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MANCHESTER
CITY COUNCIL

Economy and Regeneration Scrutiny Committee

Date: Tuesday, 20 June 2023
Time: 10.00 am
Venue: Council Antechamber, Level 2, Town Hall Extension

This is a **Supplementary Agenda** containing additional information about the business of the meeting that was not available when the agenda was published

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Membership of the Economy and Regeneration Scrutiny Committee

Councillors - Johns (Chair), Baker-Smith, Bano, Benham, Hussain, Iqbal, Northwood, Richards, I Robinson, M Sharif Mahamed and Taylor

Supplementary Agenda

Further Information

For help, advice and information about this meeting please contact the Committee Officer:

Rachel McKeon
Tel: 0161 234 4997
Email: rachel.mckeon@manchester.gov.uk

This supplementary agenda was issued on **Tuesday, 13 June 2023** by the Governance and Scrutiny Support Unit, Manchester City Council, Level 2, Town Hall Extension (Library Walk Elevation), Manchester M60 2LA

Manchester City Council
Report for Information

Report to: Economy and Regeneration Scrutiny Committee – 20 June 2023

Subject: Update on Public Transport

Report of: Strategic Director (Growth and Development)

Summary

This report provides an update on the current/recent performance and future plans for public transport in Manchester.

Recommendations

The Committee is recommended to consider and comment on the report and consider whether a regular update from TfGM on Public Transport would be useful at future committees.

Wards Affected: All

Environmental Impact Assessment - the impact of the issues addressed in this report on achieving the zero-carbon target for the city
The continued development and enhancement of a public transport network for Greater Manchester will help to reduce transport-related carbon emissions by increasing the share of journeys undertaken by bus, Metrolink and rail, encouraging active travel and reducing journeys by car.

Equality, Diversity and Inclusion - the impact of the issues addressed in this report in meeting our Public Sector Equality Duty and broader equality commitments
The continued development of the public transport network will require continued monitoring and assessment as services develop and change over time to ensure that services are responsive to need, and these interventions enable those with protected characteristics to benefit fully from access to public transport.

Manchester Strategy outcomes	Summary of how this report aligns to the OMS/Contribution to the Strategy
A thriving and sustainable city: supporting a diverse and distinctive economy that creates jobs and opportunities	Improving public transport and other non-car modes will support the growth of the economy by improving accessibility to jobs and opportunities for all residents
A highly skilled city: world class and home grown talent sustaining the city's economic success	Excellent public transport connections will allow all residents in the city to access high-quality employment and education opportunities in the city and facilitate growth. Improving infrastructure and unlocking regeneration opportunities will attract investment, in turn boosting the local economy and creating jobs.
A progressive and equitable city: making a positive contribution by unlocking the potential of our communities	Good quality and affordable public transport will facilitate opportunities for communities across the city to make more sustainable travel choices, and open up opportunities for residents and businesses to access employment and education across the city.
A liveable and low carbon city: a destination of choice to live, visit, work	High quality public transport, combined with other sustainable transport measures such as walking, wheeling and cycling can offer residents a viable alternative to the private car, therefore reducing short car journeys and therefore carbon emissions. Reducing dependency on the private car can help to create a more liveable city through reduced traffic congestion, road danger and create a safer, cleaner environment.
A connected city: world class infrastructure and connectivity to drive growth	World class infrastructure will attract investment and promote a globally successful city. High quality public transport will make it easier for residents to access high quality jobs, education and leisure opportunities across the city.

Full details are in the body of the report, along with any implications for:

- Equal Opportunities Policy
- Risk Management
- Legal Considerations

Financial Consequences – Revenue

None as a result of this report.

Financial Consequences – Capital

None as a result of this report.

Contact Officers:

Name: Pat Bartoli
Position: Director of City Centre Growth and Infrastructure
Telephone: 0161 234 3329
E-mail: pat.bartoli@manchester.gov.uk

Name: James Tate
Position: Interim Head of Infrastructure and Environment
Telephone: 07743861550
E-mail: James.Tate@manchester.gov.uk

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.

Greater Manchester Transport Committee - Greater Manchester Transport Committee – Bus Sub Committee (10th March 2023) – Bus Performance Report - 20230310 GMTC Bus Network Performance Report (greatermanchester-ca.gov.uk)

Greater Manchester Transport Committee – Metrolink & Rail Sub Committee – Metrolink Performance Report (3rd March 2023) - GMTC MRN 20211112 Metrolink Service Performance Report (greatermanchester-ca.gov.uk)

City Centre Transport Strategy (March 2021) Transport Strategy for Manchester City Centre | Manchester City Council

GM 2040 Transport Strategy (February 2017, updated January 2021) Greater Manchester Transport Strategy 2040 | Transport for Greater Manchester (tfgm.com)

1.0 Introduction

1.1 This report provides a general update on Public Transport in Greater Manchester, including the current/recent performance of buses, Metrolink and rail, alongside an update of future plans including bus franchising and development of the rail network.

1.2 Performance data for bus and Metrolink is reported from the most recent data available, presented at the March GMCA Transport Committee and included within Appendix A.

1.3 The Committee is asked to comment on the report and consider whether a more regular update to the scrutiny committee would be useful, and what content the committee would like to see as part of this update.

2.0 Background

2.1 The Bee Network

2.1.1 The Bee Network is a fully integrated transport network for Greater Manchester, delivering a joined-up London-style transport system, with buses beginning to be integrated from 2023, trams from 2024 and commuter trains by 2030. The network will offer integrated ticketing, information and a high quality user experience, transforming how people travel in and around Greater Manchester.

2.1.2 By delivering a joined up public transport system, with local control and accountability at its heart we will ensure a simple, more inclusive, and accessible and easy to use transport experience for everyone in Greater Manchester. The network will support the growth of more jobs and businesses, and the move from 40% to 50% travel by sustainable modes and help us to deliver our ambitions to be carbon neutral by 2038.

2.2 World class cycling and walking network

2.2.1 The Bee Network will also include the UK's largest cycling and walking network -- connecting every area and community in Greater Manchester, by creating more than 1,800 miles of routes and 2,400 new crossings. The roll out of the cycle hire scheme is well underway and when complete will deliver a fleet of 1,500 bikes including 300 e-bikes in Manchester, Salford and Trafford, giving 198,000 residents access to the scheme within a 5 minute walk.

2.3 Funding and Infrastructure

2.3.1 TfGM have secured a £1 billion government funding package, supported by £170 million in local contributions, meaning around £1.2billion worth of transport investment in local roads, bus, train and tram services over a five year period (2022-2027). This will include 50km of new quality bus corridors, more than 50kms of new cycling and walking routes, 2,000 upgraded bus stops and further improved transport infrastructure and connectivity for towns and high streets across the region.

2.3.2 Work is also underway to purchase 220 Zero Emission Buses, with fifty new electric buses initially introduced in Wigan and Bolton from September 2023. An additional 170 will then follow on routes to and from the future Stockport bus depot by 2024.

2.4 Improved customer experience

2.4.1 From September 2023, the Bee Network will be supported by a new Bee Network Customer Contact Centre providing a single point of contact for customers travelling in Greater Manchester.

2.4.2 World class safety and customer experience standards will be delivered across bus, tram, rail, taxi and private hire. There will also be a Bee Network app which will support customers in making seamless journeys, allowing them to buy bus and tram tickets and access real time information on services through audio/visual announcements – as well as allowing them to rate their service and give feedback to the Bee Network Customer Contact Centre.

2.4.3 A customer charter will be based on the Bee Network brand foundations and will enable the voice of customers to be placed at the heart of how products and services are designed and delivered. It will play a critical role in demonstrating accountability in how the Bee Network is delivered, operated and continually improved. The charter will clearly and simply communicate the experience that customers can expect from the Bee Network and how to provide feedback and suggestions for improvement.

2.4.4 The charter will also:

- Support the launch of the Bee Network and its ongoing delivery
- Be visible across the network
- Set out what customers can expect from TfGM
- Set out 'accepted behaviours' expected from customers
- Be developed with the people and places of Greater Manchester
- Be displayed in different formats for the people and places of Greater Manchester.
- Develop future products and pricing

2.4.5 A key objective of the Bee Network is for customers to benefit from an affordable, simple and integrated ticketing proposition, providing easier access to a choice of transport modes and encouraging more sustainable travel.

2.4.6 Working with partners through franchising transition, TfGM will build on the successful capped bus fares scheme launched in Sept 2022, which saw a £2 single cap (£1 for children) and a £5 AnyBus (£2.50 for children) all day cap for bus journeys throughout GM. The fares cap scheme has since been extended to include a weekly cap of £21 (£10.50 for children).

2.4.7 The proposition will evolve through to 2025 when Pay As You Go will be available to customers. Transforming the way people pay for travel by giving customers the ability to simply tap and go across both Bus and Metrolink, with a day or weekly cap.

2.4.8 For those that wish to continue to pay for travel in advance, this will still be available but will be much simpler, ensuring customers are able to choose which product best suits their needs.

2.4.9 Concessionary travel options will continue to be available to those that are eligible.

2.5 A recognisable, relatable brand

2.5.1 There will also be one recognisable look and feel uniting the entire Bee Network and marked with a bee - a long respected regional emblem which will clearly show the joined-up nature of the network and act as a mark of quality and integration.

3.0 Bus Performance

3.1 Introduction

3.1.1 Greater Manchester has an extensive bus network covering approximately 49.0 million miles between January 2022 and December 2022 (a decrease of 8% compared with the financial year of 2021/2022) and supporting an annual ridership of 145.8 million passengers (an increase of 8.9 million passengers compared with the financial year of 2021/22). The network (551 services) is provided on both a commercial and subsidised basis by 39 operators (as of December 2022).

3.1.2 Transport for Greater Manchester (TfGM), financially supports and manages the subsidised bus network on behalf of the Greater Manchester Combined Authority (GMCA). The funding level for the subsidised network (22.6% of the overall network mileage), supports areas of the network which are not deemed commercially viable by operators, but are considered socially necessary, and also delivers an extensive network of school bus services.

3.1.3 Data in this report covers the period of July 2022 – December 2022 which includes the ongoing recovery following the impact of the pandemic, bus and rail industrial strike actions, and a national driver shortage affecting the industry. In addition, TfGM introduced the standard fare initiative from September 2022 and received the commercial portion of the Bus Revenue Grant (BRG) from government to support network stabilisation and respond to proposed reductions from commercial operators.

3.1.4 A summary of bus performance metrics from the period of July 2022 to December 2022 is set out below, which includes the following -

- Patronage

- Operational Performance
- Fleet Profile
- Customer Complaints
- Update on Little Gem

3.1.5 Other performance data is available within the March Transport Committee report and could be included in future Scrutiny Committee reports if required.

3.2 Patronage

3.2.1 Patronage on the bus network overall is currently an estimated 86% of pre-Covid levels and is around 15% up on the equivalent period last year. An evaluation[1] of the first three months of Greater Manchester's £2 / £5 Bus Fare Offer (September – December 2022) shows that this initiative contributed to an increase of bus patronage of 10% over this period.

3.2.2 Whilst it is difficult to directly attribute the proportion of this increase which results from the fares offer and what is attributable to the ongoing recovery of travel markets post pandemic, initial estimates are that approximately 5% is due to the fares offer, equating to approximately 1.5 million additional journeys in just three months. This is particularly encouraging in respect of promoting changes in travel behaviour and encouraging mode shift from car.

3.2.3 Annual ridership on the subsidised bus network between January 2022 and December 2022 was 22.2 million, an increase of 6.0 million compared with the financial year of 2021/2022. This includes ridership on additional supported subsidised services to support the stabilisation of the network from October 2022 onwards.

3.3 Operational Performance

3.3.1 The performance of scheduled services was below the standards set by the Traffic Commissioner in terms of reliability and punctuality. The performance of frequent services was also below the standards, although to a lesser extent than the scheduled services.

3.3.2 The performance measures are being impacted by a driver shortage impacting the bus industry and the ability for operators to provide services as planned, as well as increased congestion and roadworks taking place on the network, affecting performance.

3.4 Fleet Profile

3.4.1 At the end of September 2022, 99.63% of vehicle engines were of an emission standard of 4 and above and 88.84% of these vehicle engines were of an emission standard of 6 and/or an electric vehicle, an increase compared with

[1] https://tfgm.com/data-analytics-and-insight/surveys-and-research/low-bus-fares

the end of March 2022, and a significant increase since March 2021, with the aim of improving air quality.

3.4.2 The average age of the vehicle fleet has increased between March 2022 and September 2022, with the average fleet age at 10.1 years.

3.4.3 Greater Manchester's Clean Air Plan is under review with Government. However, as the emissions reduction for a bus changing from a non-compliant vehicle to a Euro VI model is substantial the Clean Air Funding for bus replacement and retrofit for GM registered bus services remains open to operators. To end January 2023, 877 buses have been retrofitted and 69 vehicles have been replaced, these upgrades mean that 89% of the bus fleet serving Greater Manchester is now compliant with clean air standards.

3.4.4 The fleet profile will continue to improve as Bus Franchising is implemented, including the procurement of 100 new zero emission electric buses for Bus Franchising Tranches 1 and 2. All other fleet must meet a minimum specification as set out by TfGM / GMCA (e.g. Euro VI standard).

3.5 Customer Complaints

3.5.1 There were 85 subsidised bus service comments/complaints received by TfGM during the period of July 2022 to December 2022, which were within the operators control and their responsibility. This is the same of level of comments/complaints received compared with the 6-month period between July 2021 – December 2021 of 85, which were also deemed within the operators control and their responsibility.

3.5.2 The main 3 reasons of customer comments/complaints received during the period of July 2022 – December 2022 were service failure (25% / 21 comments/complaints), punctuality/reliability (24% / 20 comments/complaints) and driver behaviour (13% / 11 comments/complaints).

3.6 Little Gem

3.6.1 On the 21st April Little Gem bus company informed TfGM that they were to cease operation the following day which had implications on the operation of several general and school contracted services in south Manchester. Despite the efforts of the team, it hasn't to date been able to cover three services in the Manchester district, these being the 44, 84, and 217 routes. At the time only one bid was received but this was at an unaffordable level.

3.6.2 A formal procurement exercise is currently being undertaken in the hope that more affordable options can be secured. A decision on this will be made in mid-June.

4.0 Local Link & Ring & Ride

4.4.1 Local Link is an on-demand bus service which is located in areas which have transport links which are challenging to meet by general bus provision. The service is available for anyone travelling within the defined zones to use and they can book through our website or our contact centre. Fares are aligned to the £2 fare and System One and Get Me There bus products are accepted.

4.4.2 There are two Local Link contracts operating in Manchester. One contract consists of 3 vehicles operating in the Wythenshawe and Timperley areas. They provide key links to employment sites, particularly the airport and Wythenshawe hospitals as well as local journeys. The service operates 24/7 and provides an average of 2,900 journeys a month. The Wythenshawe service is the most successful Demand Responsive Transport (DRT) service in terms of cost per passenger.

4.4.3 Officers are currently exploring an opportunity with the Airport to fund an additional vehicle in this area to improve direct links to the airport and increase from Sale West and increase the capacity of trips in general on this service.

4.4.4 The East Manchester service consists of two vehicles which provide key links in the East Manchester area linking to North Manchester General Hospital and the MRI/Children's hospital/St Mary's. The service operates Monday to Sunday, 6.30am to 10pm and provides around 750 trips per month. This service is currently facing a high cost per passenger due to a lack of demand.

4.4.5 Ring & Ride provide accessible, low cost transport to disabled people and older people with walking difficulties. If you qualify, you can book a Ring & Ride accessible minibus to take you, and an accompanying adult, door to door for journeys of up to 6 miles in Greater Manchester. There are currently 45 vehicles in the fleet across Greater Manchester and the service operates between 8am to 10.45pm Monday to Saturday and 8am to 10.25pm on Sundays.

4.4.6 In May the Ring and Ride service provided 2,787 trips to passengers registered in the Manchester district. Refusals are currently on the rise on this service. Officers are exploring options to increase our capacity in light of increasing demands.

5.0 City Centre Free Bus

5.1 The City Centre Free Bus is an important component of the public transport offer, providing a quick service for those wishing to travel within the core of the city centre. It is well used at all times of the day, and evening services are currently being tested.

5.2 In April 2023, changes to the routes and timetables of the City Centre Free Bus were implemented, to better reflect demand. This resulted in two new routes and timetables replacing the previous 3 route service, including the introduction of evening services to operate until July when the service will be reviewed.

6.0 Bus Franchising

6.1 Introduction

6.1.1 TfGM, acting as the transport authority on behalf of the GMCA, contracts with transport operators to deliver services it specifies, with revenue risk and public accountability remaining with the transport authority.

6.1.2 Franchising is not public ownership/operation. Services will still be delivered by private companies and TfGM and GMCA are prohibited from establishing new bus companies.

6.1.3 Franchising allows the bus network to be managed as a whole system, alongside other modes, creating the opportunity for integrated timetabling, ticketing and information and allowing the GMCA to set fare levels.

6.1.4 A franchised and transformed bus system is the first phase in delivering the Bee Network.

6.2 Introduction of franchised services

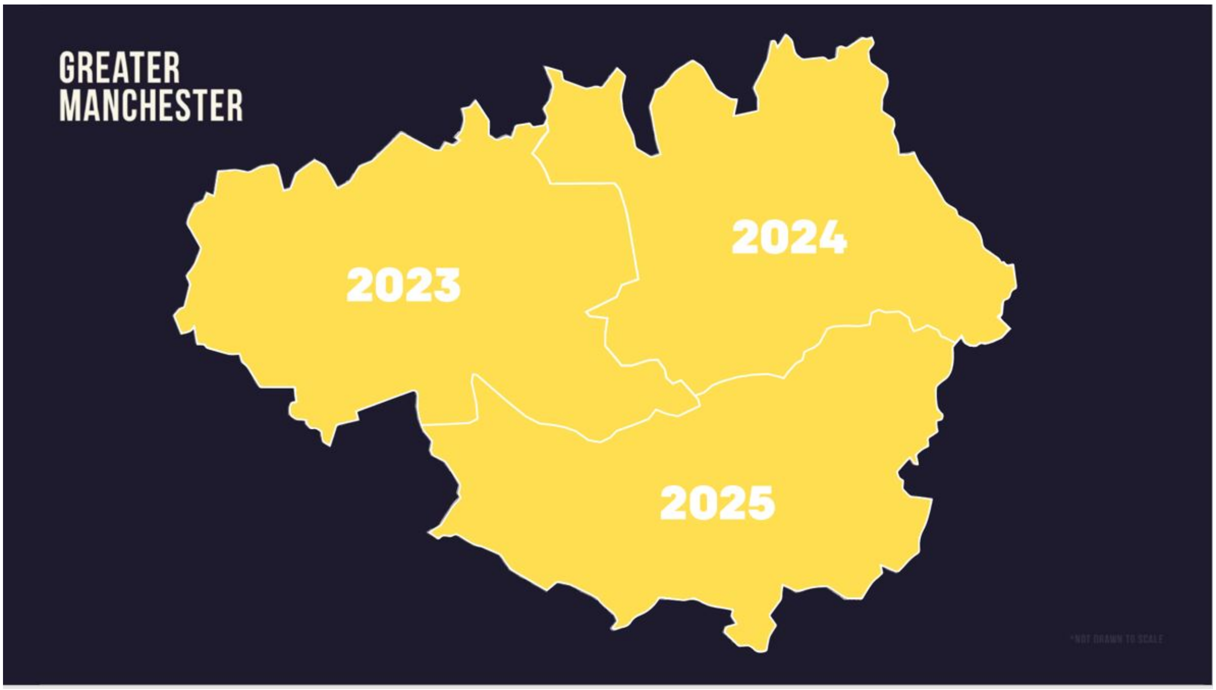
6.2.1 The current network will transition ‘as is’, so there will be no significant changes to routes or timetables on day one.

6.2.2 New low bus fares for Greater Manchester, originally planned to be introduced with the first franchised bus services in September 2023, have been introduced 12 months early to help ease the cost-of-living crisis. That means bus passengers now save up to 50% on some journeys, with an adult single bus ticket costing no more than £2 and a child single bus ticket costing no more than £1. All day travel by on any bus costa £5 for an adult and £2.50 for a child.

6.2.3 All bus services in Greater Manchester will be under local control by January 2025. The first services that will come under local control will be in Wigan, Bolton and parts of Salford, Manchester and Bury from 24 September 2023.

6.2.4 Phase two will take place in March 2024 and will see services franchised in Oldham, Rochdale, and parts of Bury, Salford and north Manchester.

6.2.5 The third and final phase will be introduced in January 2025 when bus services in Stockport, Tameside, Trafford and the remaining parts of Manchester and Salford come under local control.



6.3 Franchising changes roles and responsibilities

Deregulated system (1986-2025)	
TfGM/GMCA	**Bus operators**
Bus stops	Service delivery
Interchanges	Fares/ticketing
Information (shared)	Service frequency
Cost risk (limited)	Information (shared)
Local concessions	Revenue/patronage risk
Support for socially necessary services*	Cost risk
	Branding and marketing
	Network design
	Customer relations
	Employment of staff
	Maintenance, specification and deployment of fleet
	Depot ownership
	Onboard technology

Franchised system (introduced 2023-2025)	
TfGM/GMCA	**Bus operators**
Bus stops	Service delivery
Interchanges	Cost risk (shared)
Information	Performance risk
Fares/ticketing	Employment of staff
Local concessions	Maintenance of fleet
Service frequency	
Revenue/patronage risk	
Cost risk (shared)	
Performance monitoring	
Branding and marketing	
Network design	
Customer relations	
specification and deployment of fleet	
Onboard technology	

6.4 Highways

6.4.1 Congestion and delays created by roadworks, are one of the biggest daily challenges and unknowns bus operators face to running punctual and reliable bus services. To assist bus operations, a number of initiatives have been agreed at the Greater Manchester Highway Group:

- Explore options to reduce and / or mitigate major disruptive works at the start of bus franchising tranches (bring forward or defer works).
- Publication of a weekly roadworks bulletin (by Local Authority) for the major road network, to assist bus operators with a forward view of works and allow them to mitigate potential delays.
- Monthly Local Authority / TfGM meetings to discuss future roadworks, with a view to mitigating impacts and learning lessons from previous works.
- Development and implementation of a roadworks clash management tool, with the aim of (avoiding / reducing multiple roadworks on the same bus route at the same time). A trial in Wigan is proposed, prior to potential full rollout across Greater Manchester.
- Installation of late running bus priority at traffic signals controlled by SCOOT technology.

6.5 Bus fleet

6.5.1 From day 1 of each franchise the fleet will be:

- New Zero Emission Buses – 100 have been ordered for the first two franchise areas. A further 170 electric buses, funded from DfT's ZEBRA scheme, will run in the tranche three area from 2024.
- Operator provided fleet
- Fleet procured by TfGM and leased to operators for the life of the franchise

6.5.2 The new fleet will meet the 'best in class' specification developed by TfGM / GMCA for the Bee Network in conjunction with stakeholders. All other fleet must meet a minimum specification as set out by TfGM / GMCA (e.g. Euro VI standard). These buses will be enhanced to 'best in class' over a two-year period.

7.0 Metrolink Performance

7.1 Introduction

7.1.1 All information within this section is reported from the Metrolink Performance report using data for Metrolink from the most recent data available, presented at the March GMCA Transport Committee and included within Appendix A.

7.1.2 A summary of Metrolink performance metrics from the rolling 12 month period to early 2023 is set out below, which includes the following

- Patronage
- Performance, including

- Reliability
- Excess wait time
- Punctuality
- Asset reliability (infrastructure & trams)
- Crime and anti-social behaviour

7.2 Patronage

7.2.1 Patronage measures the number of single journeys that are made on the network. Patronage is influenced by national holidays, school holiday periods, students returning to all tiers of education, concerts/high profile spectator events and the Premier League football calendar.

7.2.2 Patronage consistently remained above 80% and reached 90% of pre-covid levels in the lead up to Christmas 2022.

7.2.3 As expected, patronage numbers decreased during the Christmas holiday period, recovering steadily post-Christmas reaching 85% of the pre-covid patronage level at the end of January 2023.

7.2.4 Patronage recovery levels post-Christmas 2022 are approximately 50% higher than the equivalent post-Christmas period in 2021.

7.2.5 Commute trip numbers across the full week are estimated to have recovered to approximately 88% of pre-Covid average numbers in January 2023 with Tuesday through Thursday typically reaching or exceeding 100% of pre-covid AM peak commute numbers.

7.2.6 Following a review of patronage numbers and passenger feedback, 2 double units have been reintroduced on the Airport line to enhance capacity in the AM and PM peak periods. Further work is being undertaken to review patronage levels and increase some peak capacities where required in 2023.

7.2.7 Driver recruitment and training remains an area of focus in order to stabilise operational performance, enhance capacities and support further recovery through 2023.

7.3 Performance

- Reliability – this is measured by operated mileage and has a target (pre-pandemic) of 99.4%. Performance shows a reliability just under target of 98%

- Excess Wait Time – a measure of punctuality, the average time passengers would wait over what would be expected if the services were running as schedules. The average monthly wait time was 69.9 seconds compared to a target of 26 seconds. Driver recruitment and training remains an area of focus in order to stabilise operational performance, enhance capacities and support further recovery through 2023.

- Punctuality – the average monthly punctuality metric for the period was 89.7%, compared to a target of 90%

- Asset reliability (infrastructure) – this is measured in terms of service distance between failures. The metrics demonstrate that the infrastructure is performing well above target.

- Asset reliability (trams) – this measures the percentage of the fleet that is available during each period. Recent periods have seen continued high levels of anti-social behaviour, which has impacted on vehicle availability.

