
**Manchester City Council
Report for Resolution**

Report to: Economy Scrutiny Committee – 6 March 2012

Subject: Economic Improvements by Ward – impact on residents' lives

Report of: Angela Harrington, Interim Head of Regeneration,
James Hand, Business Planning and Performance Manager

Summary

The purpose of this report is to present the new intelligence provided through the release of Census 2011 data, in order that the Committee can understand the economic changes in wards across the City, and how these have and will continue to impact upon residents' ability to secure economic benefit from the City's Growth.

Recommendations

Members of the Committee are requested to note and comment on this report

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Background documents (available for public inspection):

The following documents disclose important facts on which the report is based and have been relied upon in preparing the report. Copies of the background documents are available up to 4 years after the date of the meeting. If you would like a copy please contact one of the contact officers above.

Previous reports to the Economic Scrutiny Committee:-
Access for Manchester Residents to Economic Benefit – 12 December 2012
Access for Manchester residents to Economic Benefit – 18 July 2012

1 Introduction

- 1.1 The city of Manchester has seen a renaissance over the last decade and a half, driven by continuous strong economic and population growth, such that it is now a hub of business, investment, education, culture and community activity, which rivals any other city in the UK.
- 1.2 Despite the progress made, the economic downturn has impacted upon the economic growth of the City. Problems remain in connecting residents to the benefits and opportunities of economic growth. Reports presented to the Economic Scrutiny committee on 18 July 2012 and 12 December 2012, highlighted the activity of the Work and Skills Partnership that supports Manchester residents to access the economic benefit of a growing City.
- 1.3 Through an analysis of the 2011 census data, this report highlights the economic changes in the City and their impact on the lives of the City's residents. This new intelligence will guide the develop 2013 – 2014 Work and Skills Plan.

2 The 2011 Census

- 2.1 The ONS national Census was filled in by every household to include all persons present in the property on the night of 27th March 2011. The responses are self declared by the householder and it is not possible to verify if all these assertions made in the Census are true.
- 2.2 The following Census indicators (highlighted below in Figure 1), provide data which can be used to measure economic changes at ward level from 2001 to 2011.

Figure 1: A framework on Census indicators and their relevance to Work and Skill Board's Strategic Objectives.

1: Increase the number of Manchester residents who are working	2: Increase the competitiveness of Manchester residents by enhancing skills
<ul style="list-style-type: none"> ➤ Economic Activity of Manchester Residents: <ul style="list-style-type: none"> ▪ Percentage of residents who are economically active ▪ Percentage of residents who are economically inactive ➤ Hours worked by those in employment ➤ Residents in employment by standard occupational 	<ul style="list-style-type: none"> ➤ Percentage of residents with no qualifications ➤ Percentage of residents where highest level attained is level 2,3,4 or higher ➤ Percentage of households where no household member has English as their main language

classification	
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- 2.3 It should be noted that unfortunately there was no question in the Census relating to income or wages, so the data available on how wealthy Manchester residents are is limited to other data sources.
- 2.4 It should also be noted that it is not yet possible to cross tabulate responses, for example, of the number of residents who responded that they are unemployed and looking for work, how many of these have no qualifications, or cannot speak English. New data allowing cross tabulation will be released later in 2013 by ONS. Following this date, further analysis will be undertaken which will provide a deeper level of understanding of the economic status of residents.
- 2.5 There are also a number of data considerations which needed to be highlighted. Firstly, the Census data released considers the cohort of Manchester residents that are aged 16-74, and therefore some data sets include some school pupils and some retired residents, rather than just the working age population. Regarding qualification levels datasets, in 2001 the dataset includes residents aged 16-74, whereas for 2011, ONS have so far released qualification levels of all residents over 16. Occupational classes and types of job vary over time with new roles created and other roles viewed differently. A best fit view is therefore taken of which roles lie in which classes.
- 2.6 The previous Census was undertaken in 2001. Whilst it is possible to make some comparisons of data from one Census to another, in Manchester (where the city's population has grown by a 5th in that decade) this comparison is less solid than in say a market town of more static population.
- 2.7 Finally, statistical analysis is considered at Lower Super Output Areas, (LSOAs). These are statistical reporting units developed by ONS with a minimum population of 1,000 people (average 1,500). However, due to the huge increases in population experienced by some areas in Manchester, the LSOAs in Bradford, City Centre, Ancoats and Clayton, Chorlton Park and Didsbury West have been changed. This makes comparison between 2001 and 2011 more difficult for these areas.

3 An overview of changes in population and demography

- 3.1 Manchester has experienced large changes in population and demography over the last decade. The size of the population according to the 2011 census is 503,127¹, an increase of 19% over the last decade, equating to 80,202 more residents living in the City.
- 3.2 At ward level, there is a disparity in the population changes. The greatest overall increase in population was in the City Centre ward where the population more

¹ Within comments on population, it must be noted the population shortfall in the 2001 Census will have affected all 2001 statistics.

than doubled from less than 7,000, to nearly 18,000. There were several wards where there was more than a 30% increase in population; these were Ancoats and Clayton, Gorton South, Ardwick, Cheetham and Hulme. Two out of the thirty-two wards had a slight decrease in population; these were Moston at -0.2% and Miles Platting and Newton Heath at -4.9%.

