



**Manchester  
Metropolitan  
University**



**MANCHESTER  
CITY COUNCIL**



**Birley Campus Interim Impact Assessment  
Final Report**

**Peter Brett Associates**

April 2015

61 Oxford Street, Manchester, M1 6EQ

T: +44 (0)161 245 8900 F: +44 (0)161 245 8901 E: manchester@peterbrett.com

Peter Brett Associates LLP disclaims any responsibility to the client and others in respect of any matters outside the scope of this report. This report has been prepared with reasonable skill, care and diligence within the terms of the contract with the client and taking account of the manpower, resources, investigations and testing devoted to it by agreement with the client. This report has been prepared for the client and Peter Brett Associates LLP accepts no responsibility of whatsoever nature to third parties to whom this report or any part thereof is made known. Any such party relies upon the report at their own risk.

© Peter Brett Associates LLP 2014

**THIS REPORT IS FORMATTED FOR DOUBLE-SIDED PRINTING**

## FOREWARD

With the opening of the Birley Academic Building, and for the first time in its long history, Manchester Metropolitan University now operates on a single campus in Manchester, along with a campus in Crewe.

Manchester City Council is very proud to have worked with and supported MMU on their ten-year journey, in building this sustainable, city centre campus that will benefit the city and regional community.

This has been achieved through the smart, collaborative partnerships that have been developed between the University and Manchester City Council, requiring each to support one another through MMU's £350 million development programme.

It has also required colleagues from each organisation to challenge one another, to get the maximum from the finite resources, and commit to creating a high quality academic and social legacy that will benefit the local communities for many decades to come.

This interim impact assessment report highlights in detail, the many advances that have been made in developing employment, community, study and training opportunities for the local community in Hulme and the surrounding neighbourhoods.

We are now at the beginning of the next chapter in this collaborative partnership that will benefit the citizens of the city and region, through our work and commitment to providing equal opportunity and access to education for all.



Professor John Brooks  
Vice-Chancellor  
Manchester Metropolitan University



Sir Richard Leese  
Leader  
Manchester City Council

## **ACKNOWLEDGEMENTS**

With thanks to Prof. John Brooks and Mary Heaney of MMU, as well as the Heads of the Faculties of Education and Health, Psychology and Social Care, without whom this report would not have been possible. It is clear that they have been critical in delivering the Birley Campus and many of the successes outlined in this report.

Many thanks also to Manchester City Council for the information, insights and great assistance they have provided in the preparation of this report, in particular Angela Harrington, Andy Wilson and Cath Keane.

The cross-working by the University, the City Council and a range of other partners in delivering the Birley Campus, and in maximising the scope for benefits to be realised by the local community, has been exemplary.

# CONTENTS

- EXECUTIVE SUMMARY..... I**
  - The Proposed New Campus for MMU .....i
  - Moss Side & Hulme Area Profile: 2009 v 2014 .....i
  - Impact Assessment..... iii
  - Capturing Impacts ..... ix
- 1 INTRODUCTION..... 1**
  - Aims and Objectives..... 1
  - Report Structure ..... 1
- 2 MMU AND THE BIRLEY CAMPUS ..... 3**
  - Introduction ..... 3
  - Manchester Metropolitan University ..... 3
  - Previous Campuses ..... 3
  - The Birley Campus..... 4
  - Birley Fields without MMU (the counterfactual scenario) ..... 6
- 3 LOCAL PROFILE AND STRATEGIC CONTEXT..... 9**
  - Introduction ..... 9
  - Socio-Economic Profile ..... 9
  - Strategic Context..... 11
- 4 ECONOMIC IMPACTS OF THE BIRLEY CAMPUS .....15**
  - Introduction ..... 15
  - Gross Direct Impact..... 17
  - Gross Indirect Impact ..... 19
  - Gross Induced Impact ..... 20
  - Gross Multiplier Impact..... 23
  - Total Economic Impact 2009 v 2014 ..... 24
- 5 QUALITATIVE IMPACTS OF BIRLEY CAMPUS .....27**
  - Introduction ..... 27
  - Social and Community Impacts ..... 27
  - Educational Impacts ..... 32
  - Health Impacts ..... 35
  - Business Perception Impacts ..... 37
  - Physical Regeneration Impacts ..... 40
  - Environmental Sustainability ..... 44

Travel Patterns .....45

**6 CONCLUSIONS, MONITORING & ACTION PLAN .....49**

Headline Impacts .....49

Monitoring .....51

Action Plan.....53

**TABLES**

Table 1 Total Impacts - 2009 ..... iv

Table 2 Total Impacts - 2014 ..... v

Table 4.1 Summary of Gross Direct Impact ..... 19

Table 4.3 Induced GVA generated by Birley Campus..... 23

Table 4.4 Estimated Total Economic Impact of Birley Campus (2009)..... 24

Table 4.4 Estimated Total Economic Impact of Birley Campus (2014)..... 25

Table 6.1 Monitoring Framework ..... 51

**FIGURES**

Figure 4.1 PBA Economic Impact Model ..... 15

**APPENDIX**

Appendix A Updated Baseline Report

## EXECUTIVE SUMMARY

### The Proposed New Campus for MMU

- 1.1 MMU is organised into eight faculties, which includes the Faculty of Health, Psychology and Social Care and the Faculty of Education. Previously, these faculties were spread across five sites in Manchester and two in Cheshire. As part of a plan to consolidate existing facilities, the relocation of MMU's faculties of Education, and Health, Psychology and Social Care, together with other associated services and facilities, have relocated from locations at the Elizabeth Gaskell campus in Rusholme and the Didsbury campus, to Birley Fields in Hulme.
- 1.2 A total of 535 staff (430 full time equivalent) and some 6,370 students were previously employed or enrolled within the Faculty of Health, Psychology and Social Care and the Faculty of Education at the Elizabeth Gaskell and Didsbury campuses. A change in HR structure makes comparison of the number of staff at the new campus difficult, however on broadly the same terms it appears that staffing at the new campus has decreased slightly to 439 following the relocation. Conversely, the number of students has increased to nearly 7000 at Birley Fields.
- 1.3 An investment of £139 million was made in delivering the new campus, which includes:
  - 24,900 sq.m of new teaching accommodation
  - Dual MMU and community use spaces including restaurant and coffee bar, flexible foyer space and social learning areas, a multi-use hall, lecture theatres and general teaching classrooms, a drama studio as well as a student information point
  - 1,200 student residences
  - An 318 space multi-storey car park; and
  - New public realm

### Moss Side & Hulme Area Profile: 2009 v 2014

#### *Economy & Property*

- 1.4 The 2009 baseline area profile showed that the Education sector was a key employer in the area, with the proportion of people employed in the sector well above the national average. Furthermore, as a proportion of total employment, the number of people employed in education appears to be growing.
- 1.5 Since 2009, the number of people employed in businesses located in Hulme and Moss Side has fallen, although this is likely to be attributable to some degree to the economic downturn over the period since 2009. That said, employment has grown in the rest of the SRF area, Manchester, the North West and the nation as a whole over the same period.
- 1.6 More positively, however, the rental market for commercial property has shown an improvement since 2009. Whilst a range of factors may explain this, it is likely that the

development of the Hulme Campus will have already had some beneficial impacts on business performance and confidence through the construction phase, with further benefits likely following completion and full occupation. In turn, therefore, further improvements may be seen in the coming years with increases to rental values and longer, more secure lease terms adding to the value of developments in the area.

- 1.7 The improving conditions are also evident in the local housing market with prices showing an upward trend from the previous study, despite turbulence in the local and national economy and housing markets. The housing mix and tenure has shown some notable changes since the previous baseline study. The proportion of residents in flats/apartments has grown considerably in Hulme, far in excess of the national or regional trend in this respect. Similarly, the proportion of residents living in detached or semi-detached housing in Moss side has also increased, unlike the national and regional trends.
- 1.8 In terms of housing tenure, whilst the number of residents living in social rented housing has fallen in Hulme and Moss Side between the two studies, this proportion remains significantly higher than city-wide or regional comparators.