- Crime & Anti Social Behaviour (ASB) – Crime and ASB levels have decreased when comparing incidents in Nov and Dec in 2022, with the same period in 2019.

8.0 Rail Performance & Future Plans

8.1 Rail Performance

8.1.1 Overall, across the region there have been notable improvements in the operational performance for both Northern and TransPennnine in comparison to previous periods. For Northern, Right Time (RT) at Destination sits at just over 65%, and cancellations below 3%. While there have been a few instances of pre-cancelling services on Sundays due to crew availability, these occurrences are relatively few.

8.1.2 TransPennine Express (TPE's) performance has remained static, with total cancellations just below 18% in Period 01 (1st – 29th April 2023). The most recent fortnight available (in Period 02 from 30th May 2023) has seen a further increase in total cancellations to over 20%, with both p-coded and on-the-day cancellations on the rise. This figure is higher than the Period 13 (5th March – 31st March 2023) figure of 16.9%, which was affected by the reduction in services due to the Stalybridge blockade.

8.1.3 The Secretary of State (SoS) announced its plan to bring TPE under the control of the government's Operator of Last Resort (OLR) as of 28th May. TransPennine Express will continue to be the brand name but will trade as TransPennine. The contracting party (new operator under Department for Transport OLR Holdings Limited (DOHL) will be Trans Pennine Trains (TPT). The Business Plan and budget, as well as recovery plan will remain unchanged and TPE will remain as the delivery partner of TransPennine Route Upgrade. The focus going forward will be to deliver the recovery plan and reset relationships with passengers/stakeholders and unions.

8.1.4 Industrial relation issues have also had an impact on the performance of Train Operating Companies across the city region. These disruptions have resulted in decreases in patronage; although there is continued strong demand with the overall figures across the city region remaining at a high level of 95% or above.

8.2 Future Rail Infrastructure and Service Enhancements

8.2.1 Configuration State 1 of the Manchester Taskforce - the December 2022 timetable change has been successfully implemented and an assessment of performance has shown it is achieving significant reductions in delays, which at 40% is much better than modelling forecasts. It was expected that the timetable adjustments should have reduced average lateness by 20%. The Department for Transport have now committed to fund the delivery of Configuration State 2, which includes the delivery of Salford Crescent Platform 3, East of Manchester Victoria Turnback, West of Manchester Victoria Turnback and Manchester Victoria Passenger Capacity Improvements. Upon completion of the Configuration State 2 schemes, timetable changes will allow additional service to operate through North Manchester as well as further improving performance.

8.2.2 Work to progress Configuration State 3, which includes the redevelopment of Manchester Oxford Road and Platforms 15/16 at Manchester Piccadilly is ongoing. However, Network Rail has withdrawn a previous planning application (known as the Package C TWAO) for rail infrastructure work in the city which would have resulted in additional platform capacity at Piccadilly and Oxford Road stations to address the congested network through Castlefield Junction.

8.2.3 This effectively rules out the delivery of Piccadilly platforms 15/16 and in MCC & TfGM's view it is critical that a long-term plan is put in place immediately to address the capacity challenges which are severely limiting the north's rail network.

8.3 Network Rail Manchester Strategic Statement

8.3.1 Network Rail are in the process of producing a comprehensive framework for enhancing the conventional rail network across Greater Manchester to better match the long-term growth aspirations, and ambitious targets to achieve modal shift from road to public transport across the city region. The strategic statement aims to ensure a comprehensive understanding of the track capacity and capability associated with committed changes, such as HS2, Northern Powerhouse Rail (NPR) and TRU. It also encompasses consideration of the longer-term aspirations in central Manchester, as outlined in the Manchester Northern Transport Plan (MNTP).

8.3.2 The strategic statement is intended to establish a clear direction of travel by defining future configuration states, which will be subject to regular reviews as delivery dates for dependent programs mature. Additionally, the strategic statement examines various options for funders, assessing the financial aspects and determining where further work and analysis are needed to support the realisation of the rail network improvements in Greater Manchester.

8.4 Manchester City Centre Stations Vision

8.4.1 Network Rail and TfGM are promoting an approach to improving the six main stations of Central Manchester and Salford. Changing patterns in travel following the pandemic, and the changing nature of the city centre means that the stations present significant opportunities for re-purposing and providing new activities and functions to serve the respective locations.

8.4.2 A number of workshops and site visits have been organised by NR and TfGM, involving Salford Council, Manchester City Council, Transport for the North, Great British Railways Transition Team (GBRTT), HS2 and Northern Trains.

8.4.3 Stakeholders are currently working through a draft charter that once signed off will become a public document and commit us to delivering the changes that are required to improve and develop the stations across the city centre. The charter should be completed and signed off before the end of Dec 2023.

8.5 Greater Manchester Trailblazer Deeper Devolution Deal: Future Rail Partnership Working

8.5.1 The Greater Manchester Combined Authority have agreed the city-region's first devolution deal with the Government since 2017. For Rail, this means, by 2030, full integration of Rail Service into GM's Bee Network. This includes London-style integrated fares and ticketing across bus, Metrolink and rail, and Bee Network co-branding across the public transport network. This will be taken forward by a new Rail Partnership with Great British Railways, with the first pilots on integrated fares and ticketing agreed by the end of the year.

8.5.2 The deal lays the foundation for greater input into our stations, services and strategic infrastructure investment with the creation of the North West Regional Business Unit and GM Rail Board, both which are currently being mobilised by TfGM and are due to stand up this summer. As a result, both arrangements will improve local scrutiny of performance, help shape future service integration with the Bee Network and support the best possible public transport experience for the people and businesses in Greater Manchester.

8.5.3 The Trailblazer Deal Text contains a number of specific commitments, which are summarised with the Trailblazer Deeper Devolution Deal[2].

[2] Greater Manchester Combined Authority Trailblazer Deeper Devolution Deal

9.0 Appendices

Appendix A - Greater Manchester Transport Committee - Greater Manchester Transport Committee – Bus Sub Committee – Bus Performance Report - 20230310 GMTC Bus Network Performance Report (greatermanchester-ca.gov.uk)

Appendix B - Greater Manchester Transport Committee – Metrolink & Rail Sub Committee – Metrolink Performance Report - GMTC MRN 20211112 Metrolink Service Performance Report (greatermanchester-ca.gov.uk)

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GREATER MANCHESTER
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GREATER MANCHESTER TRANSPORT COMMITTEE

BUS SERVICES SUB COMMITTEE

Date:	Friday 10th March 2023
Subject:	Bus Performance Report
Report of:	Stephen, Rhodes, Director of Bus, TfGM

PURPOSE OF REPORT:

To inform members of the performance of the Greater Manchester bus network during the July 2022 to December 2022 period, with particular focus on the subsidised bus network.

RECOMMENDATIONS:

Members are asked to note the content of the report.

CONTACT OFFICERS:

Stephen Rhodes	Director of Bus	0161 244 1092 stephen.rhodes@tfgm.com
Martin Shier	Bus Network Performance Manager	0161 244 1684 martin.shier@tfgm.com

Equalities Implications:

N/A

Climate Change Impact Assessment and Mitigation Measures:

N/A

Risk Management:

N/A

Legal Considerations:

N/A

Financial Consequences – Revenue:

N/A

Financial Consequences – Capital:

N/A

Number of attachments to the report: 0

Comments/recommendations from Overview & Scrutiny Committee

N/A

BACKGROUND PAPERS:

None

TRACKING/PROCESS		
Does this report relate to a major strategic decision, as set out in the GMCA Constitution?		No
EXEMPTION FROM CALL IN		
Are there any aspects in this report which means it should be considered to be exempt from call in by the relevant Scrutiny Committee on the grounds of urgency?	No	
GM Transport Committee	Overview & Scrutiny Committee	
N/A	N/A	

1 INTRODUCTION

1.1 Greater Manchester has an extensive bus network covering approximately 49.0 million miles between January 2022 and December 2022 (a decrease of 8% compared with the financial year of 2021/2022) and supporting an annual ridership of 145.8 million passengers (an increase of 8.9 million passengers compared with the financial year of 2021/22). The network (551 services) is provided on both a commercial and subsidised basis by 39 operators (as of December 2022).

1.2 Transport for Greater Manchester (TfGM), financially supports and manages the subsidised bus network on behalf of the Greater Manchester Combined Authority (GMCA). The funding level for the subsidised network (22.6% of the overall network mileage), supports areas of the network which are not deemed commercially viable by operators, but are considered socially necessary, and also delivers an extensive network of school bus services.

1.3 Annual ridership on the subsidised bus network between January 2022 and December 2022 was 22.2 million, an increase of 6.0 million compared with the financial year of 2021/2022. This includes ridership on additional supported subsidised services to support the stabilisation of the network from October 2022 onwards.

1.4 Bus service provision represents a vital element of the Greater Manchester public transport network. Currently, three out of every four public transport journeys in Greater Manchester are undertaken by bus services. It is therefore essential that the performance of the bus network is closely monitored and understood, ensuring that not only is the quality of provision and customer journey experience maintained and enhanced, but the subsidised services budget is effectively and efficiently deployed.

1.5 Transport Focus surveys have consistently indicated that key customer priorities are value for money, driver behaviour, punctuality/reliability, and journey time.

1.6 Patronage on the bus network overall is currently an estimated 86% of pre-Covid levels and is around 15% up on the equivalent period last year. An evaluation[1] of the first three months of Greater Manchester's £2 / £5 Bus Fare Offer (September – December 2022) shows that this initiative contributed to an increase of bus patronage of 10% over this period. Whilst it is difficult to directly attribute the proportion of this increase which results from the fares offer and what is attributable to the ongoing recovery of travel markets post pandemic, initial estimates are that approximately 5% is due to the fares offer, equating to approximately 1.5 million additional journeys in just three months. This is particularly encouraging in respect of promoting changes in travel behaviour and encouraging mode shift from car.

1.7 This report covers the period of July 2022 – December 2022 which includes the ongoing recovery following the impact of the pandemic, bus and rail industrial strike actions, and a national driver shortage affecting the industry. In addition, TfGM introduced the standard fare initiative from September 2022 and received the commercial portion of the Bus Revenue Grant (BRG) from government to support network stabilisation and respond to proposed reductions from commercial operators.

2 OPERATIONAL PERFORMANCE

2.1 This section of the report presents network wide bus operational performance statistics for the Greater Manchester region, extracted from the ITO World Transit Hub (Discover) to formally report punctuality, reliability and regularity measures from October 2022. This section of the report will cover the period of October 2022 – December 2022.

2.2 The ITO World Transit Hub uses automated vehicle location (AVL) and timetable (TransXChange) information, with a matching process taking place between these 2 sets of data. ITO World Transit Hub covers the entire network and services, including school services, 24hrs a day, 7 days a week.

[1] https://tfgm.com/data-analytics-and-insight/surveys-and-research/low-bus-fares

2.3 TfGM's in-house Punctuality Reliability Monitoring System (PRMS) ended on the 30th September 2022. PRMS was based on manual observations on a small sample of the network and services during observational periods.

2.4 Figure 1 provides a comparison of the months October 2022 – December 2022 using the ITO World Transit Hub system of the key bus services operational performance indicators, spilt between those registered to adhere to a timetable with specific departure times (scheduled services) and those registered to operate six buses an hour or more, with the associated timetable stating the service frequency (frequent services).

2.5 Using the same core data set, a different methodology was used to calculate reliability and overall punctuality, compared with start and intermediate (mid-point) punctuality. Reliability and overall punctuality include frequent service intervals provided by ITO World Transit Hub (Discover). Start and intermediate (mid-point) punctuality excludes frequent service intervals and is generated 'in house' within TfGM, as these measures are currently not available via ITO World Transit Hub. Start and intermediate (mid-point) punctuality will be provided by ITO World Transit Hub in the forthcoming months.

Figure 1: Bus Service Operational Performance

		October 2022		November 2022		December 2022	
Indicator	Standard	Recorded Departures/ Observations	%	Recorded Departures/ Observations	%	Recorded Departures/ Observations	%
Scheduled Services							
Reliability*	97.00%	1,975,099	80.68%	1,505,612	80.55%	1,846,248	80.86%
Overall Punctuality*	80.00%	1,975,099	67.48%	1,505,612	64.46%	1,846,248	66.65%
Start Point Punctuality**	90.00%	421,975	75.94%	330,612	73.25%	389,845	74.73%
Intermediate (Mid-Point) Punctuality**	70.00%	1,290,601	59.73%	1,021,009	57.41%	1,219,375	58.22%
Frequent Services							
Regularity	97.00%	266,414	94.25%	225,162	92.85%	245,381	94.44%

Note: The ITO World Transit Hub was unavailable for 7 days between the 16th – 22nd November 2022, due to a technical issue.
**** Includes frequent service intervals***
***** Excludes frequent service intervals***

Scheduled Service Performance

2.6 The reliability of scheduled services (Figure 1) at the network level was below the Traffic Commissioner's minimum standard of 97.00% throughout the period of October 2022 – December 2022, with performance just above 80.00%.

2.6.1 Reliability reporting is based on scheduled/timetabled departures versus recorded/actual departures, using GPS/AVL information which can be limited by ticket machine hardware and network reception/coverage.

2.7 Start-point punctuality of scheduled services is an area where TfGM has sought more action on the part of the operator, as it is incumbent on them to provide reasonable recovery time and develop contingency plans to enable journeys to start punctually. Traffic congestion in the Regional Centre has historically hampered the increased recovery times put in place by some operators, particularly given the limited space available for vehicle layover.

2.8 The start-point punctuality of scheduled services (Figure 1) at the network level was below the Traffic Commissioner's minimum standard of 90.00% throughout the period of October 2022 – December 2022, with average performance of below 75.00% over the 3 months.

2.9 The mid-point punctuality of scheduled services (Figure 1) at the network level was below the Traffic Commissioner's minimum standard of 70.00% throughout the period of October 2022 – December 2022, with performance below 60.00%

2.10 Overall punctuality for scheduled services (Figure 1) at the network level was below the Traffic Commissioner's minimum standard of 80.00% throughout the period of October 2022 – December 2022, with performance below 70.00%.

2.11 Performance measures, as shown by the key bus services operational performance indicators, are lower compared with the data previously reported by the PRMS system, as the ITO World Transit Hub is providing a more accurate and fuller comprehensive coverage of the network. In addition, there continues to be a general driver shortage impacting the bus industry and the ability for operators to provide services as planned, as well as increased congestion and roadworks taking place on the network, affecting performance.

2.12 For Bus Franchising, an AVL system is being procured to provide the operational performance indicators.

Frequent Service Performance

2.13 In the case of frequent services, the key issue for passengers is not the adherence to a specific set of timetabled departures, but the regularity of the service compared to their expectations. Performance is measured at intermediate timing points of a journey therefore this is another area where internal targets acknowledge there may be a need for highways management interventions to achieve the minimum standards.

2.14 The mid-point regularity of frequent services (Figure 1) at the network level was below the Traffic Commissioner's minimum standard of 97.00% throughout the period of October 2022 – December 2022, with performance below 95.00%.

Fleet Profile

2.15 Since 1992, European Union (EU) regulations have been imposed on new engines, with the aim of improving air quality - meaning an engine must meet certain Euro emissions standard when it is made. The aim of Euro emissions standards is to reduce the levels of harmful exhaust emissions, chiefly:

- Nitrogen oxides
- Carbon monoxide
- Hydrocarbons
- Particulate matter

2.16 The first Euro emission standard (Euro 1) was introduced in 1992 and the latest Euro 6 emission standard in 2015. In November 2022, the EU published their proposal detailing the new Euro 7 emission standards with the aim to ensure cars, vans, lorries and buses are much cleaner, in real driving conditions that better reflect the situation in cities where air pollution problems are largest, and for a much longer period than under current rules.

2.17 A hybrid engine combines a petrol or diesel engine with an electric motor powered by a battery. The battery is charged by capturing energy from braking and, under certain conditions, from the engine.

2.18 Figure 2 highlights the observed profile of the network bus fleet, in terms of vehicle age and the engine emissions standard. The vehicle fleet profile is based upon the fleet data collated as part of the Clean Air programme.

Figure 2: Vehicle Fleet Profile

Vehicle Type	31/03/2021	31/03/2022	30/09/2022	Direction Change 2022
Euro VI (Incl Electric vehicles)	36.53%	71.71%	88.84%	Improving
Euro IV+ (E4, E5, E6 & Electric vehicles)	94.51%	98.99%	99.63%	Improving
Hybrid Diesel	13.45%	11.85%	12.19%	Improving
Electric Only	1.83%	1.53%	1.63%	Improving
Vehicle Age (Average)	9.2 years	9.4 years	10.1 years	Worsening

2.19 At the end of September 2022, 99.63% of vehicle engines were of an emission standard of 4 and above and 88.84% of these vehicle engines were of an emission standard of 6 and/or an electric vehicle, an increase compared with the end of March 2022, and a significant increase since March 2021, with the aim of improving air quality. The usage of hybrid diesel engines has improved slightly between the 31/03/2022 and 30/09/2022 from 11.85% to 12.19%.

2.20 The average age of the vehicle fleet has increased between March 2022 and September 2022, with the average fleet age at 10.1 years.

2.21 Greater Manchester's Clean Air Plan is under review with Government. However, as the emissions reduction for a bus changing from a non-compliant vehicle to a Euro VI model is substantial the Clean Air Funding for bus replacement and retrofit for GM registered bus services remains open to operators. To end January 2023, 877 buses have been retrofitted and 69 vehicles have been replaced, these upgrades mean that 89% of the bus fleet serving Greater Manchester is now compliant with clean air standards. The fleet profile will continue to improve as Bus Franchising is implemented, including the procurement of 100 new zero emission electric buses for Bus Franchising Tranches 1 and 2.

SUBSIDISED BUS NETWORK PERFORMANCE

Overview

2.22 Over the 6-month period July 2022 – December 2022, the total estimated bus network mileage within Greater Manchester was 23,875,742 miles. Commercial services provided 77% (18,404,370 miles) of the total estimated bus network mileage and TfGM subsidised services the remaining 23% (5,471,372 miles), supporting socially necessary and school bus services.

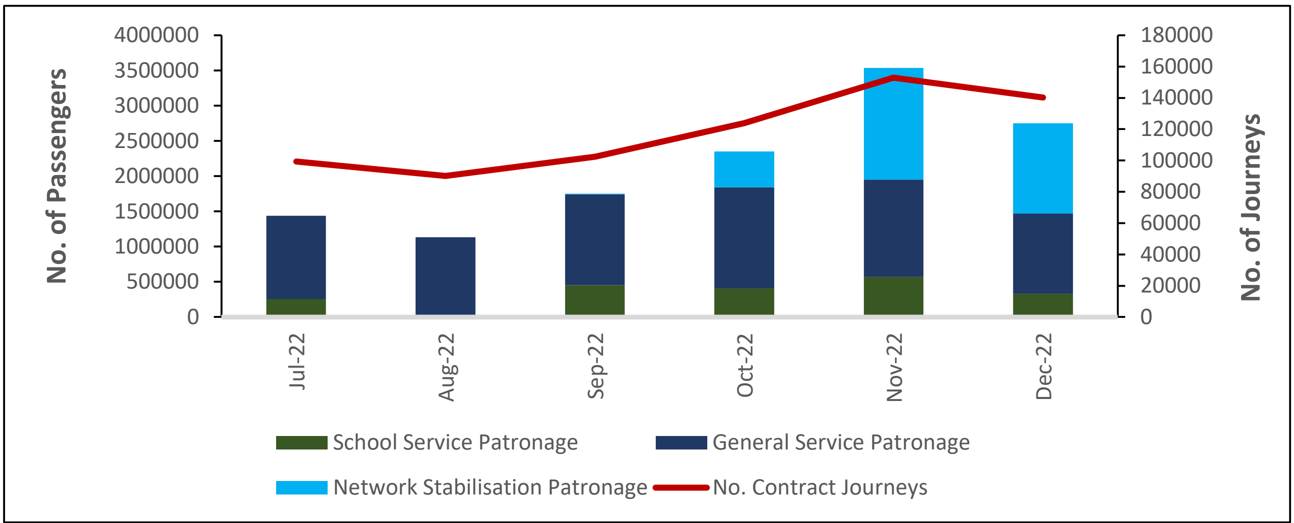
2.23 In December 2022, there were 496 subsidised service contracts in operation, compared with 460 in December 2021. In December 2022, there were 265 school subsidised service contracts and 231 general (normal) subsidised service contracts, of which 63 were network stabilisation contracts, provided by a total of 21 operators. The largest 3 operators of subsidised service contracts in December 2022 were Stagecoach Manchester (137 contracts/28% market share), Vision Bus Ltd (63 contracts/13% market share) and First Manchester (41 contracts/8% market share).

2.24 In December 2022, subsidised bus mileage was estimated to be 980,769 miles, compared with 809,230 miles in December 2021, an increase of 21% due to the increase of subsidised supported contracts, to support network stabilisation and respond to proposed reductions from commercial operators. The largest 3 operators of subsidised bus mileage in December 2022 were Stagecoach Manchester (339,329 miles/35% mileage share), Diamond Bus (150,797 miles/15% mileage share) and Vision Bus Ltd (109,870 miles/11% mileage share).

Patronage

2.25 Patronage information is collated and analysed each month to identify trends, increase our understanding of passenger demand across the subsidised bus network and facilitate contract management. Figure 3 presents the monthly patronage profile on subsidised bus services, along with the number of contracted journeys for the July 2022 – December 2022 period.

Figure 3: Subsidised Bus Service Patronage (July 2022 – December 2022)



2.26 Overall subsidised service patronage, including the school, general and network stabilisation supported services for the period of July 2022 – December 2022 was 12,962,584 passengers, on 708,766 journeys, with an average of 18 passengers per journey.

2.27 Excluding the network stabilisation patronage, subsidised service patronage including the school and general network for the period of July 2022 – December 2022 was 9,572,070 passengers on 586,183 journeys, with an average of 16 passengers per journey. The level of patronage has increased by 17% (1,366,316 passengers) compared with the patronage level recorded between July 2021 – December 2021 of 8,205,754 passengers and reflects the continued recovery in bus travel following the COVID-19 pandemic. The number of journeys has increased by

3% compared with the number of journeys recorded between July 2021 – December 2021 of 570,834 journeys. Average passengers per journey between July 2021 – December 2021 was 14.

2.28 General subsidised service patronage for July 2022 – December 2022 was 7,554,375. The level of patronage has increased by 18% (1,350,160 passengers) compared with the patronage level recorded between July 2021 – December 2021 of 6,204,215 passengers.

2.29 Between July 2022 – December 2022, the main 3 operators carrying general services subsidised patronage were Stagecoach Manchester (50.04% and 3,779,925 passengers), Go North West (9.06% and 684,725 passengers) and Rosso (8.51% and 642,985 passengers).

2.30 Schools subsidised service patronage for July 2022 – December 2022 was 2,017,695. This represents an increase of 1% (16,156 passengers) compared with 2,001,539 passengers between July 2021 – December 2021.

2.31 Between July 2022 – December 2022, the main 3 operators carrying schools subsidised patronage were: Stagecoach Manchester (25.65% and 517,591 passengers), Vision Bus (13.56% and 273,524 passengers) and First Manchester (12.11% and 244,394 passengers).

2.32 TfGM was provided the commercial portion of the Bus Revenue Grant (BRG) from the Department for Transport (DfT), from October 2022 onwards, to support network stabilisation and respond to proposed reductions from commercial operators. Patronage on services supported via network stabilisation between October 2022 – December 2022 was 3,390,514.

2.33 Between October 2022 – December 2022, the main 3 operators carrying network stabilisation service patronage were Stagecoach Manchester (47.87% and 1,623,101 passengers), Diamond Bus (21.30% and 722,229 passengers) and First Manchester (19.70% and 667,971 passengers).

2.34 Subsidised service patronage is recovering. Patronage, excluding network stabilisation patronage for the rolling 12-month period of January 2022 – December 2022 was 18,844,346 passengers and remains 4% lower compared with the 2019/2020 financial year (19,675,699 passengers).

Contract Cost

2.35 Contract payments for the subsidised services totalled £18,237,542 for the period of July 2022 – December 2022. This is a 30% (£4,219,123) increase in the expenditure for contract payments compared with the period between July 2021 – December 2021 (£14,018,419). This is reflective of the increase in subsidised supported contracts, to support network stabilisation and respond to proposed reductions from commercial operators.

2.36 The cost per passenger for the period of July 2022 – December 2022 was £1.41, a decrease of 18% compared with the cost per passenger for the 6-month period between July 2021 – December 2021 of £1.71.

Declared Lost Mileage

2.37 Operators are contractually obliged to declare any lost mileage that occurs on TfGM contracts each month and these declarations are subsequently verified through analysis of their electronic ticket machine data. The proportion of declared lost mileage incurred on the subsidised service network between July 2022 and December 2022, broken down by contract type is presented in Figure 4.