- 3.3 Manchester also has a dynamic population; 8.4% of the population, 48,375 residents, have moved to the UK within the last 5 years and 16.1%, 80,979 residents were not resident in the UK in 2001. Altogether, 25.3% or 127,061 Manchester residents were not born in the UK.
- 3.4 Manchester's age profile is changing too and despite the generally aging population nationally, the majority of Manchester wards had a decrease of over 65 age groups. In comparison to England's age profile, Manchester has an overall younger population, with many more 15-39 year olds and fewer 40-90 year olds.
- 3.5 Considering working age population only (16yrs to 64), there are now 358,165 residents of working age, an increase of 100,140 residents on the 2001 figure of 258,025. 71.2% of the Manchester population are now of working age, compared to 65.7% in 2001. At ward level, in 2011 the largest volume of working age population is in the City Centre, 17,212 residents, (94.4% of the ward population), followed by Cheetham, with 15,544 residents, (68.9%) and Ardwick with 14,742 residents (76.6%). In 2001, the largest working age population volumes were in the wards of Old Moat, Rusholme and Chorlton, each with over 9,000 working age residents.

4 Economic Activity of Manchester Residents

- 4.1 The Census gives a self completed picture of all those residents who were working, or were available to work and seeking a job on the day of the Census. This self identification process means that a direct comparison between the Census data set and DWP benefit statistics cannot be made.
- 4.2 In this census indicator set, residents declare:
 - Whether they are full time or part time employees or self employed;
 - Whether they are unemployed and available for work (irrespective of whether they are claiming benefits);
 - Whether they are working (or looking for work) whilst studying.

All these categories classify the resident as economically active. If they were not working, or seeking a job and able to start it within two weeks, then they are economically inactive, for example:

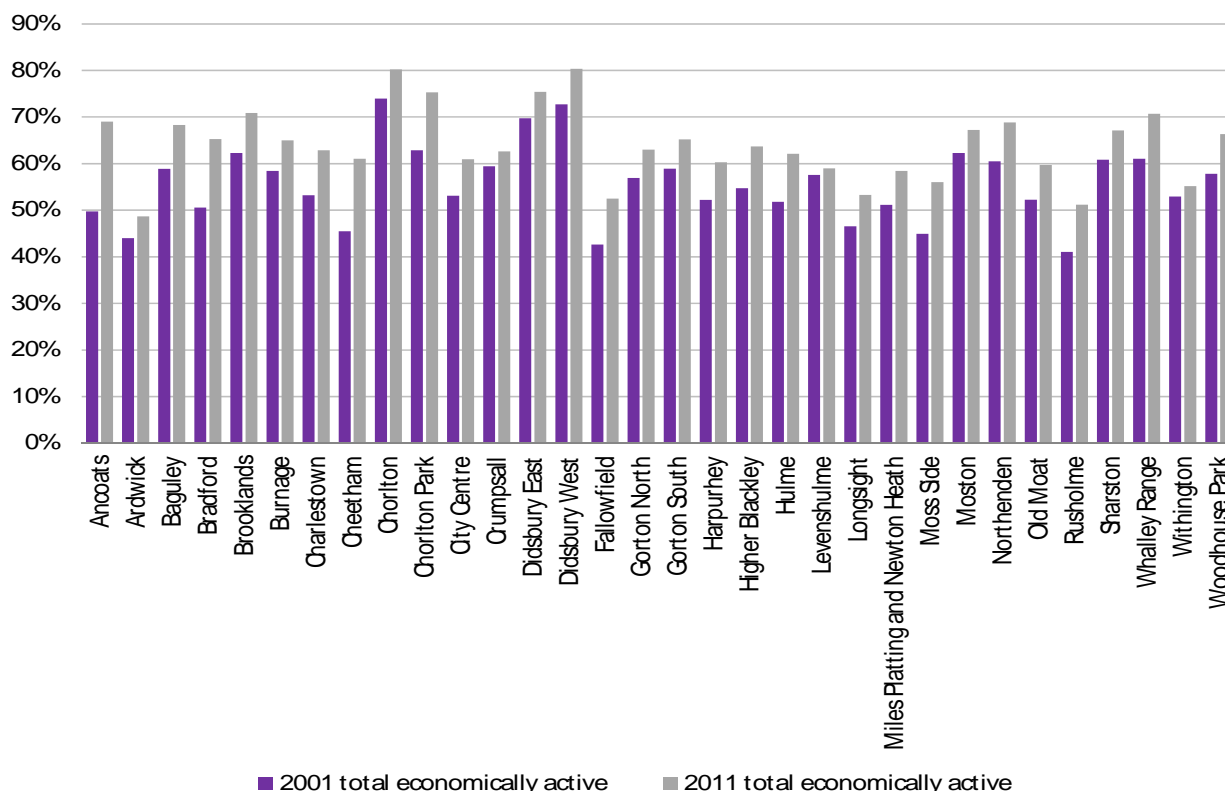
- A full time student who does no paid work;
- A homemaker looking after children or family members;
- A work-limiting long term sick or disabled resident

Some of these residents may receive some benefits; the common factor is that they are not in, or available for employment.