### *People and Society*

- 1.9 Although it is clear that a large proportion of residents of both Hulme and Moss Side still experience significant socio-economic hardship, analysis of data trends since 2009 reveal that the deprivation gap between the wards and the city as a whole is narrowing. Since 2009 the resident population and economic activity rates in Hulme and Moss Side have increased, whilst unemployment levels have fallen. Furthermore, life expectancy levels have improved, and teenage conception rates and numbers of people claiming incapacity benefits have fallen.
- 1.10 These changes can be linked to the urban regeneration efforts aimed at economic development, physical and environmental improvements, enhancement in the local quality of life and community capacity building that began through the City Challenge programme of the 1990s. The regeneration programme, linked to the proximity of the areas in relation to the city centre, has made the wards particularly attractive to young professionals. The opening of the new University campus marks a next phase of regeneration that will provide local employment opportunities and help to produce improved outcomes for local residents.

### *Education and Aspiration*

- 1.11 Hulme and Moss Side have seen considerable improvements in education across a number of age groups since the 2009 baseline report. Primary school attainment in English and Maths has closed the gap on regional and national standards, with attainment in Moss Side exceeding these in some cases.
- 1.12 Secondary school attainment, measured in terms of gaining five or more A\*-C's and gaining five or more grades A\* -G has also shown considerable improvement. Again, this has mostly been notable in Moss Side where the proportion of students achieving grades A\* -C has grown considerably.

- 1.13 Finally, the proportion of NEETs (Not in Education, Employment or Training) in Moss side has remained comparatively low during the period. In Hulme, data shows that the proportion has fallen notably in the last five years, although these are still higher than the average for the wider Manchester area.
- 1.14 It is likely to be somewhat too early to measure any impact of the new campus on participation rates in further and higher education. Additional data is required in this respect, and its collection forms part of the monitoring framework set out in Section 6 of this report.

## Impact Assessment

- 1.15 In 2009, Roger Tym & Partners (now Peter Brett Associates) were appointed to assess the likely impacts of the proposed new Birley Campus on the Moss Side and Hulme areas. The study sought to assess the likely impacts across three broad categories:
- Economic impacts – quantifying the stable annual impact of the proposed campus in terms of jobs supported and gross value added, by taking into account the direct, indirect, induced and multiplier impacts of the scheme.
  - Social, business perception and regeneration impacts – identification of the qualitative impacts that the campus is likely to have on the area in terms of its community, physical regeneration and perceptions as a place to do business.
  - Educational impacts - the impacts that the location of the new campus may have on educational achievement and aspiration of Hulme and Moss Side residents by encouraging more young people to remain in education for longer, and adults who may have underachieved or left education early, to gain more qualifications.

## Economic Impacts

### *Direct Impact*

- 1.16 The direct impact is the number of jobs and GVA generated by MMU at the new campus. Although a direct comparison between the 2009 and 2014 direct employment is difficult because to new systems and structures within the MMU, employment by MMU at the new campus in 2014 is slightly lower than the 2009 forecast of 535 jobs (430 FTE), at 497 jobs (434 FTE).
- 1.17 The construction of the campus generated more jobs based on actual construction costs and turnover figures compared to the 2009 estimate. It is calculated that the campus generated 948 labour years of construction employment, equating to a further 95 permanent jobs. Higher than the estimated 590 labour years of construction employment, equating to a further 58 FTE jobs, in 2009.

### *Indirect Impact*

- 1.18 Indirect impacts arise in the local economy from the supply of goods and services to the new campus. The 2009 report estimated an additional £3.99 million would be spent by the university in the local area as a result of the relocation. This spend would support 29 local jobs (22 FTE). Based on up to date information on campus turnover,

these indirect impacts are assessed to equate to £4.5 million, supporting 49 jobs (39 FTE).

### *Induced Impact*

- 1.19 The induced impact represents the revenue and jobs generated by the spending of university staff, students and related visitors in the local economy. Based on the findings of staff and student surveys, the 2009 study estimated that expenditure would support a total of 129 (101 FTE) jobs. Applying the latest information and inflationary uplifts the induced impacts of the campus are estimated to generate £7.5 million in GVA and support a total of 188 jobs (150 FTE jobs).

### *Multiplier Impact*

- 1.20 The multiplier impact is the additional jobs and income generated through re-spending of an initial monetary injection into the economy. For example, spending by staff and students at a local newsagent enables the owner to pay for supplies and labour, which in turn provides the employees with money to purchase groceries and so on, generating further economic activity.
- 1.21 It was estimated in 2009 that multiplier impacts would support 125 total jobs, or 97 FTE jobs in Hulme and Moss Side. The updated assessment shows the multiplier impacts to have increased to 245 total jobs or 196 FTE jobs.

### *Total Economic Impact*

- 1.22 Bringing the elements together, the 2009 estimate of total economic impacts of the new campus would support 877 local jobs, or 708 full time equivalent jobs. The 2009 data suggested that the Birley Fields Campus would provide an income multiplier impact equivalent to 2.22 (i.e. for every £1 in turnover at MMU Birley Fields campus, a further £1.22 is generated in the local economy). The resulting employment multiplier is 1.47, i.e. for every 100 jobs at MMU Birley Fields a further 47 jobs are supported in the local economy.

**Table 1 Total Impacts - 2009**

	Spend	Total Jobs	FTE Jobs	GVA
<b>Direct Impact</b>	£26,603,000*	594	488	£19,790,000
<b>Indirect Impact</b>	£3,990,000	29	22	£950,000
<b>Induced Impact</b>	£11,130,000	129	101	£4,300,000
<b>Multiplier Impact</b>	£17,380,000	125	97	£4,160,000
<b>TOTAL</b>	<b>£59,103,000</b>	<b>877</b>	<b>708</b>	<b>£29,200,000</b>

\* This figure and related discussion of it in para. 1.15 below differs from that in the 2009 report, the source of which is not apparent.

1.23 This 2014 Interim Impact Assessment shows an increased level of jobs and GVA across each element of the economic impact which would support a total of 1072 jobs, or 913 FTE jobs. The updated data shows the new campus provides an income multiplier impact equivalent to 2.14 (i.e. for every £1 in turnover at MMU Birley Fields campus, a further £1.41 is generated in the local economy). The resulting employment multiplier is 1.81 (i.e. for every 100 jobs at MMU Birley Fields, a further 181 jobs are supported in the local economy).

**Table 2 Total Impacts - 2014**

	Spend	Total Jobs	FTE Jobs	GVA (£m)
<b>Direct impact</b>	£30,100,000	592	529	£23,649,956
<b>Indirect impact</b>	£4,500,000	49	39	£1,955,099
<b>Induced impact</b>	£15,124,816	187	150	£7,479,461
<b>Multiplier impact</b>	£22,568,538	245	196	£9,772,698
<b>TOTAL</b>	<b>£72,293,353</b>	<b>1,072</b>	<b>913</b>	<b>£42,857,214</b>

## Qualitative Impacts

### *Social & Community Impacts*

- 1.24 Development of the campus has exceeded the qualitative impacts estimated in the 2009 study across the criteria assessed. The 2009 study estimated the value of volunteering in Moss Side and at £13,060 and that was likely to increase to over £26,000 following the campus relocation and targeting of projects in Hulme and Moss Side. This figure has been exceeded following the latest assessment, equating to £32,120, some £19,060 higher than was assessed in 2009.
- 1.25 In addition, the 2009 report set out a broad range of community engagement and development activities being undertaken as part of the campus relocation project. These aimed at creating genuine two-way exchange of knowledge and expertise with the wider community, that are likely to enhance skills and give residents confidence to engage further with MMU and higher education in general.
- 1.26 Extensive consultations were undertaken in respect of the design and layout of the campus development itself, and changes made to reflect the issues identified by the local community and their aspirations for the project, including the location of the main car park. The inclusion of a range of facilities within the campus that are available for and already well used by local community groups is a sign of the success of this activity.
- 1.27 The ground floor facilities are open to members of the local community and include meeting rooms, social and learning spaces with Wi-Fi throughout; a large drama and dance studio with seminar room and changing facilities, equipped to support

professional drama and dance classes and practice; Multi-purpose hall, with retractable seating for 200 and with the flexibility to accommodate sports, events, drama, production and public events; 4 large lecture theatres with high quality AV equipment; a café and a large kitchen area; and a teaching clinic for local health practice. Externally, the public realm (including a community orchard and sensory garden, developed with assistance from Hulme Community Garden Centre) are well used by local residents.

- 1.28 Potential negative impacts of the campus on community cohesion have also been considered and addressed. Examples of this include designing in a taxi drop-off point within an internal courtyard so as to prevent closing of car doors waking residents late at night. Issues with a contractor working outside of agreed hours, a particular challenge given delays with the completion of residential buildings, were also addressed swiftly in consultation with local stakeholders.
- 1.29 The community engagement and development projects planned have been successfully delivered, most notably the public engagement fellowships that have helped to embed MMU within the Moss Side and Hulme communities. The success of efforts in ensuring community cohesion, are reflected in the positive statements made by local residents, some of whom who were previously sceptical about the project, as well as local elected members.