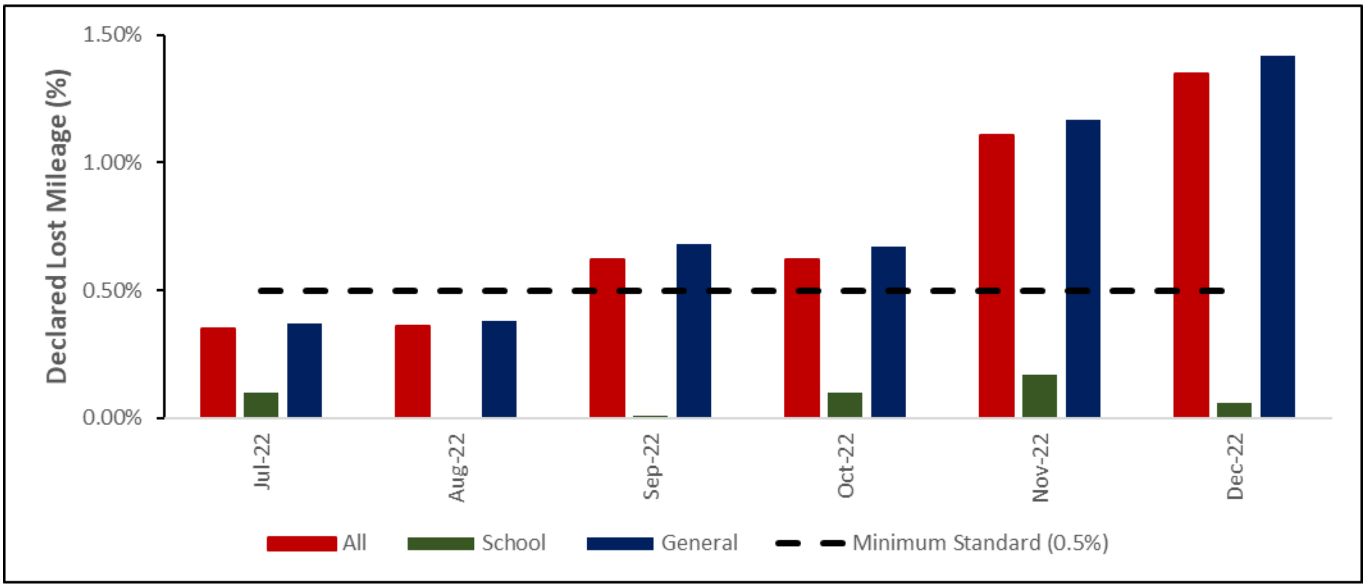
2.38 Between July 2022 and December 2022, the declared lost mileage for all subsidised services was 47,987 miles, which represented 0.81% of the subsidised scheduled mileage. The significant service delivery issues relating to the national driver shortage must be acknowledged as a significant impact in the period under review. This is an increase compared with the period between July 2021 and December 2021 declared lost mileage for all subsidised services of 41,216 miles, representing

0.88% of the subsidised scheduled mileage. Declared lost mileage is above the industry standard of 0.5%.

2.39 General subsidised declared lost mileage for the period between July 2022 and December 2022 was 47,671 miles, representing 0.86% of the general subsidised scheduled mileage. This is an increase compared with the period between July 2021 and December 2021 declared lost mileage for all subsidised services of 40,578 miles, representing 0.95% of the subsidised scheduled mileage. Declared lost mileage is above the industry standard of 0.5%.

2.40 Schools subsidised declared lost mileage for the period between July 2022 and December 2022 was 297 miles, representing 0.08% of the school subsidised scheduled mileage. This is a reduction compared with the period between July 2021 and December 2021 declared lost mileage for all subsidised services of 637 miles, representing 0.15% of the subsidised scheduled mileage. Declared lost mileage is below the industry standard of 0.5%.

Figure 4: Declared Lost Mileage (July 2022 – December 2022)



2.41 The main 3 reasons for declared lost mileage for all subsidised services as identified by operators during the period between July 2022 and December 2022 were: staff shortage (44% affecting 21,287 miles), bus breakdowns (24% affecting 11,495 miles) and traffic congestion and enforcement (22% affecting 10,497 miles).

Operational Performance

Figure 5: Subsidised Bus Network Operational Performance

		October 2022		**November 2022**		**December 2022**	
Indicator	Standard	*Recorded Departures/ Observations*	%	Recorded Departures/ Observations	%	Recorded Departures/ Observations	%
Scheduled Services							
Reliability*	97.00%	485,995	81.61%	519,241	81.60%	966,760	81.90%
Overall Punctuality*	80.00%	485,995	67.38%	519,241	64.63%	966,760	67.31%
Start Point Punctuality**	90.00%	275, 988	74.57%	191, 761	74.48%	301,612	74.37%
Intermediate (Mid-Point) Punctuality**	70.00%	1,218,612	59.06%	666, 112	58.36%	1,362,307	58.12%

Note: The ITO World Transit Hub was unavailable for 7 days between the 16th – 22nd November 2022, due to a technical issue.
**** Based on subsidised individual trips/journeys***
*****Based on subsidised services (full and partial services)***

2.42 This section of the report presents subsidised bus network operational performance statistics for the Greater Manchester region, extracted from the ITO World Transit Hub (Discover) to formally report punctuality and reliability measures from October 2022. This section of the report will cover the period of October 2022 – December 2022.

2.43 ITO World Transit Hub covers the subsidised network and services, including school services, 24hrs a day, 7 days a week.

2.44 Using the same core data set, a different methodology was used to calculate reliability and overall punctuality, compared with start and intermediate (mid-point) punctuality. Reliability and overall punctuality are based on subsidised trips/journeys as defined by the ITO World Transit Hub (Discover). Start and intermediate (mid-point) punctuality are based on subsidised services (full and partially subsidised) and are generated 'in house' within TfGM. Start and intermediate (mid-point) punctuality will be provided by ITO World Transit Hub in the forthcoming months.

2.45 The reliability of subsidised scheduled services (Figure 5) was below the Traffic Commissioner's minimum standard of 97.00% throughout the period of October 2022 – December 2022, with performance just above 80.00%.

2.45.1 Reliability reporting is based on scheduled/timetabled departures versus recorded/actual departures, using GPS/AVL information which can be limited by ticket machine hardware and network reception/coverage.

2.46 The start-point punctuality of subsidised scheduled services (Figure 5) was below the Traffic Commissioner's minimum standard of 90.00% throughout the period of October 2022 – December 2022, with performance just below 75.00%

2.47 The mid-point punctuality of subsidised scheduled services (Figure 5) was below the Traffic Commissioner's minimum standard of 70.00% throughout the period of October 2022 – December 2022, with performance just below 60.00%

2.48 Overall punctuality for subsidised scheduled services (Figure 5) was below the Traffic Commissioner's minimum standard of 80.00% throughout the period of October 2022 – December 2022, with performance below 70.00%.

2.49 As with the overall network, operational performance indicators are lower compared with the data previously reported by the PRMS system, as the ITO World Transit Hub is providing a more accurate and fuller comprehensive coverage of the network. In addition, there continues to be a general driver shortage impacting the bus industry and the ability for operators to provide services as planned, as well as increased congestion and roadworks taking place on the network, affecting performance.

Customer Comments

2.50 Customer comments/complaints are received via the Customer Experience Platform (CPX) at TfGM, for commercial, subsidised and Local Link services. The level of customer comments/complaints received during the period of July 2022 – December 2022 for commercial, subsidised and Local Link services is presented in Figure 6.

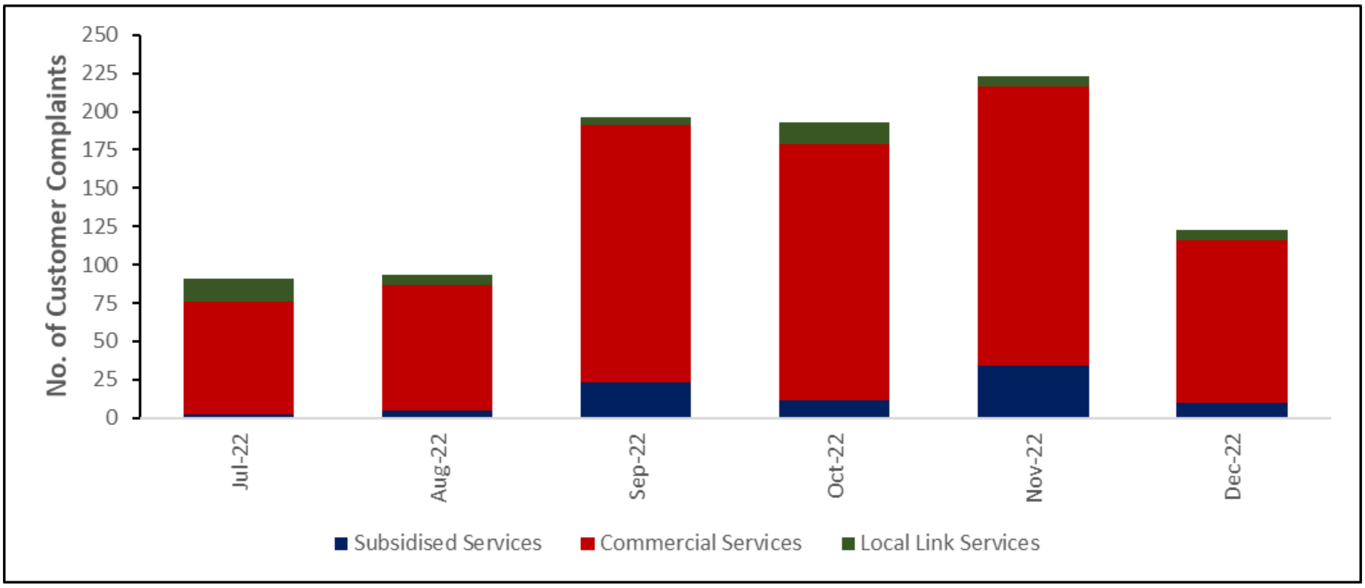
2.51 There were 85 subsidised bus service comments/complaints received by TfGM during the period of July 2022 to December 2022, which were within the operators control and their responsibility. This is the same of level of comments/complaints received compared with the 6-month period between July 2021 – December 2021 of 85, which were also deemed within the operators control and their responsibility.

2.52 The main 3 reasons of customer comments/complaints received during the period of July 2022 – December 2022 were service failure (25% / 21 comments/complaints), punctuality/reliability (24% / 20 comments/complaints) and driver behaviour (13% / 11 comments/complaints).

2.53 There were 54 Local Link comments/complaints received by TfGM during the period of July 2022 to December 2022. This is a reduction of 26% in the number of comments/complaints received, compared with the 6-month period between July 2021 – December 2021 of 73.

2.54 The main 3 reasons of customer comments/complaints received during the period of July 2022 – December 2022 were service failure (50% / 27 comments/complaints), booking error (19% / 10 comments/complaints) and other problem (15% / 8 comments/complaints). Examples of other problem classification areas include lack of wheelchair access, lack of service coverage in specific areas and unhappy with vehicle size.

Figure 6: Customer complaints/comments (July 2022 – December 2022)



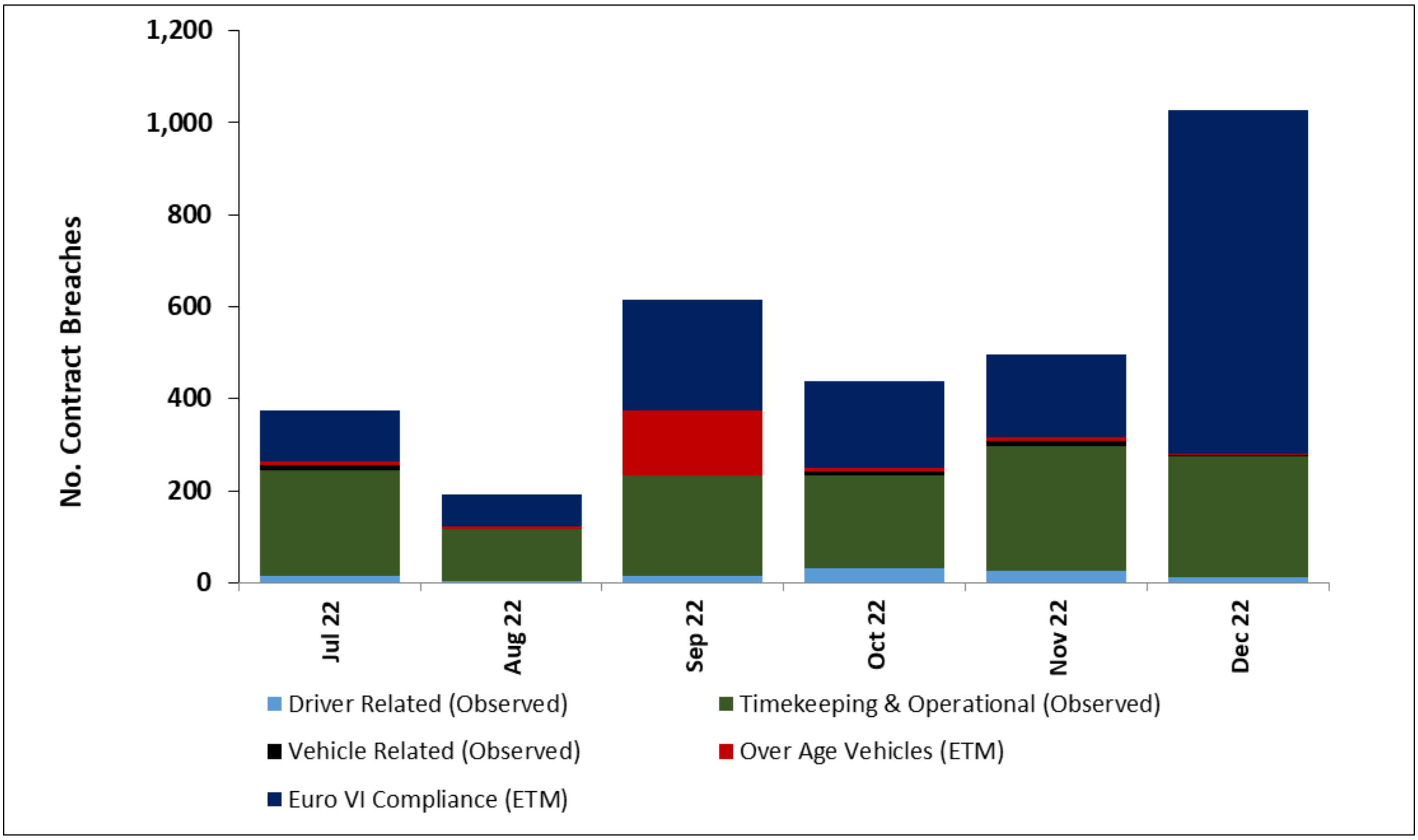
Contract Breaches

2.55 Contract breaches are reported failures to deliver a subsidised service in accordance with the contract specification and result in a financial deduction being made from the operator's monthly payment. The level of financial penalty is dependent on the number and composition of breach types. Figure 7 shows the monthly number of contract breaches by type and source for the period of July 2022 – December 2022.

2.56 49% of contract breaches between July 2022 and December 2022 were attributed to Euro VI non-compliant breaches (1,535), 41% were due to timekeeping and operational breaches (1,297), 6% were attributed to over age vehicles (174), 3% were driver related (103) and 1% were vehicle related (34).

2.57 Euro VI compliance monitoring was introduced for all new tendered contracts from in September 2021, as part of the Clean Air Programme.

Figure 7: Contract Breaches (July 2022 – December 2022)



Vehicle Profile

2.58 In December 2022, the average age of the vehicle fleet used on the subsidised network was 9.37 years. When compared by contract type, the average age of the vehicle fleet used on general services was 9.42 years and on the school network was 9.83 years. The average age of the vehicle fleet overall and on both the general and schools network remains below TfGM's tendered age limit of 15 years.

Deductions from Operator Payments

2.59 Contract deductions are a financial deduction made from the operator's monthly payment. Declared lost mileage and contract breaches, including employing overage vehicles on the network, contribute towards the financial deductions made.

2.60 Contract deductions for the subsidised services totalled £189,691 for the period of July 2022 – December 2022. This is a 37% (£51,688) increase in the contract deductions made in the period between July 2021 – December 2021 (£138,003)

2.61 Contract deductions represented 1.04% of the total contract payments paid (£18,237,542) in the period of July 2022 – December 2022, compared with 0.98% of the total contract payments paid (£14,018,419) during the 6-month period between July 2021 – December 2021.

3 RECOMMENDATIONS

3.1 Recommendations are set out at the front of this report

Stephen Rhodes
Director of Bus

GREATER MANCHESTER
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GREATER MANCHESTER TRANSPORT COMMITTEE
METROLINK AND RAIL NETWORKS SUB-COMMITTEE

Date:	Friday 03 March 2023
Subject:	Metrolink Service Performance
Report of:	Danny Vaughan, Head of Metrolink, TfGM

Purpose of Report

This report provides an update on Metrolink services and performance.

Recommendations:

Members are asked to note the contents of this report.

Contact Officers

Danny Vaughan	Head of Metrolink	daniel.vaughan@tfgm.com
Victoria Mercer	Metrolink Service Delivery Manager	victoria.mercer@tfgm.com

BOLTON MANCHESTER ROCHDALE STOCKPORT TRAFFORD
BURY OLDHAM SALFORD TAMESIDE WIGAN

Equalities Implications: n/a

Climate Change Impact Assessment and Mitigation Measures: n/a

Risk Management: n/a

Legal Considerations: n/a

Financial Consequences – Revenue: n/a

Financial Consequences – Capital: n/a

Number of attachments to the report: 2

- Appendix 1: Period date listing
- Appendix 2: Patronage by line

Comments/recommendations from Overview & Scrutiny Committee: n/a

BACKGROUND PAPERS: Metrolink Service Performance report of 13 January 2023

TRACKING/PROCESS

Does this report relate to a major strategic decision, as set out in the GMCA Constitution? No

EXEMPTION FROM CALL IN Are there any aspects in this report which means it should be considered to be exempt from call in by the relevant Scrutiny Committee on the grounds of urgency? No

GM Transport Committee n/a

Overview & Scrutiny Committee n/a

1. ABOUT METROLINK

1.1 Metrolink is the largest urban light rail network in the UK. It provides a fast, frequent service which is fully accessible to all, running 7 days a week, 364 days of the year.

1.2 The Metrolink network is owned by TfGM and is operated and maintained on TfGM's behalf through a contract with KeolisAmey Metrolink (KAM).

1.3 The network uses high-floor trams with raised platform stops and had reached patronage of over 45 million passengers each year prior to the covid pandemic.

1.4 There are 147 trams serviced from two depots.

1.5 Trams serve 99 stops covering routes totalling just over 100km. Metrolink is the most accessible of the public transport networks in Greater Manchester, providing step free access across the entire network.

2. PERFORMANCE SUMMARY

2.1 The Metrolink Quarterly Performance Report provides a performance summary for the rolling 12-month period.

2.2 As expected, patronage numbers decreased during the Christmas holiday period, recovering steadily post-Christmas reaching 85% of the pre-covid patronage average at the end of January 2023.

2.3 Commuter trip numbers during the morning and evening peak periods are estimated to have reached 100% of pre-covid equivalent numbers on Tuesdays, Wednesdays and Thursdays.

2.4 Weekend trips have broadly returned to 100% of pre-pandemic levels, with increased patronage correlating to major events in Greater Manchester, with more people than ever using Metrolink to get to football matches.

2.5 Reliability performance deteriorated slightly in periods nine and ten due to 2 incidents: a derailment in period 9 and a signal fault in period 10. Both occurred on the critical section of track between St Peter's Square and Cornbrook, where incidents impact a number of lines and services.

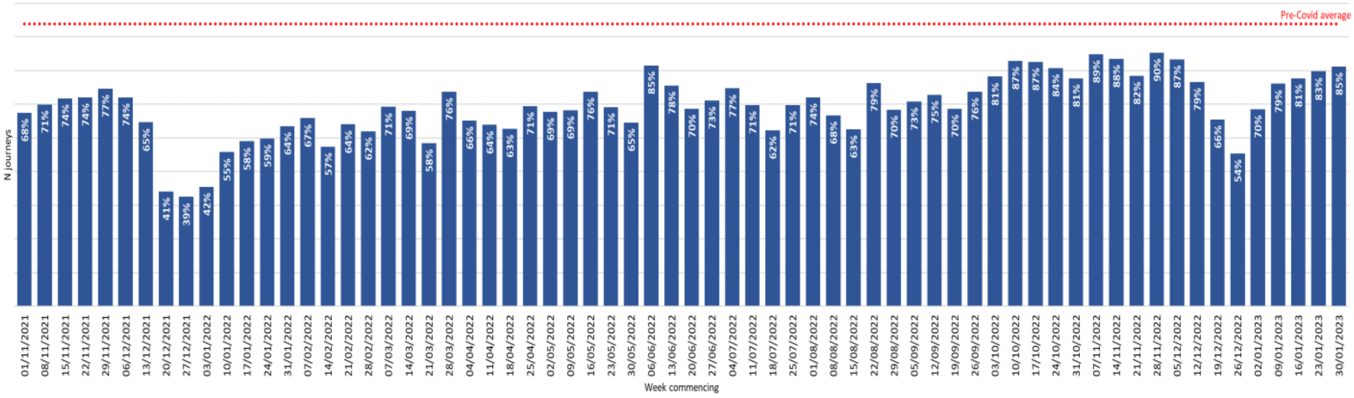
2.6 Metrolink performance was also impacted by ongoing rail strikes which affected operation through Navigation Road and Altrincham stops. Detailed performance is outlined in section 4.

2.7 Looking ahead to planned engineering works for 2023, we will have an ongoing programme of planned works which will be shorter in duration throughout the year landing on weekends and evenings, with some longer duration track and tunnel works in planning for the summer months. Planned works for March are outlined in section 5.1.

3. PATRONAGE

3.1 Patronage measures the number of single journeys that are made on the network.

3.2 Seasonality impacts are clearly visible in the chart.



3.3 Seasonal impacts include dates around national holidays, school holiday periods, students returning to all tiers of education and the Premier League football calendar. Patronage is also influenced by concerts and other high profile spectator events across the duration of the year.

3.4 Journeys on the network fluctuate in correlation with these seasonal impacts and events. Patronage consistently remained above 80% and reached 90% of pre-covid levels in the lead up to Christmas 2022.

3.5 As expected, patronage numbers decreased during the Christmas holiday period, recovering steadily post-Christmas reaching 85% of the pre-covid patronage level at the end of January 2023.

3.6 Patronage recovery levels post-Christmas 2022 are approximately 50% higher than the equivalent post-Christmas period in 2021.

3.7 Commute trip numbers across the full week are estimated to have recovered to approximately 88% of pre-Covid average numbers in January 2023 with Tuesday through Thursday typically reaching or exceeding 100% of pre-covid AM peak commute numbers.

3.8 Following a review of patronage numbers and passenger feedback, 2 double units have been reintroduced on the Airport line to enhance capacity in the AM and PM peak periods. Further work is being undertaken to review patronage levels and increase some peak capacities where required in 2023.

3.9 Driver recruitment and training remains an area of focus in order to stabilise operational performance, enhance capacities and support further recovery through 2023.

3.10 A breakdown of patronage by line can be found in Appendix 2.

4. OPERATIONAL AND CUSTOMER PERFORMANCE

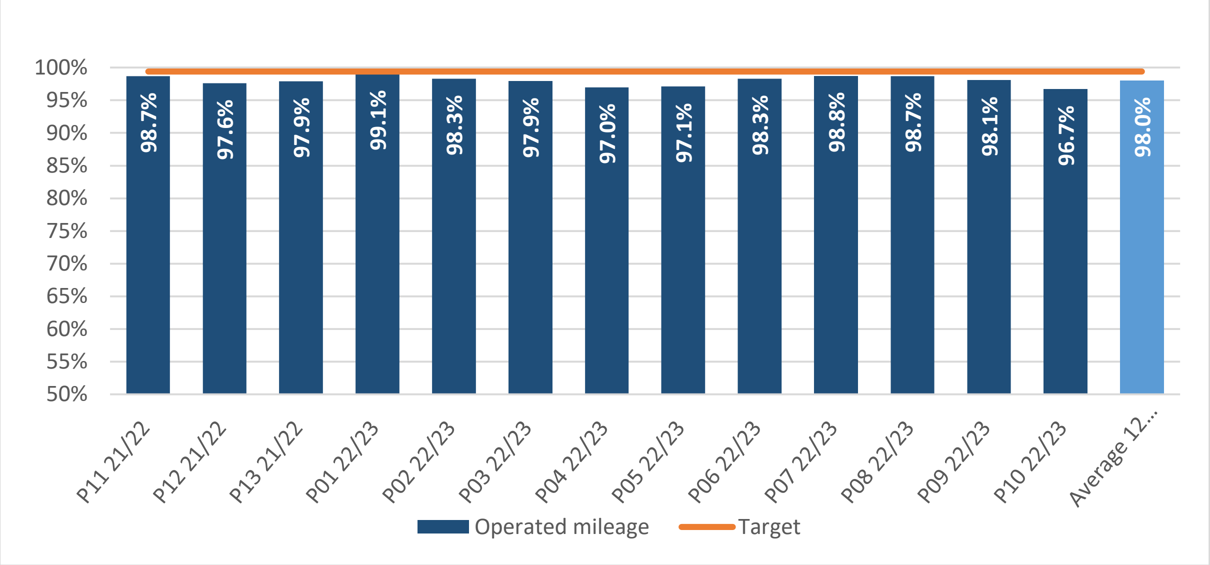
RELIABILITY

4.1 Reliability is measured by operated mileage. Operated mileage is the number of tram vehicle miles operated compared with the number of scheduled miles, with a target of 99.4% before the pandemic.

4.2 Reliability deteriorated slightly in periods nine and ten. The incidents which most influenced performance were:

- Period nine: on 23 November a tram derailed near St Peter’s Square which meant that services heading into the city centre were able to access the city at Deansgate-Castlefield, Victoria and Piccadilly, but nothing was able to cross the city centre from mid-afternoon until 20:00. Residual minor delays impacted the network for the rest of the day.
- Period ten: on 14 December, a signalling fault at Cornbrook impacted the network whereby services heading towards the city centre from the south side had to turn short. Services heading towards the south of the network turned at Deansgate-

Castlefield. The duration of this incident was only 30 minutes but the central location of Cornbrook amplified the effect of the disruption.



