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

Figure 47: 16-18 EFA funded starts by level and sector 2013/14 and 2014/15, excluding apprenticeships

	Sector	Entry and Level 1 2013/14, Final	Entry and Level 1 2014/15, Q4	Level 2 2013/14, Final	Level 2 2014/15, Q4	Level 3 2013/14, Final	Level 3 2014/15, Q4	Level 4,5 and Higher 2013/14, Final	Level 4,5 and Higher 2014/15, Q4	Non-level specific 2013/14 Final	Non-level specific 2014/15 Q4	Total 2013/14, Final	Total 2014/15, Q5
High job growth	Business Services	1,176	750	951	902	9,565	5,453	23	23	37	1	11,752	7,129
	Construction	2,222	2,368	1,442	1,468	634	648	20	37	49	2	4,367	4,523
	Creative	822	833	1,548	1,585	10,967	14,604	170	179	8	9	13,515	17,210
	Digital	225	17	740	681	3,901	3,753	17	17	4		4,887	4,468
	Finance	105	39	479	371	230	1,606	25	30			839	2,046
	Personal Services	837	668	1,716	1,528	815	564	5	4	5	8	3,378	2,772
	Professional	0	0	61	11	5,162	3,251	9				5,232	3,262
	Sport	774	649	1,793	1,285		3,595	57	44	4	2	2,628	5,575
Modest job growth	Health and Social Care	1,708	1,168	2,316	2,197	4,459	4,192	46	50	38	6	8,567	7,613
	Hospitality and Tourism	1,069	887	1,279	1,304	4,128	699	6		2		6,484	2,890
	Retail	509	204	255	115		28	1		27	0	792	347
	Transport/Storage/Logistics	29	11	19	7			0				48	18
Declining jobs	Agriculture	200	230	193	269	305	396	0	1	5	3	703	899
	Education	0	0	1	5	7,987	14	3	5		4	7,991	28
	Environment	32	0		1	32	24	0				64	25
	Manufacturing	337	230	683	678	967	894	39	46	2		2,028	1,848
	Motor Trades	1,027	1,116	994	873	127	176	0				2,148	2,165
	Public Administration	375	269	590	590	979	907	12	4			1,956	1,770
Non-sector specific	Academic	2,993	1,440	11,575	15,617	41,266	50,847	18	18	42	5	55,894	67,927
	Employability	35,081	33,499	8,164	10,017	1,943	4,858	4	3	15,001	11,151	60,193	59,528
	Not Applicable	623	877	74	270			0		8,287	9,252	8,984	10,399
	Unknown	0	0			8,270		1	3	390	126	8,661	129
Total		**50,144**	**45,255**	**34,873**	**39,774**	**101,739**	**96,509**	**456**	**464**	**23,901**	**20,569**	**211,113**	**202,571**

- The analysis of skills by starts at academic level indicates an increase of over 4,700 starts at level 2 compared to 2013/14. Other levels have declined with 46,714 starts at Level 1 and 96,509 starts at Level 3 (-5,311 and -5162 compared to 2013/14 starts, respectively).
- In terms of GM growth sectors creative (17,287 starts) business services (7,178 starts), health and social care (7,647 starts), digital (4,470) and sectors have the highest starts in 2014/15. Hospitality and tourism (-1,232), sport (-978 starts) and personal services (-607) have experienced the largest decline compared to last year.

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Source: SFA In year data cube 2014/15

Top ten 16-18 skills providers control more than half of total market

Figure 48: Youth (16-18) EFA-funded starts by largest providers in 2014-15, excluding apprenticeships -

Institution Name	Entry level and Level 1	Level 2	Level 3	Level 4 (original)	Not Applicable/ Not Known	Grand Total
MANCHESTER COLLEGE, THE	10,367	5,742	3,691	161	3,817	**23,778**
SALFORD CITY COLLEGE	2,541	3,479	7,471	18	12	**13,521**
LORETO COLLEGE	159	391	11,556			**12,106**
BURY COLLEGE	2,842	3,583	4,891	19	103	**11,438**
BOLTON COLLEGE	5,000	3,018	1,915	17	1,063	**11,013**
XAVERIAN COLLEGE	1,314	1,541	6,615			**9,470**
TAMESIDE COLLEGE	2,932	2,439	1,669	17	2,180	**9,237**
HOPWOOD HALL COLLEGE	4,003	3,104	1,493	26	516	**9,142**
THE OLDHAM COLLEGE	3,189	2,520	1,279	41	972	**8,001**
HOLY CROSS COLLEGE	19	156	7,606	5	73	**7,859**
WINSTANLEY COLLEGE	58	37	7,631			**7,726**
AQUINAS COLLEGE	204	383	7,133			**7,720**
TRAFFORD COLLEGE	1,435	2,831	2,525	11	10	**6,812**
ASHTON SIXTH FORM COLLEGE	65	715	5,196	5	773	**6,754**
CHEADLE & MARPLE SIXTH FORM	335	954	4,861	1	353	**6,504**
WIGAN AND LEIGH COLLEGE	1,999	2,579	1,018	71	70	**5,737**
ST JOHN RIGBY RC SIXTH FORM	98	367	3,993			**4,458**
ECONOMIC SOLUTIONS LIMITED	2,238	1,375	10		707	**4,330**
STOCKPORT COLLEGE	1,633	1,434	609	58	1	**3,735**
NCG	1,677	638			140	**2,455**

- The Manchester College (TMC) tops the list of youth starts – providing 12.2% of all GM starts and 10,257 more starts than Salford City College. However, large cohorts of European Social Fund (a largescale European programme supporting employment and skills) learners are included in the data.
- The top five providers account for a third of all 16-18 EFA funded starts.
- The most level 3 youth starts were reported at Loreto College.
- Only a few training providers have a substantial number of learners starting at level 4. It must be noted that Higher Education qualifications like L4 are predominately funded by the Higher Education Funding Council for England.
- * Only providers with more than 1,000 learners are listed.
- The top 10 providers control approximately 57% of the total market in 16-18 course starts.

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Source: SFA provisional data cube 2014/15

Apprenticeship starts among young people fall slightly

Figure 49: Apprenticeship starts, 16 to 18 year olds in GM, 2009/10 to 2014/15*

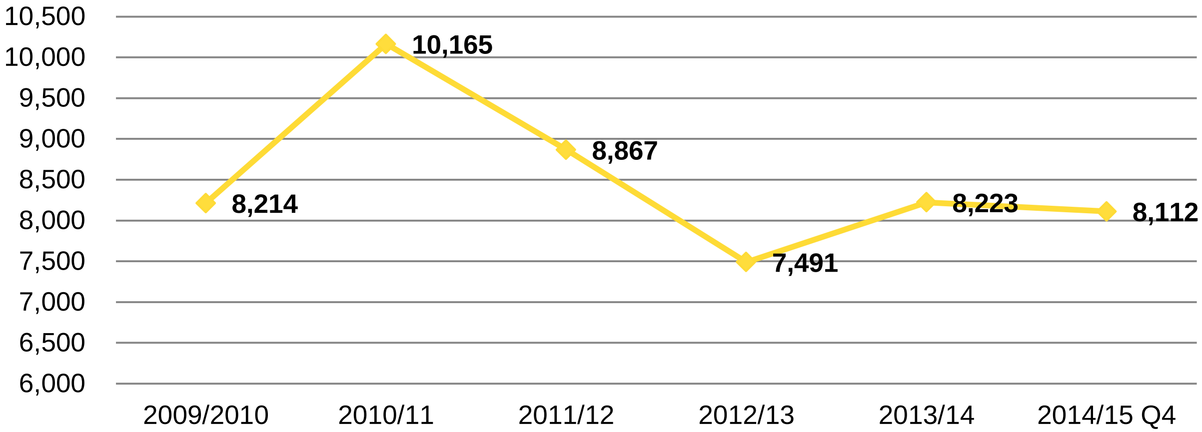
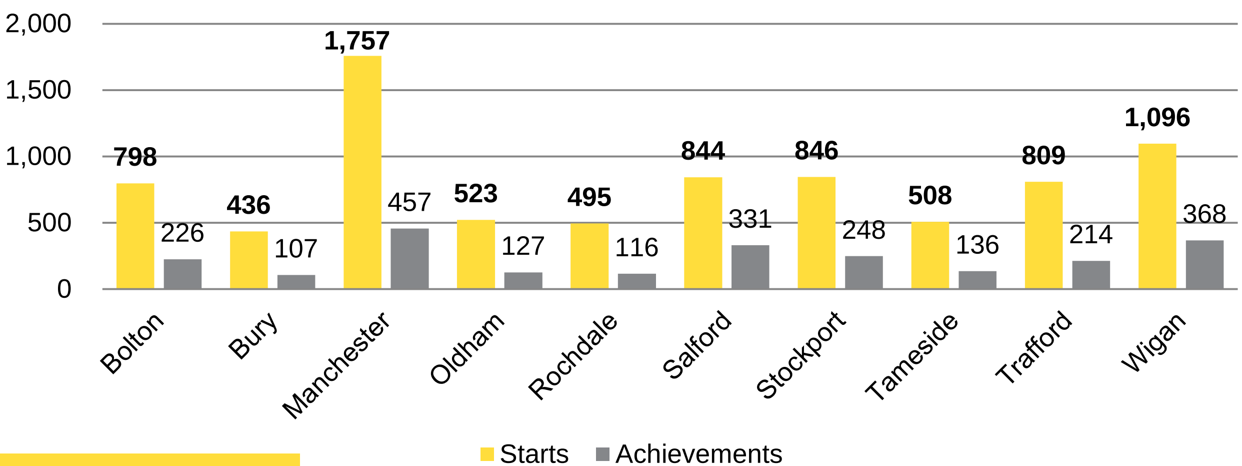


Figure 50: Apprenticeship starts by district, 16 to 18 year olds



- There is no clear evidence from recent years that apprenticeships are seen as an especially attractive option by young people.
- Reforms designed to enhance quality since 2010/11 (e.g. the elimination of 'programme led' apprenticeships) appear to have led to a stabilising of starts at just over 8,000 a year in GM – fewer than 1,000 in most districts.
- Part of the explanation could, however, lie in the declining population of 16-18 year olds. .
- There were 2,330 16-18 achievements in 2014/15 across all GM apprenticeships. Manchester City (457 Achievements), Wigan (368) and Salford (331) have the highest achievement rates in 2014/15. However, an 'achievement' is not a measure of success; it merely reflects the number who achieved their apprenticeship in the time period.