4.3 Manchester has seen significant improvements in the number of residents in work, both in volume and percentage terms. In 2001, the volume of workers aged 16-74 was 142,451, and by 2011 this had increased by 50% to 213,705 residents. This increase means that 70,000 more residents are now working and living in the City, than a decade ago. The percentage of residents who are economically active has also risen. In 2001, 57.8% of 16-74 year olds were economically active, while in 2011, 63.5% of residents in this age group were economically active.

Figure 2: Economically Active Residents Ward Changes

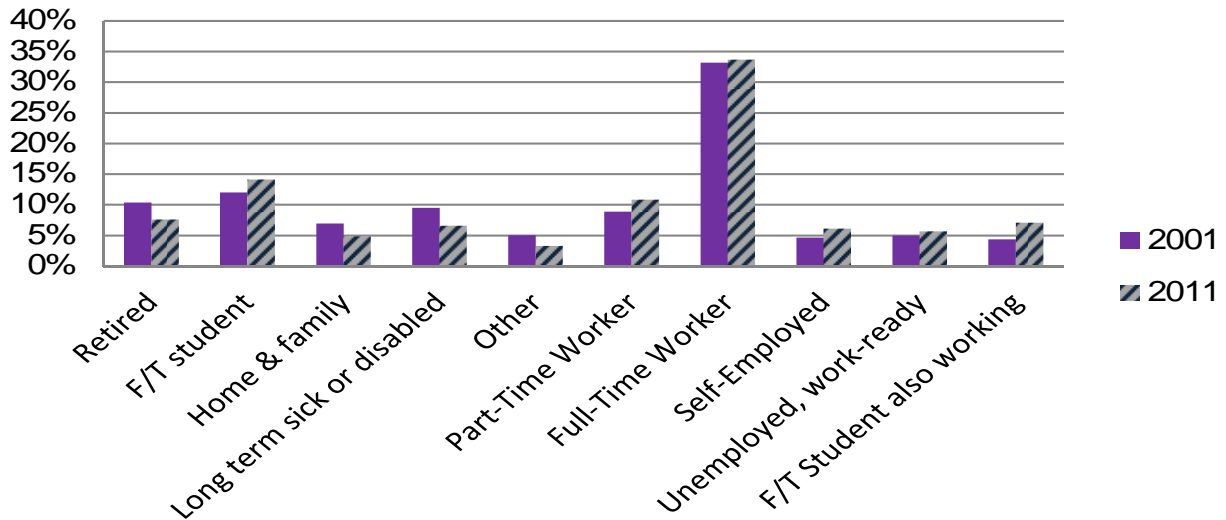
Economic Activity of Residents 2001 and 2011



4.4 The chart below (figure 3) compares the economic activity of the various groups at City level. The largest percentage is for those in full time work, in 2001 this was 33.2% of the 16-74 year old population. In 2011, 33.7% of the 16-74 year old population was working full time. In 2011, there were also more residents working part time 10.8%, compared to 8.9% of residents in 2001. In addition, there were increases in the percentages of residents who are self employed, 6.2% rather than 4.6% in 2001.

Figure 3: Economic Activity of Manchester Residents Aged 16-74 years

Economic activity of residents



4.5 Additionally, more of the population are students: there were increases in the percentages of those who are full time students and not working as well as full time students who are also working to support their studies. In 2001, 12% of the Manchester population were studying and not working. In 2011, this had increased to 14.1% of Manchester population. It has become more popular to work while studying, in 2001, this group accounted for 4.4% of residents, this has risen to 7.1% in 2011.

4.6 Conversely, there have been reductions in the percentages of retired residents, from 10.4% in 2001 to 7.6% in 2011; those who stay at home to look after home or family, from 7.0% in 2001 to 4.9% in 2011, and those who are long term work-limiting sick or disabled from 9.5% in 2001 to 6.6% in 2011. This has all contributed to the reduction in the percentage of residents who are economically inactive, from 42.2% in 2001, to 36.5% in 2011.

4.7 Examination of the 2011 Census data, at ward level, shows there are large variations in the proportions of economically active and inactive subgroups. Some pertinent variations and changes include:

- 7 wards have more than 40% of residents aged 16-74 who are working full time (Didsbury West, Chorlton, Chorlton Park, Didsbury East, Ancoats & Clayton, Brooklands and Northenden) in contrast to Ardwick and Longsight where only 16.1% and 16.4% of residents are in full time work.
- There are ten wards where at least 10% of the economically active population are full time students who also work. The highest percentage, 16.8% was for Withington. The remaining nine wards were: Ardwick, Fallowfield, City Centre, Rusholme, Hulme, Longsight, Moss Side, Old Moat and Levenshulme.