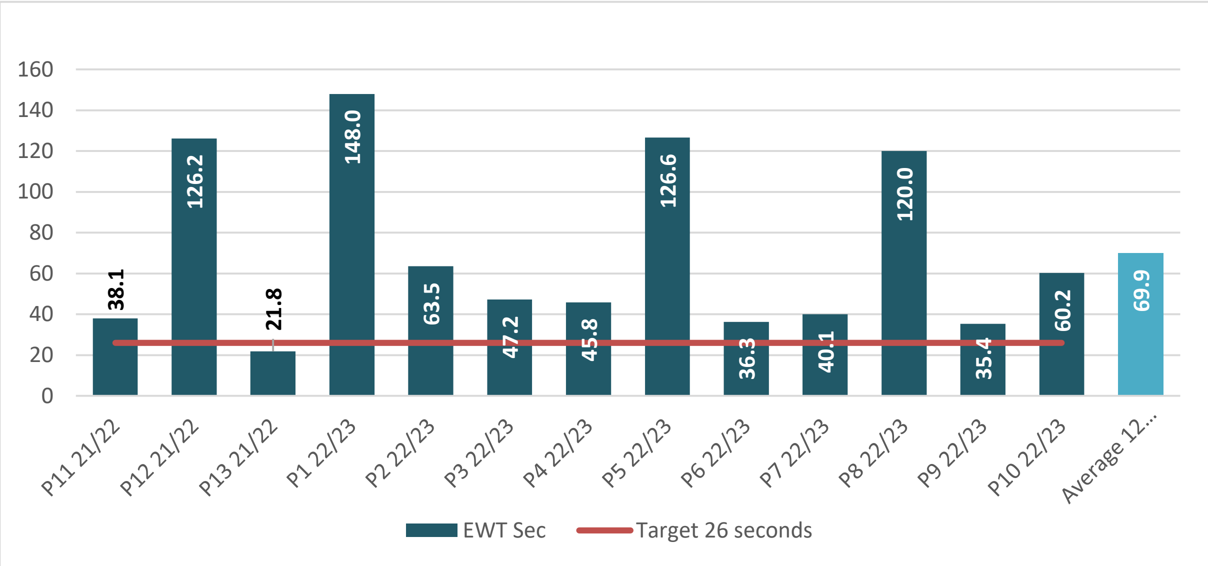
EXCESS WAIT TIME

4.3 Excess Wait Time (EWT) is a measure of punctuality. It is the average time passengers wait over what would have been expected if the service were running exactly as scheduled.

4.4 The average EWT performance for the 12 months to November 2022 was 69.9 seconds against a pre-pandemic target of 26 seconds.

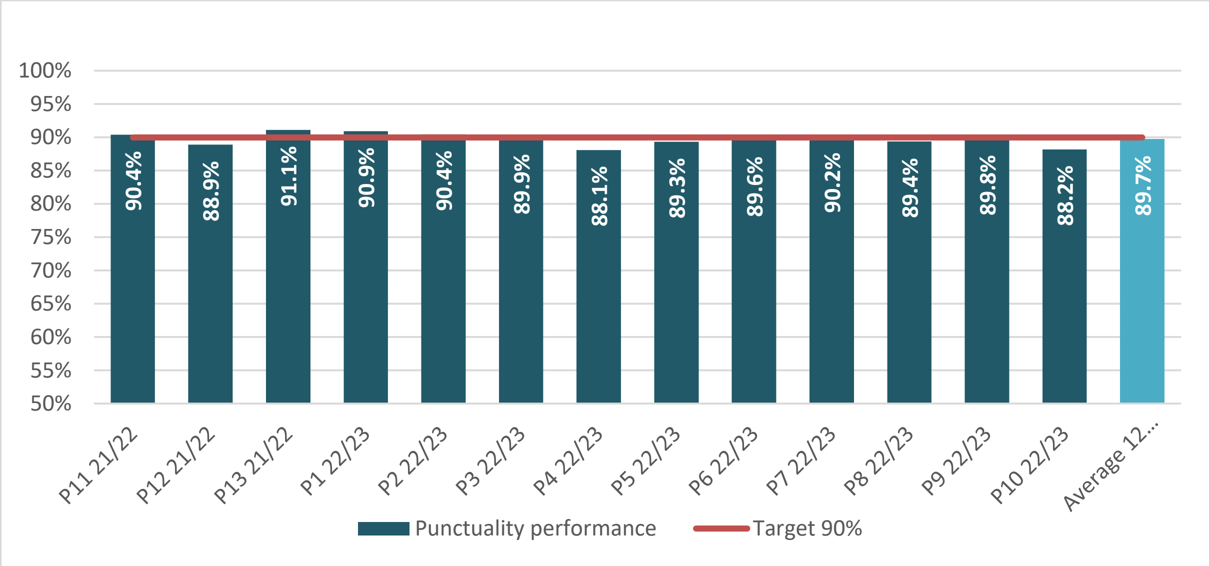
4.5 Performance in periods seven and eight was impacted by the incidents described above in 4.1.

4.6 The chart below shows EWT performance over the year. In this case a lower number is better performance for our passengers.



PUNCTUALITY PERCENTAGE OF SERVICES OPERATING TO TIME

4.7 Punctuality performance covering the previous 12 months (13 periods) is shown below.



4.8 Performance improved to just shy of target in period nine. Period ten performance deteriorated slightly, but the average 12-month performance remains very close to target.

ASSET RELIABILITY - TRAMS

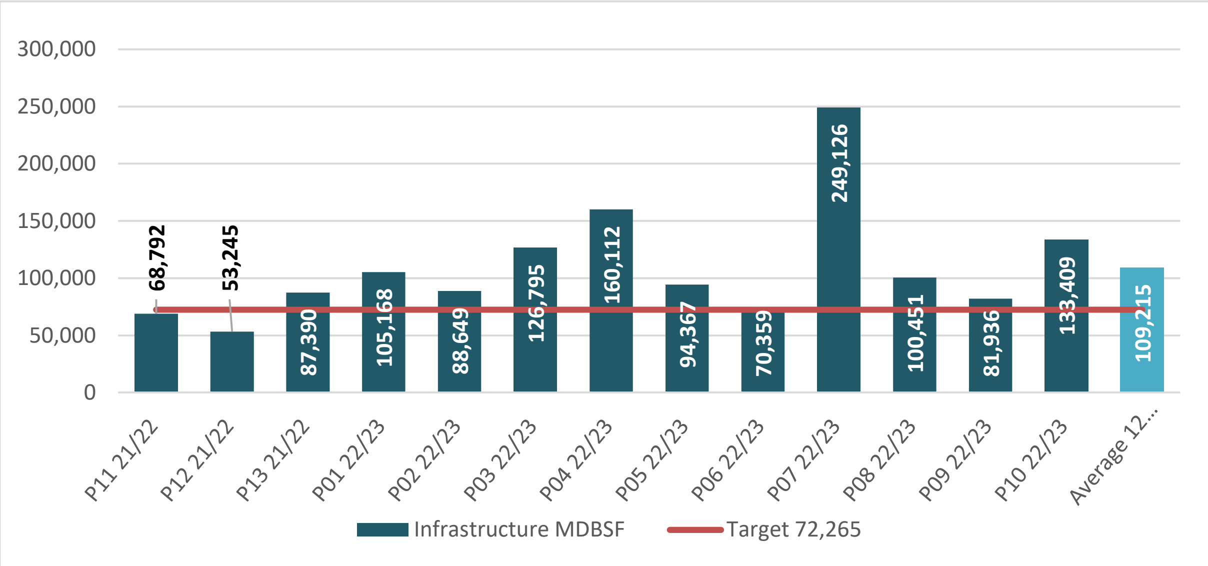
4.9 Tram availability shows percentage of the fleet that has been available during each period.

4.10 Recent periods have seen continued high levels of anti-social behaviour, resulting in six smashed glazing panels, seven smashed passenger doors and four vandalised interior panels. Offensive graffiti and etching continue to be a problem. This significant level of damage impacts on vehicle availability.

ASSET RELIABILITY – INFRASTRUCTURE

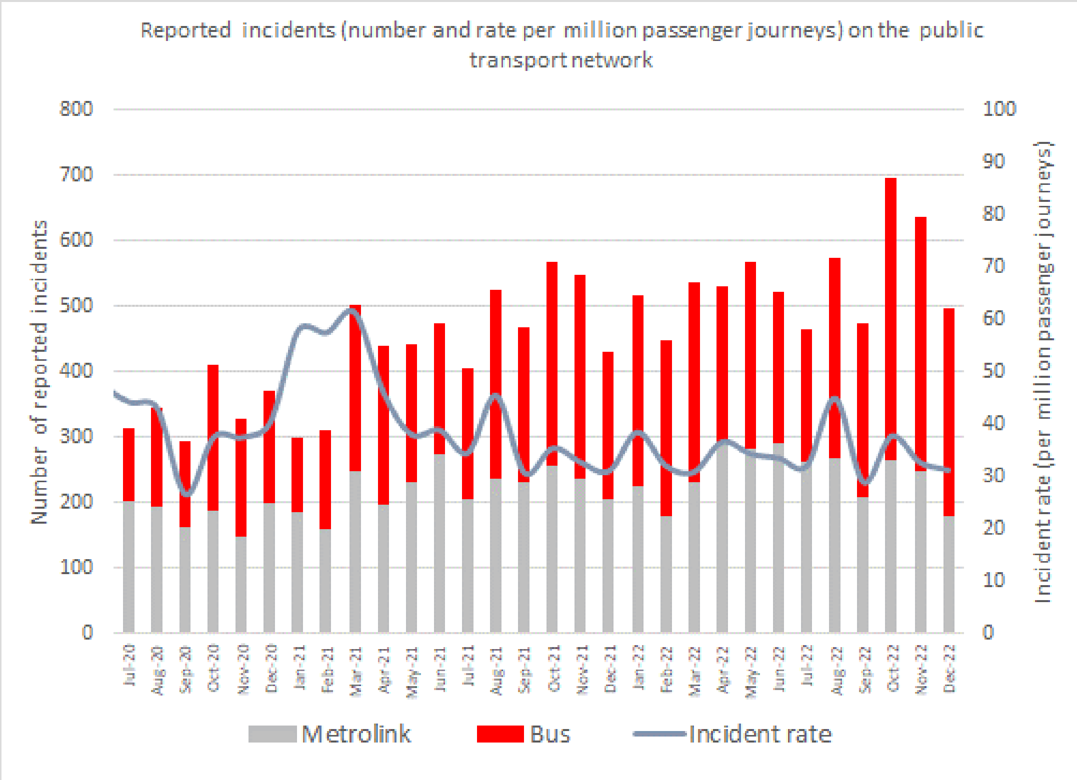
4.11 Infrastructure reliability performance is measured in terms of service distance travelled between failures. Examples of some of the infrastructure equipment covered by this category are signalling systems, overhead line, track and traction substations.

4.12 Infrastructure assets continued to perform well during periods nine and ten, despite the cold temperatures. Period ten performance was the third best in the past 13 periods. Swift attendance on site meant that impact to service was significantly reduced, and in some cases, avoided altogether. The average 12 month rolling performance remains well above target.



CRIME & ANTI-SOCIAL BEHAVIOUR

4.13 On average, 241 incidents of crime and anti-social behaviour per month were reported to Metrolink over last 12 months.



Crime & ASB Category	Dec 2019 Incidents	Dec 2022 Incidents
ASB	9	23
Assault (inc. domestic incidents)	31	17
Damage to Property	16	33
Drink and Drug Related Incidents	8	8
Harassment & Intimidation	61	61
Obstruct/Interfere with Network Operations	12	13
Other Public Order	13	7
Robbery & Thefts	25	11
Sexual Assault/Sexual Incident	2	4
Tram Surfing	1	0
Weapons Incident	14	3
Grand Total	192	180

4.14 There has been a decrease in the number of reported incidents on the Metrolink network in December 2022, compared with December 2019. The location with the highest number of reported incidents was the city zone with 53 incidents reported.

4.15 The number of reported assaults on the Metrolink network declined during November and December 2022, in comparison with November and December 2019.

4.16 The number of criminal damage incidents declined during December 2022 when compared to November 2022. However, in comparison to November and December 2019 it remains high.

4.17 A transport specific 'Mini Operation AVRO' took place on Friday 16 December, which aimed to reassure travelling passengers and deter instances of criminality. Activity was focused on major transport hubs in the Regional Centre, to coincide with the festive 'Mad Friday'. The operation was supported by GMP specialist resources from the Transport Unit, Tactical Aid Unit and Tactical Dog Unit along with the district team from Manchester city centre. Diversion and intervention opportunities were provided by Manchester city council with youth engagement from Manchester Youth Zone and Foundation 92. Over 12,000 customers were engaged with across the network with 600 fines issued and seven arrests made.

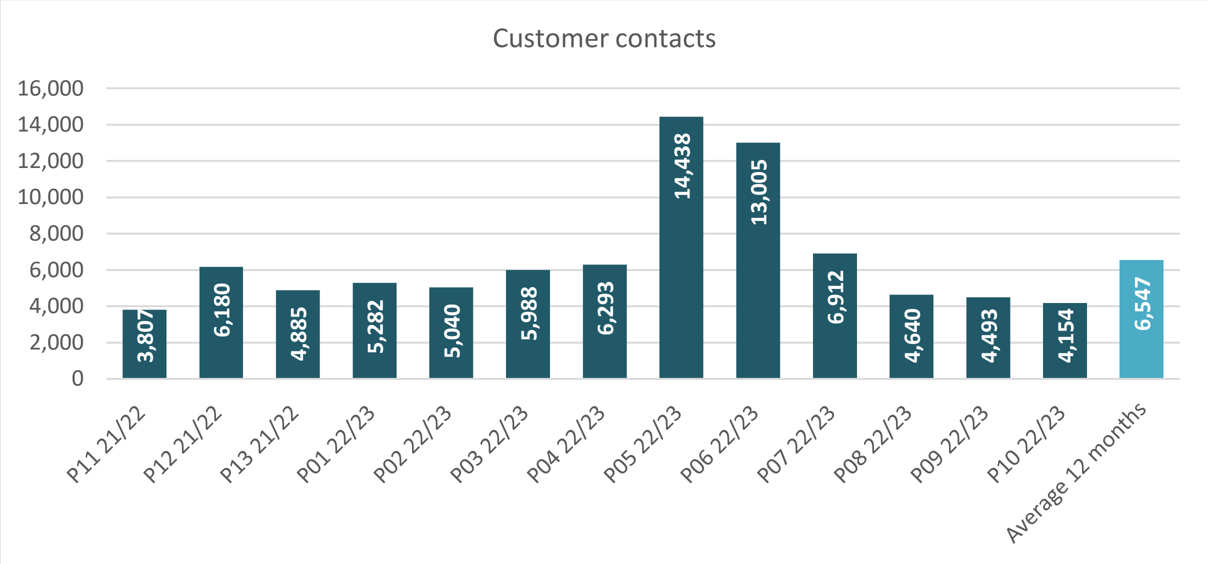
4.18 TravelSafe operations were carried out across the network throughout periods nine and ten, focusing on crime and anti-social behaviour hotspots. Deployments were supported by local councils, district policing teams, Foundation 92 and British Transport Police. Dates and locations of deployments include:

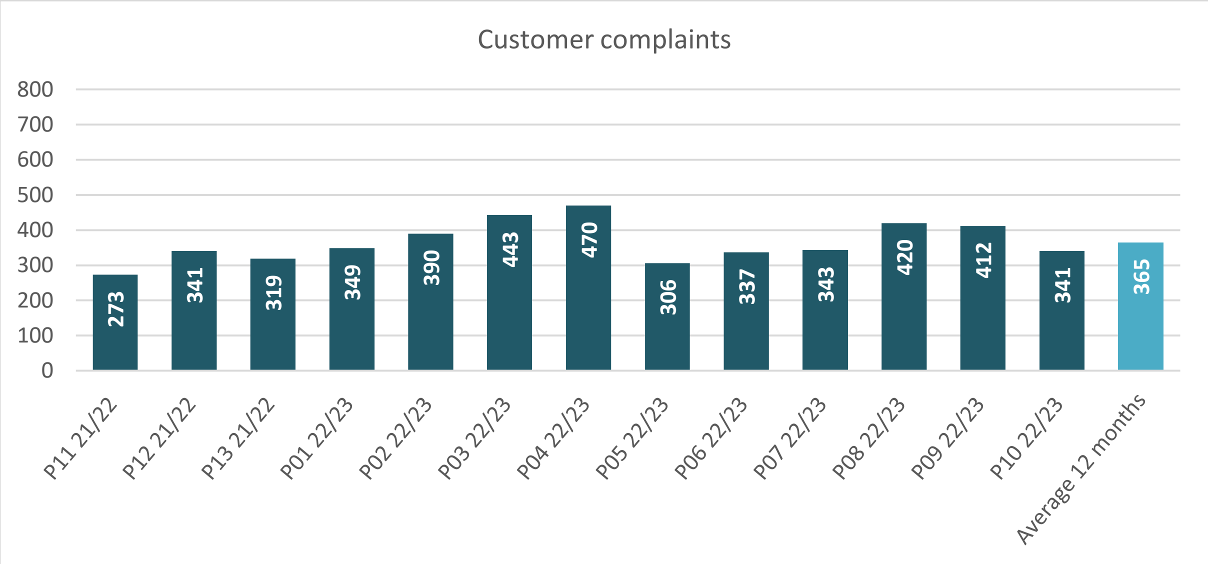
- Victoria: 16 November
- Oldham Rochdale line 29 November
- Wythenshawe: 7 December
- Regional Centre 'Mini Avro': 16 December
- North Manchester: 21 December
- Bury: 28 December
- Rochdale line: 3 January

CUSTOMER CONTACTS AND COMPLAINTS

4.19 Just over 85,000 customer contacts were dealt with during the year, averaging at 6,547 customer contacts per period (excluding twitter).

4.20 Customer contacts in periods nine and ten maintained consistent levels with period eight. Customer complaints have also held steady.





CUSTOMER EXPERIENCE AND ENGAGEMENT

4.21 Travelsafe partnership school engagements continued with Crucial Crew and educational visits as outlined below bring the total young people engagement to date this year to circa 18,000, at the following locations;

- Trafford Crucial Crew
- Hollingworth Academy
- Derby High School, Bury
- St Monica’s High School, Bury
- St Mary’s School, Leigh
- St Anne's School, Droylsden
- Community engagement/Driver simulator, Mahdlo Youth Zone

- School engagement/Driver simulator, Hollingworth Academy 10

4.22 KAM's School Engagement team continues to work within the local community. Students from Loreto College visited Trafford Depot for a tour of the control room and engineering department during period ten.

4.23 Customer reassurance stalls were set up in the city centre on "Mad Friday", the last working Friday before Christmas, to support customers travelling on Metrolink who may be unfamiliar with the network.

4.24 A "Meet the Manager" session was held at Piccadilly station during the evening peak on 20 December. The focus of the event was on security and safety and to demonstrate how Metrolink works with community partners and external agencies to keep customers safe. Personal safety alarms were given away which was positively received by customers. Representatives from Barnabus, Manchester Youth Zone, TravelSafe and Carlisle attended to offer support and underline key collaborative relationships.

4.25 KAM held an evening with young people at Manchester Youth Zone to emphasise how to keep safe on the system. Young people attending had the opportunity to try the driver simulator which proved very popular.

4.26 White Ribbon Day on 25 November provided the opportunity to raise awareness and open discussions about male violence against women in all areas of life. A stall in Piccadilly station was staffed by Customer Ambassadors who gave information on how to stay safe on public transport.

4.27 Several volunteering opportunities were offered to KAM colleagues over the festive period and participation levels were very good. Examples of the types of activity arranged were; preparing and serving Christmas lunches, wrapping gifts and helping with Christmas quizzes. KAM staff volunteered at the Beacon Centre in the city centre.

5. FORWARD LOOK

PLANNED MAINTENANCE AND PROJECT WORK FOR 2023

5.1 Several dates in March will be impacted by short lived disruptive access to complete various works on the Metrolink network. They are as follows:

- On Sunday 5 March there will be no tram service between Rochdale Town Centre and Rochdale Railway Station, a bus replacement will operate between the stops.
- On Saturday 11 and Sunday 12 March a closure will take place at Shudehill and Piccadilly Gardens. Tram services will be diverted during this time with bus replacements to connect services to Piccadilly.
- On Monday 13 March there will be no trams operating between Rochdale and Victoria after 21:00 and a bus replacement will operate.
- On Sunday 26 March there will be a network wide closure until 09:00. After this time trams will start to operate as usual except between Rochdale and Freehold where a closure will stay in place all day with a bus replacement operating after 09:00.
- On Saturday 1 and Sunday 2 April there will be no trams operating between Freehold and Rochdale Town Centre, a bus replacement will be operating.
- On Sunday 23 April there will be no trams operating between Manchester Airport and Wythenshawe Town Centre, a bus replacement will be operating.

5.2 During the summer months plans are in place to carry out essential work on both the Eccles and Bury lines. These are both currently still in the planning stages and more information will be available in the coming months.

Danny Vaughan
Head of Metrolink, TfGM

Appendix 1 - Period date listing

This report details the highlighted Period/s

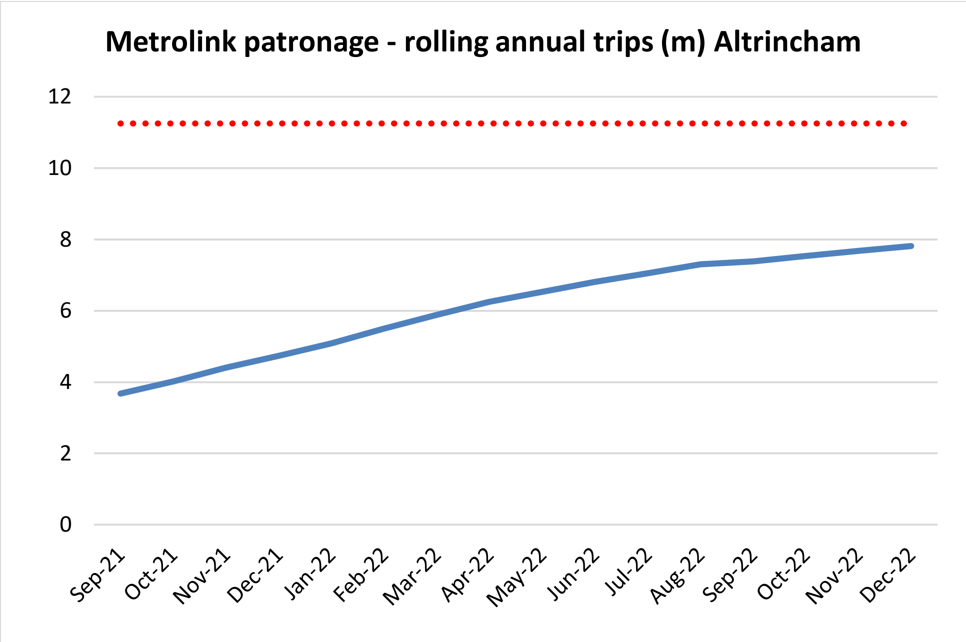
2021/22

Period	Start Date	End Date
1	01/04/2021	01/05/2021
2	02/05/2021	29/05/2021
3	30/05/2021	26/06/2021
4	27/06/2021	24/07/2021
5	25/07/2021	21/08/2021
6	22/08/2021	18/09/2021
7	19/09/2021	16/10/2021
8	17/10/2021	13/11/2021
9	14/11/2021	11/12/2021
10	12/12/2021	08/01/2022
11	09/01/2022	05/02/2022
12	06/02/2022	05/03/2022
13	06/03/2022	31/03/2022

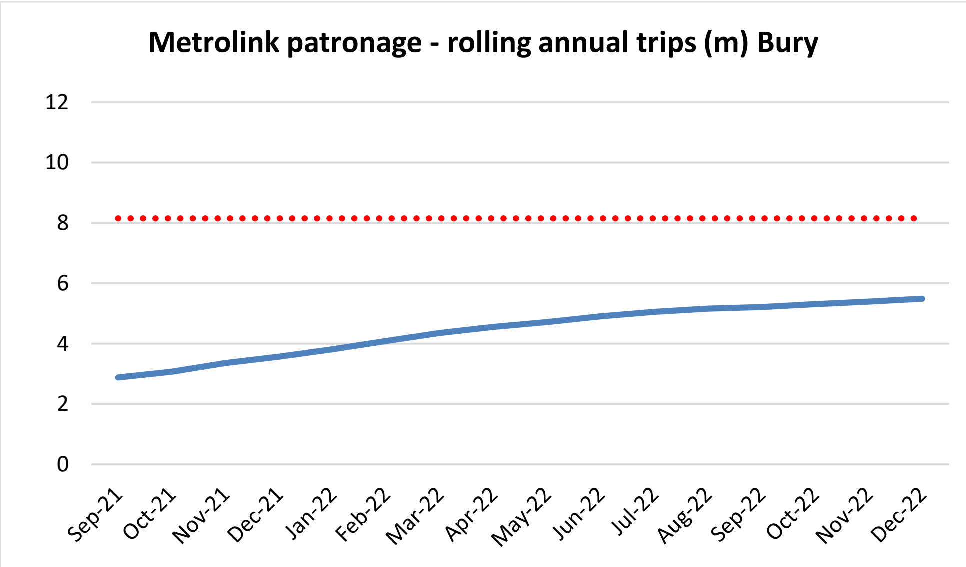
2022/23

Period	Start Date	End Date
1	01/04/2022	30/04/2022
2	01/05/2022	28/05/2022
3	29/05/2022	25/06/2022
4	26/06/2022	23/07/2022
5	24/07/2022	20/08/2022
6	21/08/2022	17/09/2022
7	18/09/2022	15/10/2022
8	16/10/2022	12/11/2022
9	13/11/2022	10/12/2022
10	11/12/2022	07/01/2023
11	08/01/2023	04/02/2023
12	05/02/2023	04/03/2023
13	05/03/2023	31/03/2023