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*Sources: SFA In Year Datacube 2014/15

Apprenticeships: Business and care frameworks remain most popular

Figure 51: Youth (16-18) SFA-funded apprenticeship starts by sector and year, 2011/12-2014/15

	Sector	2011/12, Final	2012/13, Final	2013/14, Final	2014/15, Q4	% Difference from 2013/14
High job growth	Business Services	2,360	2,014	2,117	1,990	**-6%**
	Construction	575	635	708	768	**8%**
	Creative	16	21	87	49	**-44%**
	Digital	316	279	539	536	**-1%**
	Financial Services	233	242	259	270	**4%**
	Personal Services	889	788	796	796	**0%**
	Professional Services	340	266	386	396	**3%**
	Sport	950	363	185	220	**19%**
Modes job growth	Health and Social Care	1,024	1,116	1,208	1,199	**-1%**
	Hospitality and Tourism	490	214	405	266	**-34%**
	Retail	245	122	153	196	**28%**
	Transport/Logistics	638	389	517	380	**-26%**
Declining jobs	Education	42	86	68	94	**38%**
	Manufacturing	261	299	348	365	**5%**
	Motor Trade	364	294	356	353	**-1%**
	Primary Industry	117	22	81	98	**21%**
	Public Administration	7	8	10	5	**-50%**
Other	Not Applicable	0	233	0	157	
	Total	8,867	7,391	8,223	8,138	**-1%**

- Business related frameworks such as business administration and customer service have seen a steady decline in the last few years. Transport and hospitality and tourism have registered larger falls over the year.
- Recent years have seen a clear trend towards the growth of digital related apprenticeships, while health and social care has witnessed stable volumes overall.

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*Sources: SFA In-Year Datacube 2014/15

Intermediate level frameworks show largest fall among young people

Figure 52: Youth (16-18) SFA-funded apprenticeship starts by sector, level and year, 2013/14 and 2014/15

		Intermediate		Advanced		Higher		Total	
	Sector	2013/14 Final	2014/15, Q4	2013/14, Final	2014/15, Q4	2013/14, Q4	2014/15, Q4	2013/14, Q4	2014/15, Q4
High job growth	Business Services	1,759	1,695	348	280	10	15	2,117	4,107
	Construction	592	605	237	280	1	3	830	1,718
	Creative	12	11	75	38			87	136
	Digital	59	39	458	462	22	35	539	1,075
	Financial Services	119	136	127	115	16	20	262	533
	Personal Services	582	586	214	210			796	1,592
	Professional Services	327	329	49	46	10	21	386	782
	Sport	93	95	92	125			185	405
Modest job growth	Health and Social Care	625	696	461	383			1,086	2,165
	Hospitality & Tourism	358	230	47	36			405	671
	Retail	148	184	5	12			153	349
	Transport/Logistics	471	351	43	28			514	893
Declining jobs	Education	39	55	29	39			39	55
	Manufacturing	52	48	295	316	1	1	52	48
	Motor Trade	289	289	67	64			289	289
	Primary Industry	58	58	23	40			58	58
	Public Administration	9	5	1				9	5
Other	Unknown, N/A	0	0	0	0	0	0	0	157
	Total	**5,592**	**5,412**	**2,571**	**2,474**	**60**	**95**	**8,223**	**8,138**

- Intermediate apprenticeships have reduced the most with 180 fewer starts than 2013/14. There were also about 90 fewer advanced level apprenticeships. Meanwhile, higher level apprenticeships have grown by 58%.
- Two thirds of apprenticeships starts (67%) were at level 2 in 2014/15, while apprenticeships at level 4 remain very low at 1.2%.
- There were 2,474 advanced level starts, 4% down on 2013/14. Higher level apprenticeships are concentrated in the professional service, business service and digital industries.
- Analysis by sector shows that apprenticeship starts within high growth sectors such as Business Services (4,107,+1,990 starts compared) Construction (1,718,+888) Digital (1,075, +536) and Professional Services (782,+396) have increased since 2013/14.

Source: In Year Datacube 2014/15. q4 data is provisional.

Top 10 16-18 apprenticeship providers have 37% of the market

Figure 53: Largest apprenticeship providers, 16-18 year olds, 2014/15

	Intermediate	Advanced	Higher	Total
ECONOMIC SOLUTIONS LIMITED	620	226	4	850
MANCHESTER COLLEGE, THE	368	84	3	455
TOTAL PEOPLE LIMITED	87	218	9	314
BURY COLLEGE	147	84	2	233
GM CHAMBER OF COMMERCE	82	123	9	214
WIGAN AND LEIGH COLLEGE	162	48		210
TRAFFORD COLLEGE	135	68		203
THE OLDHAM COLLEGE	142	53	2	197
DAMAR LIMITED	139	36	8	183
LEARNDIRECT LIMITED	108	45		153
NORTH LANCS. TRAINING GROUP LIMITED	140	13		153
TAMESIDE COLLEGE	100	41	3	144
BOLTON COLLEGE	111	32		143
BUSINESS IMPACT UK LIMITED	139	4		143
ROCHDALE TRAINING ASSOCIATION LIMITED	91	46	1	138
STOCKPORT COLLEGE	99	39		138
ALLIANCE LEARNING	73	63		136
THE APPRENTICE ACADEMY LIMITED	78	58		136
MICHAEL MCCORMACK	101	34		135
SALFORD CITY COLLEGE	91	28		119
PARAGON EDUCATION & SKILLS LIMITED	93	23		116
ESG (SKILLS) LIMITED	86	26		112
RATHBONE TRAINING	49	52		101
CITB	75	22		97
PROCO NW LIMITED	77	19		96
FIRST4SKILLS LIMITED	79	12		91
MICHAEL JOHN TRAINING LIMITED	71	17		88
LIFETIME TRAINING GROUP LIMITED	73	13		86
BABCOCK TRAINING LIMITED	59	26		85
NCG	76	9		85
METSKILL LIMITED	77	3		80

- While the market for apprenticeships is still dominated by private training providers, the proportion offered by colleges is just under one quarter (23.6% - 1,910). This represents an increase on 2013/14 (17.2%).
- Although the list is dominated by colleges and training organisations, there are some exceptions. For example, the Greater Manchester Chamber of Commerce - primarily a business representation organisation – is also a significant provider of youth apprenticeships (number 5 on the list).

*Source: SFA in Year Datacube 2014/15

SKILLS SUPPLY: ADULTS

Adult further education learners fall by more than 30,000

Figure 54: Adult (19+) SFA-funded starts by sector and year 2011/12-2014/15, excluding apprenticeships

		2011/12 final	2012/13 final	2013/14 Final	2014/15 Q4
High job growth	Business Services	23,018	28,945	26,974	20,894
	Construction	10,101	7,887	7,474	7,644
	Creative	17,118	17,180	12,401	10,362
	Digital	4,102	4,869	3,575	948
	Finance	2,259	2,484	2,378	1,681
	Personal Services	5,636	5,853	6,684	7,009
	Professional	245	215	306	631
	Sport	7,320	6,459	4,491	4,359
Modest job growth	Health and Social Care	16,240	17,595	16,296	12,967
	Hospitality and Tourism	6,449	6,568	6,553	5,415
	Retail	3,760	3,003	1,812	1,430
	Transport/Logistics	1,403	2,590	4,909	3,321
Declining jobs	Agriculture	1,510	1,589	1,613	1,099
	Education	2,013	2,590	1,964	1,617
	Environment	345	150	20	197
	Manufacturing	4,870	4,568	5,314	4,645
	Motor Trades	2,940	2,127	2,389	1,616
	Public Administration	2,918	4,146	1,202	1,651
Non-sector specific	Academic	13,265	15,148	14,445	13,626
	Employability	110,952	115,543	127,200	111,786
	Not Applicable	24,257	24,466	29,864	35,385
	Unknown	10,940	8,044	3,218	2,313
Total		**271,661**	**282,019**	**281,082**	**250,596**

- Data for 2014/15 shows there has been a decline in the total number of learners since 2011/12 of 7.8%. This fall in learner numbers could be related to the reduced funding to further education.
- The Adult Skills Budget (ASB) has fallen as adult skills absorbs the impact of the government's efforts to reduce public expenditure. In 2011/12, the national ASB was £2.83 billion. This fell to £2.71bn in 2012/13, and to £2.26bn in 14/15.
- Worryingly, the number of starts in many technical (in the widest sense) sectors declined further: Digital saw its number plummeting from over 4,000 in 2011/12 to 948 in 2014/15 - a decline of 77%. Construction witnessed a decline of almost a quarter (-24.3%) in the same period.