### *Education Impacts*

- 1.30 It is difficult to produce statistical proof to support predictions in terms of educational aspiration and enthusiasm. The potential educational impacts of the scheme are gleaned from consultation with a range of educational professionals. Participation rates in higher education for Hulme and Moss Side in 2009 were low and well below average rate for the wider region. Whilst further data is being sought on the current position, the update to the area profile showed that the proportion of NEETs has reduced significantly in both Hulme and Moss Side since 2009.
- 1.31 The consensus view among those consulted in 2009 was that the proposed new campus could increase the take up of higher education places among local young people as well as re-engage adults in Hulme and Moss Side, particularly through the following means:
- Providing positive role models in the area;
  - Demonstrating the value of education;
  - Giving confidence in ability to progress into higher education; and
  - Raising aspiration for higher education among local young people.
- 1.32 Among the staff in the schools, and those working in the adult sector, there was a caveat that, while the new campus would be initially exciting, it would not achieve anything unless it was accompanied by a strategic approach and genuine partnership. There was a clear and consistent view that the university must develop, and make clear to all, a strategy for engaging with the local community, including schools, in order to make all collaborative work as effective as possible. It is clear that these activities have been undertaken and are largely considered to be successful. As such,

it is reasonable to expect that data will show an increase in FE/HE participation amongst local young people in due course.

### *Health Impacts*

- 1.33 Whilst ultimately a health centre has not been included in the campus development, MMU has sought to maximise the health benefits provided by Birley Fields. This has been done through the establishment of a Health Impact Group. This has led to a number of activities being undertaken by third year pre-registration nursing students, under supervision, within the community. Free health screenings for the community are a core element of these activities.
- 1.34 A brand new facility within the Birley campus is the MMU Clinic, which is available to staff, students and the public. Various treatments are available at competitive prices for sports injury, headaches, back pain, physiotherapy, neurological conditions, women's health, headaches and acupuncture. These services provide further opportunities to develop links with the local community and improving the health and wellbeing of residents, as well as contributing to the expertise being transferred to students at the campus.

### *Business Perception Impacts*

- 1.35 Consultations with local business, economic development and inward investment organisations in 2009 revealed generally poor perceptions of Hulme and Moss Side as a place to do business as a result of perceptions around crime and anti-social behaviour and the skill levels of the local workforce. However, it was also envisaged that the campus will change perceptions of the area as a place to do business and help to attract business to the remaining vacant office space at Birley Fields, in part as a result of the improved environmental quality.
- 1.36 The 2009 surveys also showed that businesses expected that the campus would attract new retail and service business to the area to take advantage of the expenditure of staff and students. Whilst the additional retail space on Stretford Road as part of the Birley Campus development is not yet complete, it is understood that there has been reasonable interest from potential tenants of the new floorspace, and that it is likely that all of the space will be let in due course.
- 1.37 It is perhaps too early to understand the business impacts of the campus having only recently opened. However the data gathered suggests a much improved picture in terms of reduced retail vacancy rates, higher rateable values as well as the achieved rents by landlords. Whilst a new business survey has not been undertaken as part of this interim assessment, anecdotal evidence suggest that the Birley Fields development has increased confidence and changed perceptions of the area with investments having been made on retail remises and extensions to opening ours being implemented.
- 1.38 Outside of the retail sector, the areas surrounding the campus appear to have become more attractive to businesses. No. 1 Archway was the last vacant office building at Birley Fields, this building was bought outright by UK Fast, an internet server and data

centre provider. It is understood that the investment in the new campus and the availability of a young, skilled workforce were major factors in choosing the location.

### *Physical Regeneration Impacts*

- 1.39 In physical regeneration terms, the 2009 study identified the site of the campus as the final 'missing piece' in the regeneration of Hulme. The site lay unused and subject to anti-social behaviour. Development of the campus was thought likely to inject new vitality and activity in the area, supporting local shops and services and improving surveillance and security; to radically improve the physical environment and amenity; and to better connect residential areas with the facilities that serve them.
- 1.40 Now that the development of the campus is largely complete, it is clear that its impact on the built form and function of the area is considerable and hugely beneficial. The main academic building is of a very high architectural standard and stands as statement of confidence in the area. It is already a local landmark that marks the gateway to the City Centre. Beyond this, the layout of the campus has enabled new, safer and higher quality pedestrian routes between existing residential areas and nodes of activity such as Hulme High Street.

### *Impacts on Travel Patterns*

- 1.41 The University's Green Travel Plan promotes sustainable forms of transport such as walking, cycling and public transport, and will significantly reduce reliance on travel by private car and assist in achieving sustainability objectives. Whilst it is too early to determine the extent to which the travel patterns have changed, the relocation of the campuses to Birley Fields and closer to the existing core MMU campus at All Saints will, in itself, reduce the need to travel and provide the opportunity to promote non-car modes by virtue of increased proximity. In addition to this, MMU is pump-priming a bus route connecting Didsbury to the new Campus.

### *Environmental Sustainability Impacts*

- 1.42 In terms of environmental and sustainability credentials, the campus is an exemplar project. The design itself sought to retain as many existing mature trees as possible and relocate good specimens where this was not possible. A large number of new trees were also planted.
- 1.43 The campus aspires towards the three zeros: zero carbon, zero water and zero waste. The building will achieve BREEAM Excellent as a minimum and measure are being explored to achieve an Outstanding rating. The main academic building is innovative and uses a displacement air system with aero foils located over the atria on the roof and heat recovery during winter months.
- 1.44 The campus also includes an Energy Centre using a natural gas CHP unit to provide centralised energy for the site. It also includes a borehole water treatment plant and water storage.

## Capturing Impacts

- 1.45 In 2009, our report set out a palette of potential actions that would assist in capturing and maximising the beneficial social, educational; regenerative and economic impacts of the new campus and the investment and expenditure it generates in Hulme and Moss Side. The following overview provides a brief summary of whether and how these actions were implemented.
- Maximise local employment impacts through an initiative targeting Hulme and Moss Side residents for MMU jobs;
    - All MMU entry level jobs at the Birley Campus are ring-fenced for local residents
  - Enable construction apprenticeships for local residents on-site during the construction of the campus. Based at the Birley Campus, these should lead to a formal construction qualification for participants upon completion of the apprenticeship;
    - Formal targets for the use of local labour were included in the contracts between MMU and its construction partners. These targets were exceeded. The levels of local labour were as follows:
      - Sir Robert McAlpine (construction partner for the main academic building) recruited 42% of the workforce for the project from the Greater Manchester area and 13% from the City of Manchester
      - GB Building Solutions (construction partner for the residential buildings) recruited 43% of its workforce from Greater Manchester, including 12% from the wards of Moss Side and Hulme.
    - 5 construction apprenticeships were created, and GBBS ran a workshop aimed at women and girls in construction;
  - Maximise indirect benefits by selecting local suppliers to retain expenditure in Hulme and Moss Side.
    - Local providers used in catering supply
    - 14 local companies were contracted, including Hulme Community Garden Centre, which provided trees and a range of other plants, including herbs for the Sensory Garden
    - Local sourcing to be a factor in future supply chain decisions
  - Maximise staff and student volunteering by working with CoMMUni to target local projects and organisations;
    - The scale and value of MMU volunteering, and its targeting to the Hulme and Moss Side areas is shown to have increased
  - Work with local sports and leisure facilities and organisations to share resources and encourage joint activities;
    - MMU now has a partnership with MCC and MCFC to deliver sporting activities in around Moss Side and Hulme. The viability and use of existing facilities in the area was considered as part of the new campus.