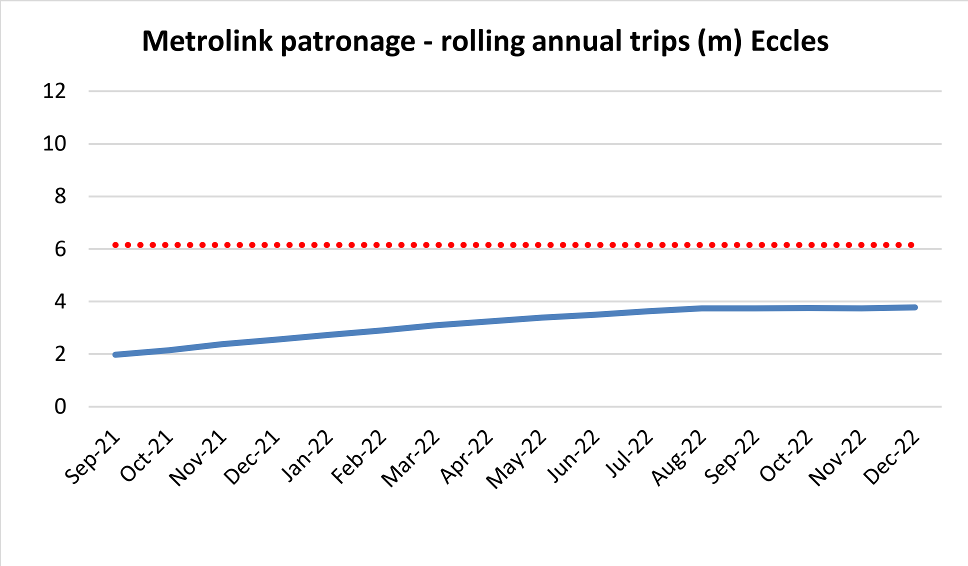
Appendix 2 – Patronage by line



Journeys latest:	7.8
Journeys pre-covid:	11.3

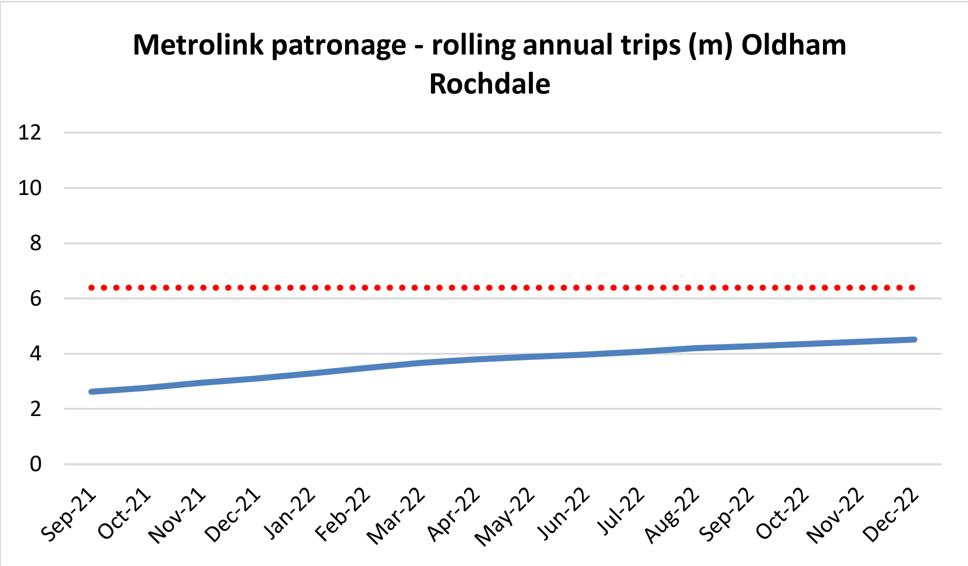


Journeys latest:	5.5
Journeys pre-covid:	8.2



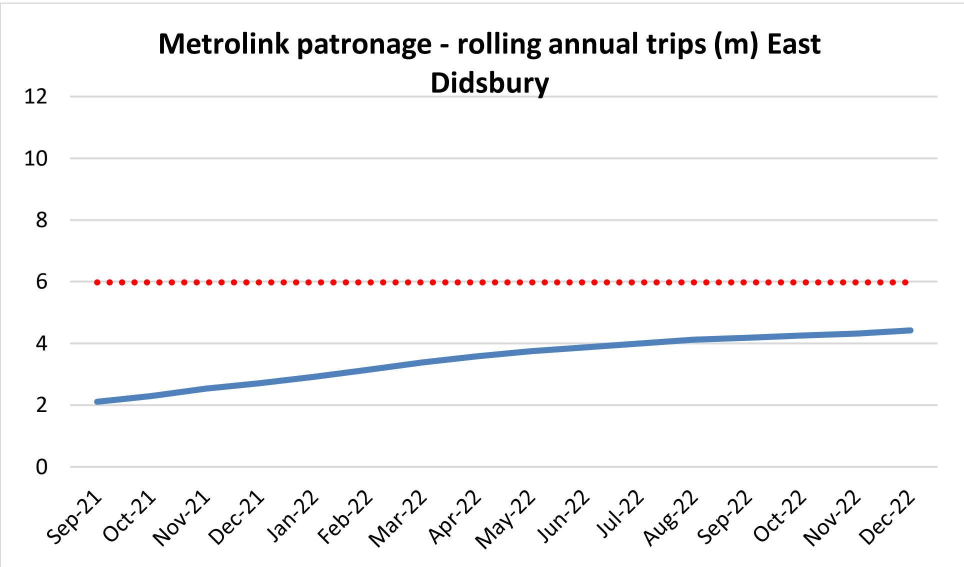
Journeys latest: 3.8

Journeys pre-covid: 6.2



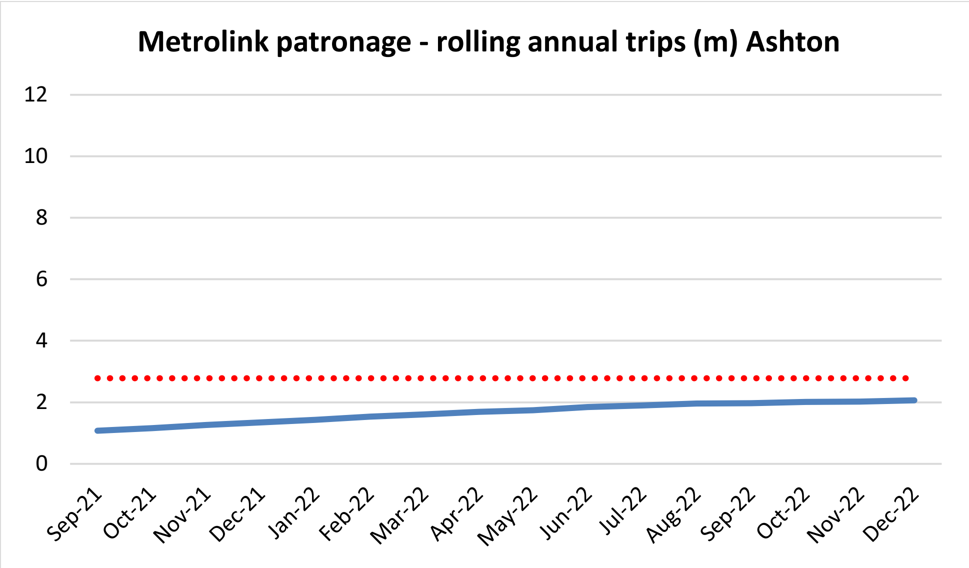
Journeys latest: 4.5

Journeys pre-covid: 6.4



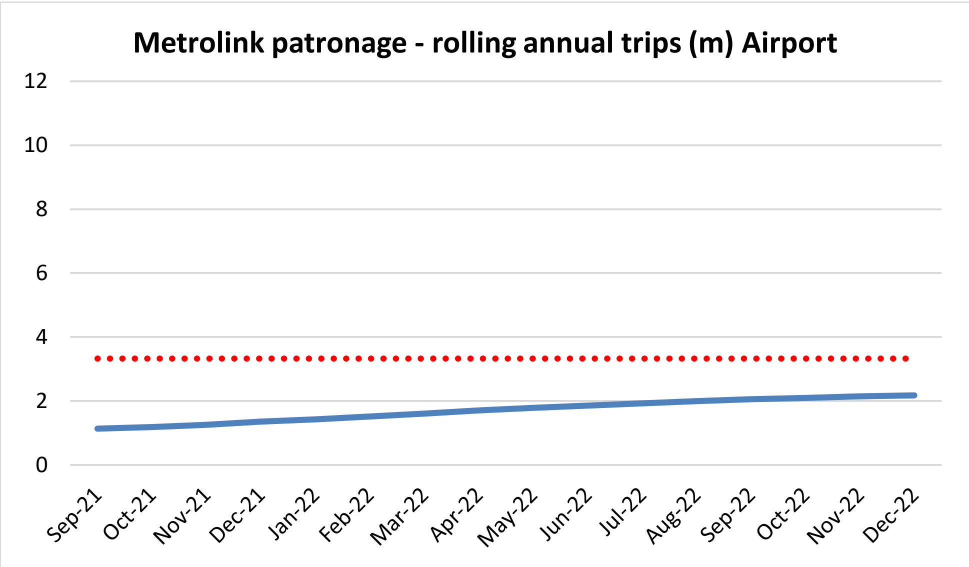
Journeys latest: 4.4

Journeys pre-covid: 6.0



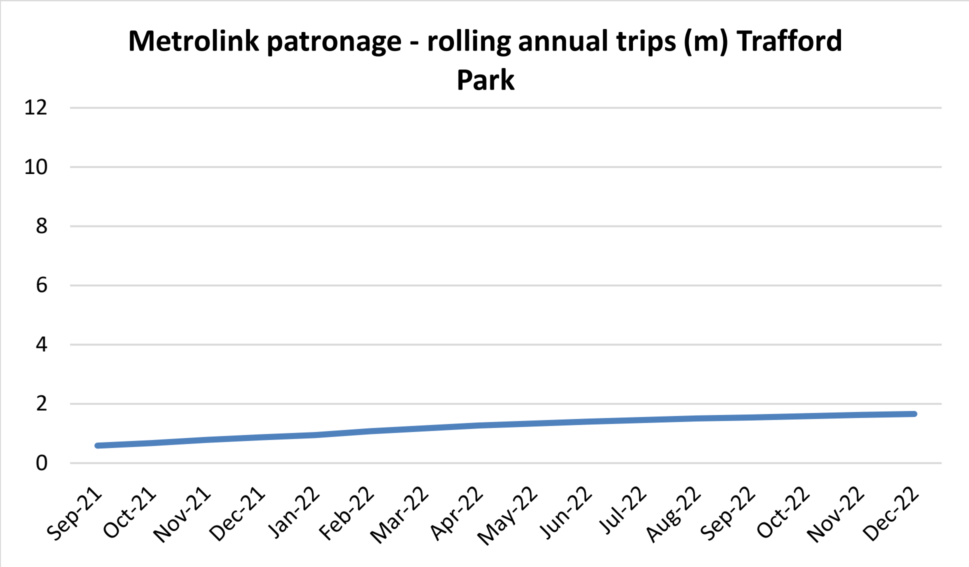
Journeys latest: 2.1

Journeys pre-covid: 2.8



Journeys latest: 2.2

Journeys pre-covid: 3.3



Journeys latest:	1.7
Journeys pre-covid:	-

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Manchester City Council
Report for Information

Report to: Economy and Regeneration Scrutiny Committee – 20 June 2023

Subject: Headlines from the 2021 Census

Report of: Assistant Chief Executive

Summary

Economy Scrutiny members requested an update on the results from the 2021 Census and how the information is used to help with decisions about how funding and resources are used for public services.

This report summarises the headline outputs that have been released from the 2021 Census so far (as at June 2023), specifically describing the change in resident population, the concerns we have in terms of missing population, and an overview of how the Census results are generally used to support decision making.

Recommendations

The Committee is recommended to:-

(1) Consider and comment on the information in the report and the headlines from the 2021 Census.

Wards Affected: All

Environmental Impact Assessment - the impact of the issues addressed in this report on achieving the zero-carbon target for the city
Census information will be used as appropriate to inform our plans for tackling climate change in the Council and the city

Equality, Diversity and Inclusion - the impact of the issues addressed in this report in meeting our Public Sector Equality Duty and broader equality commitments
The Census provides intelligence about the diversity of Manchester residents that will be used alongside the Council’s data and intelligence to inform the services that are available for residents

Manchester Strategy outcomes	Summary of how this report aligns to the OMS/Contribution to the Strategy
A thriving and sustainable city: supporting a diverse and distinctive economy that creates jobs and opportunities	The Census provides intelligence about the residents of Manchester that informs all themes of the Our Manchester Strategy
A highly skilled city: world class and home grown talent sustaining the city's economic success	
A progressive and equitable city: making a positive contribution by unlocking the potential of our communities	
A liveable and low carbon city: a destination of choice to live, visit, work	
A connected city: world class infrastructure and connectivity to drive growth	

Full details are in the body of the report, along with any implications for:

- Equal Opportunities Policy
- Risk Management
- Legal Considerations

Financial Consequences – Revenue

None

Financial Consequences – Capital

None

Contact Officers:

Name: Paul Holme
Position: Head of Performance, Research & Intelligence
Telephone: 07939 262234
E-mail: paul.holme@manchester.gov.uk

Name: James Binks
Position: Assistant Chief Executive
Telephone: 0161 234 1146
E-mail: james.binks@manchester.gov.uk

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.

None

1.0 Introduction

1.1 Economy Scrutiny members requested an update on the results from the 2021 Census and how the information is used to help with decisions about how funding and resources are used for public services.

1.2 This report summarises the headline outputs that have been released from the 2021 Census so far, specifically describing the city's change in resident population, the challenges in terms of people/groups that have been missed by the census, and an overview of how Census results are generally used to support decision making.

2.0 Background

2.1 The Office for National Statistics (ONS) undertakes a national Census every ten years, the latest of which took place on 23rd March 2021. Whilst the Census provides us with a holistic picture of our residents at a snapshot in time, the ONS took the decision to conduct the Census during the unprecedented COVID-19 pandemic and this brings challenges in terms of understanding what the city's usual population was at that time.

2.2 This report therefore presents the 2021 Census and the key trends associated with it, but also highlights those areas where we believe there are significant differences and gaps with more detailed local intelligence held by the Council and partners

2.3 The national Census is used extensively to inform decision-making both locally and nationally, therefore it is important that we understand how we can best use this intelligence resource alongside our other local monitoring and reporting.

3.0 Key concerns with the Census results

3.1 The Council has developed its own population forecasting model, Manchester City Council Forecasting Model (MCCFM). This model is more accurate than the Census as it draws together a wide range of additional data sources such as Council Tax registrations, GP lists, University Student Accommodation data, School Census, plus plans and forecasts about housebuilding and volumes of people migrating in and out of the city. The model has been used for many years to inform a wide range of service planning.

3.2 The Census recorded a significant undercount of people in Manchester compared to MCCFM, of at least 33,000 people. The total Census count for Manchester was 551,944 compared to the MCCFM number of 588,277 in March 2021.

3.3 The Census 2021 household count also appears too low, with between 12,862 to 20,362 households estimated to be missing when comparing local Council Tax records and our register of Houses in Multiple Occupation (HMOs /

shared houses) - Manchester's household count should be between 227,596 to 229,500, not 214,730 as counted by the Census

3.4 Most of the missing households we believe are due to missed new build apartment blocks, hidden HMO households, communal establishments & purpose built student accommodation, or because some households were digitally excluded from a mostly digital census in 2021.

3.5 The residents who are most likely to be missing are aged 18-49, with a mix of young professionals and international students in the inner city, and young to middle-aged adults including students in HMO, some with young children. Those missing from digitally excluded areas could be any age but more likely to be aged under 40 or over 65.

3.6 A higher-than-average proportion of those missing are likely to be Black, Asian and minority ethnic residents based on their age and the areas of the city that they are missing from.

3.7 All the above correlate with the fall or low rise in resident numbers for those aged 18-49 when comparing Census 2011 and Census 2021 – a trend that is clearly at odds with the city's development and growth in the past decade.

4.0 Headline results from the 2021 Census

4.1 Despite these issues, the Census is still a good picture of our residents and it is useful alongside other local data, to inform decision-making.

4.2 A full breakdown of the key trends can be found in Appendix 1 and via the Council's interactive dashboard (https://www.manchester.gov.uk/info/100004/the_council_and_democracy/8069/census_2021). Some key messages are as follows:

4.3 Manchester has one of the fastest growing populations in the country, up 9.7% / 48,900 people between the 2011 and 2021 Census. If we add in those that we believe we are missing then this would rise to 16.9% / 85,177 people)

4.4 The city has always been very diverse and the pace of change has been very quick in the last ten years. The proportion of residents identifying as from all Black, Asian and Ethnic Minority communities (non-white) has increased from 33% to 43% in the last ten years. The proportion identifying as non-white British has increased from 40.7% in 2011 to 51.3% in 2021. Around one in three residents recorded that they were born outside of the UK

4.5 There are also more languages than ever being spoken across the city, 94 languages in total, with Urdu, Arabic and Polish being the top three after English

4.6 There have been significant shifts in religion with a growth in residents stating Muslim or No Religion compared to 2011, and a reduction those with a Christian religion

4.7 Questions about sexual orientation and gender were asked for the first time in 2021 providing another insight into diversity of the city. When compared to the national average, Manchester has proportionally more residents who identify themselves as gay, lesbian, bisexual or other sexual orientation (6.7% of respondents in Manchester, against 3.2% in England and Wales). Likewise, Manchester has a higher percentage (0.8%) of people identifying with a different gender to registered at birth than England and Wales (0.5%)

4.8 Most residents (82.2%) stated that their general health was Good or Very Good, which is in-line with the national average. 11.8% said their health was Fair and 6.0% said their health was Poor or Very Poor. Although 17% of people stated they had a disability that limited their day-to-day activities, and overall 33% of households stated that one or more people in the household had a disability

4.9 The census showed a decrease in the number of residents who were economically active, down from 63.5% in 2011 to 59.2% in 2021, however it is likely that the pandemic affected these responses as some respondents would have been furloughed and students may not have been at term-time addresses

4.10 The main employment sectors recorded by residents show that the city had nearly 90,000 people working in professional or technical occupations (including. science, engineering, health, teaching, research, planning, social workers, etc), 32,000 in elementary occupations (including. construction, goods storage, postal/delivery workers, porters, waiting/bar staff, cleaning, security, etc), 24,000 in caring & leisure type services (including childcare, nursing, care workers, leisure attendants, hairdressing, etc), and 22,000 in sales & customer service occupations (including. sales assistants, shop owners, call centre workers, etc)

4.11 Location of work and travel to work methods were both affected by the timing of the 2021 Census, with 32% of working residents doing that from home at the time

4.12 The largest housing tenure group in the city was home ownership (79,925 households), however when combined private renting (69,403) and social renting (63,276) illustrate a high level of renting across the city – also note that the potential missing households in the census are likely to be private renters so those numbers are like to be an undercount

4.13 The Census also seeks to understand how houses/homes are used and therefore calculated overcrowding based on the number of people and the number of bedrooms in a property. Nearly 81,000 households have the right number of rooms to people, over 116,000 have more rooms that they need, but 16,953 do not have enough rooms and are classified as overcrowded.

4.14 Over 164,000 residents have level 4 and above qualifications (e.g. HNC,NHD, Degree, Post-Graduate), around 80,000 have level 3 (e.g. A-Levels or equivalent), a significant increase since 2011 (Level 4 = c.117,000, Level 3 = c.65,000). There has also been a reduction in the number of people with No Qualifications, down from 93,800 in 2011 to 86,100 in 2021.

4.15 In the context of Economy Scrutiny it is worth noting that that the quarterly Economic Monitor, which was presented at the May'23 meeting, is an additional resource which enables decision-makers to review trends since the 2021 Census and identify where further progress beyond the period 2011 to 2021 may have occurred.
(https://democracy.manchester.gov.uk/documents/g4367/Public%20reports%20pack%2023rd-May-2023%2010.00%20Economy%20and%20Regeneration%20Scrutiny%20Committee.pdf?T=10)

4.16 The Census alongside other related statistics from the Office for National Statistics such as Mid-Year Estimates are used extensively in national and local decision-making. They underpin calculations about funding, they feed into planning for future services, and are built into baselines and forecasts to assess how places are changing across the country. Whilst the Census is not used in isolation, it is more important this time around that decision makers understand the context around the timing of the Census and the impact the pandemic will have had on the results.

4.17 Locally we have good knowledge and expertise to ensure we use the data in the right way and make the right assumptions. The Council has been working with key partners to ensure that we share that local knowledge and expertise, especially at a locality level where the differences may be more acute. Nationally, we are working with and challenging the ONS to ensure that the picture for Manchester is as accurate as possible and that their methods are appropriate and their guidance to users is clear. ONS are developing a new Dynamic Population Model that takes data from various administrative sources and Manchester is on the working group of Local Authorities that are helping to design this. Whilst this will not result in changes to the 2021 Census results (as they are a point in time and will not be adjusted for missing data), we anticipate that adjustments will be made to their associated data products to reflect that Manchester likely had an undercount and that our recovery from the pandemic means that any temporary dip in people living or visiting the city has significantly recovered since March 2021.

4.18 We are also working with other Government departments and associated organisations to ensure that any decision-making (especially relating to funding and service planning) is reflective of an accurate picture of Manchester.

4.19 Appendix 1 to this report provides more information on the 2021 Census results and links to where additional information can be found.

5.0 Recommendations

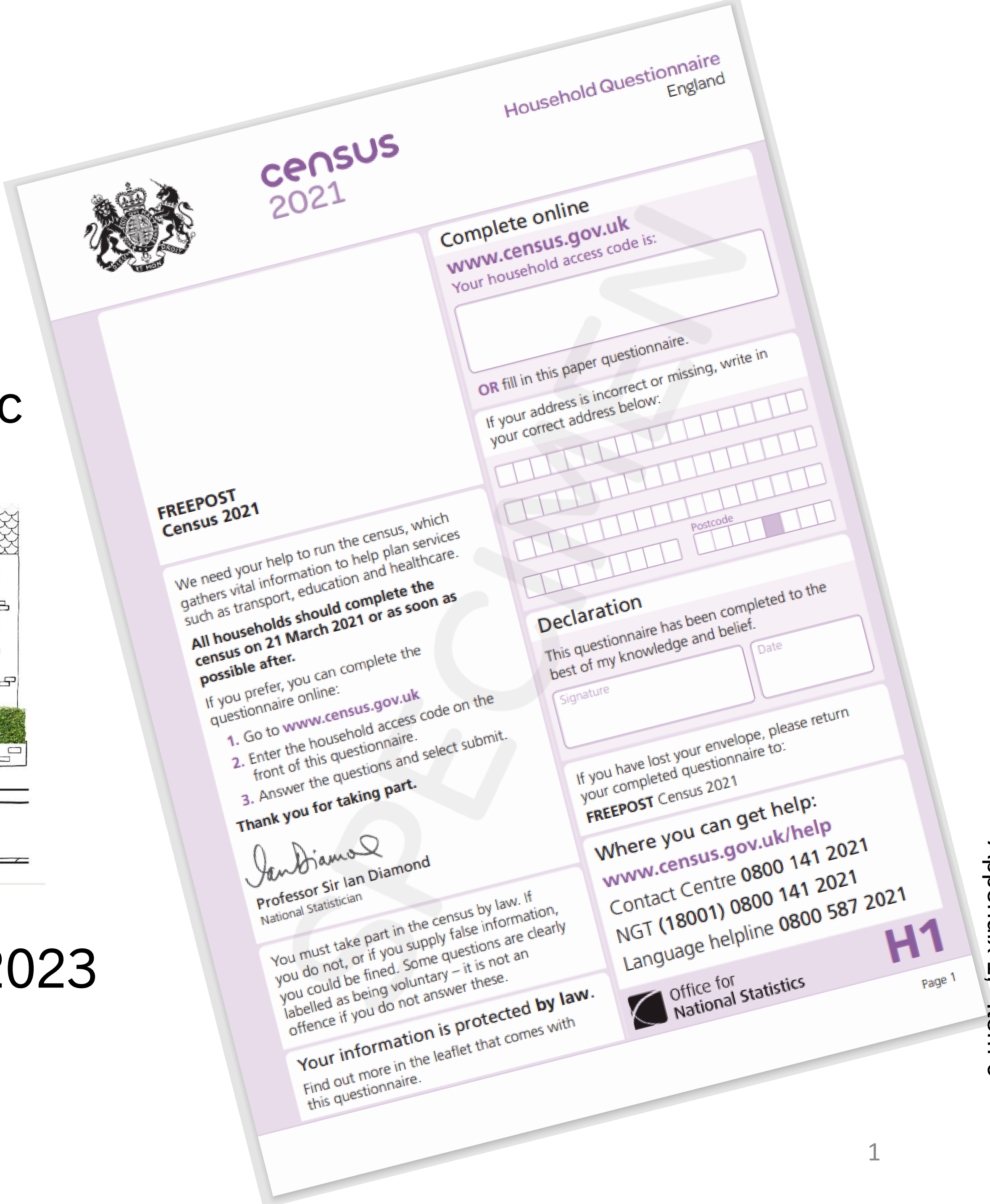
5.1 Scrutiny members are asked to consider and comment on the information in the report and the headlines from the 2021 Census

6.0 Appendices

Appendix 1 – Census 2021 results in Manchester (slidepack)

Census 2021 Manchester

A snapshot of life in the middle of a pandemic


Household Questionnaire
England

census 2021

Complete online
www.census.gov.uk
Your household access code is:

OR fill in this paper questionnaire.