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SFA Datacube 2014/15

Adult learning fall at entry and intermediate levels, small increase at L3+

Figure 55: Adult (19+) SFA-funded starts by sector and level, 2013/14 and 2014/15, excluding Apprenticeships

		Entry and level 1		Level 2		Level 3		Level 4+		Other	
Growth	**Sector**	**2013/14**	**2014/15**	**2013/14**	**2014/15**	**2013/14**	**2014/15**	**2013/14**	**2014/15**	**2013/14**	**2014/15**
High	Construction	1,008	2,083	3,625	3,139	2,012	2,055	286	281	543	86
	Professional	14	34	72	140	115	291	51	135	54	31
	Digital	1,709	151	674	201	364	320	96	139	716	137
	Business Services	9,450	8,418	5,921	4,481	1,203	969	394	382	9,931	6,644
	Personal Services	2,320	2,563	2,770	2,325	1,091	1,497	26	116	477	508
	Sport	607	166	1,190	1,706	321	630	92	148	2,281	1,709
	Creative	3,555	3,234	853	911	878	785	546	605	6,569	4,827
	Finance	667	124	869	667	474	456	352	434	16	0
Modest	Health and Social Care	3,970	2,691	5,705	4,898	3,426	3,074	588	447	2,607	1,857
	Retail	568	1,094	592	321	33	4	18	11	601	0
	Transport/Storage/Logistics	2,503	523	2,381	2,798	1	0	0	0	24	0
	Hospitality and Tourism	1,420	1,353	2,908	2,863	196	171	8	1	2,021	1,027
Declining	Public Administration	139	114	755	814	100	215	15	70	193	438
	Agriculture	767	380	265	263	101	123	0	0	480	333
	Environment	4	0	1	197	15	0	0	0	0	0
	Manufacturing	866	717	2,476	2,946	349	729	296	253	1,327	0
	Motor Trades	1,292	733	940	728	132	133	0	0	25	22
	Education	6	39	97	126	732	809	464	403	475	240
Non-Specific Sectors	Academic	1,026	1,352	7,054	7,308	1,101	900	226	224	5,038	3,842
	Employability	81,884	66,093	11,743	9,421	729	792	78	58	32,766	35,422
	Unknown	0	0	0	0	0	0	32	48	3,186	2,265
	Not Applicable	8,188	8,005	198	201	217	0	0	0	2,588	6,418
	Total	**121,963**	**99,867**	**51,089**	**46,454**	**13,590**	**13,953**	**3,568**	**3,755**	**71,918**	**65,806**

Learning at entry and level 1 and level 2 fell, while level 3 or higher both showed a slight rise comparing 2014/15 with 2013/14. In most cases, high growth sectors outperformed modest and declining sectors. Health & social care and business showed decline across all skill levels. Manufacturing showed growth at levels 2 and 3, but declines at entry and level 1 and level 4.

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Source: SFA Datacube 2014/15

Top 10 adult skills providers account for just under two thirds of all starts

Figure 56: Adult (19+) SFA-funded starts by provider 2014/15*, excluding apprenticeships

	Entry and Level 1	Level 2	Level 3	Level 4+	Not Known	Total
MANCHESTER COLLEGE, THE	30,782	13,263	3,355	1,093	14,688	63,181
MANCHESTER CITY COUNCIL	6,811	952		0	13,395	21,158
OLDHAM METROPOLITAN BOROUGH COUNCIL	4,175	636	20	0	6,944	11,775
BOLTON METROPOLITAN BOROUGH COUNCIL	4,636	1	0	0	5,846	10,483
BOLTON COLLEGE	6,573	2,129	655	182	288	9,827
HOPWOOD HALL COLLEGE	2,862	1,789	625	152	3,017	8,445
SALFORD CITY COLLEGE	4,510	1,279	448	55	2,070	8,362
WIGAN AND LEIGH COLLEGE	2,867	1,930	701	345	1,843	7,686
TRAFFORD COLLEGE	2,545	2,214	1,107	119	1,242	7,227
WORKERS' EDUCATIONAL ASSOCIATION	4,369	910	36	0	585	5,900
THE OLDHAM COLLEGE	2,656	1,379	766	253	41	5,095
TAMESIDE COLLEGE	1,629	1,786	736	195	342	4,688
NCG	1,147	313	66	28	2,886	4,440
LEARNDIRECT LIMITED	3,306	849	174	0	26	4,355
BURY METROPOLITAN BOROUGH COUNCIL	2,243	502	6	0	1,514	4,265
BURY COLLEGE	1,472	1,707	811	45	142	4,177
ECONOMIC SOLUTIONS LIMITED	3,029	804	56	0	1	3,890
STOCKPORT COLLEGE	1,415	1,337	444	367	0	3,563
WIGAN METROPOLITAN BOROUGH COUNCIL	298	148	9	0	2,836	3,291
STOCKPORT METROPOLITAN BOROUGH COUNCIL	899	160	53	0	1,732	2,844
THE CITY OF LIVERPOOL COLLEGE	2,201	436	7	10	0	2,654
ESG (SKILLS) LIMITED	814	348	0	0	1,353	2,515
CALDERDALE COLLEGE	775	512	12	0	872	2,171
WEST NOTTINGHAMSHIRE COLLEGE	418	879	20	0	321	1,638
MANTRA LEARNING LIMITED	1,024	435		0	6	1,465
PETROC	1,270	183		0	0	1,453
TAMESIDE METROPOLITAN BOROUGH COUNCIL	668	82	3	0	589	1,342
CHEADLE AND MARPLE SIXTH FORM COLLEGE	261	205	173	9	617	1,265
DERBY COLLEGE	152	1,068	31	0	5	1,256
LANCASHIRE COUNTY COUNCIL	8	265	10	4	882	1,169
GATESHEAD COLLEGE	302	809		0	0	1,111
AVANTA ENTERPRISE LIMITED	621	1		0	396	1,018
AQUINAS COLLEGE	12	77	65	0	826	980
ROCHDALE TRAINING ASSOCIATION LIMITED	718	229	0	0	29	976
WEST CHESHIRE COLLEGE	287	342	12	7	187	835

- In 2014/15 there were 438 providers delivering adult SFA-funded starts to Greater Manchester residents. The top 35 are listed.
- The top 10 providers account for 62% of the total skills delivery market.
- As well as accounting for just under half (or 49%) of learning starts in GM in total, the colleges also deliver a majority of starts at levels 4 or above (73%).
- Local authorities – through their adult education services – remain significant training organisations in terms of volumes of learners. Manchester, Oldham, Bolton, Bury, Stockport , Wigan, and Tameside have started more than 55,000 adult learners on courses.

*SFA Provisional Datacube, 2014/15

Adult apprentice numbers are rising once again following loans reversal

Figure 57: Adult (19+) apprenticeship starts by sector and year, 2008/9-2014/15*

		2008/9	2009/10	2010/11	2011/12	2012/13	2013/14	2015/16
High job growth	Creative	2	4	22	9	16	33	26
	Digital	37	61	107	412	465	406	536
	Financial Services	16	0	35	65	160	174	186
	Personal Services	298	344	496	565	645	751	799
	Professional	270	367	400	519	357	387	432
	General Business/Services	2,339	3,028	6,681	7537	7345	7028	7749
	Sport	236	434	852	641	300	310	292
	Construction	630	630	790	601	546	740	865
Modest job growth	Health and Social Care	880	1367	3,708	4,876	4867	3839	5317
	Hospitality and Tourism	550	877	1,140	1,203	639	1407	1507
	Retail	505	790	2,262	1,617	916	694	561
	Scientific	0	0	0	0	0	8	6
	Transport//Logistics	329	443	769	971	965	1051	1166
Declining jobs	Primary Industry	47	67	160	190	107	90	96
	Education	1	36	68	580	769	505	682
	Environment	0	0	0	165	34	65	30
	Manufacturing	186	294	654	939	788	1138	1243
	Public Administration	8	19	45	89	63	65	76
	Not Applicable*	252	291	518	3264	4496	1016	659
Total		6586	9052	18707	24243	23,478	19,707	22,228

- Adult apprenticeships (19+) grew by almost 13% between 2013/14 and 2014/15. In effect, this reflects the strong recovery of the adult apprenticeships market following the scrapping of the decision to introduce adult learner loans for apprentices.
- Frameworks related to general business and business services (for example, business administration, customer service and management) and health and social care remain the most popular sector-relevant apprenticeships.
- Health and social care added the most starts compared with 2013/14 – almost 1,500.

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Source: SFA Datacubes, 2012/13-2015/16; Data for 2015/16 is in-year datacube 2015/16. *Not applicable figures reflect changes to frameworks and sector definitions

Greater Manchester has over 300 adult apprenticeship providers

Figure 58: Top 30 adult (19+) apprenticeship providers by level in 2014/15

	Intermediate	Advanced	Higher	Trailblazer	Total
ECONOMIC SOLUTIONS LIMITED	425	527	52		1,004
MANCHESTER COLLEGE, THE	528	307	71		906
LEARNDIRECT LIMITED	558	335	11		904
GP STRATEGIES TRAINING LIMITED	387	363	120		870
ESG (SKILLS) LIMITED	404	329	28		761
BURY COLLEGE	369	273	67		709
BABCOCK TRAINING LIMITED	473	185	3		661
LIFETIME TRAINING GROUP LIMITED	323	181	7		511
EQL SOLUTIONS LIMITED	133	292	59		484
ROCHDALE TRAINING ASSOCIATION LIMITED	192	178	63		433
TRAFFORD COLLEGE	200	182	24		406
WIGAN AND LEIGH COLLEGE	208	113	24		345
SALFORD CITY COLLEGE	190	134	18		342
TOTAL PEOPLE LIMITED	144	168	12	16	340
NORTH LANCS. TRAINING GROUP LIMITED(THE)	228	96			324
NCG	170	115	28		313
PARAGON EDUCATION & SKILLS LIMITED	185	124			309
JOINT LEARNING PARTNERSHIP LIMITED	145	125	32		302
WEST NOTTINGHAMSHIRE COLLEGE	200	88	3		291
DAMAR LIMITED	129	106	19		254
THE OLDHAM COLLEGE	117	120	12		249
NORTH NOTTINGHAMSHIRE COLLEGE	123	100	19		242
UNIVERSITY OF DERBY	228	2			230
DAWN HODGE ASSOCIATES LIMITED	120	78	24		222
JARVIS TRAINING MANAGEMENT LIMITED	87	123	2		212
WIGAN METROPOLITAN BOROUGH COUNCIL	80	92	40		212
AGE UK TRADING CIC	123	62	23		208
ALLIANCE LEARNING	109	84	4		197
BCTG LIMITED	121	47	18		186
EASTLEIGH COLLEGE	102	60	22		184

- Of 340 adult apprenticeship providers in Greater Manchester, the table shows the top 30 in 2014/15. The top 10 have 34% of the total market.
- Economic Solutions Limited and The Manchester College were the two largest providers overall.
- LearnDirect is the largest provider for intermediate level apprenticeships and Economic Solutions is the largest at advanced level.
- GP Strategies Training was the largest provider of higher level apprenticeships.
- Overall, 56% of all adult apprenticeship starts were at Level 2, 38% at Level 3, and 6% at Level 4.