4.8 In terms of economic inactivity:

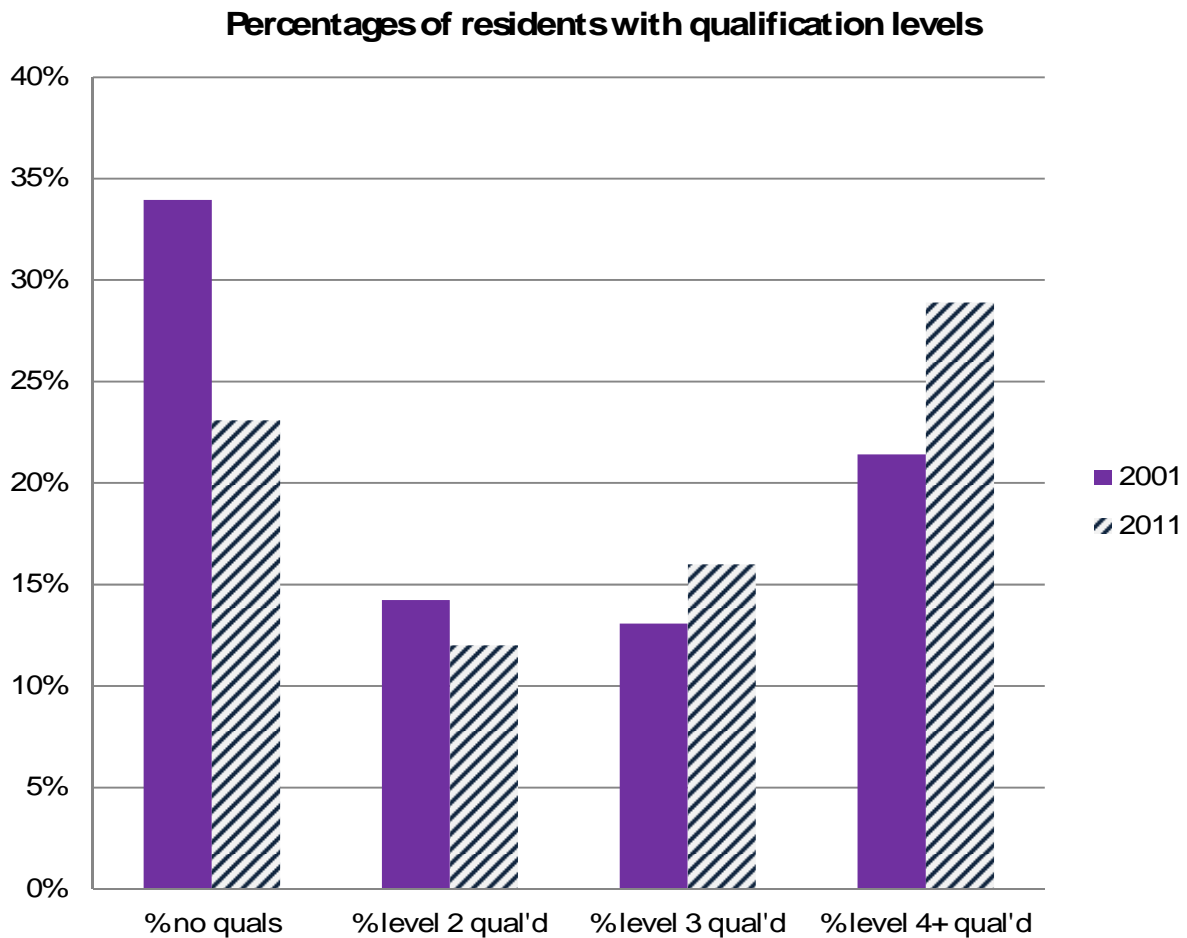
- The ward with the highest percentage of retired residents is Moston at 13.4%. The lowest percentage of retired residents is in the City Centre ward at 1.1%.
- Longsight ward has the greatest percentage of residents staying at home looking after family at 9.5%. This compares to the City Centre ward with just 0.4%.

- Miles Platting and Newton Heath has 13.3% of residents who are long term sick or disabled compared to the City Centre with just 0.7%.

5 Qualification and Skills

- 5.1 Overall, we know the skills profile of Manchester residents is improving. During the last two years, young people leaving secondary education have achieved qualifications at the national average, with 81.3% of Manchester pupils achieving 5 GCSEs at grade C in 2012. In addition, over the last 4 years the Government's skill policy has increased the volume of NVQ level 2 education, targeted at workless adults. This appears to have had a positive impact on the large number of workless residents without any qualifications.
- 5.2 Manchester has the largest student population in Europe with over 100,000 students across five universities. A report to the committee in January 2013 highlighted that 58% of graduates from the six GM Universities enter employment in the local area, equating to approximately 18,000 graduates from Greater Manchester universities every year.
- 5.3 There are now more highly qualified residents living in the City than ever before. The percentage of residents over 16 years qualified to level 3 is 16.0% compared to 13.1% of 16-74 year olds a decade ago. The percentage of graduates has increased from 21.4% of 16-74 year olds to 28.9% of all adults over 16. Overall, Manchester residents are more qualified, and to higher levels in 2011 than in the past: there are now more than 117,000 graduates living in the City, almost double the number a decade ago.

Figure 4: Qualification levels of Residents



Note: 2001 data is for residents age 16-74 only. 2011 data is for all adults over 16.