If your address is incorrect or missing, write in your correct address below:

Postcode

FREEPOST
Census 2021

We need your help to run the census, which gathers vital information to help plan services such as transport, education and healthcare.

All households should complete the census on 21 March 2021 or as soon as possible after.

If you prefer, you can complete the questionnaire online:

1. Go to **www.census.gov.uk**
2. Enter the household access code on the front of this questionnaire.
3. Answer the questions and select submit.

Thank you for taking part.

Professor Sir Ian Diamond
National Statistician

You must take part in the census by law. If you do not, or if you supply false information, you could be fined. Some questions are clearly labelled as being voluntary – it is not an offence if you do not answer these.

Your information is protected by law.
Find out more in the leaflet that comes with this questionnaire.

Declaration
This questionnaire has been completed to the best of my knowledge and belief.

Signature

Date

If you have lost your envelope, please return your completed questionnaire to:
FREEPOST Census 2021

Where you can get help:
www.census.gov.uk/help
Contact Centre 0800 141 2021
NGT (18001) 0800 141 2021
Language helpline 0800 587 2021

H1

Office for National Statistics

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Economic Scrutiny (Appendix 1) – 20 June 2023

Performance, Research and Intelligence Team
Manchester City Council

Appendix 1, Item 6

The Census process in 2021

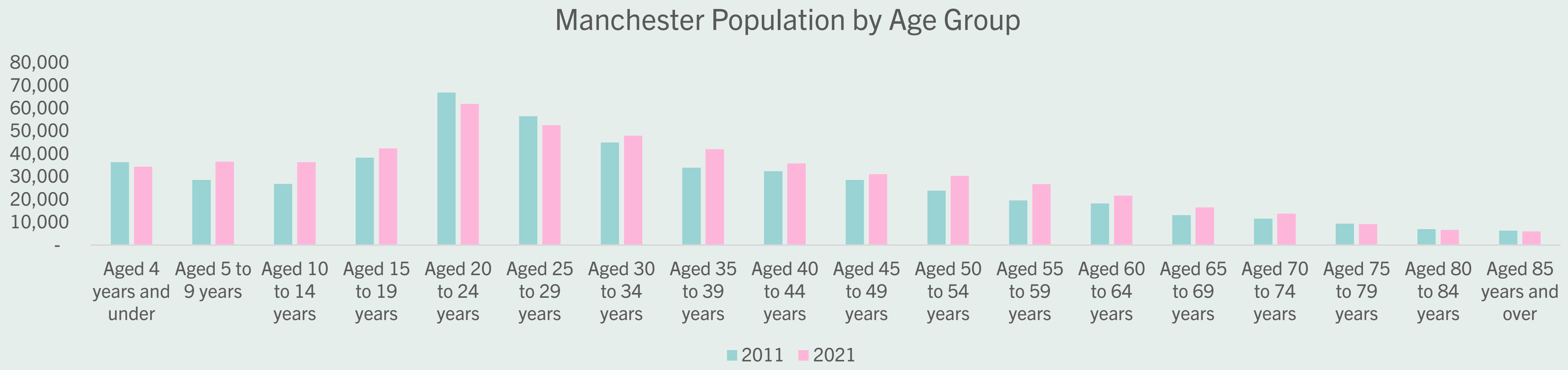
- Census 2021 was carried out during the COVID-19 pandemic at a point when Greater Manchester was seeing COVID-19 infection rates rise (March 2021).
- A national 'lockdown' was in place; though pupils had returned to face-to-face teaching in schools (8th March), the 'stay at home' order remained, and social contact was limited to households or 'support bubbles' only.
- This will have undoubtedly impacted how many people were aware of the Census, how many responded and how many non-responding households were chased up.
- This was the first 'digital' Census conducted in England and Wales. Paper surveys were available, but relied on the respondent knowing that a paper copy was available, how to request one (via the telephone) and having the 'access code' from the Census letter.
  - The 'access code' may have contributed to challenges with capturing all households within a house in multiple occupation (HMO). Capturing all households within an HMO relied on every household within the HMO knowing the online access code or organising their own code, then subsequently completing the Census. Potentially, many households did not see this code (limited communication between households in a HMO) and therefore did not complete the Census.
  - Of those who responded, we know the majority responded online, with mobile phone being the most popular method for response. However, we know that many households will have been missed because of no digital access, the restrictions placed on socialising due to COVID-19 making it hard to get help, and there being limited recognition of the fact that a paper copy was an option.
- Though 'follow-up' officers were operational, there may have been reluctance – during a pandemic – to open doors to unknown callers.
- The Census asks respondents to self-identify in terms of ethnicity, national identify, language and religion. In 2021 there were new questions on:
  - Sexual orientation and gender identity for over 16s
  - Same-sex marriages
  - Past service in the UK Armed forces

Census 2021 Challenge

- Manchester City Council's (MCC) **mid-2021** population estimate is **588,277** usual residents (assuming all students at term-time address).
- The Census 2021 count is an undercount of **at least 33,000** residents compared to the MCC Forecasting Model (MCCFM), from an estimated 12,862 - 20,362 households missing when comparing Council Tax and our record of registered Houses in Multiple Occupation
- MCC assess Manchester's household count as between **227,596 - 229,500** not 214,730 as counted by the Census
- MCC have concluded that most **missing households** are due to missed new build apartment blocks, hidden HMO households or because of digital exclusion
- The most likely demographics of missing residents in households are **aged 18-49**, with a mix of young professionals and international students in the inner city, and young to middle-aged adults including students in HMO, some with young children. Those missing from digitally excluded areas could be any age but more likely to be aged under 40 or over 65
- A higher-than-average proportion of those missing are likely to be **Black, Asian and minority ethnic residents** based on their age and the areas they are missing from
- As well as missing **households**, MCC assess there are **4,641** to **9,910 Communal Establishment students** missing on the Census (based on official records and available bedspaces)
- All the above correlate with the fall or low rise in resident numbers of those aged 18-49 between Census 2011 and Census 2021
- While the Census offers a rich snapshot of data, some of which is not available elsewhere, this Census was undertaken during a pandemic and does not reflect the entire usual population or their characteristics as a result. Local data and intelligence products are used to complement administrative data (such as the Census) and 'fill in the gaps'.

Census undercount in Manchester

- Manchester's population has been consistently undercounted by ONS - the 2001 Census missed 40,000 residents, which MCC successfully challenged, and the city continues to be undercounted in ONS mid-year estimates*.
- The Census counted 551,944 Manchester residents. This is believed to be an undercount of at least 33,000 so <u>we need to consider this when looking at any 2021 Census Data</u>
- Census is statistically adjusted to smooth out inaccuracies caused by non-response but still lower than expected
- Undercount notably among people in their 20s and 30s, more broadly those aged 18-49, including students, students (inc. International), graduates, young professionals and workers from the rest of the UK and abroad – much attributed to the impact of the pandemic
- Note that the number of students living in the Manchester rose by 5,100 in the academic year 2021/22, and local media reports (cite) student accommodation is so oversubscribed in 2022/23 incentives are being offered to students to live elsewhere. Some of this rise is likely to be students who deferred during COVID19 taking up places.



*ONS MYE net migration is consistently too low, with too few people estimated by ONS to be joining the city and too many residents estimated to be leaving each year, e.g., ONS estimate Manchester lost c.2,000 residents through migration in 2018 during our construction and economic boom.

Manchester City Council Forecasting Model (MCCFM)

Manchester's Population is inherently difficult to quantify with a wide range of drivers (current & historic) which means that national (Office for National Statistics) estimates / projections are out-of-sync with evidence of population growth and change 'on the ground'. Historically, the assumptions behind ONS's projections (sub-national population projections (SNPP) and mid-year estimates (MYE) have not fully reflected the constitution and long-term make-up of the population in the city.

It's challenging gauging migration anywhere in UK but Manchester is particularly difficult because it's the north west's economic hub, has two universities, has lots of available rental stock and established communities from across the world. It also has the difficulty of the other GM districts acting like suburbs because of its shape. Jobs' growth and considerable residential development 'pulled' residents to the city and are factors in graduates hoping to stay in the city.

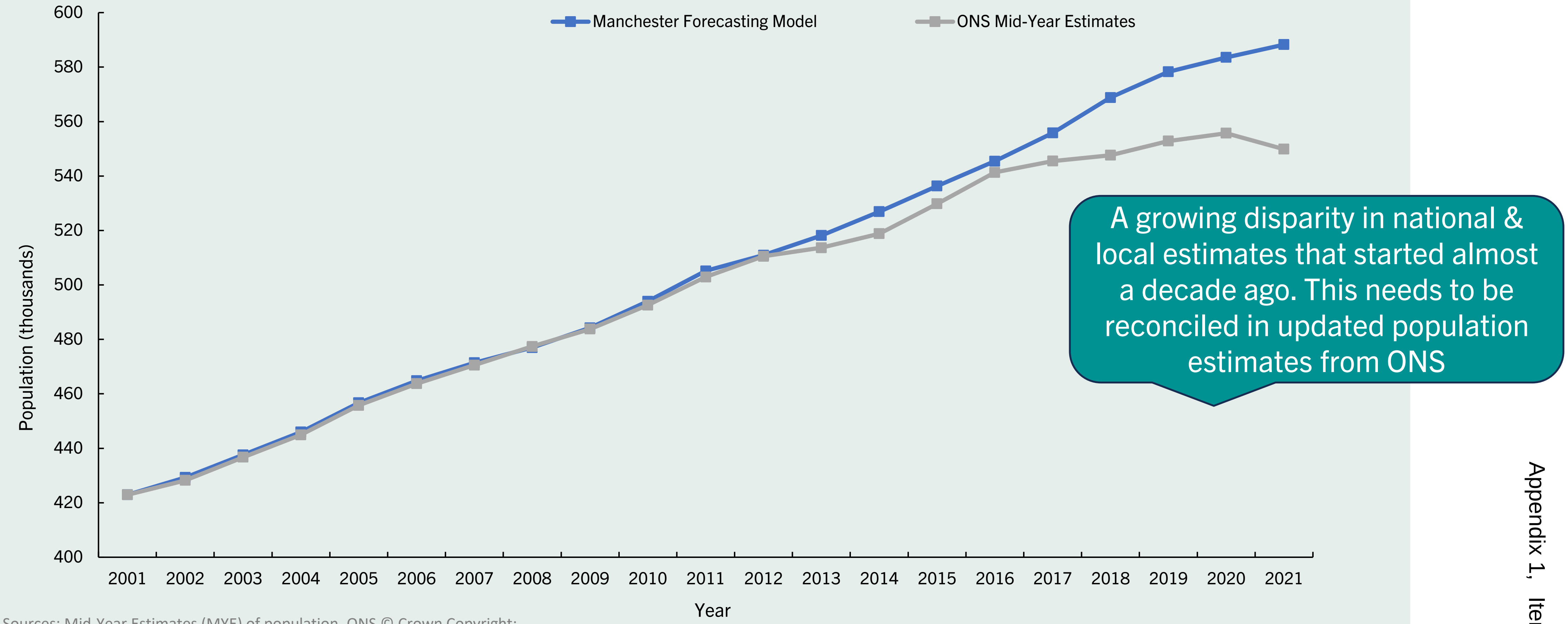
National projections are also subject to a time delay and it's challenging to adjust these datasets to provide forecasts for ward and district level populations. If populations at ward level are revised upwards retrospectively, whether from more births than expected or administrative records indicating higher numbers, the method of distributing extra population is the same across the country, not an issue for 99% of districts but a problem with some of our wards where there are either very low or high numbers of a particular age and/or where there has been rapid population change.

The **MCCFM therefore is a population forecasting model for the 32 wards in Manchester**. The Council started its own forecasts in response to the challenges we had with the 2001 Census, and formally started using MCCFM in preparation for the 2011 Census, giving us well over a decade of experience. It forecasts the population by single year of age (SYOA) and by sex (male/female). The model consists of five elements, with multiple administrative datasets contributing to each element.

- Constraints – using administrative data & published estimates to set a starting position
- Fertility – new births in the city; and Mortality – deaths in the city
- Immigration – people moving to the city; and Emigration – people moving out of the city

The MCCFM enables us to address some of the challenges above, allowing us to: take account & assess ONS estimates/projections; update as soon as local data is available; adjusted to reflect local migration birth or death rates; model at smaller areas that the city to reflect localised changes; and the ability to add in known policy decisions that may affect our future population (i.e. house building, jobs, etc)

Manchester's Forecasting Model vs ONS Estimates



Sources: Mid-Year Estimates (MYE) of population, ONS © Crown Copyright;
MCCFM W2021xiii, Manchester City Council (Shared Intelligence PRI)

Difference between MCC and ONS estimates is predominantly made up of residents of working age (due to differing migration assumptions) because ONS consistently estimate more people have left the City than MCC do.

Census 2021 Results: Population overview

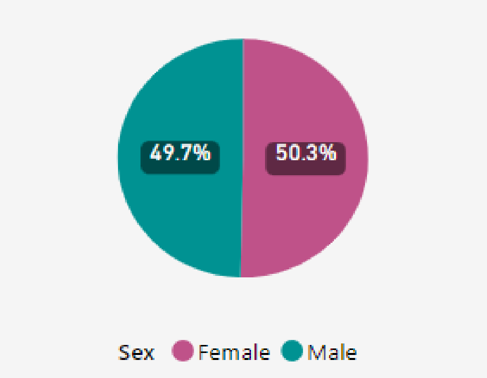
- Our population has grown by 48,900 between censuses, it was 503,100 in 2011.
- The largest increases between censuses have been in the 10-14 age group, rising by 9,500 and the 35-39 age group rising by 8,000.
- Proportionally, the 10-14 and 55-59 age groups have changed most, both growing by 36%.
- The median average age band is 30-34 years old, the median age is 31.
- The census recorded 214,700 households in Manchester.
- Based on census figures, there are 4,773 people per square kilometre.
- Census 2021 captured 94% of residents and 93% of households, based on ONS estimates.

Note this compares to 588,277 in our own estimates

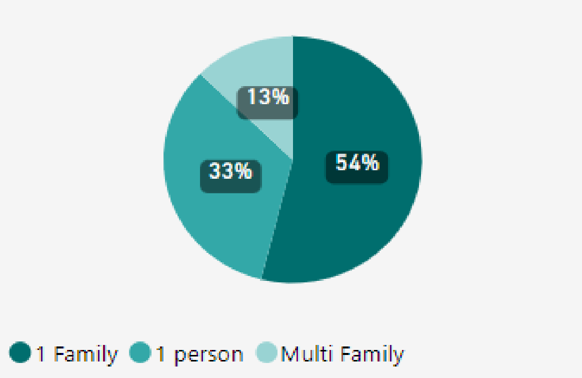
Manchester's Census 2021 population

551,944

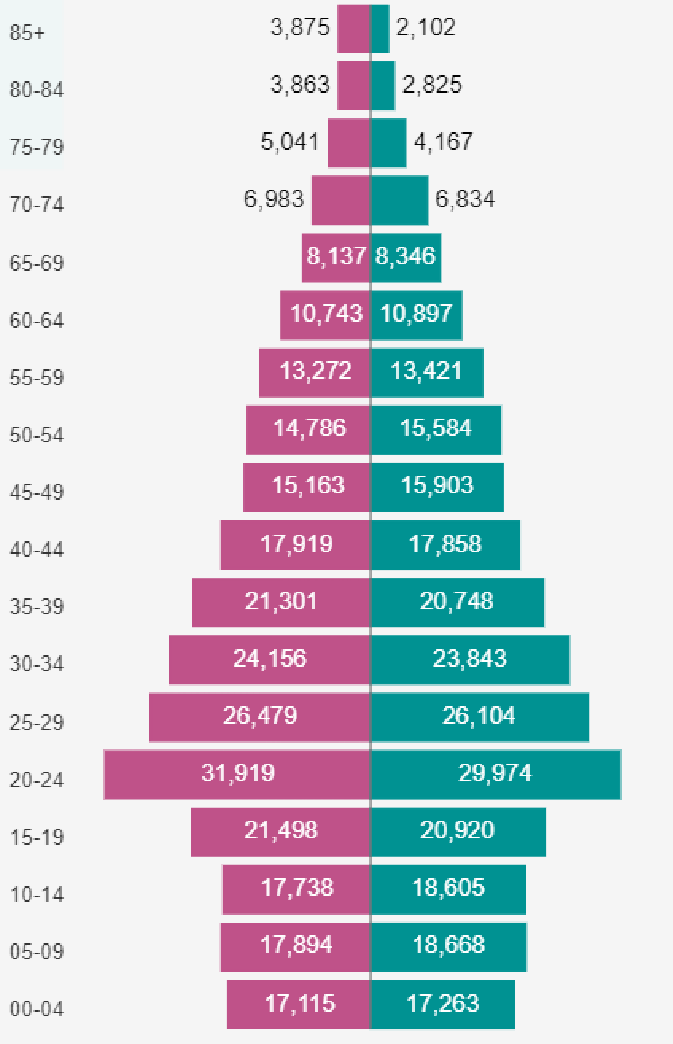
Population by Sex



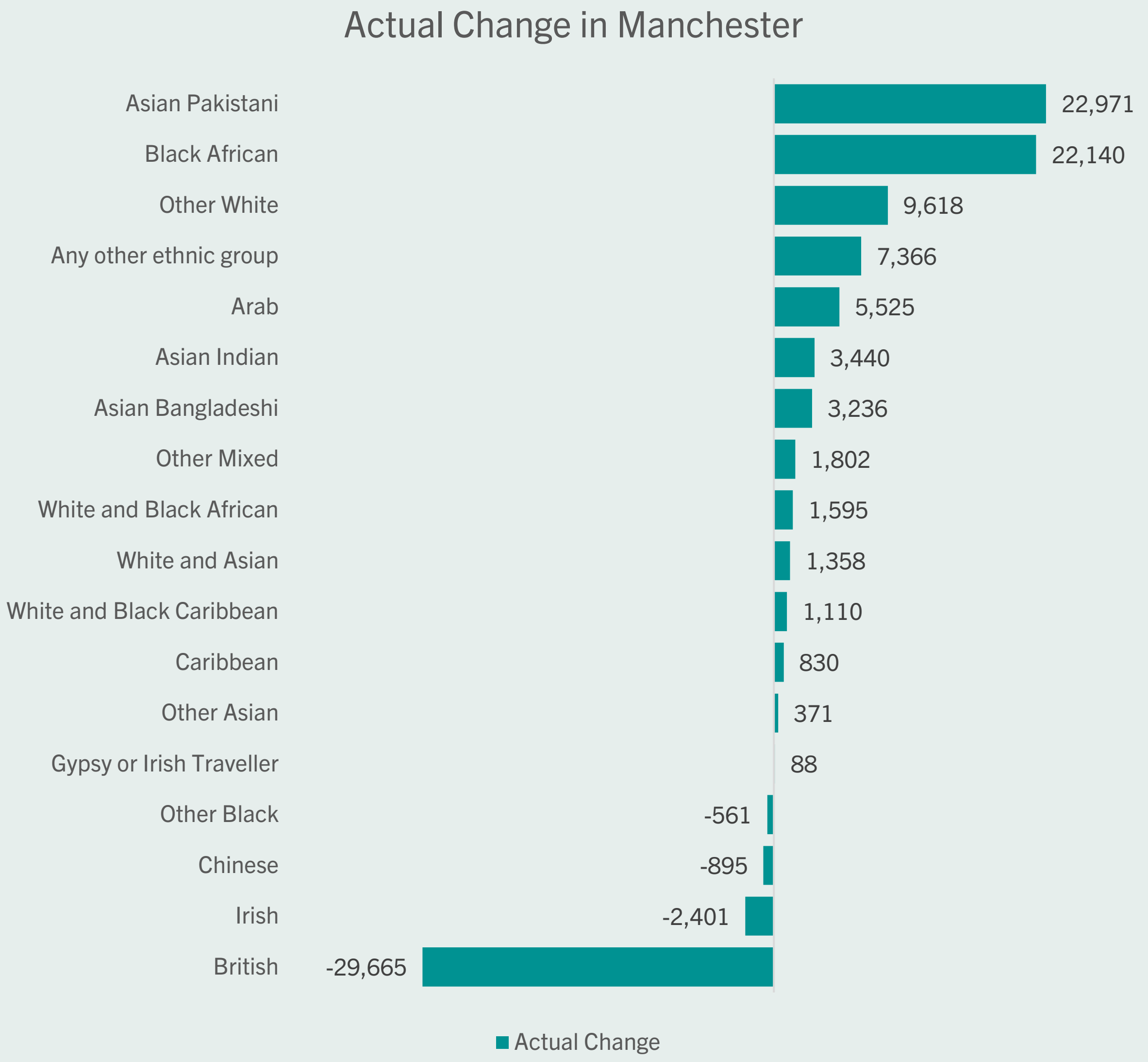
Household Composition Overview



Population by Age Group and Sex



Census 2021: Ethnicity - Overall population by ethnic group



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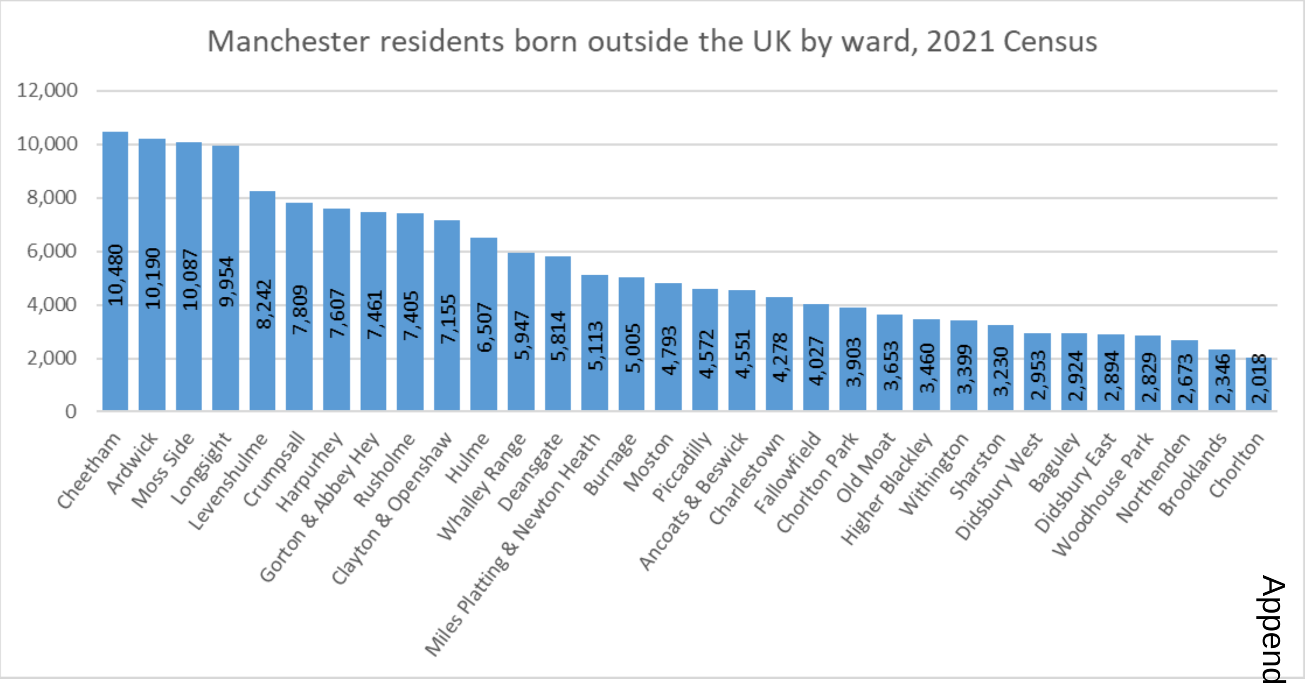
1 in 3 residents of Manchester were born outside the UK

Manchester has a proud tradition of attracting people from outside the UK which stretches back centuries, with many newcomers choosing to make the city their permanent home. These settled residents have thrived to form established communities and continue to act as a strong pull factor from around the world, particularly in certain areas of the city.

Within Manchester:

- 1 in 3 residents recorded in the 2021 Census* were born outside the UK (173,200 residents, 31%) compared to 1 in 4 residents (127,050, 25%) in the 2011 Census.
- Cheetham had the highest number of residents born outside the UK who had lived in Manchester for 10 years or more (5,350 residents) followed by Moss Side (5,200), Longsight (5,050) and Ardwick (4,200).
- Nearly a quarter of residents born outside the UK lived in Cheetham, Ardwick, Moss Side and Longsight.
- Cheetham had the highest number of residents born outside the UK (10,450) and the highest percentage (48%).
- The highest region of birth for those born outside the UK recorded in 2021 was the Middle East and Asia (52,100 residents) as in 2011 (57,350).
- Pakistan was the highest country of birth after England (30,750 residents) recorded in the 2021 Census, as in 2011 (20,700 residents).
- 105,850 residents had a non-UK passport compared to 76,700 in 2011.