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*SFA Provisional Datacube, 2014/15

Substantial growth in advanced and higher adult apprenticeships

Figure 59: Adult (19+) apprenticeship starts by sector, level and year*, 2013/14-2014/15

	Sector	Intermediate 2013/14, Final	Intermediate 2014/15, Q4	Advanced 2013/14, Final	Advanced 2014/15, Q4	Higher 2013/14, Final	Higher 2014/15, Q4
High job growth	Business Services	301	274	165	171	1	2
	Construction	453	480	284	380	4	7
	Creative	16	16	15	9	2	1
	Digital	172	156	210	342	24	38
	Financial Services	99	96	75	90	0	0
	Personal Services	424	391	327	405	0	0
	Professional	154	152	163	187	70	99
	General Business	3,811	3,943	1,977	2,482	181	498
	Sport	223	156	87	136	0	0
Modest job growth	Health and Social Care	2,386	2,637	1,931	2,680	168	528
	Hospitality and Tourism	1,146	1,096	237	388	3	9
	Retail	532	403	159	141	1	11
	Scientific	1	5	8	12	0	6
	Transport//Logistics	817	933	234	233	0	0
Declining jobs	Primary Industry	62	58	28	38	0	0
	Education	109	143	396	523	0	0
	Environment	59	26	13	4	0	0
	Manufacturing	871	953	263	233	3	0
	Public Administration	35	41	30	35	0	0
	Not Applicable	0	0	8	0	1	3
Total		**11,671**	**11,959**	**6,610**	**8,489**	**458**	**1203**

- Advanced and especially higher level apprenticeships among adults (19+) both grew strongly. Advanced level apprenticeships grew by 24%, while higher level apprenticeships grew by 162%. At intermediate level, starts only increased slightly.
- The growth in higher apprenticeships was driven by frameworks relevant to general business (for example, management and senior administrative frameworks) and health (especially care leadership and management) in particular, but digital and professional also showed growth.
- At advanced level, the fastest growing sectors were digital, sport and hospitality and tourism.

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Source: SFA In-Year Datacube, 2014/15. 14/15 data is provisional (Q4)

Health and social care remains the most popular adult apprenticeship

Figure 60: Most popular adult (19+) apprenticeship frameworks in 2014/15

Framework	Total Starts	Intermediate	Advanced	Higher
Health and Social Care	3464	1818	1,646	
Management	2657	1264	1,046	347
Customer Service	1970	1428	542	
Business and Administration	1819	1083	736	
Children and Young People's Workforce	884	346	538	
Hospitality	757	493	264	
Improving Operational Performance	753	753		
Supporting Teaching and Learning in Schools	582	149	433	
Catering and Professional Chefs	538	487	51	
Care Leadership and Management	535			535
Retail	493	349	144	
Warehousing and Storage	470	445	25	
Accounting	351	109	152	90
Hairdressing	332	117	215	
Construction Building	270	181	89	
Barbering	237	169	68	
IT, Software, Web and Telecoms Professionals	237	23	173	41
Sales and Telesales	234	137	97	
Exercise and Fitness	219	109	110	
Cleaning and Environmental Support Services	207	201	6	
Driving Goods Vehicles	198	198		
IT Application Specialist	188	117	71	
Engineering Manufacture	171	27	144	
Health Dental Nursing	152		152	
Electrotechnical	144		144	
Providing Financial services	144	62	82	

- The health and care sector generates by far the largest number of apprenticeships for 19+ year olds.
- The table shows the clear orientation of the apprenticeship system towards the service sector - a phenomenon that is particularly apparent among adult apprentices over the age of 19, and especially over the age of 25.
- At higher level, management and care leadership and management are the most popular.

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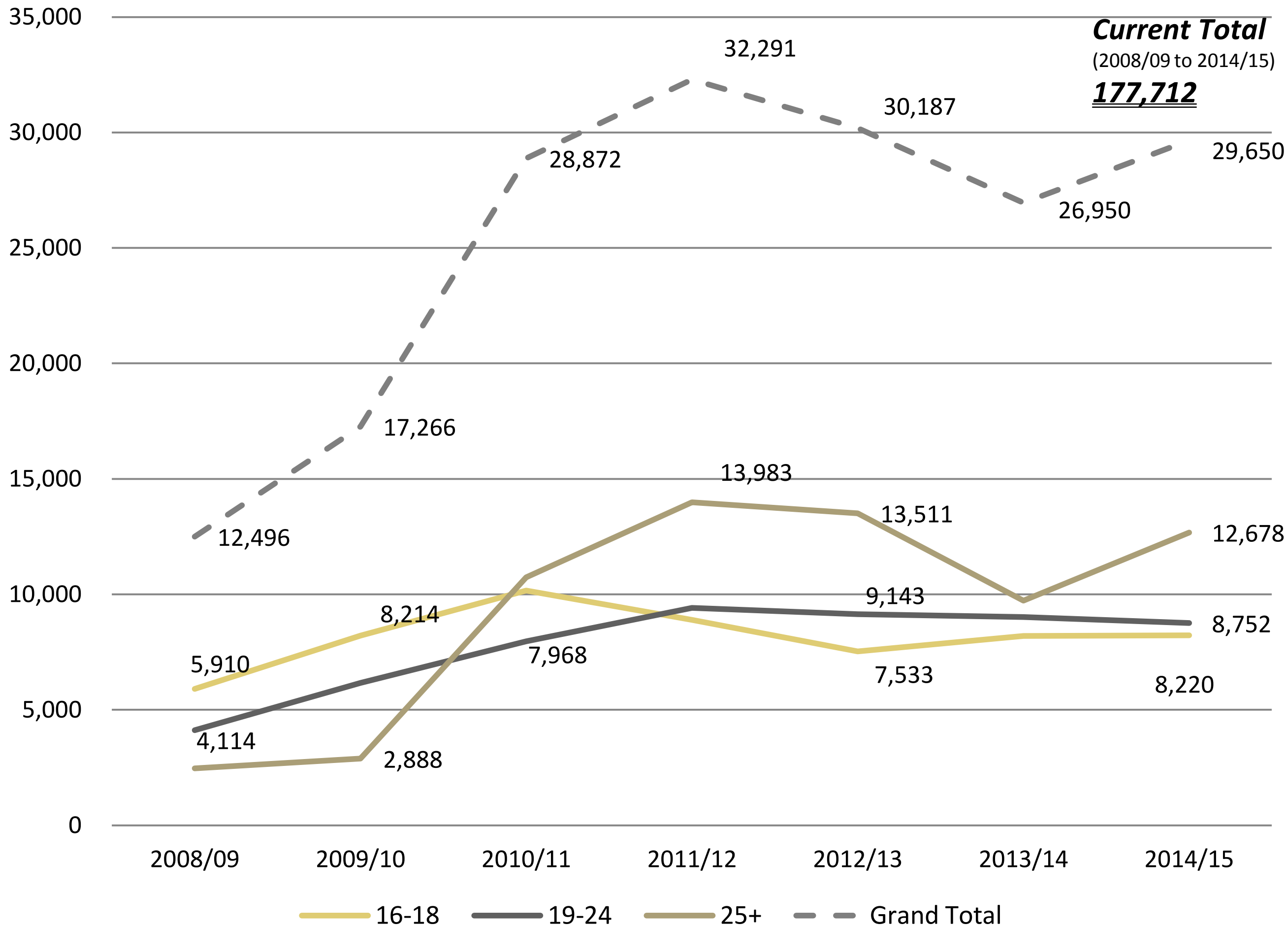
Source: SFA Provisional Datacube, 2014/15

Rise in apprenticeships driven by adults over 25 years old

Figure 61: Apprentice start trends, 2008/9-2014/15*



- After a dramatic fall of adult apprentices in 2013/14 – likely linked to the introduction (and subsequent abolition) of learner loans for 24 year olds and over - the number of adult apprentices has increased again over the last academic year.
- However numbers have yet to return to the peak of 2011/12.
- By contrast, numbers of 16-18 year old apprentice starts have remained fairly stable over the last few years – as indeed have 19-24 year olds.
- The government commitment of creating 3 million apprenticeships over a five year period until 2020 implies a target of about 180,000 apprenticeships in Greater Manchester.