- Investment in sustainable transport modes.
  - A new bus service, pump-primed by MMU, is now operating between Parrs Wood and the campus
  - High quality routes and facilities for cyclists have been put in place, alongside safe and direct pedestrian routes
  - Electric car charging points have been installed
- Convene local primary, secondary and further education institutions and Higher Futures 4U representatives to discuss involvement in scheme;
  - MMU continues to work closely with local schools and colleges on a wide range of initiatives and programmes aimed at increasing participation rates in higher education
- Focus Faculty of Education student placements in Hulme and Moss Side;
  - Placements in the local area have been targeted
- Convene representatives from local secondary and further education institutions, and Aimhigher;
  - MMU continues to work closely with local schools and colleges
- Develop a 'two-way' relationship between the local community, the university and other partners and stakeholders
  - This has been achieved through a variety of means and the campus is already effectively operating within the community

# 1 INTRODUCTION

- 1.1 Peter Brett Associates (formerly Roger Tym & Partners), were appointed in 2009 by Manchester Metropolitan University (MMU) and Manchester City Council (MCC) to undertake an impact assessment of a new campus for MMU at Birley Fields in Hulme. This report provides an interim update of some elements of that original study to determine the extent to which the projected impacts have been achieved, and identify means by which impacts can be maximised.
- 1.2 MMU's Faculty of Health, Psychology and Social Care (FHPSC) and the Faculty of Education (IoE), together with associated services and facilities, have now relocated from their previous locations in Didsbury and Ardwick wards to Birley Fields, with the main academic building opening in September 2014 and student accommodation opening shortly thereafter.

## Aims and Objectives

- 1.3 The overarching aim of this work is to assess the likely impacts of the new campus on Hulme and Moss Side in economic, social/regeneration and educational terms. More specifically, objectives include to:
- Measure the key social, economic and educational characteristics of the two wards against those shown in the baseline profile from 2009. (The interim update of the area profile forms a separate report that is included at Appendix 1 of this report.);
  - Update the assessment of the quantifiable impacts of the scheme, based on up-to date information. This focuses on the economic impacts such as job creation and gross value added (GVA), on the wards of Moss Side and Hulme;
  - Update the assessment of the likely qualitative impacts of the campus, particularly in terms of community cohesiveness, business perceptions of the area, physical regeneration, and sustainable movement patterns;
  - Assess whether there is any evidence yet that the campus development has increased levels of participation in further and higher education by raising ambitions and aspirations of local primary and secondary school students; and
  - Review and update where necessary the 2009 action plan of key tasks that will assist in capturing and maximising the beneficial social, educational, regenerative and economic impacts of the new campus and the investment and expenditure it generates for Hulme and Moss Side.

## Report Structure

- 1.4 The remainder of our report is structured to meet the aims and objectives set out above as follows:

- **Section 2** - introduces MMU and its existing campuses followed by a description of the proposals for the Birley Campus ;
- **Section 3** - provides a summary of the socio-economic profile of the local area and a review of the policy and strategic context;
- **Section 4** - provides our quantitative analysis of the economic impacts of the proposed Birley Campus . We estimate the revenue the scheme would generate, the number of FTE jobs and GVA and the expenditure impact on the local economy. We draw on the findings from our business, student and staff surveys;
- **Section 5** - provides our analysis of the qualitative impacts of the new campus on the local area, drawing on consultations with a variety of local organisations and stakeholders;
- **Section 6** - examines the educational impacts of scheme and the potential for raising the educational achievement and aspirations of the local residents; and
- **Section 7** - sets out a summary of our findings and identifies an action plan for MMU to maximise the potential benefits of the new campus for the local area.

## 2 MMU AND THE BIRLEY CAMPUS

### Introduction

- 2.1 This section of the report introduces Manchester Metropolitan University (MMU) and its existing campuses in terms of the size, nature and location. This leads on to a discussion of how the university is reshaping itself and how the Birley Fields in Hulme campus is a key aspect of this exercise. A more detailed description of the proposals for the Birley Campus is set out along with an assessment of the future of the Birley Fields area should MMU not re-locate there – the counter-factual scenario.

### Manchester Metropolitan University

- 2.2 MMU was established as a Polytechnic in 1970 and became a university in 1992. The university was developed initially as a centre of Technology, Art and Design from Manchester Mechanics' Institution (1824) and Manchester School of Design (1838). Later schools of Commerce (1889), Education (1878) and Domestic Science (1880) were added along with colleges at Didsbury, Crewe, Alsager and the former Domestic and Trades College (1911), latterly Hollings College.
- 2.3 The university now has over 37,000 students, up from 33,500 in 2009. In 2009, the university was spread across seven campuses: five in Manchester and two in Cheshire. A major investment programme has seen facilities concentrated in two campuses in Central Manchester (of which Birley Fields now forms part) and one in Crewe. The university offers over 1,000 courses and qualifications, many of which have a strong vocational basis.
- 2.4 To achieve this, the university has or is investing some £350 million in new academic and student accommodation over the 10 years to 2015. A further investment plan comprising over £200 million of projects is currently being prepared and will focus on a range of existing buildings and the public spaces that connect the buildings, with the aim of creating world class, sustainable and student centred facilities.



### Previous Campuses

- 2.5 MMU is organised into eight faculties, which includes the Faculty of Health, Psychology and Social Care (FHPSA) and the Faculty of Education (FoE), and was spread across the university's seven campuses in Manchester and Cheshire.

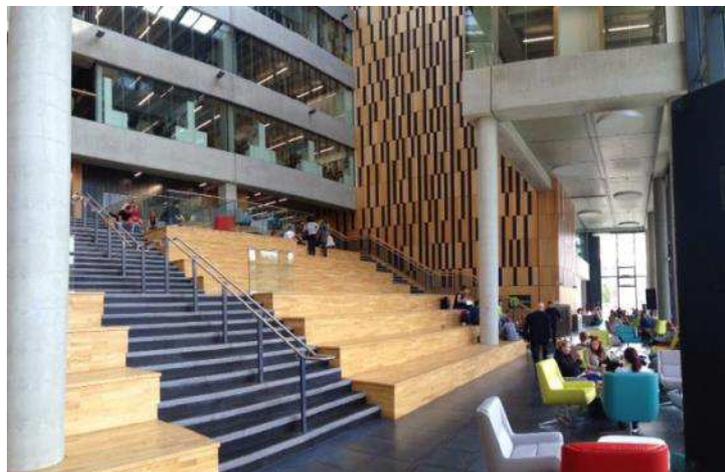
- 2.6 MMU's FoE is a leading UK centre for educational research and study that provides initial teacher education and training, and continuing professional development to the entire education workforce. It was spread across campuses in Didsbury and Crewe.
- 2.7 The FHPSC previously operated from two campuses, with health and psychology related programmes based at the Elizabeth Gaskell campus in Ardwick ward, and social work and social change courses located in Didsbury.
- 2.8 A total of 535 staff were employed within the FHPSC, the IoE and other supporting divisions at the Elizabeth Gaskell and Didsbury campuses. Some 3,610 were enrolled in the Faculty of Education at the Didsbury campus and a further 2,760 students within the FHPSC were split between the Elizabeth Gaskell and Didsbury campuses.

## The Birley Campus

- 2.9 The Birley Campus is largely complete and the relocated FHPSC and Faculty of Education are now both fully operational from the new academic building there. An investment of £139 million was made in delivering the new campus across an 11 acre site, which includes:
  - 24,900 sq. m of new teaching accommodation
  - 1,200 student residences
  - An 318 space multi-storey car park; and
  - New public realm
  - Dual MMU and community uses spaces including restaurant and coffee bar, flexible foyer space and social learning areas, a multi-use hall, lecture theatres and general teaching classrooms, a drama studio as well as a student information point



- 2.10 A change in HR structure makes comparison of the number of staff at the new campus difficult, however on broadly the same terms it appears that staffing at the new campus has decreased slightly to 439 following the relocation. Conversely, the number of students has increased to nearly 7000 at Birley Fields.
- 2.11 In terms of environmental and sustainability credentials, the campus is an exemplar project. The design itself sought to retain as many existing mature trees as possible and relocate good specimens where this was not possible. A large number of new trees were also planted.
- 2.12 The campus aspires towards the three zeros: zero carbon, zero water and zero waste. The building will achieve BREEAM Excellent as a minimum and measures are being explored to achieve an Outstanding rating. The main academic building is innovative and uses a displacement air system with aero foils located over the atria on the roof and heat recovery during winter months.
- 2.13 The campus also includes an Energy Centre that uses a natural gas CHP unit to provide centralised energy for the site. It also includes a borehole water treatment plant and water storage.
- 2.14 Community engagement and development activities have also been a key feature of the project, with the aim of establishing a learning district that is embedded in the local community. The development seeks to actively reinforce and promote physical, social, educational and employment links between the university and the local community of Hulme. This includes dual use facilities for students and local residents, and the focussing of university activities (including health and educational work, as well as volunteering activities) in the local community.
- 2.15 The core academic accommodation includes:
- Dedicated accommodation for academic staff;
  - Specialist teaching space for the Faculty of Education (including for ceramics, art, music, design and technology, science, and dance and drama);
  - Specialist teaching space for the FHPSC (including for clinical skills and psychology);
  - Shared general teaching accommodation (lecture theatres, seminar rooms and the like);
  - A shared student support/learning resource centre and student hub, catering and extensive social learning spaces; and
  - Space for Learning and Research Information Services staff.