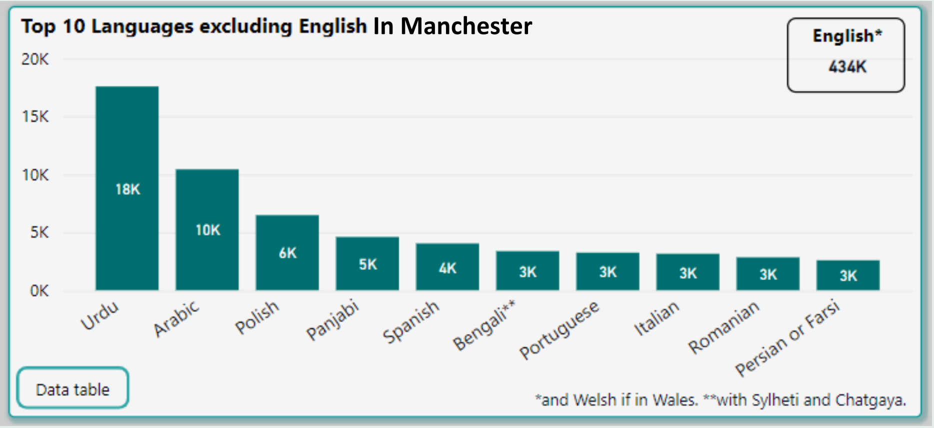


More detail from the 2021 Census about these topics is available on the Manchester City Council Census 2021 website: [Census 2021 - MCC Intranet (manchester.gov.uk)]

*not all residents were recorded in the 2021 Census due to COVID19

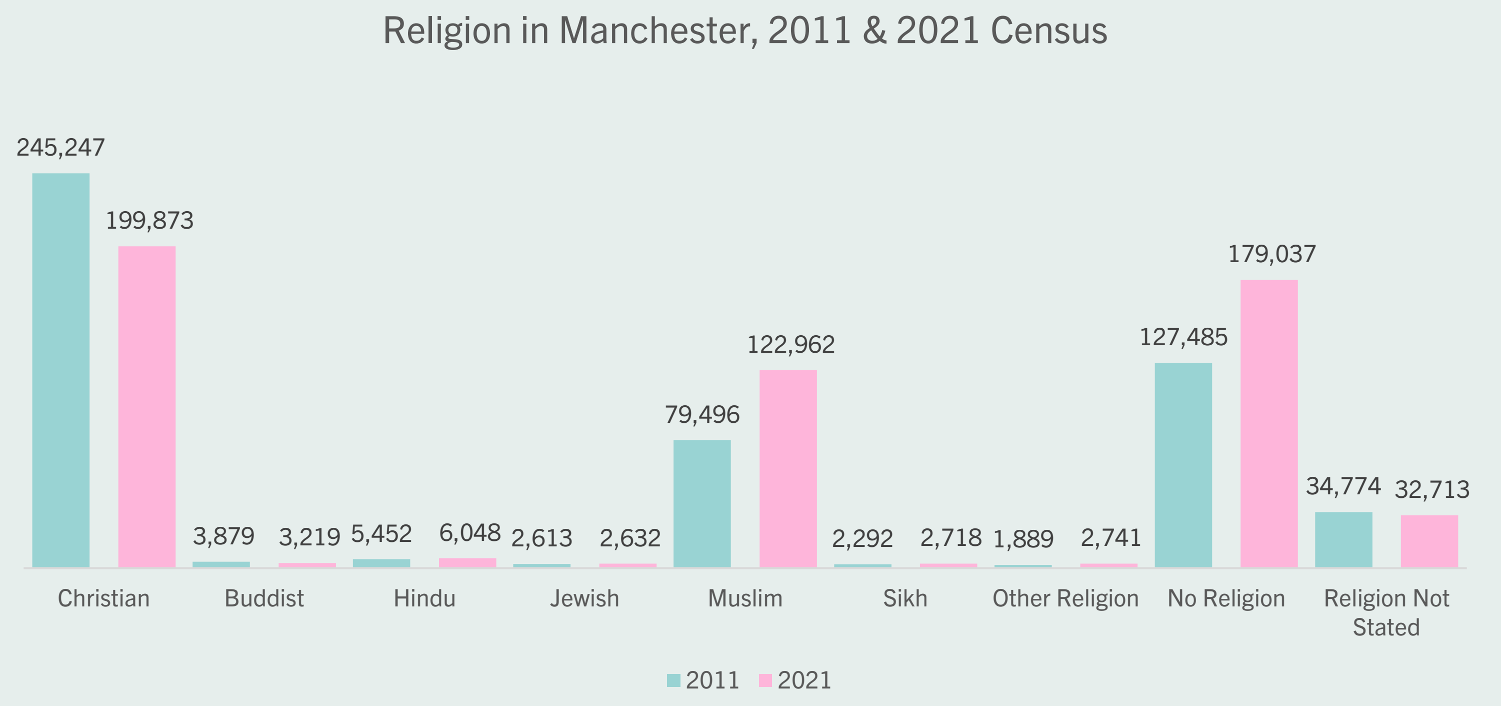
Census 2021: Languages spoken across the city

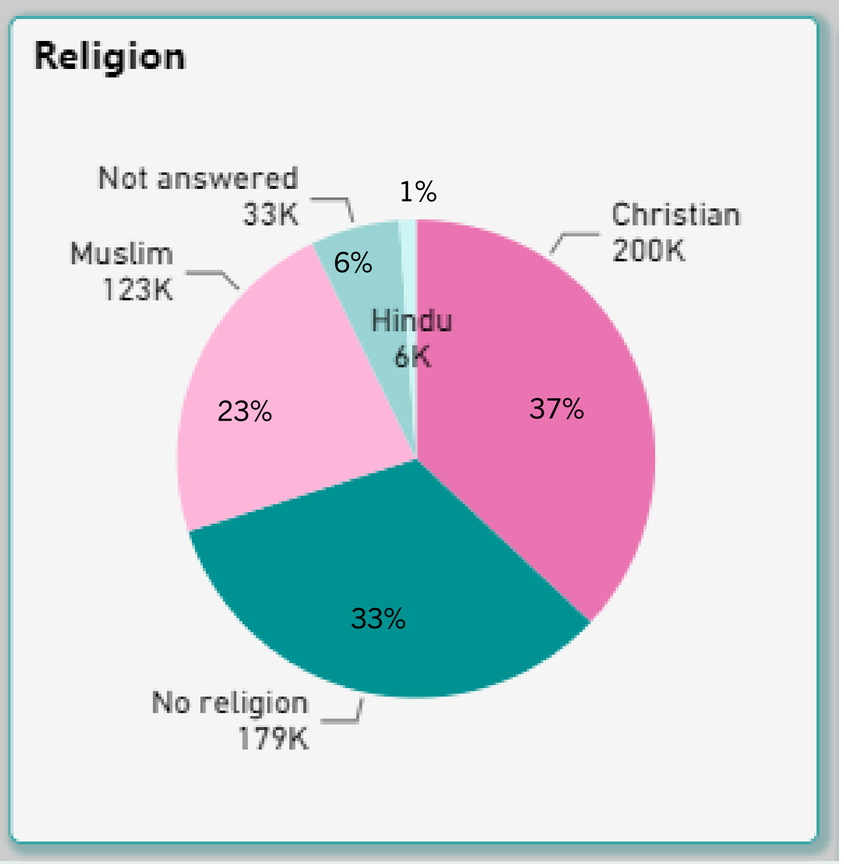
Main Language	2021 Manchester	2011 Manchester	% Change In Manchester
Urdu	17,572	13,095	34.2%
Arabic	10,425	7,037	48.1%
Polish	6,471	6,447	0.4%
Chinese (other than Mandarin and Cantonese)	5,019	5,878	-14.6%
Panjabi	4,591	4,719	-2.7%
Spanish	4,032	1,869	115.7%
Bengali (w. Sylheti and Chatgaya)	3,367	3,114	8.1%
Portuguese	3,239	1,458	122.2%
Italian	3,142	753	317.3%
Romanian	2,834	720	293.6%



- 94 languages in total are spoken as a main language across Manchester.
- After English (in residents aged 3+), the most common language spoken is Urdu, followed by Arabic. There has been an increase in residents with these as their main language since 2011.
- Spanish, Portuguese, Italian and Romanian have also increased significantly since 2011.
- The respondent having a main language other than English should be considered against 'proficiency in English'. Across the city, English is the main language in every ward.
- 'Main language' does not equate to identity or give an idea of proficiency.

Census 2021: Religion





- Manchester has seen a decline of 12.5 percentage points in the number of Christian residents between the 2011 and 2021 Census. England & Wales have a 59.3% Christian resident population.
- The Muslim resident population has increased by 6.5 percentage points between the 2011 and 2021 census. Compared with England & Wales in 2021 Manchester has a higher rate of Muslim residents, England & Wales has 4.8%, Manchester has 22.3%.

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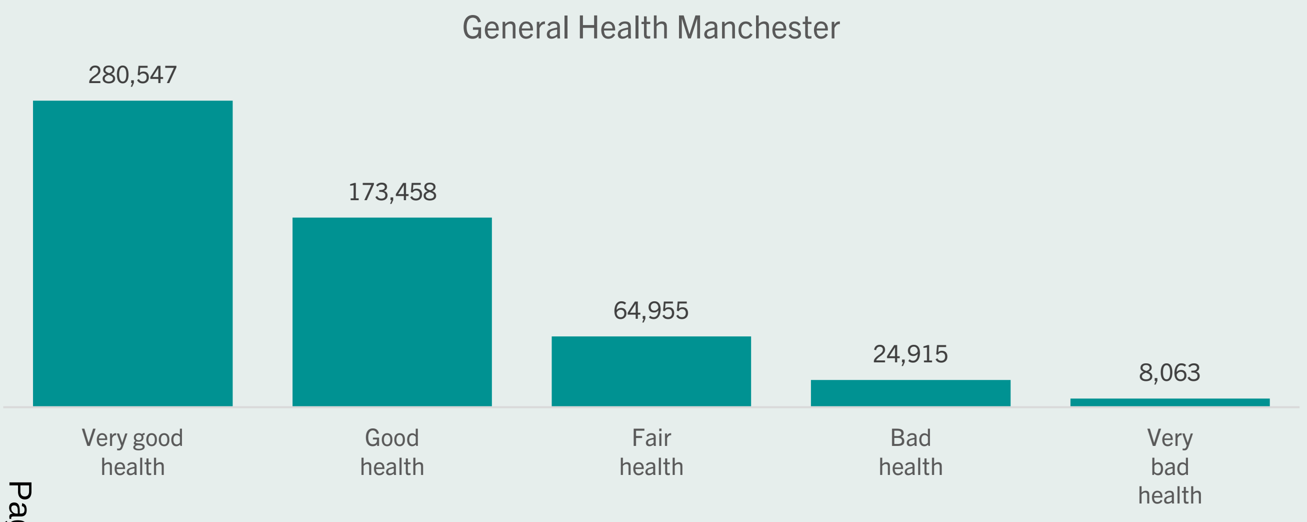
Census 2021: Sexual Orientation and Gender Identity

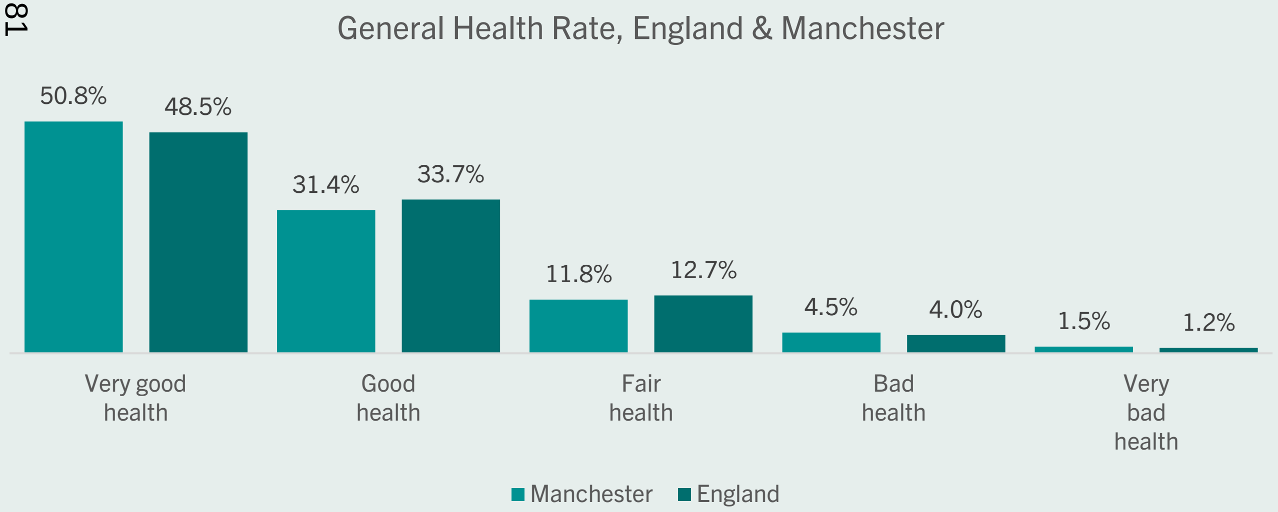
Sexual Orientation	Count	Percent
Straight or Heterosexual	370,576	84.61%
Not answered	38,162	8.71%
Gay or Lesbian	14,608	3.34%
Bisexual	11,782	2.69%
Pansexual	1,853	0.42%
Queer	429	0.10%
Asexual	375	0.09%
All other sexual orientations	175	0.04%

Gender Identity	Count	Percent
Same as registered at birth	401,445	91.66%
Not answered	32,034	7.31%
Different from registered at birth but not specified	1,988	0.45%
Trans man	751	0.17%
Trans woman	725	0.17%
Non-binary	701	0.16%
All other gender identities	314	0.07%

- Sexual orientation and Gender identity were not collected in the 2011 census; this was the first time that these questions have been asked. Gender identity refers to a person's sense of their own gender and may differ from the sex registered at their birth.
- Across England and Wales, 89.4% of those aged 16 and over identified as straight or heterosexual (43.4 million people), 3.2% identified as gay, lesbian, bisexual or other sexual orientation (1.5 million people). Manchester has a lower rate of Straight or Heterosexual (84.6%) and has a higher rate of those who identified as gay, lesbian, bisexual or other sexual orientation (6.7%) when compared with England and Wales.
- Across England and Wales, the gender identity of 93.5% of those aged 16 and over is the same as registered at birth (45.5 million people), and the gender identity of 0.5% differs (262,000 people). The remaining 6% did not answer (2.9 million). In Manchester 0.8% of respondents (c.3,470 people) stated that their gender identity was different to that registered at birth. A lower percentage of people reporting the same registered gender as birth than England and Wales, demonstrating that Manchester is a city where differences are embraced and welcomed.

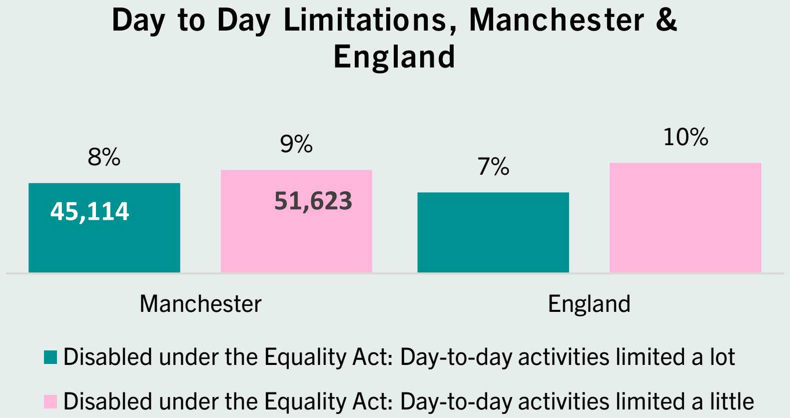
Census 2021: General Health





- 50.8% of Census 2021 respondents in Manchester stated that they are in 'Very good health'. This is higher than the national level of 48.5%.
- Those considering themselves to be in 'Good health' was higher at the National level than in Manchester (nationally 33.7% compared with 31.4% in Manchester).
- England also has a higher proportion of people who consider themselves to have 'Fair health'. Manchester is behind the national rate by 0.9 percentage points.
- For those identifying their health as 'Bad health' and 'Very bad health', Manchester has a higher proportion of people than at the national level, for 'Bad health' there is a 0.5 percentage points difference, and for 'Very bad health', there is a 0.3 percentage point difference.

Census 2021: Disability and carers



- Within Manchester there are more people who are classified as Disabled under the Equality Act that have their activities limited a little rather than limited a lot. England has a higher proportion of people who are disabled who are limited a little than in Manchester. Manchester has a higher proportion of people whose day-to-day activities are limited a lot than England.

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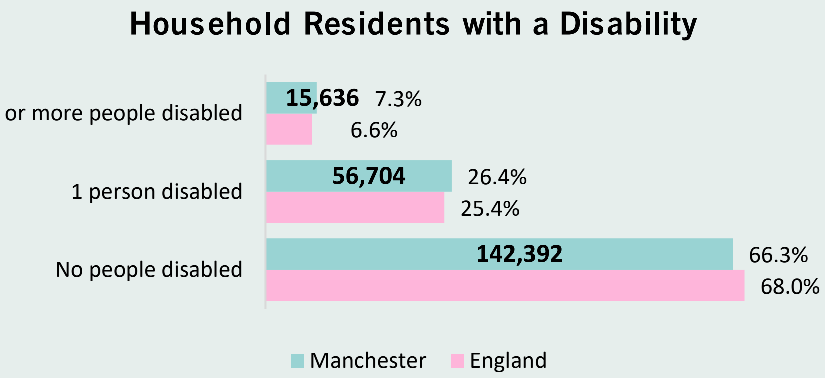
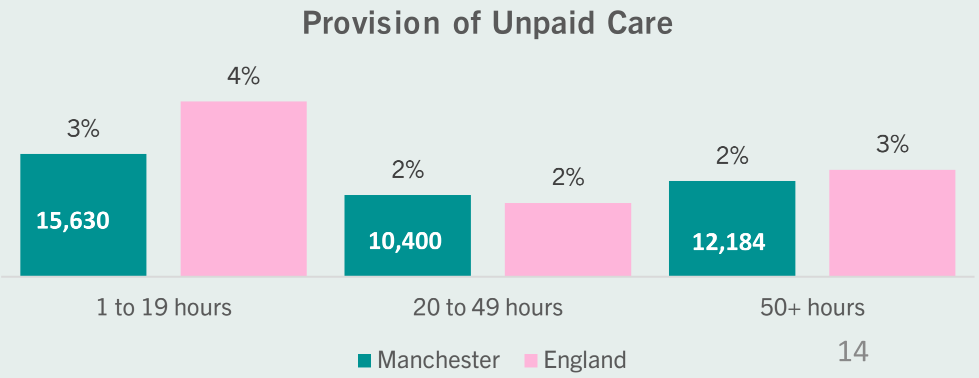


- Manchester has a higher proportion of households with residents disabled under the Equality Act in comparison with England. Census responses indicate that 15,636 households have 2 or more people disabled, 7.3% of Manchester households (6,6% of England households) and 56,704 households have 1 person disabled, 26.4 of Manchester households (25,4% of England households)

- The provision of unpaid care in Manchester is predominantly between 1-19 hours, with 3.0% of 2021 census respondents reporting that level of unpaid care. The national level, the figure stands at 4.3%. Those reporting unpaid care between 20-49 in Manchester was higher than at the national level, 2.0% compare with 1.8%, however the provision of unpaid care over 50 hours was higher at the national level than in Manchester, 2.6% compared with 2.4%.



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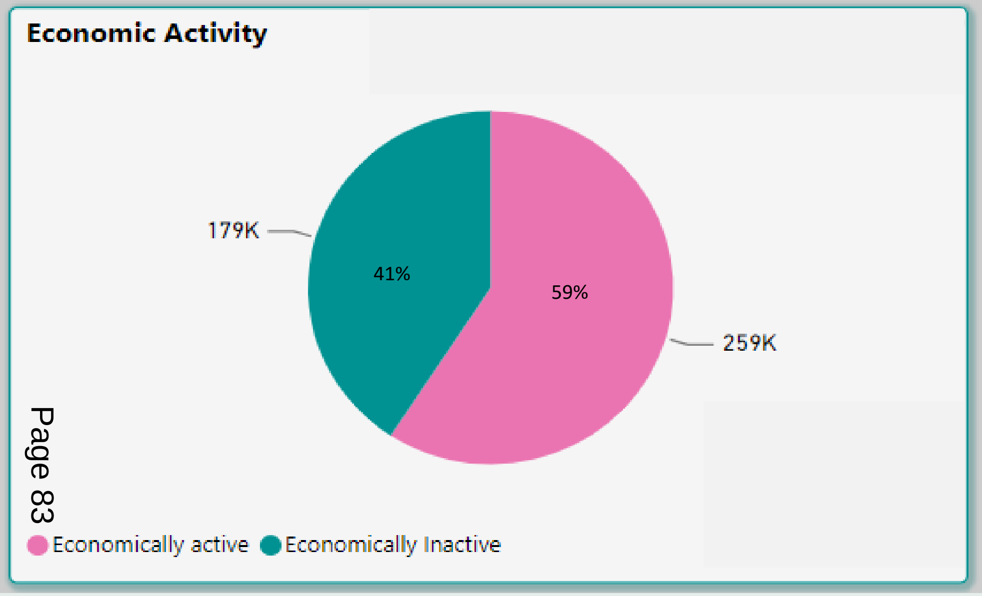
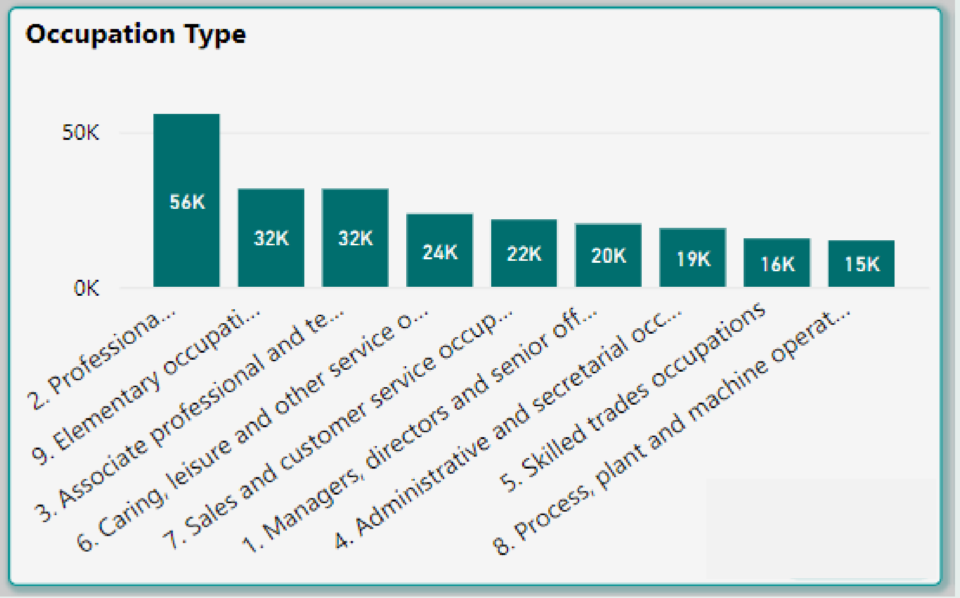
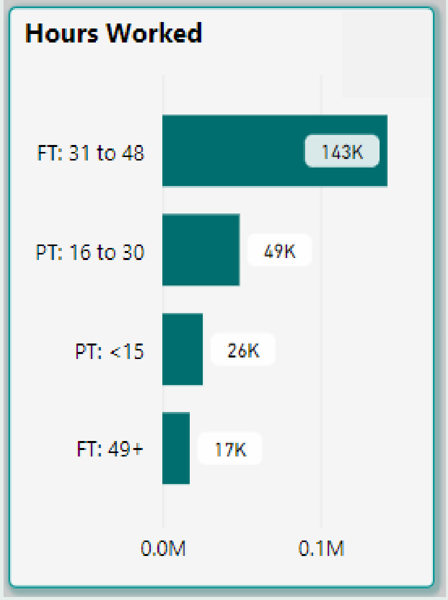
Census 2021: Economic Activity



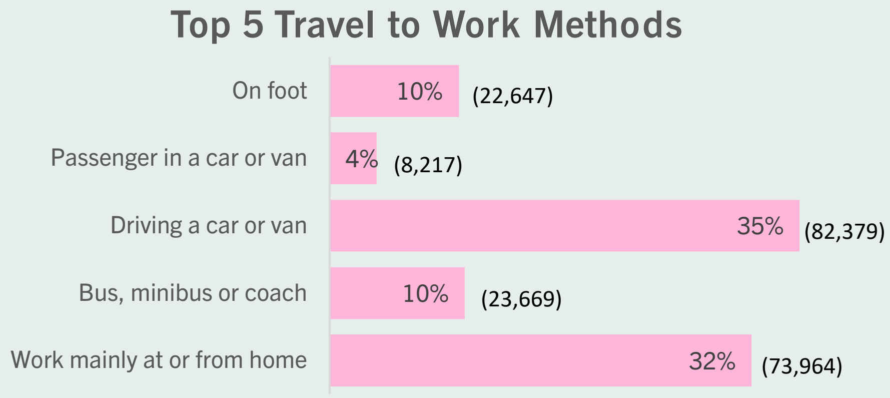


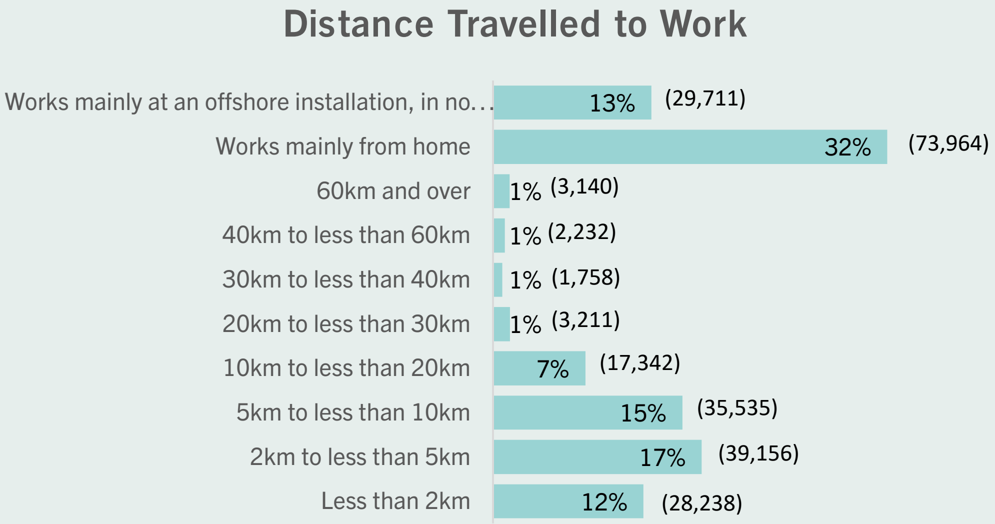


- Census 2021 shows a decrease in those economically active from 63.5% of the population in 2011 to 59.2% in 2021. However, caution is needed in comparing those values as census 2011 included those aged 16-74 whereas census 2021 included 16+ and so likely included more people economically inactive due to age.
- Census 2021 took place during a period of rapid change. The ONS gave extra guidance to help people on furlough answer the census questions about work but are unable to determine how it was followed.