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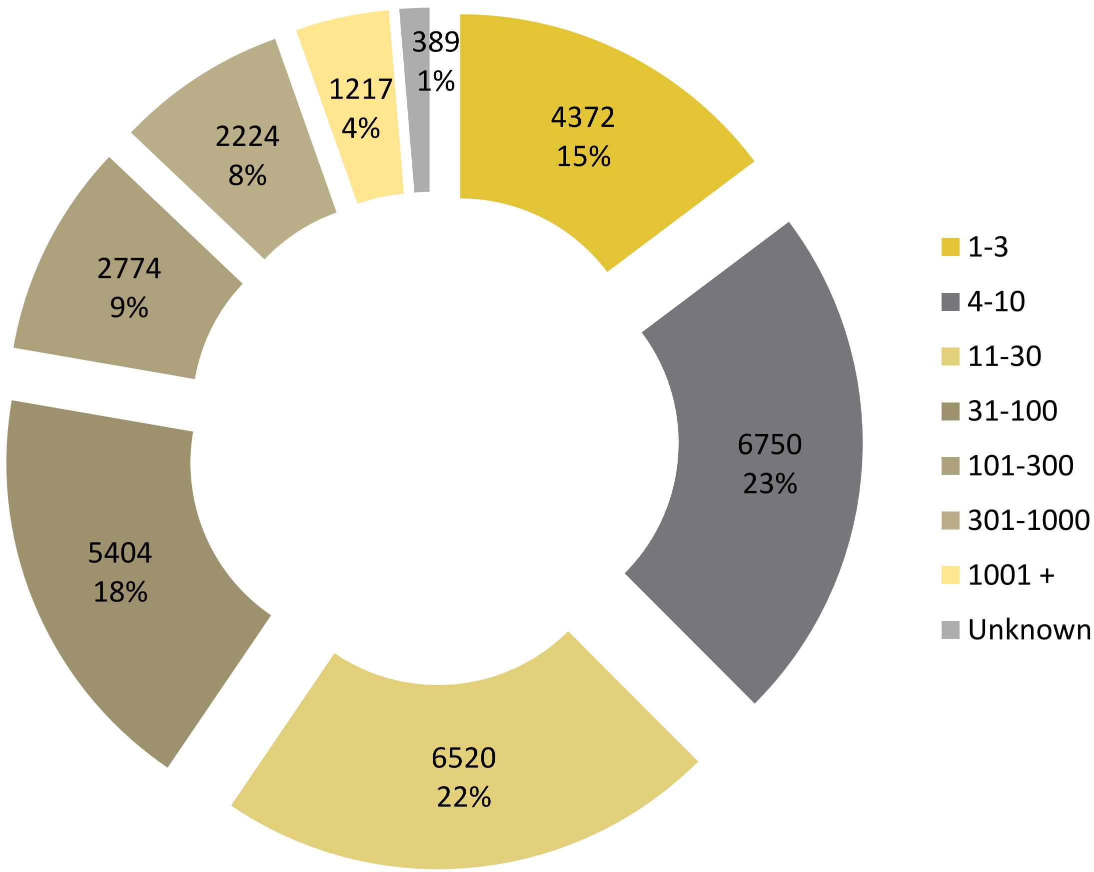
*SFA Full Year Datacube 2012/13 (covering 2008/9 to 2010/11) and provisional Datacube 2014/15 (including full year data for 2011/12 to 2013/14)

Over a third of apprenticeships are in firms with fewer than 10 staff

Figure 62: Apprenticeships in Greater Manchester by size of workplace, 2014/15



- The chart shows a breakdown of apprenticeships in 2014/15 by workplace size.
- The size bands used by the SFA differ from those used by the ONS. However, larger firms account for disproportionately high numbers of apprentices, while small firms are under-represented.
- For example, 81% of firms have fewer than 10 employees in GM. However, they account for 38% of apprenticeships. Meanwhile, firms with more than 500 employees account for less than 0.1% of all employers.
- But firms with more than 301 employees account for 12% of all apprentices.

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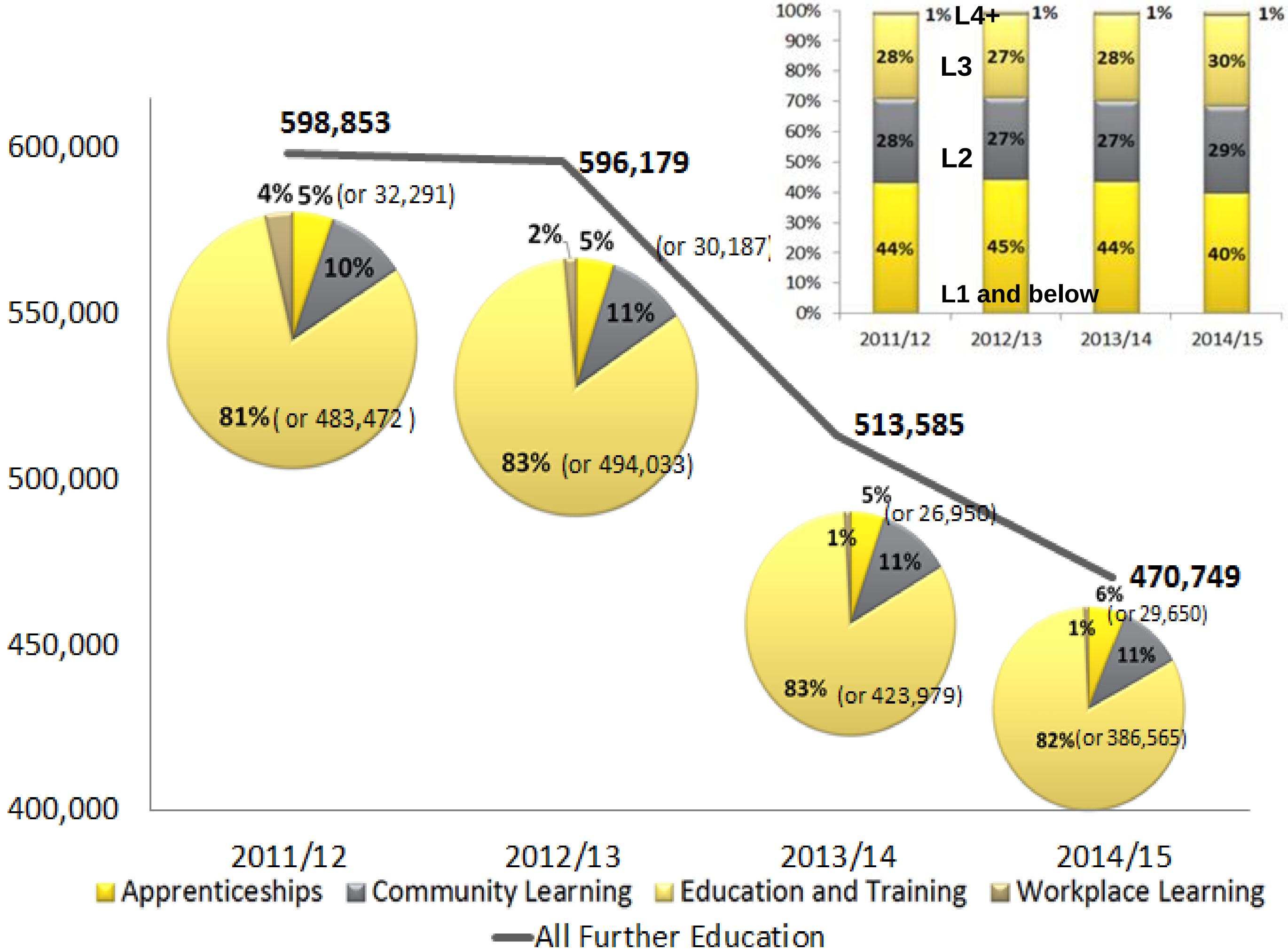
Source: SFA In Year Datacube, 2014/15. % has been rounded. Size brackets refer to those used by the SFA.

Course starts in post-16 education down by 21.4% since 2011/12

Figure 63: Overall learner starts in post 16 skills system by funding stream, level and year, 2011/12-2014/15



- This overview of all publicly funded post -16 learning starts in GM (all ages, all levels) shows a considerable decline of well over a fifth over the last 4 years.
- The starkest decline is amongst workplace learning – down from just over 21,000 learners in 2011/12 to just under 4,000 in 2014/15 (or 83%).
- Both education and training, and community learning have seen a decline of about one fifth. Apprenticeships experienced a comparably moderate drop of 8% over the same time period. However, apprenticeship starts have increased again over the last year.
- By skill level, recent years suggest there has been very modest change. Entry and level 1 has decreased slightly, while level 3 and level 2 appear to have expanded slightly.
- The explanation for the fall is uncertain, but may relate, at least in part ,to demographic trends.

Source: Provisional Datacube 2014/15

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Business courses remain the most common higher education subject

Figure 64: All higher education qualifiers by institution and subject, 2013/14

	Bolton	MMU	Manchester	Salford	GM Total	UK Total
Medicine & dentistry	0	0	970	20	990	18,245
Subjects allied to medicine	270	685	1,415	1,160	3530	84,445
Biological sciences	275	1,120	915	435	2,745	62,715
Veterinary sciences	0	0	0	0	0	1,155
Agriculture	0	30	0	0	30	6,060
Physical sciences	5	355	925	205	1,490	27,775
Mathematical sciences	25	105	540	40	710	12,180
Computer sciences	65	340	405	225	1,035	26,980
Engineering & technology	405	300	1,985	565	3,255	50,185
Architecture, building & planning	95	265	135	465	960	18,735
Social studies	120	985	1,650	575	3,330	74,715
Law	50	470	500	165	1,185	31,920
Business & administrative	265	2,885	2,475	965	6,590	134,960
Mass communications	35	315	45	305	700	19,920
Languages	60	355	930	275	1,620	36,660
History & philosophy	5	375	600	40	1,020	28,025
Creative arts & design	300	920	230	875	2,325	61,705
Education	540	1,820	630	40	3,030	75,250
Combined	0	0	0	0	0	6,165
Total - All subjects	2,515	11,320	14,355	6,355	34,545	777,800

- In 2013/14, 34,545 people qualified from the four mainstream universities in GM (excluding post graduates). Student qualification levels remain very stable overall – 80 more people qualified than in 2011/12. Bolton and MMU increased the numbers of qualifiers, while the universities of Manchester and Salford showed slight reductions.