- 2.16 In addition to the academic and ancillary space, the Birley Campus also provides student residential accommodation for 1,200 students and a new multi-storey car park has been opened.

## **Birley Fields without MMU (the counterfactual scenario)**

- 2.17 Prior to the development of the Birley Campus, the site was an area of under-used informal open space that was left behind following the demolition of Hulme Crescents in the early 1990s. The land was subject to fly-tipping and other anti-social behaviour and had very little amenity value or utility to the local community.



- 2.18 The best guide as to what would have happened to the sites at Birley Fields without the MMU proposal is the development that has already occurred and planning policies and strategies that relate to it. Existing development at Birley Fields comprises a series of five office blocks, within which a reasonable amount of space remains vacant. Original developers HBG and Manchester Technopark (part of Manchester Science Park) were not seeking to seek to deliver additional office development in this location, given the volume of unoccupied space that existed there.
- 2.19 As part of the Hulme City Challenge bid in the early 1990s, Birley Fields was identified for high quality office-led employment development. This aspiration/objective was subsequently reflected in planning policy for the area through the Manchester Plan (and revisions to it), which allocates the site for employment development. Other than the initial development of the five existing office blocks developed in the early 2000s, it appears that there is little additional or more recent demand for office uses on the site from either the developer or occupier markets.

- 2.20 In 2004, the Birley Fields Strategic Review sought to assess why development had not occurred at the rate envisaged, assess the market for additional development at the site and recommend a land use strategy for the sites, along with an approach to implementing it. This study concluded that southern parts of the area, around the existing office uses, should be retained for office development, whilst land immediately south of Bonsall Street should be developed for ancillary employment generating uses such as hotel, leisure and showroom uses. The land north of Bonsall Street and other sites fronting Stretford Road were proposed to be released for residential development. However, despite the wider range of uses sought/permitted by the 2004 Strategic Review, no further development has taken place at Birley Fields. In this context we consider that had MMU's proposal not gone ahead, the site was unlikely to have been redeveloped for the uses envisaged in the short-medium term. Indeed, given economic conditions between 2008 and 2013, it is unlikely that the site would have seen any development during this period.
- 2.21 Following discussions with agents for the site and others, it is felt that the most likely outcome for the site in the medium-long term would be incremental residential development. Whilst some infill office development might occur to the south of the site around existing buildings, further large scale speculative office development is considered unlikely in view of the number of very large scale office-led development proposals in competing and preferentially located city fringe areas including Greengates, Strangeways, the Co-op Site and Southern Gateway.
- 2.22 Clearly, incremental development for residential uses, along with small scale developments of others uses, would not provide significant economic and regenerative benefit to the local community in terms of jobs and changed perceptions.



## 3 LOCAL PROFILE AND STRATEGIC CONTEXT

### Introduction

- 3.1 In order to establish the context for the impact assessment and of the new Birley Fields in Hulme campus, this section of the report summarises the findings of the Baseline Profile of the Moss Side and Hulme wards, undertaken at a previous stage of this project. It establishes the benchmark position of the two wards against a number of economic, social and educational indicators. It is intended that this profile can then be updated at set periods in the future to measure the actual impact of the campus. This work also helps to establish the existing characteristics of the area on which the new campus will build.
- 3.2 Following on from this is a document review which assesses the policy and strategy context for the campus development at a national, regional and local level.

### Socio-Economic Profile

#### Economy & Property

- 3.3 The 2009 baseline area profile showed that the Education sector was a key employer in the area, with the proportion of people employed in the sector well above the national average. Furthermore, as a proportion of total employment, the number of people employed in education appears to be growing.
- 3.4 Since 2009, the number of people employed in businesses located in Hulme and Moss Side has fallen, whilst employment has grown in the rest of the SRF area, Manchester, the North West and the nation as a whole over the same period.
- 3.5 More positively, however, the rental market for commercial property has shown an improvement since 2009. Whilst a range of factors may explain this, it is likely that the development of the Hulme Campus will have already had some beneficial impacts on business performance and confidence through the construction phase, with further benefits likely following completion and full occupation. In turn, therefore, further improvements may be seen in the coming years with increases to rental values and longer, more secure lease terms adding to the value of developments in the area.
- 3.6 The improving conditions are also evident in the local housing market with prices showing an upward trend from the previous study, despite turbulence in the local and national economy and housing markets. The housing mix and tenure has shown some notable changes since the previous baseline study. The proportion of residents in flats/apartments has grown considerably in Hulme, far in excess of the national or regional trend in this respect. Similarly, the proportion of residents living in detached or semi-detached housing in Moss side has also increased, unlike the national and regional trends.

- 3.7 In terms of housing tenure, whilst the number of residents living in social rented housing has fallen in Hulme and Moss Side between the two studies, this proportion remains significantly higher than city-wide or regional comparators.

## People and Society

- 3.8 Although it is clear that a large proportion of residents of both Hulme and Moss Side still experience significant socio-economic hardship, analysis of data trends since 2009 reveal that the deprivation gap between the wards and the city as a whole is narrowing. Since 2009 the resident population and economic activity rates in Hulme and Moss Side have increased, whilst unemployment levels have fallen. Furthermore, life expectancy levels have improved, and teenage conception rates and numbers of people claiming incapacity benefits have fallen.
- 3.9 These changes can be linked to the urban regeneration efforts aimed at economic development, physical and environmental improvements, enhancement in the local quality of life and community capacity building that began through the City Challenge programme of the 1990s. The regeneration programme, linked to the proximity of the areas in relation to the city centre, has made the wards particularly attractive to young professionals. The opening of the new University campus marks a next phase of regeneration that will provide local employment opportunities and help to produce improved outcomes for local residents.

## Education and Aspiration

- 3.10 Hulme and Moss Side have seen considerable improvements in education across a number of age groups since the 2009 baseline report. Primary school attainment in English and Maths has closed the gap on regional and national standards, with attainment in Moss Side exceeding these in some cases.
- 3.11 Secondary school attainment, measured in terms of gaining five or more A\*-C's and gaining five or more grades A\* -G has also shown considerable improvement. Again, this has mostly been notable in Moss Side where the proportion of students achieving grades A\* -C has grown considerably.
- 3.12 Finally, the proportion of NEETs (Not in Education, Employment or Training) in Moss side has remained comparatively low during the period. In Hulme, data shows that the proportion has fallen notably in the last five years, although these are still higher than the average for the wider Manchester area.
- 3.13 It is likely to be somewhat too early to measure any impact of the new campus on participation rates in further and higher education, although data is awaited in this respect.

## Strategic Context

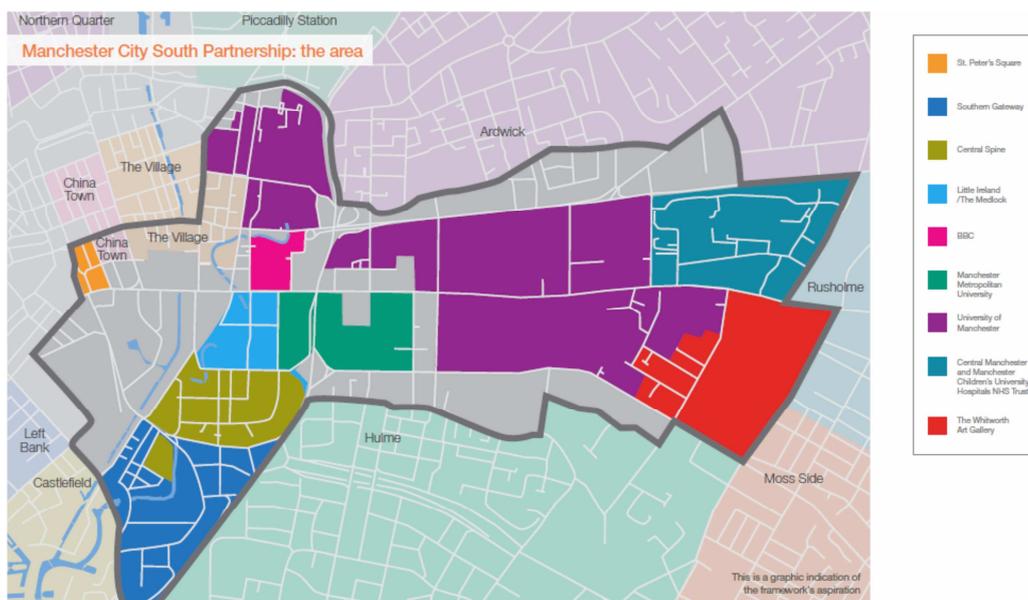
### City-Regional Policy and Strategy

#### *Manchester Core Strategy*

- 3.14 The Manchester Core Strategy provides the overarching planning policy guidance that will direct the future development of the city. Contained within the document are a number of policies relating to the economic and academic development of the city, including the Birley Campus .
- 3.15 Policy CC1 identifies the areas where the primary economic development should be focussed in the city centre and its fringes. The Birley Fields (and Manchester Science Park) location is identified as an area that can accommodate high density B1a office development, with the view that these will be ‘spin off research and development industries’ resulting from the campus development. Policy C5 notes that the Birley Campus will add additional pressures and requirements for additional retail provision in the latter years of the plan. The location of the additional retail provision is suggested to be kept within close proximity to Hulme District Centre.