- 5.4 Despite the improvements in the Manchester skills profile, there remains a huge variation across Manchester Wards. The Census 2011 data shows that 23.1% of the Manchester adult population have no qualifications. This percentage has decreased from 2001 when it was 34.0% of Manchester residents aged 16-74 had no qualifications. In addition, the percentage of residents qualified to level 2 has decreased from 14.2% of 16-74 residents in 2001 to 12.0% of all adults over 16 in 2011.
- 5.5 Analysis of the 2011 data highlights 10 wards that have over 30% of adult residents with no qualifications. The worst performing wards are concentrated in North, East and Wythenshawe Regeneration areas. Miles Platting and Newton Heath ward has the highest percentage of residents with no qualifications (41%) followed by Harpurhey (36.7%), Woodhouse Park (36.2%) and Gorton North (34.4%) and Charlestown (34.2%).
- 5.6 In 2001, there were three wards where the majority of adults aged 16-74 had no qualifications: these were Miles Platting and Newton Heath, Ancoats and Clayton, and Bradford. In 2001, two of these wards, Ancoats and Clayton and Bradford had over 50% of residents aged 16-74 without qualifications, while by 2011, this had improved to 26.9% and 21.3% of residents over 16 without

qualifications. These were the largest improvements overall.

- 5.7 The wards with the highest levels of residents who are level 2 qualified, i.e. 5 A*-C GCSEs or equivalent as their highest qualification, according to 2011 Census data, are clustered around Wythenshawe and North Manchester.
- 5.8 In terms of higher level skills, Withington and Fallowfield wards have more than one third of their residents whose highest qualification is NVQ level 3. Those wards with a greater percentage of level 3 qualified residents are those with a significant student population.
- 5.9 The percentage of graduates living in Manchester has increased from 21.4% of 16-74 year olds in 2001 to 28.9% of all residents over 16 in 2011 and there are now more than 117,000 graduates living in the city, almost double the number a decade ago. Over two thirds of residents (16-74yr olds) living Didsbury West are qualified to at least degree level.
- 5.10 Considering the percentages of graduates per ward in 2001 compared to 2011, the greatest improvement was in Ancoats and Clayton. In 2001, there were 10.1% of residents aged 16-74 qualified to level 4 or above, in 2011 this has increased to 34.6% of residents qualified to level 4 or above. There were five other wards with large increases in the number of graduate residents. These were: Bradford, Chorlton Park, Hulme, Cheetham and the City Centre.
- 5.11 The wards where less than 20% of the adult resident population are graduates are clustered in the East, North and Wythenshawe SRFs. Miles Platting and Newton Heath has the lowest percentage of graduates amongst its adult population, at just 12%.
- 5.12 With over 25% of Manchester residents not born in the UK, language skills remains a big barrier to employment for many of these residents. Census data shows that 10.3% of Manchester households have no member who speaks English as their first language. Longsight was the ward with the highest percentage of non-English speakers: 25% of households had no one whose main language was English. There were five other wards where a significant number of residents were non-native English speakers, these are: Cheetham, Crumpsall, Rusholme, Moss Side and Whalley Range.
- 5.13 Previous reports to Economy Scrutiny on skills levels have drawn from the Annual Population Survey (APS), which is a sample population survey and published by Nomis. The Census data is more comprehensive and provides us with statistically more robust information at ward level. However, at city level the confidence indicators for APS are good. For comparison purposes the differences between APS and Census qualification data are outlined below.

Comparison of qualifications data reported in Census 2011 and Annual Population Survey (year to December 2011)

	Percentage of population
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Highest NVQ level attained	Census 2011 (age 16+)*	APS (yr to Dec 2011) (age 16-64)**
level 1	11.1%	9.2%
level 2	12.0%	13.2%
Apprentice	1.7%	2.0%
Level 3	16.0%	16.7%
Level 4	28.9%	38.3%
Other	7.1%	6.6%
No Quals	23.1%	14.0%
sum	99.90%	100.00%

*source: ONS, Census 2011, Table KS501

**Source: ONS, Annual Population Survey (yr to Dec 2011) via nomis

Notes:

1. Census is based on those residents aged 16 and over, whereas available APS data is based on residents aged 16 to 64 so this is not a like for like comparison.
2. Census is based on whole population whereas APS is sample survey. However, at city level, confidence intervals are quite small (average around 2 to 3 percent) so potential error in APS is not great.
3. The main differences are in those who have attained L4 and those with no quals. This *could* be explained by the assumption that older residents (aged over 64) are less likely to be qualified to degree level and more likely to report no quals.

6 **Employed Residents**

- 6.1 The Census asked residents what their main job was if they had one. The data released thus far has been given as classes of occupation. These occupational classes and the relationship to skills levels are highlighted in figure 5. The skill level required is a guide, further ONS releases of data will allow further analysis of whether those in a particular occupational class hold higher or lower qualifications than this.