- In percentage terms, the University of Manchester accounts for 41%, MMU for 32%, Salford for 18% and Bolton for 7% of all qualifiers in GM.

- Just under one in five qualifiers pursued studies in business and administration.

- Approximately 42% of the qualifiers were in science subjects (broadly defined).

- The following subject areas each accounted for approximately 10% of all qualifiers: subjects allied to medicine, social studies, engineering and technology and education.

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Source: Higher Education Statistics Agency

TRAVEL TO LEARN PATTERNS, APPRENTICESHIP VACANCIES, WORK PROGRAMME/WORKING WELL

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Younger learners at level 1 are unlikely to travel far to learn

Figure 65: Learner travel flows – Level 1, % who live and learn in borough, GM

PROVIDER LOCATION →

LEARNER POSTCODE ↓

Youth - L1 and below	Bolton	Bury	Manchester	Oldham	Rochdale	Salford	Stockport	Tameside	Trafford	Wigan	Outside GM	Grand total
Bolton	86.9	4.8	1.3	0.0	0.1	3.4	0.0	0.1	0.1	1.8	1.5	100
Bury	8.6	76.2	6.3	0.2	3.1	2.5	0.0	0.4	0.2	0.0	2.5	100
Manchester	0.5	3.7	78.5	0.8	3.8	1.8	4.2	0.9	4.6	0.0	1.3	100
Oldham	0.1	0.2	6.0	76.1	11.0	0.4	0.2	4.8	0.1	0.0	1.1	100
Rochdale	0.7	12.5	5.8	5.5	73.8	0.2	0.0	0.2	0.0	0.0	1.2	100
Salford	5.5	1.8	12.6	0.1	0.3	71.2	0.1	0.9	3.4	0.4	3.6	100
Stockport	0.6	0.0	21.2	0.1	0.0	1.6	68.7	3.1	0.9	0.0	3.8	100
Tameside	0.5	0.0	14.7	1.7	0.8	1.2	2.1	77.5	0.2	0.0	1.3	100
Trafford	0.6	0.5	24.4	0.1	0.0	5.2	0.8	0.0	65.4	0.0	3.0	100
Wigan	3.4	0.0	0.6	0.0	0.0	3.0	0.0	0.0	0.1	84.0	8.8	100
GM TOTAL	12.5	6.9	25.4	9.2	9.5	7.0	5.5	7.5	4.0	10.0	2.6	100

PROVIDER LOCATION →

LEARNER POSTCODE ↓

Adult andL1 and below	Bolton	Bury	Manchester	Oldham	Rochdale	Salford	Stockport	Tameside	Trafford	Wigan	Outside GM	Grand total
Bolton	78.1	3.7	2.8	0.5	0.3	2.6	0.2	0.1	0.4	2.7	8.7	100
Bury	6.2	64.8	12.4	1.4	1.2	1.6	0.4	0.3	0.2	0.0	11.4	100
Manchester	0.1	0.3	74.4	1.8	0.4	1.7	2.6	0.4	2.6	0.1	15.5	100
Oldham	0.1	0.2	7.5	78.4	3.5	0.6	0.5	2.1	0.4	0.0	6.6	100
Rochdale	0.5	4.6	7.3	10.2	63.9	0.7	0.2	0.2	0.2	0.1	11.9	100
Salford	2.5	1.1	26.2	0.9	0.1	47.4	0.3	0.4	7.0	0.1	14.0	100
Stockport	0.4	0.1	11.3	2.3	0.1	0.7	67.8	1.9	0.8	0.0	14.7	100
Tameside	0.4	0.6	12.9	15.5	0.3	0.7	7.7	51.5	0.5	0.0	10.0	100
Trafford	1.0	0.1	35.2	0.8	0.1	2.4	1.3	0.2	43.2	0.0	15.7	100
Wigan	2.3	0.4	2.4	0.3	0.2	0.5	0.2	0.1	0.4	70.3	22.8	100
GM TOTAL	8.1	4.3	34.8	10.2	5.7	5.2	4.7	3.7	3.4	6.3	13.7	100

Source: Provisional SFA Datacube, 2014/15

This travel to learn analysis is focused on Education and Training courses only. Apprenticeships have been excluded from the analysis because the workplace of the learner can be in a different location from the learning provider, and it is to the workplace that the apprentice will do most of their commuting. About 10% of courses do not correspond to specific learning levels.

Adult learners are generally more inclined to travel to their learning at level 1 than young people, with about 1 in 3 (or 36%) traveling to learning outside of their home borough – compared to 1 in 4 young people (or 24%). Adult learners are also considerably more likely to travel outside of GM, especially from Manchester, Trafford, and Wigan.

The most self-contained local authorities across both age groups are Bolton and Manchester.

The least self-contained areas for both youth and adult learners are Trafford and Salford.

Most young learners at L2 stay close to home when they learn

Figure 66: Learner travel flows – Level 2, % who stay live and learn in borough, GM

PROVIDER LOCATION →

LEARNER POSTCODE ↓

YOUTH - L2	Bolton	Bury	Manchester	Oldham	Rochdale	Salford	Stockport	Tameside	Trafford	Wigan	Outside GM	Grand total
Bolton	74.2	10.1	1.1	0.0	0.0	6.6	0.0	0.1	0.6	2.9	4.4	100
Bury	5.5	80.8	4.1	0.2	2.7	3.5	0.0	0.2	1.0	0.0	1.9	100
Manchester	0.1	4.6	64.6	1.7	4.2	3.6	7.2	1.3	12.0	0.0	0.6	100
Oldham	0.2	0.5	7.4	68.8	13.7	0.4	0.0	6.6	0.6	0.0	1.7	100
Rochdale	0.3	21.6	5.9	8.2	61.5	0.4	0.1	0.2	0.3	0.0	1.5	100
Salford	3.6	3.3	6.0	0.0	0.3	76.4	0.2	0.2	7.7	0.3	2.1	100
Stockport	0.1	0.3	20.2	0.7	0.1	0.7	65.9	2.8	3.8	0.0	5.3	100
Tameside	0.1	0.2	15.0	1.8	0.9	0.4	3.0	75.5	1.2	0.0	2.1	100
Trafford	0.0	0.7	18.7	0.1	0.0	5.0	0.9	0.0	72.3	0.0	2.3	100
Wigan	4.4	0.5	0.6	0.0	0.0	6.5	0.0	0.0	0.7	75.1	12.2	100
GM TOTAL	9.1	9.8	19.9	8.4	8.2	9.3	7.0	8.3	8.6	8.1	3.2	100

PROVIDER LOCATION →

LEARNER POSTCODE ↓

ADULT L2	Bolton	Bury	Manchester	Oldham	Rochdale	Salford	Stockport	Tameside	Trafford	Wigan	Outside GM	Grand total
Bolton	49.8	6.1	3.9	0.6	0.4	8.9	0.3	0.2	1.5	5.8	22.6	100
Bury	4.3	51.3	8.6	1.3	2.8	5.9	0.5	1.1	1.6	0.5	22.0	100
Manchester	0.2	1.1	60.8	1.8	0.8	3.9	3.3	1.3	4.8	0.3	21.7	100
Oldham	0.1	1.1	8.6	49.7	7.0	1.7	0.7	5.9	1.9	0.4	22.9	100
Rochdale	0.4	7.1	6.9	8.3	52.8	1.4	0.5	1.2	1.5	0.1	19.9	100
Salford	2.8	2.3	20.0	0.9	0.4	35.6	1.0	0.6	7.1	1.4	27.9	100
Stockport	0.3	0.8	14.6	1.2	0.2	2.9	49.4	3.6	4.6	0.2	22.3	100
Tameside	0.1	0.3	12.9	5.4	0.5	2.6	5.1	46.7	2.5	2.4	21.4	100
Trafford	0.3	0.4	21.4	0.7	0.1	3.8	2.0	0.6	41.5	0.3	29.0	100
Wigan	3.0	0.8	2.5	0.5	0.2	1.8	0.2	0.0	0.6	52.2	38.3	100
GM TOTAL	5.1	4.9	24.1	6.6	6.0	6.4	4.8	4.9	5.4	7.1	24.7	100

Source: Provisional SFA Datacube, 2014/15

- Adults on a level 2 course are more likely to travel outside of their home district compared to adults studying at level 1 or below, with just over half (or 51%) doing so. Among learners under 18, just 28% travel outside their home district – a very similar proportion to level 1 and below.
- Learners over 18 years at level 2 are more likely to travel outside of Greater Manchester for learning too – especially among learners from Salford, Trafford, and especially Wigan travelling outside of Greater Manchester.
- For adults, the most self-contained local authority area is Manchester.
- Among young people at level 2, the most self-contained are Bury, Salford, and Tameside. The least self-contained are Manchester and Rochdale.