#### *Corridor Manchester - Strategic Development Framework*

- 3.16 The core objective of Corridor Manchester (formerly Manchester City South Partnership) is to maximise the economic potential of the Corridor Manchester area, which covers areas around the Oxford Road corridor from the City Centre to Rusholme and includes the universities (as shown on the plan below). It proposes to achieve this by harnessing the investment currently being made by key institutions (the two universities, the Health Trust and the private sector); by stimulating future improvement and growth at key locations in the area; and by capturing economic benefit from this investment for disadvantaged local residents in the wards surrounding the area and the city as a whole.



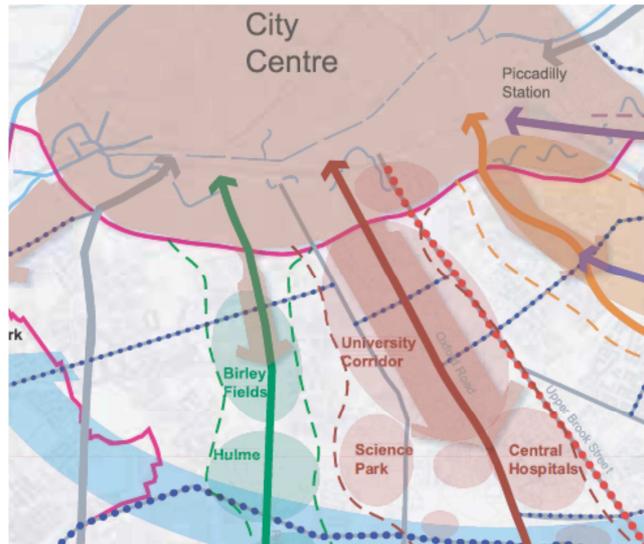
Source: Corridor Manchester Strategic Development Framework

- 3.17 The Strategic Development Framework is intended to establish a basis and a context for the commitment of current and future partners to the improvement of the area and to add value to their individual programmes and schemes. Institutional developments such as the proposed investment and development of the MMU All Saints campus as part of a £250 million masterplan to consolidate academic activity underpins the platform on which the Strategic Development Framework is built.
- 3.18 The Framework recognises the role that MMU as an educational institution plays in enhancing the Corridor Manchester Area. It is expected that this role will be further enhanced over the next five years as the university invests £350 million into the consolidation of seven of its campuses into three. The Development Framework has the potential to ensure that four of the five wards bordering the Corridor Manchester area (Ardwick, Hulme, Moss Side and Rusholme) which currently suffer from high levels of unemployment will benefit from the influx of investment that the aforementioned developments will promote.

### *Central Manchester Strategic Regeneration Framework*

- 3.19 The Central Manchester Strategic Regeneration Framework (2005) was produced to guide the regeneration of the area by providing a basis for public and private sector investment.
- 3.20 The Framework was updated in 2014 and covers the wards of Hulme, Moss Side, Rusholme, Ardwick and Longsight. It identifies a series of key objectives which address the economic, social and physical strands that underpin the delivery of the long term vision for Central Manchester. These key objectives include:
- Capitalise on Central Manchester's strategic location on the fringe of the Regional Centre to achieve sustainable economic growth.
  - Create the local conditions and opportunities that will bring in investment and enable larger employers and SME's to grow.
  - Develop projects that link unemployed residents to local employers and future growth sectors
  - Ensure transport investment and travel plans support growth and manage car parking and congestion in a way which balances the needs of businesses and residents.
  - Ensure Central Manchester has thriving District Centres based on strong partnerships with businesses, residents and the voluntary and community sector.
  - Develop successful residential neighbourhoods with high quality management regimes.
- 3.21 The Central Manchester Strategic Regeneration Framework highlighted the significance of arterial routes such as Princess Road in;
- Developing the link between the city centre and the airport as a prime office location;

- Providing stronger links with commercial development in Regional Centre, creating opportunities for office development on the fringes of the city centre;
- Creating a strong and compelling case for further office development at Birley Fields; and
- Improving the frontage to Princess Road.



- 3.22 The Central Manchester SRF has been approved by the City Council's Executive as a material consideration in the decisions the Council makes as a Local Planning Authority.
- 3.23 The Framework confirms the city's support for the expansion of MMU and acknowledges the importance of this expansion in spreading city centre growth out from the heart of the city.

## Local Policy and Strategy

### *Birley Fields Strategic Review (2005)*

- 3.24 Jones Lang LaSalle (JLL) was appointed by Manchester City Council in December 2004 to undertake a Scoping Study of the Birley Fields Study Area. The report considers, amongst other things, the following:
- The issues that have impaired the progress of the Birley Fields Study Area;
  - The strategic and policy context for the Study Area and the opportunities emerging from the growth of the city's economy;
  - A commercial and market appraisal for the Study Area's potential;
  - The future development prospects for the Birley Fields area;
  - A proposed land use strategy for the comprehensive development of the area; and
  - An approach to implementation.
- 3.25 As part of the Hulme City Challenge in the early 1990s, Birley Fields was identified as having the potential for the creation of a high quality site that would attract high technology industry wishing to invest in the City. However, since the slowdown of this market sector in 2002, there have been a number of new strategic initiatives which are likely to impact on the future development and direction of the core Birley Fields offer.
- 3.26 Over the ten years from 2005, the Knowledge Capital initiative was expected to generate over 100,000 new jobs in high value-added growth sectors. Birley Fields

lies within the 'arc of opportunity' it defines and is thus well placed to take advantage of any development spin-offs generated by this initiative.

- 3.27 Through the analysis of background information, key issues, strategic and policy context and market information, JLL conclude that the right approach for the Birley Fields Study Area would be for it to remain largely an employment location satisfying the needs and demand for new employment opportunities in Central Manchester. However, the study also notes that it is important that any development should provide employment opportunities for local residents.
- 3.28 Moreover, given the amount of housing development surrounding the Study Area, the continuing demand for housing and the need to provide a more balanced range of housing for sale, the report identifies a number of sites around the edges of the Study Area which should be promoted for housing.

#### *Hulme Ward Plan 2014/15*

- 3.29 Ward Plans support the local delivery of Strategic Regeneration Frameworks by documenting the main issues affecting the ward and the detailed actions required to address them. The Plans are developed by the council officers, elected members and other local partners such as Registered Social Housing Providers, Greater Manchester Police, community groups and local traders. This group of partners work together to deliver the action plan, sometimes using grants to help local community groups finance projects that support ward priorities. The plans are updated annually to reflect the changing aspirations of the ward.
- 3.30 The Hulme Ward Plan sets out the priorities for the ward based around three overarching themes: Growth, Reform and Place. Birley Fields is identified as an area that should be supported by the local councillors for the ongoing regeneration of the Ward. This relates to the Place theme and the view of trying to regenerate the area and promote growth.

#### *Moss Side Ward Plan 2014/15*

- 3.31 The Moss Side Ward Plan focuses on similar themes to that For Hulme. Whilst there is no specific mention of Birley Fields in the Plan it is clear to see how it will have an impact on the priorities. Business, Employment and Financial Inclusion is a key priority for the ward, along improving access to training and encouraging participation in the South Manchester Enterprise Network.