Figure 5: Census Occupational Classes and relationship to Skill Level

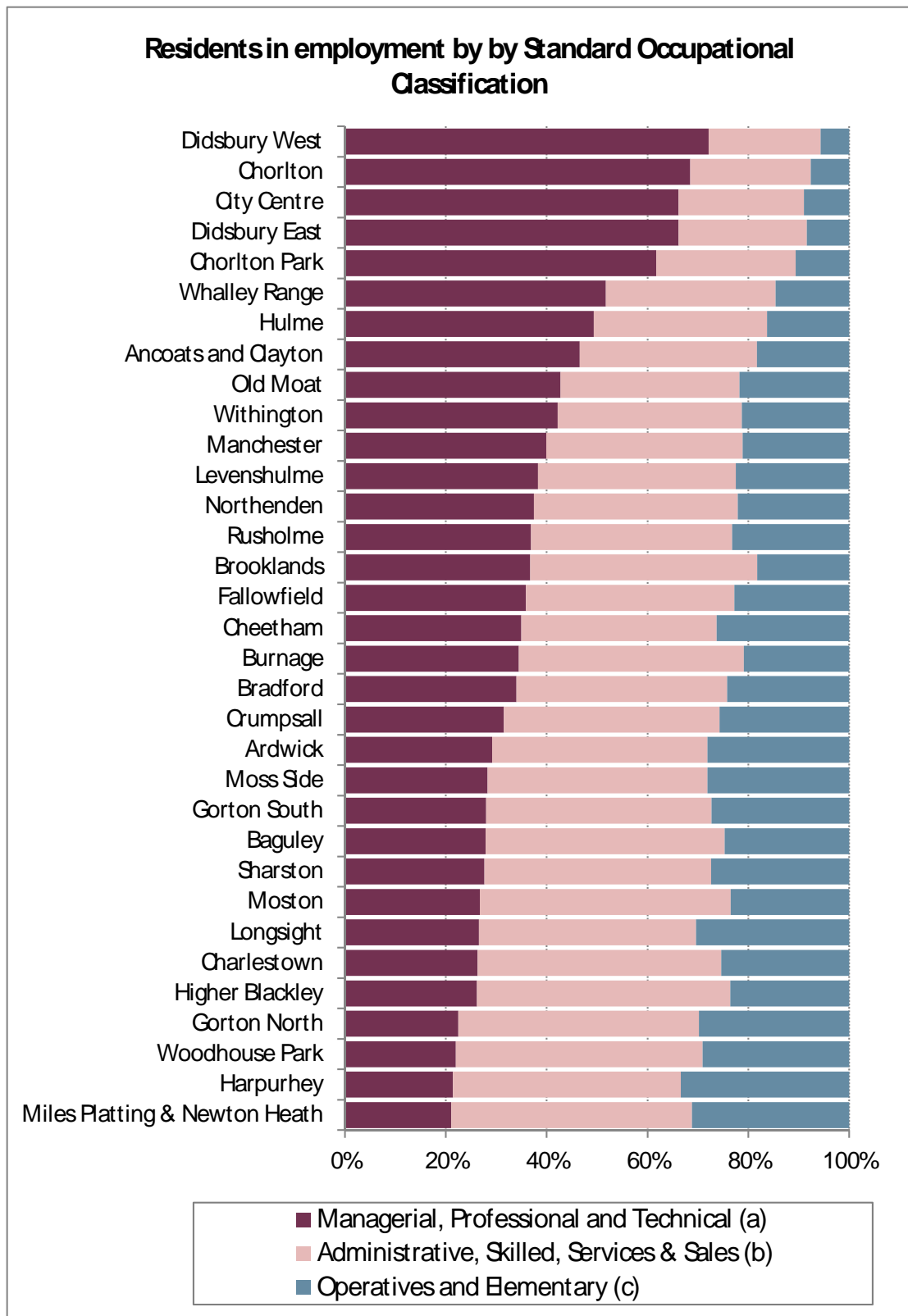
Occupational Class	Description	Skills Level Requirement
Managerial, Professional and Technical	Managers, Directors and Senior Officials, Professional Occupations, Associate Professional and Technical Occupations	NVQ 3 and NVQ 4+ (Degree)
Administrative, Skilled, Services & Sales	Administrative and Secretarial Occupations, Skilled Trades Occupation; Caring, Leisure and Other Service Occupations; Process, Plant and Machine Operatives	NVQ 3 (2 A-Levels) – NVQ 2

Operatives & Elementary	Process, Plant, Machine -Elementary Occupations	No Qual's – NVQ 2 (5GCSE Grade C and above))
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6.2 As can be seen in figure 6, the City Centre and wards in Central and South SRF wards have the greatest percentages of residents working in Managerial, Professional and Technical roles. Didsbury West has the greatest percentage of residents who work have a Managerial, Professional or Technical role, at 72.1%. Whereas the wards in East, Wythenshawe and North SRF areas make up the majority of wards with the highest percentage of workers in Operatives and Elementary roles. Miles Platting and Newton Heath, the ward with the highest percentage of residents with no qualifications, has the lowest percentage, 21.1%, of residents working in a Managerial, Professional or Technical role. Harpurhey ward has the highest number of residents in low skill, elementary occupations.

6.3 As to be expected, and highlighting the link between the resident's skills levels and the occupational class of those employed, the ten wards with the highest percentages of level 4 qualified residents are the same ten wards with the highest percentages of residents employed in Managerial, Professional and Technical roles.