* Response likely impacted by Covid including employees on Furlough – NB 22,000 Students also included in 'Economically Active'

Census 2021: Travel to Work





- Driving a car or van remained the most common method of travel to work between censuses, with working from home becoming the 2nd most common, up from 6th in 2011.
- The travel distances to work decreased between censuses to include working from home as the most common.
- Caution must be taken when reviewing this data. As the Census was conducted during the Covid-19 pandemic this will have had an impact on the number of people working from home and also on the distances being travelled for work.
- Travel to work methods is monitored more closely using Transport for Greater Manchester and can be found on slide 28 of the Economy Update that is produced on a quarterly basis.

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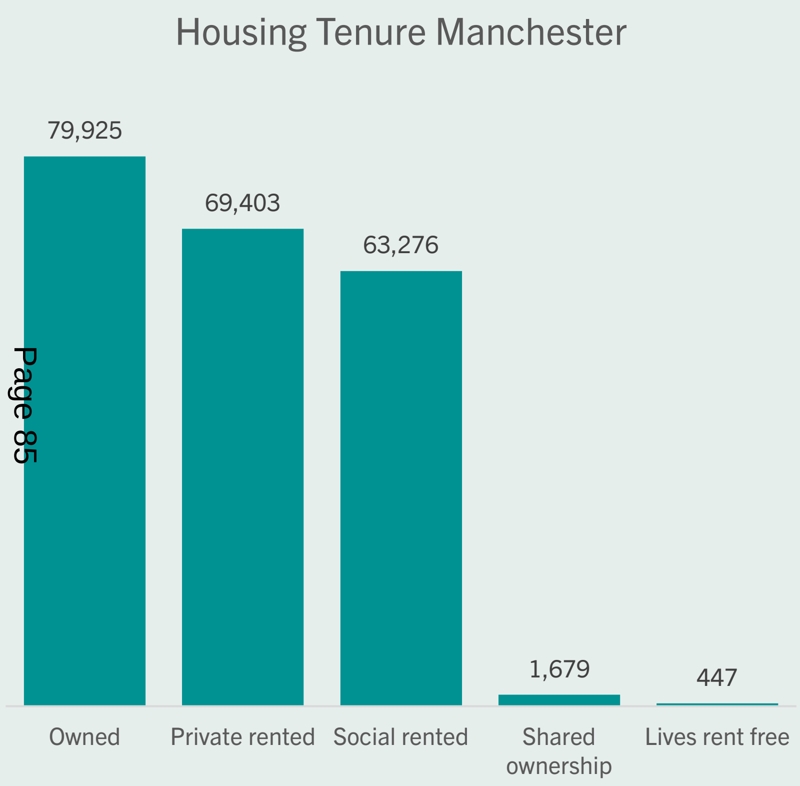
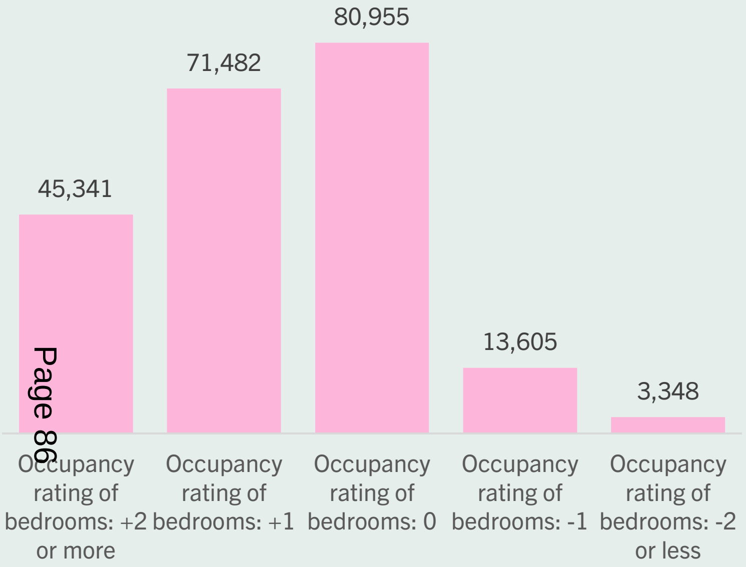
Census 2021: Housing and home

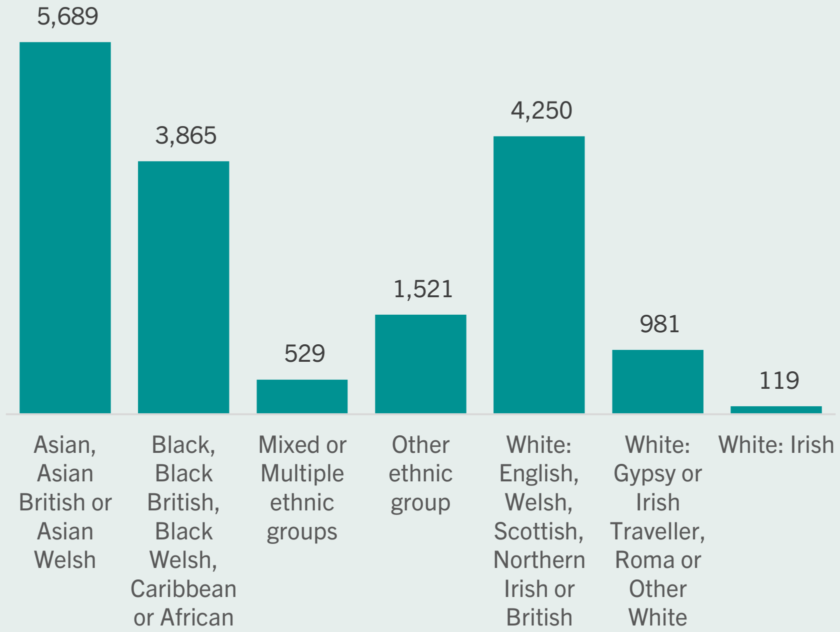


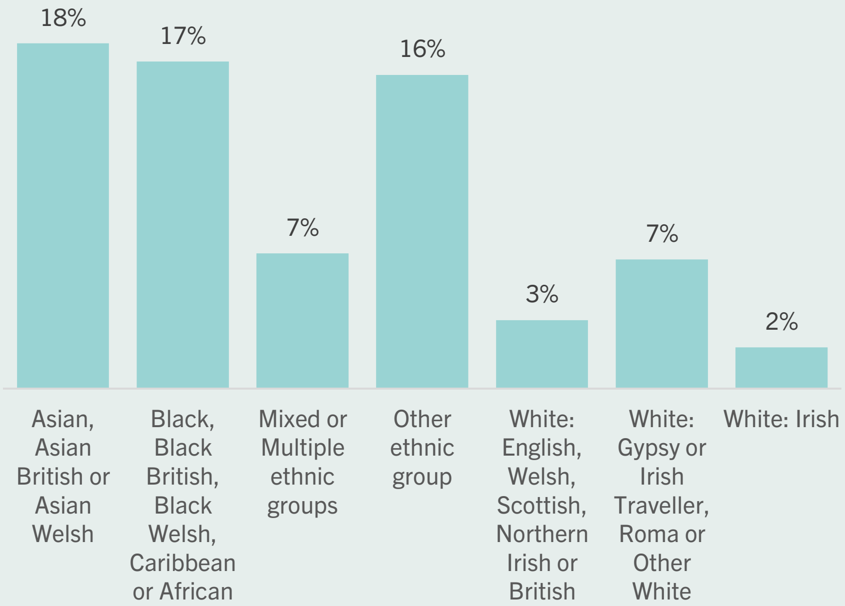
Purpose of Second Address	Count in Manchester
Student's home address	24,197
Another parent or guardian's address	15,063
Other	5,013
Partner's Address	3,879
Holiday Home	2,151
Another address when working away from home	1,557
Student's term-time address	153
Armed forces base address	107

- The most common tenure type in Manchester are 'Owned' properties at 37%, down from 38% in 2011.
- The second most common tenure type are 'Private Rented' at 32%, up from 28%, and replacing Social Rented (30%) from the 2011 Census.
- Caution must be taken when interpreting 'tenure' data especially with the 'privately rented sector' as these are the households most likely to be affected by the undercount.
- In Manchester 499,818 (91%) residents do not have a second address, according to the 2021 census. Of those that do, 40,339 have a second address in the UK and 25,100 have a second address outside of the UK.
- Second Address and Purpose of Second Address are resident counts.

Census 2021: Overcrowding by Ethnicity







- According to the 2021 Census, there are 16,953 (the combined figure of occupancy rating -1 and -2 combined) households in Manchester that have an occupancy rating below the recommended amount for each specific household. Technically meaning there isn't enough bedrooms for the composition of the household.

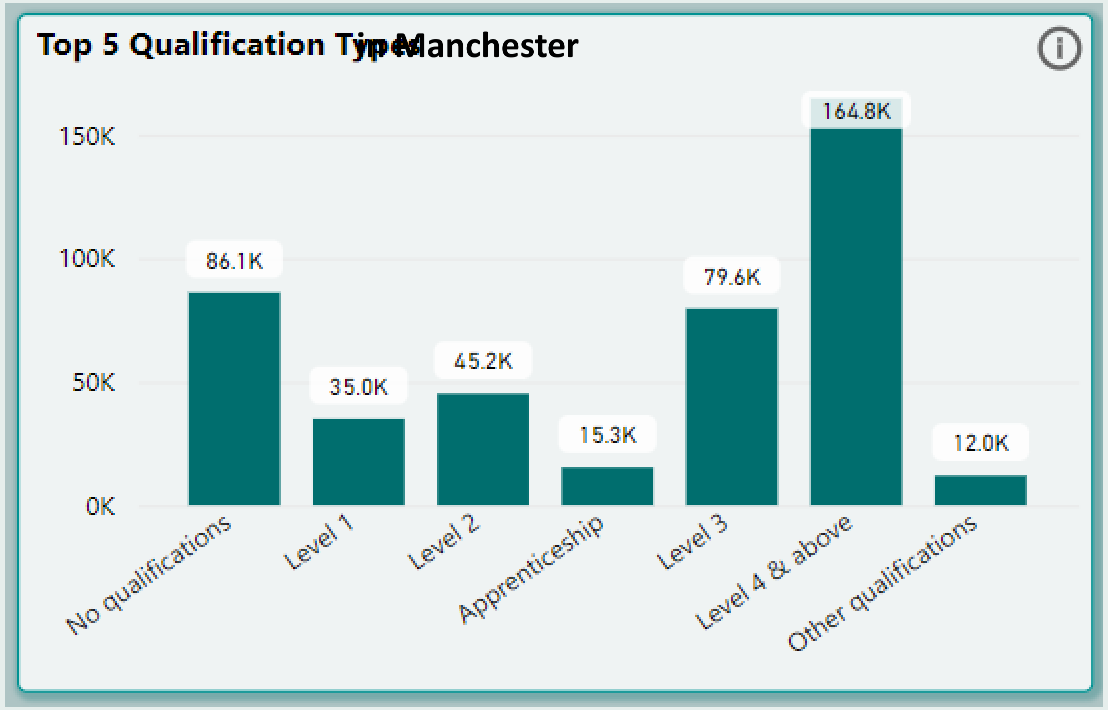
- Asian, Asian British or Asian Welsh has the highest number of domiciles that are understood to be overcrowded due to there not being enough bedrooms. This ethnic group also have the highest percentage of households that are overcrowded, with 18%.

- Other ethnic group, had the fourth largest count of overcrowded households. As a proportion of households with an overcrowded occupancy rating of -1 or more, this demographic cohort ranks third at 16%.

Census 2021: Highest Level of Qualification

All Residents aged 16+	2021 in Manchester	% in Manchester	England and Wales %
No Qualifications	86,110	19.7%	18.2%
Level 1/Entry Level	34,988	8.0%	9.6%
Level 2	45,164	10.3%	13.4%
Apprenticeship	15,322	3.5%	5.3%
Level 3	79,621	18.2%	16.9%
Level 4 or Above	164,763	37.6%	33.8%
Other	11,990	2.7%	2.8%

Level 1 – one to 4 GCSE passes (C+/Grade 4) or equivalent
Level 2 – 5 or more GCSE passes (C+/Grade 4+) or equivalent
Level 3 – Two or more A-Levels or equivalent
Level 4 – HNC/HND/Degree/Post-Graduate



- Manchester has seen a rise in the number of people with higher level qualifications, with 'Level 3' and 'Level 4 and Above' exceeding the rates seen in England & Wales. One explanation for this rise is that for younger people, degrees are becoming the norm. Another is that new entrants into the City, including international workers and student, are likely to be highly qualified.

- Lower level / No Qualifications have seen a decline since the 2011 census, this is due to the older working age retiring, when qualifications were not necessarily needed to work.

Using population statistics to inform service planning

Public Service Planning

- MCC using MCCFM to determine future demand & changing need to develop more accurate business and budget planning
- Alongside profiling residents' characteristics with the locality insight packs
- Planning for local services, like GPs, Libraries, schools, transport, etc
- Business Rates and Council Tax projections

Health & Social Care

- Project to consider & respond to demand from projected population growth (i.e. Primary and Community Care)
- Short term actions to react to current growth in wider city centre
- Long term approach to substantial developments taking place over the next 15-20 years, e.g. Northern Gateway.

Education

- MCC using MCCFM for school place planning
- ONS estimates & projections led to too few places being planned for in certain areas of the city in 2015
- Local MCCFM ensure we are planning based on local context & reality

Electoral Services

- MCCFM used by Electoral Boundary Commission for boundary review
- Supporting the need to keep boundaries reflective of real local communities

Neighbourhoods

- Waste & Recycling planning
- Parks, Open Space & Leisure assessments and planing
- Neighbourhood insights packs to support local planning & engagement

Housing

- Translating expected population growth into new housing requirements
- Considering household makeup, housing type/locations, and affordability

The importance of the Census and population statistics

Funding – ensuring funding is proportional to the actual population

- Any resource allocation formula that is based on ONS population estimates and projections derived from the 2021 Census may mean that we have insufficient funding to meet the needs of the local population. Such as the Government's Local Government funding settlement administered by DLUHC.
- The particular characteristics of our local population means that the undercount in the 2021 Census has a bigger impact in Manchester compared with other parts of Greater Manchester.

Service Planning – ensure the undercount in the census results is understood in terms of key cohorts

- The disproportionate undercount of the population in certain age groups, notably 20-39 year olds means that planning and funding services that meet the needs of this cohort of people needs to be carefully considered.
- This age group contains a higher proportion of people identifying with an ethnic group compared with other age groups so the 'missing' population is likely to contain a disproportionate number of BAME people.
- The 'ageing on' of this population cohort means that the undercount may continue to be seen in older age groups in the future.

Transparency & equality – ensuring all residents are visible

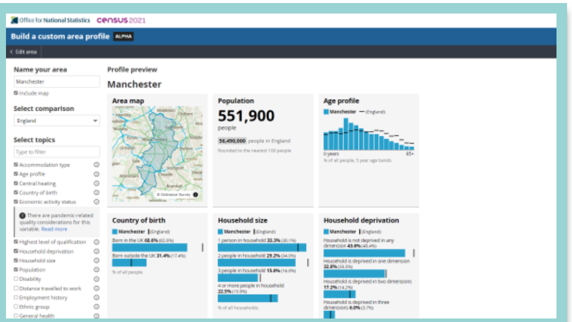
- We need the Census, alongside other local datasets, to help us ensure we know our residents & communities and that they are properly represented in decision-making and future planning.

Census 2021: Accessing the Data

Manchester insight tool – Census profiles – including Ward level breakdowns
Updated as data is released

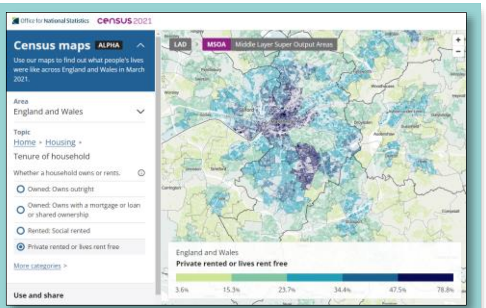
[Census 2021 | Census 2021 | Manchester City Council]

ONS Online tool –
Build a custom area profile



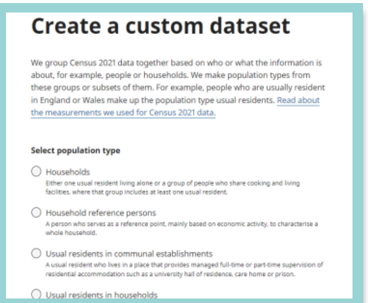
[Build a custom area profile - Census 2021, ONS]

ONS Online tool – compare nationwide and visualise on interactive maps



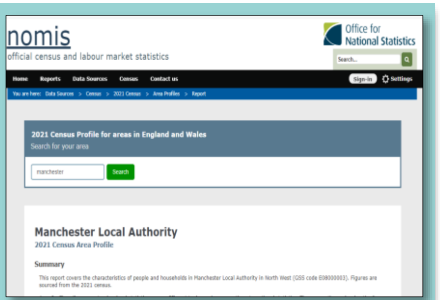
[Census Maps - Census 2021 data interactive, ONS]

ONS Online tool – Create a custom dataset (can combine multiple variables and data can be available at small area)



[Create a custom dataset - Office for National Statistics (ons.gov.uk)]

NOMIS: Access and query the raw data and past Census data



[Nomis - Official Census and Labour Market Statistics (nomisweb.co.uk)]

Timetable for future Census Releases:
[Release plans - Office for National Statistics (ons.gov.uk)]

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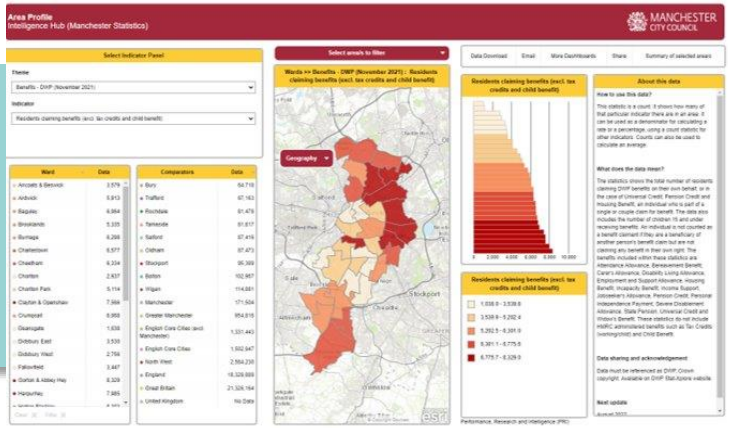
Accessing other Data

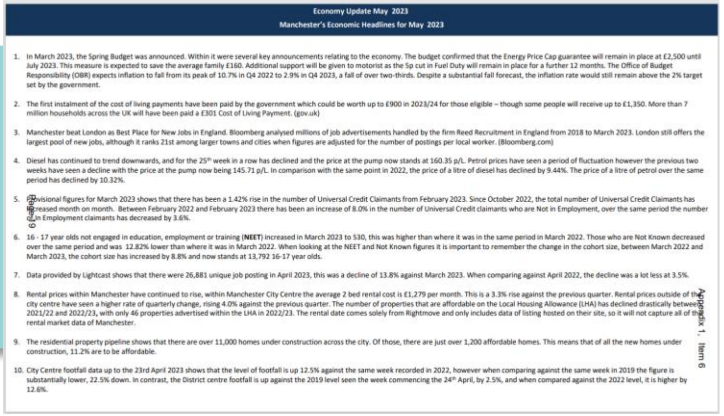
Manchester Intelligence Hub

[Intelligence Hub | Manchester City Council]



Quarterly Economic Monitor

[(Public Pack)Agenda Document for Economy Scrutiny Committee, 23/05/2023 10:00 (manchester.gov.uk)] (Page 19)



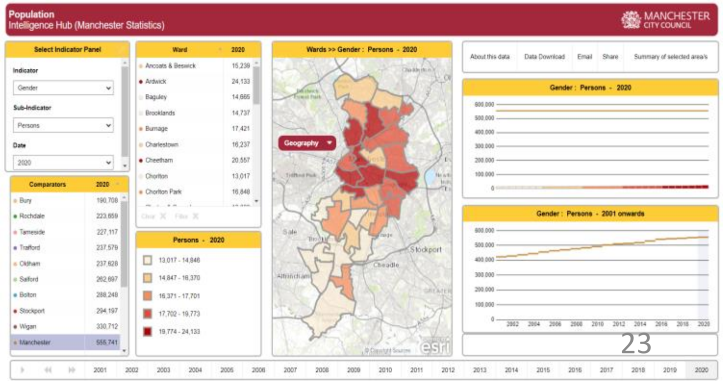
Economy Update May 2023

Manchester's Economic Headlines for May 2023

1. In March 2023, the Spring Budget was announced. Within it were several key announcements relating to the economy. The budget confirmed that the Energy Price Cap guarantee will remain in place at £2,500 until July 2023. This measure is expected to save the average family £160. Additional support will be given to motorist as the 5p cut in Fuel Duty will remain in place for a further 12 months. The Office of Budget Responsibility (OBR) expects inflation to fall from its peak of 10.7% in Q4 2022 to 2.9% in Q4 2023, a fall of over two-thirds. Despite a substantial fall forecast, the inflation rate would still remain above the 2% target set by the government.
2. The first instalment of the cost of living payments have been paid by the government which could be worth up to £900 in 2023/24 for those eligible – though some people will receive up to £1,350. More than 7 million households across the UK will have been paid a £301 Cost of Living Payment. (gov.uk)
3. Manchester beat London as Best Place for New Jobs in England. Bloomberg analysed millions of job advertisements handled by the firm Reed Recruitment in England from 2018 to March 2023. London still offers the largest pool of new jobs, although it ranks 21st among larger towns and cities when figures are adjusted for the number of postings per local worker. (Bloomberg.com)
4. Diesel has continued to trend downwards, and for the 25th week in a row has declined and the price at the pump now stands at 160.35 p/L. Petrol prices have seen a period of fluctuation however the previous two weeks have seen a decline with the price at the pump now being 145.71 p/L. In comparison with the same point in 2022, the price of a litre of diesel has declined by 9.44%. The price of a litre of petrol over the same period has declined by 10.32%.
5. Provisional figures for March 2023 shows that there has been a 1.42% rise in the number of Universal Credit Claimants from February 2023. Since October 2022, the total number of Universal Credit Claimants has increased month on month. Between February 2022 and February 2023 there has been an increase of 8.0% in the number of Universal Credit claimants who are Not in Employment, over the same period the number of In Employment claimants has decreased by 3.6%.
6. 16 - 17 year olds not engaged in education, employment or training (**NEET**) increased in March 2023 to 530, this was higher than where it was in the same period in March 2022. Those who are Not Known decreased over the same period and was 12.82% lower than where it was in March 2022. When looking at the NEET and Not Known figures it is important to remember the change in the cohort size, between March 2022 and March 2023, the cohort size has increased by 8.8% and now stands at 13,792 16-17 year olds.
7. Data provided by Lightcast shows that there were 26,881 unique job posting in April 2023, this was a decline of 13.8% against March 2023. When comparing against April 2022, the decline was a lot less at 3.5%.
8. Rental prices within Manchester have continued to rise, within Manchester City Centre the average 2 bed rental cost is £1,279 per month. This is a 3.3% rise against the previous quarter. Rental prices outside of the city centre have seen a higher rate of quarterly change, rising 4.0% against the previous quarter. The number of properties that are affordable on the Local Housing Allowance (LHA) has declined drastically between 2021/22 and 2022/23, with only 46 properties advertised within the LHA in 2022/23. The rental date comes solely from Rightmove and only includes data of listing hosted on their site, so it will not capture all of the rental market data of Manchester.
9. The residential property pipeline shows that there are over 11,000 homes under construction across the city. Of those, there are just over 1,200 affordable homes. This means that of all the new homes under construction, 11.2% are to be affordable.
10. City Centre footfall data up to the 23rd April 2023 shows that the level of footfall is up 12.5% against the same week recorded in 2022, however when comparing against the same week in 2019 the figure is substantially lower, 22.5% down. In contrast, the District centre footfall is up against the 2019 level seen the week commencing the 24th April, by 2.5%, and when compared against the 2022 level, it is higher by 12.6%.

Population - Mid Year Estimates

[Population (instantatlas.com)]



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