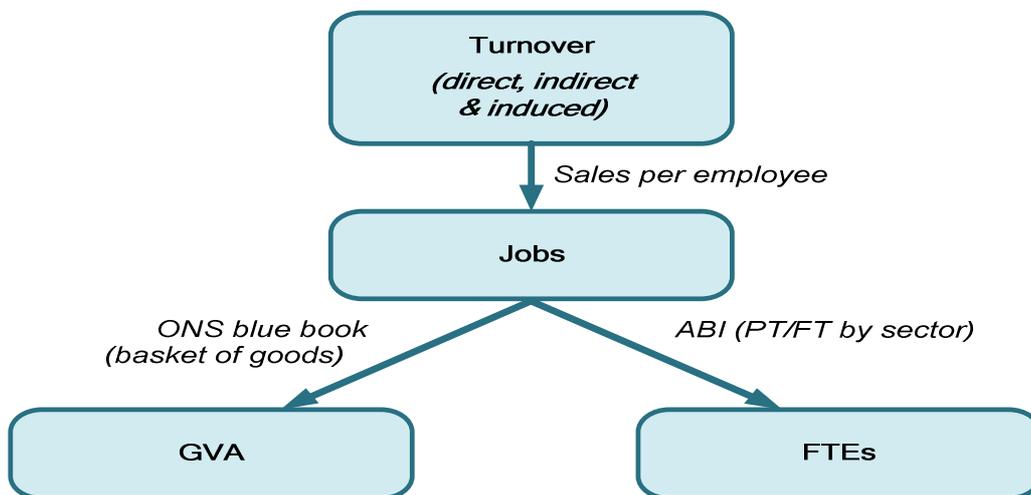
## 4 ECONOMIC IMPACTS OF THE BIRLEY CAMPUS

### Introduction

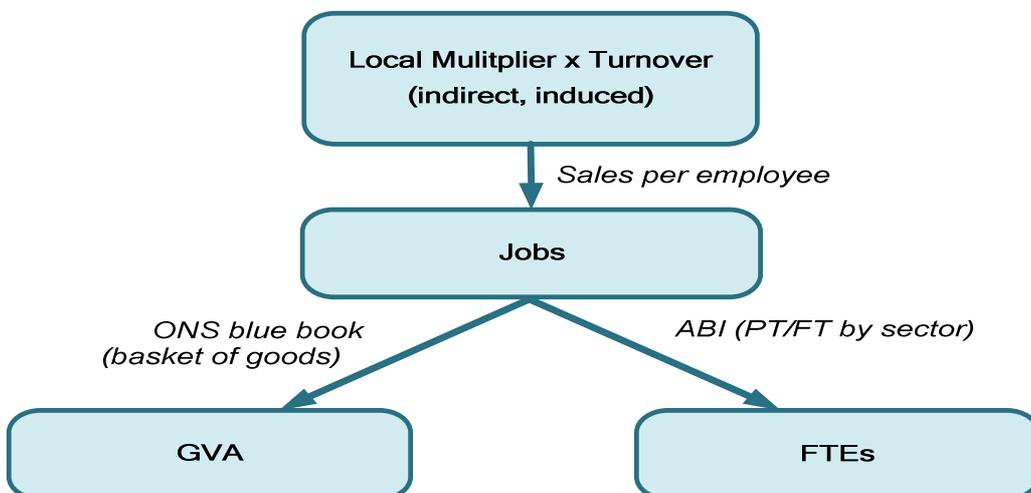
4.1 In this chapter we update the assessment of the economic impacts of the Birley Campus on the local economy of Hulme and Moss Side. We carry out this modelling work by estimating the revenue it would generate and the number of jobs and gross value added (GVA) supported in the local economy. An overview of the model is provided below in Figure 4.1.

**Figure 4.1 PBA Economic Impact Model**

#### 1. Economic Model: First Round Effects



#### 2. Economic Model: Second Round Effects



- 4.2 We estimate the annual stable impact over one year by taking into account:
- The direct impact - the number of jobs at the new campus. This information has been provided by MMU;
  - The indirect impact - relates to the numbers of jobs supported through the local economy supply chains serving the activities of the campus;
  - The induced impact - the revenue and jobs generated by university staff, students and their visitors spending in the local economy; and
  - Finally the multiplier impact is the additional jobs and income generated in the wider economy through re-spending. To estimate this we have applied a standard multiplier factor as specified by the Homes and Communities Agency (HCA) (formerly English Partnerships (EP)).
- 4.3 We forecast these impacts based on what we know about:
- The MMU operations at the new campus, using information obtained from the university;
  - Student and staff spending profiles adapted from 2009 survey responses; and
  - The economic profile of local businesses and the depth and breadth of the local economy to capture economic impacts. This is obtained from the Baseline Profile and 2009 business survey responses.
- 4.4 Where there are gaps in the information required to estimate the economic impacts of the scheme, we have relied on assumptions informed by case study information, guidance including the department for Business, Enterprise & Regulatory Reform (BERR) and HCA standards, secondary sources such as UK PLC turnover per job data, and a degree of judgment based on our experience.

## Surveys

- 4.5 To ascertain the importance of the university and the potential impact of the new campus on the local economy, in 2009 extensive surveys of MMU staff and students, and local business were undertaken. Survey questions were emailed to all 535 staff and 6,370 students at the MMU's Elizabeth Gaskell and Didsbury campuses to establish information on their spending patterns in the local economy (defined as 20 minutes' walk time from the campus). Responses were received from 119 staff (a response rate of 22%) and 326 students (a 5% response rate).
- 4.6 For the business survey, some 150 businesses in the Hulme and Moss Side wards were emailed or handed a questionnaire. This achieved a response from 47 businesses (a response rate of 29%). These responses were useful in indicating how money is spent and captured locally. The results from these three surveys feed into the economic impact model.

- 4.7 It is important to note that no new surveys have been undertaken to inform this interim update of the impact assessment. Rather, the key information has been extrapolated from the 2009 surveys, taking account of inflation. It is recommended that new surveys are undertaken as part of the final impact assessment of the campus, expected to take place in 2 or 3 years' time.

## Gross Direct Impact

### Academic and Support Staff

- 4.8 In 2009, MMU estimated there would be 535 jobs located at the new campus, or 430 full time equivalent (FTE) jobs. Of these, 382 would be staff in professional occupations including academic and managerial positions, and 153 would be administrative, support and maintenance staff. This was in line with the staff numbers at Elizabeth Gaskell and Didsbury campuses. It was estimated at that time based on staff survey data, that 31 jobs (26 FTE jobs), at the new campus would be occupied by local Hulme and Moss Side residents, with 13, (11 FTE) of these in professional positions and 18 (15 FTE) in admin, support and maintenance positions.
- 4.9 Although direct comparisons between the 2009 and 2014 direct employment is difficult because of new systems and structures within the MMU, employment by MMU at the new campus in 2014 appears slightly lower than was forecast in 2009 at 497 jobs (434 FTE), as opposed to the 2009 estimate of 535 (430 FTE) jobs. Based on the 2009 staff survey data, it is estimated that 26.5 FTE jobs at Birley Fields in 2014 are taken by residents of Moss Side and Hulme.
- 4.10 The 497 jobs at the university as a result of the campus relocation will be new to Hulme and Moss Side. Logically, this should improve employment opportunities for the residents of Hulme and Moss Side. Furthermore, if the subsequent redevelopment/re-use of the existing Didsbury and Elizabeth Gaskell campuses are taken into account, then the impact may still be, to some degree, net additional for Manchester and the region. Both the Didsbury and Elizabeth Gaskell sites have now been sold. The Elizabeth Gaskell site is proposed for a £50m investment by Nuffield Health to create a new flagship tertiary care hospital, whilst the Didsbury Campus is proposed for residential-led redevelopment to provide 98 new-build and converted houses and apartments; a new primary school and retain sporting facilities and open space.

### Construction

- 4.11 Direct outputs of the Birley Fields scheme also include building the new campus. Total capital costs (including fees) were estimated in 2009 to be £120 million. Based on

turnover per employee data<sup>1</sup> for construction, it was projected that the project would generate 590 labour years of construction. HM Treasury guidance suggests that 1 permanent construction job equates to 10 construction years, so we deduce an impact from MMU's relocation to Birley Fields of 59 additional construction jobs (equivalent to 58 FTEs in this sector).