Figure 6: Occupational Classes of Manchester Residents (Ward) 2011 ONS

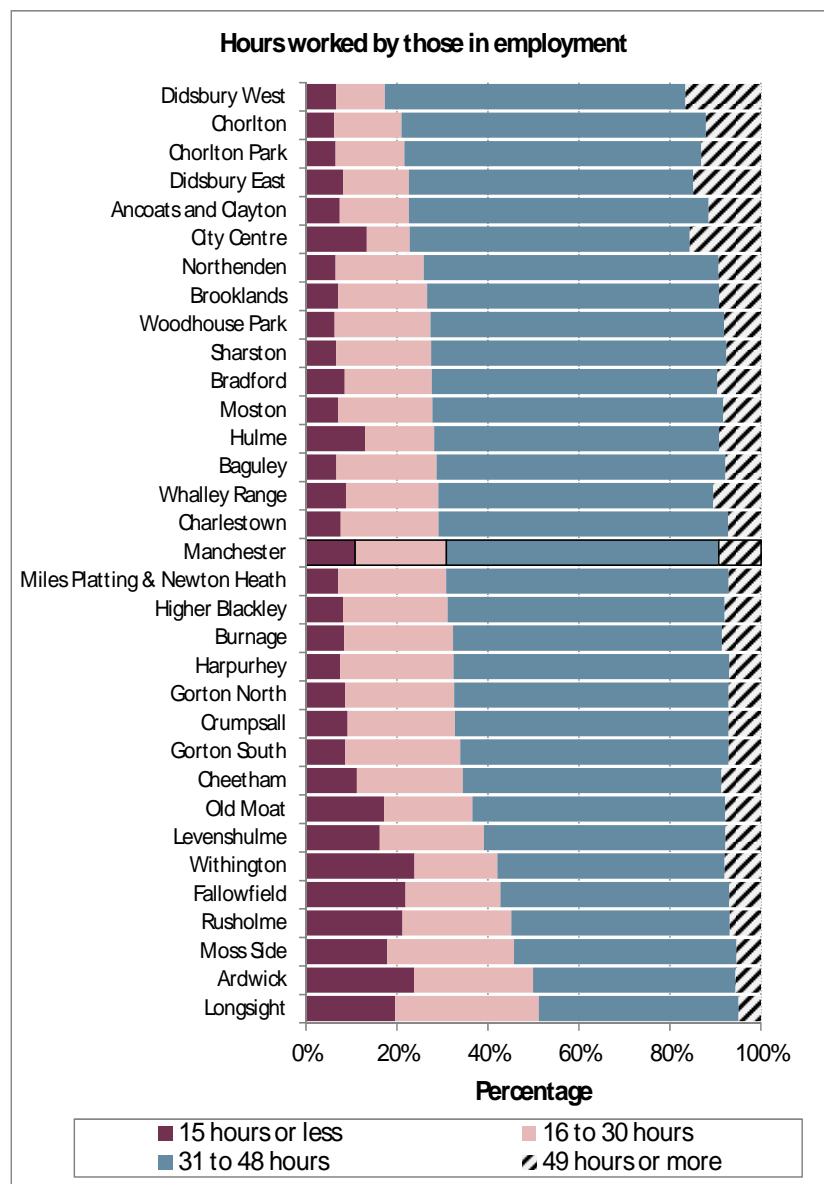


6.4 A comparison with the classes of occupational data from the 2001 Census

shows the same six wards occupying the top rankings for residents employed in Managerial, Professional and Technical roles. Didsbury West is the ward with the highest percentage in each Census, with 71.9% in 2001 and 72.1% in 2011 of working residents. Despite the changes in population and the proportion of residents who are economically active, the percentages of those in top roles has remained the same, and from the same wards.

- 6.5 Looking at the lowest ranked wards, five out of the six wards are the same from the 2001 and 2011 census respectively. Bradford is the only ward that has moved out of the lowest six, climbing from second lowest in 2001, with 21.6% top roles, to 15th lowest in 2011, with 34% of Managerial, Professional or technical roles.
- 6.6 In addition to occupation, the Census provides information on how many hours are worked by the working resident population in each ward (see figure 7 below). The link between the residents skills levels and jobs, the wards with the most full time workers are those that are the most affluent in the City for example City Centre ward.. Those wards with the highest number of part time workers (under 15 hours), include Withington, Fallowfield, Ardwick and Rusholme, which are the wards with the highest student populations.

Figure 7: Number of Hours Worked By Employed Manchester Residents.



6.7 Overall, the percentages of employed residents who are working part time, classed as less than 31 hours per week, is much higher in 2011, than in 2001. At City level, in 2001, 74.5% of working residents worked full time, compared to 69.2% in 2011.

6.8 In 2001, there were six wards where more than 30% of workers were working part time, these were Ardwick, Fallowfield, Hulme, Longsight, Moss Side and Rusholme: these are wards with large student populations.

6.9 In 2011 there were four wards, Ardwick, Rusholme, Withington and Fallowfield with more than 20% of working residents working 15 hours or less. Data for 2001 shows the same wards in this category, however, the percentages were lower: the highest percentage was 16.5% for Fallowfield. At a City level, in 2001, 8.1% of working residents worked 15 hours or less, in 2011, this was 10.8% of working residents.