Young learners at L3 are increasingly likely to travel beyond home district

Figure 67: Learner travel flows – Level 3, % who live and learn in borough, GM

PROVIDER LOCATION →

LEARNER POSTCODE ↓

YOUTH -L3	Bolton	Bury	Manchester	Oldham	Rochdale	Salford	Stockport	Tameside	Trafford	Wigan	Outside GM	Grand total
Bolton	50.1	17.3	1.0	0.1	0.0	9.6	0.0	0.1	0.0	5.6	16.2	100
Bury	1.2	93.4	2.4	0.1	0.5	1.7	0.0	0.0	0.1	0.0	0.6	100
Manchester	0.1	6.7	73.2	2.1	1.0	3.0	7.2	1.8	4.4	0.0	0.5	100
Oldham	0.0	0.7	7.3	78.2	7.1	0.1	0.1	3.6	0.1	0.1	2.7	100
Rochdale	0.1	24.5	4.0	8.0	61.7	0.7	0.1	0.1	0.0	0.0	0.8	100
Salford	2.4	3.5	23.9	0.1	0.1	63.9	0.1	0.2	1.0	3.6	1.2	100
Stockport	0.0	0.0	25.6	0.0	0.0	0.3	71.5	0.9	0.4	0.0	1.1	100
Tameside	0.1	0.1	16.6	2.0	0.4	0.3	5.5	73.5	0.2	0.0	1.3	100
Trafford	0.2	0.4	52.5	0.0	0.0	9.3	0.8	0.0	31.4	0.0	5.5	100
Wigan	4.5	0.1	0.4	0.0	0.0	8.9	0.0	0.0	0.1	72.7	13.3	100
Grand Total	5.8	13.2	22.9	8.5	6.5	8.1	11.6	7.0	2.7	9.5	4.3	100

PROVIDER LOCATION →

LEARNER POSTCODE ↓

ADULT - L3	Bolton	Bury	Manchester	Oldham	Rochdale	Salford	Stockport	Tameside	Trafford	Wigan	Outside GM	Grand total
Bolton	46.1	10.2	8.6	0.7	0.6	3.2	1.2	0.2	2.7	5.1	21.3	100
Bury	6.8	51.1	15.1	1.7	2.2	2.8	0.9	1.1	4.8	0.3	13.2	100
Manchester	0.7	1.8	60.1	2.7	1.3	3.1	4.6	2.4	7.1	0.1	16.1	100
Oldham	0.2	1.8	13.5	53.7	6.7	0.6	0.8	8.4	1.7	0.0	12.5	100
Rochdale	0.8	13.3	11.3	8.7	44.9	0.5	0.8	0.7	3.2	0.1	15.6	100
Salford	4.4	1.2	26.9	0.7	0.6	30.2	0.4	0.4	13.9	1.1	20.1	100
Stockport	0.8	0.9	20.5	0.8	0.1	2.0	47.6	3.7	6.3	0.1	17.2	100
Tameside	0.2	1.1	16.6	2.3	0.4	1.7	4.2	52.9	6.3	0.1	14.3	100
Trafford	0.3	0.9	26.7	0.4	0.0	3.5	2.8	0.6	47.5	0.4	16.9	100
Wigan	3.3	0.8	5.7	0.0	0.1	1.8	0.6	0.0	1.4	51.6	34.8	100
GM TOTAL	5.7	6.6	25.1	6.5	5.0	4.7	6.4	6.4	8.7	6.4	18.5	100

Source: Provisional SFA Datacube, 2014/15

- The trend of learners at higher learning levels being more likely to travel outside of their home authority also holds true for young learners at level 3, with one third (or 33%) doing so.
- However, adult learners at level 3 are just as likely as their peers studying at level 2 to travel to their learning, with just over half (or 51%).
- Among adults, the most self contained local authorities are Manchester, Oldham, Tameside, Wigan, and Bury.
- The travel-to-learn patterns of young learners in Greater Manchester show very different trends across districts, with Bury being nearly entirely self-contained (i.e. 93% of learners having taken up learning within Bury), and at the other extreme only a third of learners (or 31%) from Trafford learning within their home borough.

Learners at L4 are much more likely to travel outside their home district

Figure 68: Learner travel flows – Level 4+, % who live and learn in borough, GM

PROVIDER LOCATION →

LEARNER POSTCODE ↓

YOUTH -L4+	Bolton	Bury	Mancheste r	Oldham	Rochdale	Salford	Stockport	Tameside	Trafford	Wigan	Outside GM	Grand total
Bolton	16.1	3.6	10.7	0.0	0.0	10.7	0.0	0.0	0.0	12.5	46.4	100.0
Bury	3.2	35.5	22.6	3.2	0.0	0.0	3.2	0.0	3.2	0.0	29.0	100.0
Manchester	2.0	2.0	64.0	6.0	2.0	2.0	14.0	0.0	2.0	0.0	6.0	100.0
Oldham	0.0	0.0	7.1	39.3	17.9	0.0	5.4	5.4	0.0	0.0	25.0	100.0
Rochdale	0.0	14.5	12.9	17.7	22.6	0.0	1.6	0.0	0.0	0.0	30.6	100.0
Salford	0.0	0.0	32.3	0.0	0.0	41.9	3.2	0.0	3.2	9.7	9.7	100.0
Stockport	0.0	2.1	8.3	0.0	0.0	0.0	56.3	0.0	0.0	0.0	33.3	100.0
Tameside	0.0	0.0	19.1	6.4	0.0	0.0	14.9	36.2	0.0	0.0	23.4	100.0
Trafford	10.3	0.0	41.4	0.0	0.0	6.9	10.3	0.0	20.7	0.0	10.3	100.0
Wigan	2.4	0.0	2.4	0.0	0.0	0.0	1.2	0.0	2.4	58.5	32.9	100.0
Grand Total	3.3	4.9	19.1	8.1	5.1	4.5	10.4	4.1	2.2	11.8	26.6	100.0

PROVIDER LOCATION →

LEARNER POSTCODE ↓

Adult – L4	Bolton	Bury	Manchester	Oldham	Rochdale	Salford	Stockport	Tameside	Trafford	Wigan	Outside GM	Grand total
Bolton	32.9	4.1	10.8	0.9	1.2	1.5	1.2	0.0	1.2	10.2	36.2	100.0
Bury	11.7	36.8	17.6	2.9	0.8	0.4	0.8	0.8	0.4	1.3	26.4	100.0
Manchester	0.7	1.2	59.4	3.7	2.1	0.7	10.6	2.0	2.8	0.2	16.5	100.0
Oldham	0.3	1.9	15.9	44.1	9.6	0.0	2.5	9.0	0.3	0.0	16.4	100.0
Rochdale	1.4	8.3	15.2	9.3	32.1	3.8	0.7	1.0	0.0	0.7	27.6	100.0
Salford	1.7	2.2	41.7	1.7	0.4	15.2	3.5	0.9	2.6	3.9	26.1	100.0
Stockport	0.3	0.3	17.3	0.0	0.0	0.3	57.4	3.2	2.4	0.0	18.9	100.0
Tameside	0.9	0.3	22.9	6.0	0.0	0.6	10.7	40.4	0.3	0.3	17.6	100.0
Trafford	1.2	0.4	36.9	0.8	0.0	0.8	7.8	3.7	25.4	0.8	22.1	100.0
Wigan	4.1	0.0	5.4	0.0	0.0	0.4	0.2	0.0	0.2	60.0	29.7	100.0
GM TOTAL	4.9	4.1	27.4	6.8	4.1	1.8	10.2	5.6	2.9	9.3	22.8	100.0

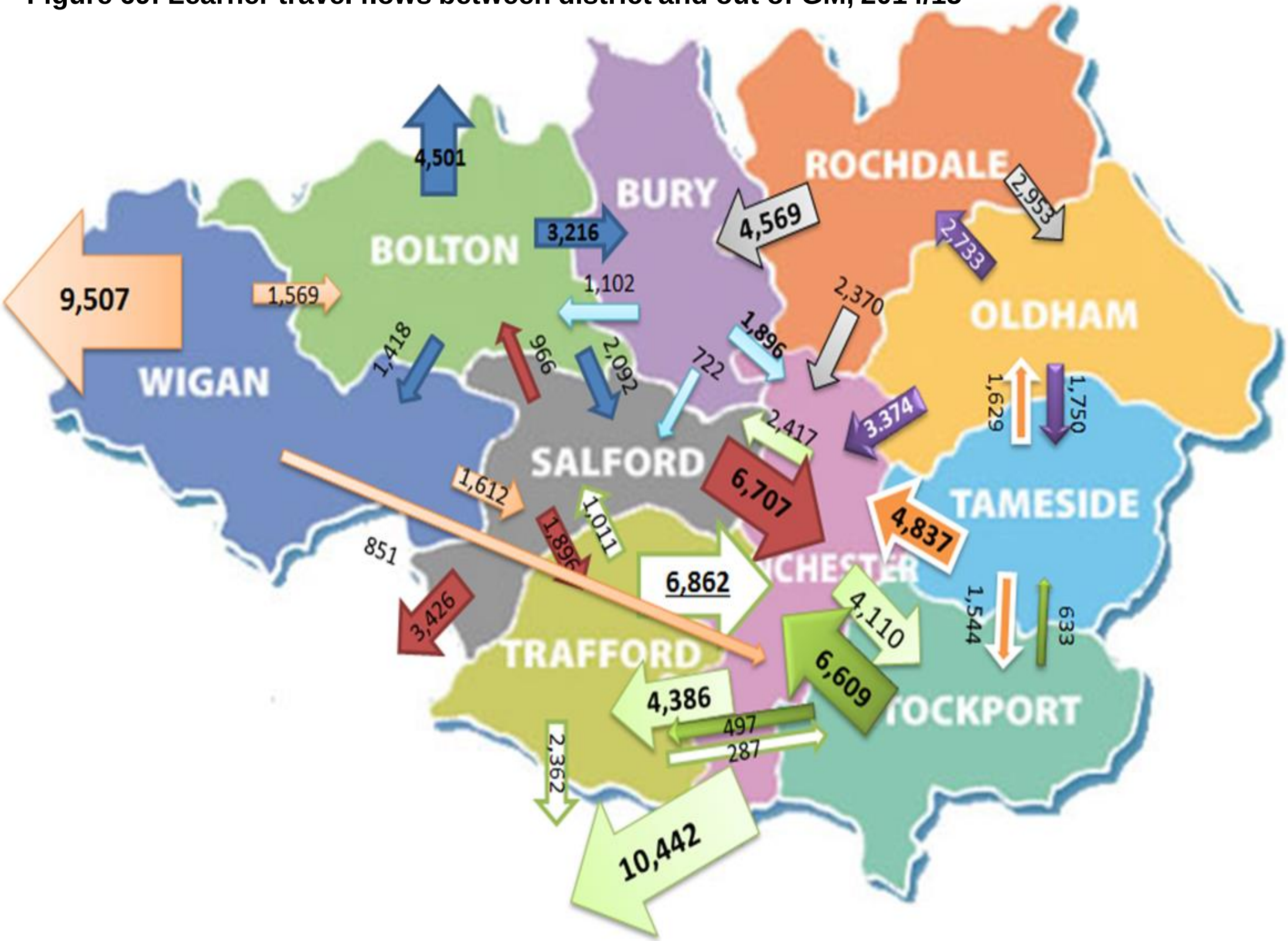
Source: Provisional SFA Datacube, 2014/15