6.10 The highest percentage of residents working long hours, 49 or more, are found in the City Centre, Ancoats and Clayton, Didsbury East and West, Chorlton and Chorlton Park wards. There is no change in this from 2001. Interestingly, higher percentages of working residents worked over 49 hours a week in 2001 than in 2011 which perhaps reflects the impact of the recession on employers and so less willing and able to pay for overtime.

7 Summary

7.1 The City's significant achievement in increasing the working age population by more than 70,000 residents in the last decade highlights the economic renaissance of Manchester. The move to a younger demographic profile will have lasting economic benefit as these individuals remain economically productive for a longer period. However, it is essential that the City creates the neighbourhoods of choice that will keep these residents within the City.

7.2 The Census shows that for many residents language remains a major issue. Language issues not only impact on adults' participation in labour market, but impact also on their children's educational attainment. Census data will allow the Work and Skill partners to target ESOL (English for Speakers of Other Languages) more effectively and provides the evidence for increased volumes in ESOL provision across the City. However, this needs to be set within the context of the limited funding available for ESOL delivery. Through the opportunities that exist within City Deal and the developing strategy to deliver Greater Manchester Skill priorities, we must articulate Manchester's ongoing and increasing need for ESOL linked to employment opportunities.

7.3 Over the last ten years the City has seen large job growth through developments in the City Centre, (Spinningfields, Piccadilly Gardens and Arndale redevelopment,) as well as development in SRF areas (Manchester Fort, Central Park, the Corridor and the Airport). Through the Census, it is clear that this business growth has led to increased levels of economic activity for Manchester residents, with an extra 70,000 residents identifying as economically active. However, a crucial question remains hidden within the data: how has this economic growth penetrated many of our established deprived communities.

7.4 The higher skill profile of Manchester residents is positive news and will help to address the employer demand for higher skills in developments including Airport City, Etihad Campus, City Centre Growth (Civic Quarter and Creative Quarter, NOMA). Through these developments it is anticipated that by 2025, we will have between 55,000 – 65,000 new jobs. The majority of these jobs will have a skills need of NVQ level 3 and above; therefore, more needs to be done make sure that the large cohort of residents with no or low skills can retrain and up-skill in order that they can benefit from this expected growth. A greater focus on skills, and higher skills in particular, will allow Manchester and GM to address the £7.2 billion productivity gap highlighted in Manchester Independent Economic Review (2010).

- 7.5 Whilst residents' occupational types (across the wards) have not changed much over the last decade, the City has more part-time workers than ever before. The reason for this is a mixed picture. We know that the labour market has significantly changed. The recession has meant employers have reduced employees' hours in order to reduce wages cost without losing staff; greater numbers of people are choosing patchwork careers, sometimes due to industry practices (e.g. digital and creative in particular) and sometimes due to family make up. There is a national picture of under-employment, and the 2011 Census data suggest this is the case in Manchester. We need to be mindful of this picture in light of the roll out of Universal Credit (UC), as this part-time employed cohort will need to increase working hours as part of the conditionality of UC.
- 7.6 As mentioned at the beginning of this report, the income level of Manchester residents and workers was not part of the Census 2011, which would have allowed us another way of analysing how these economic changes have impacted on residents. A useful proxy on this is the Annual Survey of Hours and Earnings (ASHE). This identifies both resident and workplace wage levels. It is a survey of employee jobs based on a 1% sample of (HMRC) PAYE records. The latest data available from ONS is for April 2012, however, due the small sample size of the dataset, caution should be exercised when comparing values from one year to the next. There were changes made to the weighting system in 2011, so it is not possible to compare 2012 and 2011 datasets with those for previous years. Workplace wage median is calculated by making an assessment of wages based on the location of the employer: resident wage median is calculated based upon where a resident lives.
- 7.7 For 2012, Manchester's median resident wage was £362.60 per week and the workplace wage £433.40. The gap between the resident and workplace wage stands at £70.80 for 2012, indicating that the workplace wage is around one-fifth higher than the resident wage. Comparing 2012 to 2011, both the resident and workplace wages have risen despite the current economic difficulties. The workplace wage rose from £425.00 to £433.40, whilst the resident wage rose from £347.90 to £362.60 per week. The gap between resident and workplace wages has reduced, from 22% of the resident wage in 2011 to 19.5% in 2012. In 2011, Manchester had the highest workplace wages of all Core Cities and Manchester's workplace wages are consistently higher than those in the North West, Core Cities average and England. In 2012, Manchester's workplace wages had further increased and were 5.2% higher than those of England as a whole, an increase of 0.3 percentage points on 2011 figures.

8 Conclusion

- 8.1 The City has seen significant economic and population growth since 2001. The Census has shown that the City has improved economically: we have a larger working age population, an increased skills profile, and a younger demographic profile. Whilst there is a gap between resident wages and workplace wages, we are closing this gap, and at a faster rate than all other core cities.
- 8.2 At ward level, all wards have seen increases in the number of economically

active residents and have an improved resident skills base. However, the rate of improvements differs greatly.

- 8.3 The 2011 Census still leaves a number of questions unanswered, but further releases of data and analytical tools will allow us to see what changes are being made below Ward level. This intelligence will be particularly relevant for SRF delivery and prioritising neighbourhood action over the coming years.