- Only small numbers of SFA funded learners pursue their studies at L4 (1.1% or 4191 in total). However, those that do are much more willing to travel to learn than learners at other levels. Only in Manchester, Wigan and Stockport do more than half the learners study in their home district.
- Another difference to travel patterns at other learning levels is that young learners at level 4+ are proportionally slightly more likely to travel to a different authority for their learning than adult learners. At all other learning levels, adult learners are considerably more likely to travel outside of their home borough.
- Most learners at level 4+ in 2014/15 are from Wigan (17%), followed by Rochdale (13%), Oldham (11%), and Bolton (11%).

new economy

Greater Manchester learners who leave their home district mostly learn in a neighbouring borough

Figure 69: Learner travel flows between district and out of GM, 2014/15



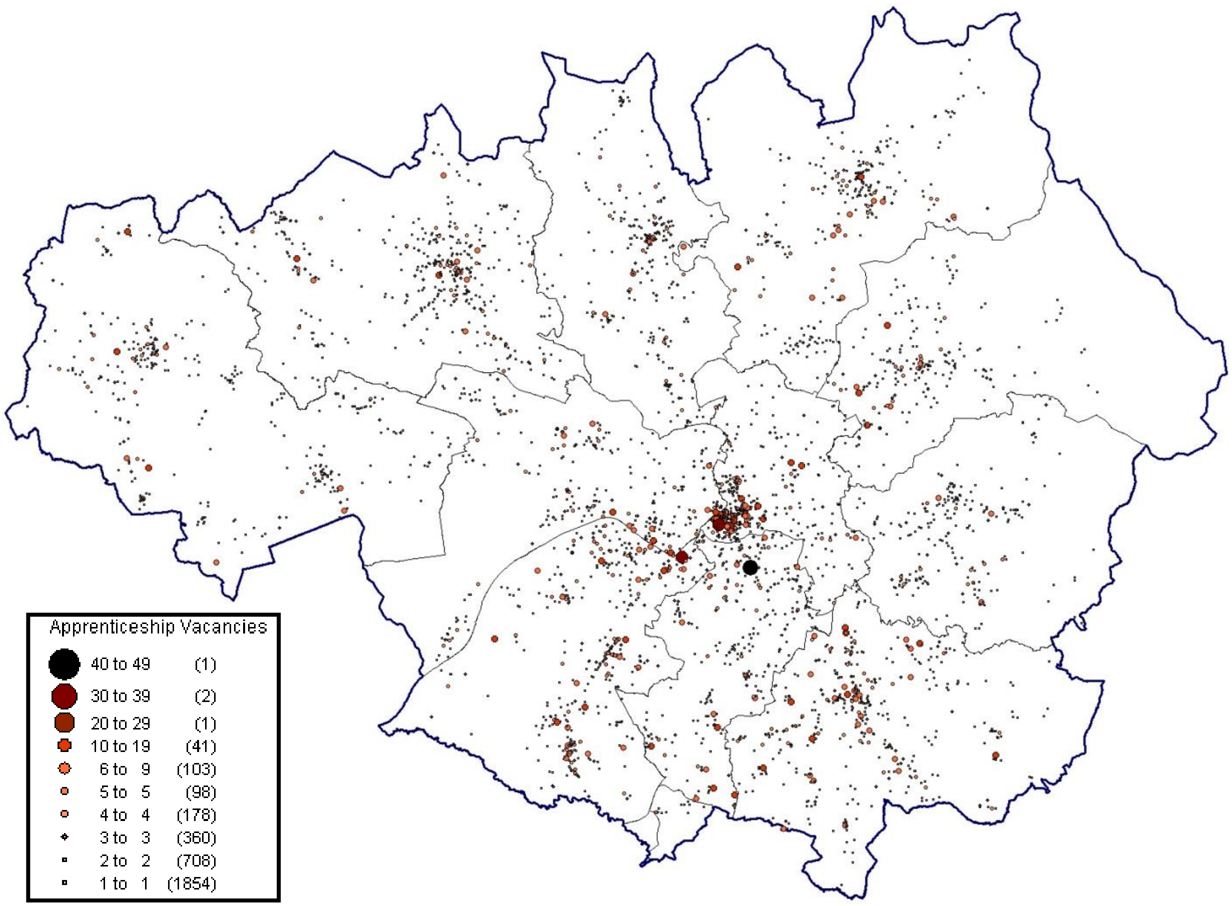
- This travel-to-learn map shows that learners who leave their home borough to study tend to travel to a neighbouring borough. The only three exceptions to that are very small numbers of learners travelling from Wigan to Manchester, and from Stockport to Trafford and vice versa.
- The main learning destination outside of GM is Liverpool, with 1.1% of GM learners traveling there.
- Learners from **Wigan** almost exclusively study either in the borough (66%) or outside of GM (23%). Wigan has the highest proportions of learners traveling outside of GM, typically to St Helens, Warrington or South Ribble.
- All other travelling outside of GM marked on the map ranges between 10% and 12% of all learners in the respective borough.

new economy

Source: Provisional SFA Datacube, 2014/15
Map navigation: Arrows of the same colour show numbers of commuters from the same local authority and illustrate the main learning destinations from each borough. The arrows further in- or decrease in size depending on the total number of commuters.

Apprenticeship vacancies mostly around central and southern areas

Figure 70: Apprenticeship vacancies in GM (Oct 2013 to Oct 2014)



- Most of the 11,105 apprenticeship vacancies in GM were advertised in Manchester (3,137 in total or 28%), followed by just over 1,300 vacancies (or 12%) in Stockport and Trafford.
- The sector with by far the highest number of vacancies is business, administration and law, offering close to half (42%) of the apprenticeships.
- Retail and commercial enterprise offered 1 in 5 apprenticeships (21%). 10% of all vacancies were advertised in Public service and Care.

new economy

SFA Apprenticeship Vacancies Data

Major change in programmes for job-term jobless imminent

- For Greater Manchester residents there are currently two programmes in place to help people out of work for a long time into employment: the Work Programme and the Working Well Pilot.
- The **Work Programme (WP)** is a national programme which was introduced in June 2011 aimed at long-term JSA claimants and some claimants of Employment Support Allowance (ESA) who were either deemed fit to work or who volunteer for the programme. The WP is due to finish in 2017.
- The WP aims to operate by a 'black box' model – meaning that the methods through which clients are helped are not centrally prescribed, but aim to be 'flexible' based on need and judgement.
- The number of people moving onto the WP has decreased sharply over the last two years. For example, 420 individuals 'attached' to the programme in September 2015, compared with 890 in September 2014 and 1,870 in September 2013 – a reduction of 78% in two years. For this reason no WP performance data is included here.
- Since the start of the programme (June 2011) to September 2015, there were 101,370 attachments to the WP in GM and 30,550 found a 'sustained' job (30%). (In the UK, the figures are 1.75m attachments and 481,880 jobs; 27%).
- Contractors for the WP operating in GM are Avanta, G4S and Seetec.
- The **Working Well (WW)** programme is a GM based pilot that began in March 2014.
- The first phase of the programme is aimed at 5,000 ESA claimants who have been unemployed for more than three years and who have been through the WP, but who have not found work.
- The programme will expand over 2016 and 2017 by widening the cohort to include more people with mental health issues and others. Participants receive help for up to two years.
- After 2017, the programme aims to grow once again to help 50,000 people. It will also take on JSA/Universal Credit recipients and clients who have a recent history of cycling in and out of work.
- There are two WW contractors – Ingeus (which also provides the WP in other areas of the country) and BigLife.
- To December 2015, approximately 3,950 people have started the programme. Some 225 have found work.
- Firm decisions about the successor programme to the WP in Greater Manchester have yet to be taken. However, the new scheme will be locally, but jointly, commissioned by both the Department for Work and Pensions and the GM Combined Authority
- The two programmes use different job performance criteria and are thus not directly comparable. The WW definition of a sustained job is one that lasts for over a year (54 weeks). The WP definition is a role that lasts for three months for ESA and six months for JSA claimants.

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GREATER MANCHESTER SKILLS ANALYSIS 2015/16

January 2016

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