- 4.12 Applying the actual constructions costs of the campus of £139 million and updated turnover per employee data, it is calculated that the Birley Campus generated 948 labour years of construction employment, which equates to a further 95 permanent jobs. This figure is almost double that projected in 2009, partly as a function of increased project costs and partly as a function of reduced turnover per employee in the construction sector.



- 4.13 It is known that significant elements of the main academic building were manufactured off-site. Based on information provided by construction partner Sir Robert McAlpine, the value of these works is estimated at £19.876m. If the value of this off-site manufacturing is deduced from the construction impacts, the project still generates 812 total jobs, equating to 81 permanent jobs.

## Summary and Comparison

### *Jobs*

- 4.14 Table 4.1 estimates the Birley Fields scheme would directly support 594 jobs (488 FTEs). While we would expect that a number of these jobs will be filled by local residents, this may require existing staff to leave their job for a better offer or retirement. That said, based on current proportions, we would anticipate that some 40 jobs<sup>2</sup> (34 FTEs) would be filled by local residents.

---

<sup>1</sup> This uses RPI grossed up 2008 figures based on 2006 Sales per Employee by Sector information from UK PLC, A Financial Analysis of Corporate Britain, 2005, Hampton, The Prospect Shop.

<sup>2</sup> To be consistent with the multiplier factors below we have assumed 15% of the construction jobs will be filled by local residents

**Table 4.1 Summary of Gross Direct Impact**

	All Jobs (2009)	All Jobs (2013)
Birley Campus Staff		
<i>Professional Staff</i>	382	319
<i>Admin, Support and Maintenance Staff</i>	153	178
Construction	59	95
<b>Total</b>	<b>594</b>	<b>592</b>

Source: RTP and Manchester Metropolitan University

### *Gross Value Added*

- 4.15 Unlike revenue, which reflects just the flow of money in and out of an economy, GVA reflects the true value through profits, salaries and investment in an area. It is the net value of revenue after allowing for supply inputs. In 2009, and based on the 2006 UK Blue Book account<sup>3</sup> grossed up to 2008 figures, each service sector job was assessed to generate some £33,300 in gross value added (GVA).
- 4.16 The workplace GVA is defined as the net additional value to the economies of Hulme and Moss Side from the Birley Fields scheme. We estimated this in 2009 to be approximately £19.8 million. However, some of the jobs generated from the new campus will be occupied by people living outside of Hulme and Moss Side, so a proportion of direct revenue will leak out of the local economy. The net additional revenue which accrues to people who live in Hulme and Moss Side was assessed to be £1.3 million in resident based GVA.
- 4.17 The 2014 interim update shows that the total direct workplace GVA of the project is £23.8m. Assuming the same proportion leaks out of the local economy as projected in 2009, the resident based direct GVA impact of the new campus is £1.57m

### **Gross Indirect Impact**

- 4.18 Indirect impacts arise from university spending on goods and services in the local economy by MMU's Birley Fields establishment. To gauge this potential impact and the importance of the university for local businesses, in 2009 we undertook a survey of businesses in the Hulme and Moss Side area. The results of the 47 business respondents showed:
- Half of all respondents considered the university to be important or very important for their business, suggesting strong linkages between the university, its students and local businesses;

<sup>3</sup> UK Blue Book: GVA in all service sectors/ jobs in all service sectors (grossed up from 2006 to 2008). ONS

- Local businesses spend approximately 19% of their revenue purchasing supplies from other businesses in the Hulme and Moss Side area; and
- 75% of staff that work in these local businesses also live in Hulme and Moss Side.

4.19 We were unable to obtain information about the annual amount spent by MMU on local supplies so we have estimated the indirect impact based on total spend and information deduced from our business survey. As noted above the business survey indicated that there are strong links

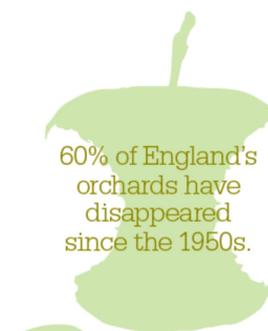
between the university and local businesses. In addition, it is understood that local sourcing has been a consideration in MMU's supply chain decisions. For example, we note that Hulme Community Garden Centre has provided many of the plants for the Sensory

## Community Orchard

The Birley Community Orchard is made up of 19 varieties of apple, pear, cherry and plum trees.

The area is a magnet for wildlife, provides valuable habitats and is a great place to explore and unwind.

All the fruit trees were grown and maintained in Hulme Community Garden Centre before being planted at Birley Campus. The trees have been selected because of their suitability to the local climate and bountiful cropping characteristics.



Garden and Community Orchard. We assumed in 2009 that 15%<sup>4</sup> of the estimated total campus turnover excluding labour costs will be spent in the local area. The assumed proportion of campus turnover that is spent locally remains the same for the 2014 update.

4.20 In 2009, 15% of campus turnover represented approximately £3.99 million<sup>5</sup> in additional local spend per year, based on an un-weighted average of UK PLC sales per employee across a number of sectors. This spend would support 29 local jobs (22 FTEs). The turnover of the new campus has now increased to £30.0 million, of which some £4.5 million would be retained locally. This level of spend is assessed to support a total of 49 local jobs (39 FTE).

4.21 We estimated in 2009 that the local economy GVA generated from these indirect jobs is £0.95 million based on the average GVA per job of £33,300. The 2014 update shows this impact to have increased to £1.95 million, based on an average GVA per job of £39,965.

## Gross Induced Impact

4.22 A further impact is the amount spent in the local economy by staff, students and their visitors, which is referred to as the induced impact. To gauge this impact in 2009, we

<sup>4</sup> This is based on English Partnerships neighbourhood multiplier factor of 1.15 and assumes strong local supply linkages and income or induced effects.

<sup>5</sup> This is based on the two campuses total turnover excluding labour costs of £26,602,904

asked staff and students based at the Elizabeth Gaskell and Didsbury campuses about their weekly spend. To ensure we captured local spend and not leakage to areas further afield, we obtained spending patterns outside of the university but within a 20 minute walk of the respective campus.

- 4.23 As mentioned previously, no new surveys have been undertaken as part of this work, although the figures been updated to take account of inflation since that time.

### *2009 Findings*

- 4.24 The 2009 estimate the value of MMU Birley Fields staff spending in the Hulme and Moss Side economy, we multiplied weekly expenditure figures by the number of jobs and by the number of weeks staff members on average work per year<sup>6</sup>. This produced an annual staff spend in the local economy of £730,800.
- 4.25 To translate this spend into local jobs, we used data from UK PLC<sup>7</sup> which provides turnover per employee in sectors specific to the spending categories. In total, an annual spend of £730,800 was shown to support 8 total jobs (7 FTE).
- 4.26 Average weekly student expenditure in 2009 was shown to be £56.27. Rent is the largest expenditure followed by major supermarket/multiple food and drink store, one off large purchases and bars, pubs and clubs. Student expenditure in these categories is beneficial to the local economy as these types of services support many local jobs. Expenditure on rent excludes mortgage repayments and is money spent in the local economy and paid directly to local landlords. Student spending at supermarkets and bars, pubs and clubs which are likely to employ a high proportion of Hulme and Moss Side residents, also support a significant number of jobs in these sectors.
- 4.27 To calculate the annual value of student spending in the local economy, we multiply average weekly spend by the number of academic weeks students are at the campus and by the total number of students at the new campus. Many students enrolled at the Faculty of Education spend approximately a third of the academic year on placements. We assume these placements are not in Hulme and Moss Side and so for part of the academic year students will spend both time and income outside the local area. Therefore, we assumed a low end figure of time spent on campus for FoE students of 20 weeks, whereas students in the FHPSC are on campus for 35 weeks.
- 4.28 Grossing the weekly student expenditure produces a total annual spend in the local economy of £9.5 million. To translate this local spend into jobs we used turnover per

---

<sup>6</sup> Based on information provided by the university, staff categorised as professional work 40 weeks per year; while admin, support and maintenance staff work 46 weeks per year.

<sup>7</sup> This uses RPI grossed up 2008 figures based on 2006 Sales per Employee by Sector information from UK PLC, A Financial Analysis of Corporate Britain, 2005, Hampton, The Prospect Shop

employee by sector from UK PLC<sup>8</sup>. Therefore £9.5 million supports 114 total jobs (89 FTEs).

4.29 Visits to MMU students by non MMU students provide an additional source of income for the local economy. The results from our student survey showed that, on average:

- Each student receives 2 visits per term;
- Each student receives 1 visitor per visit; and
- The length of each visit is approximately 1.3 days.

4.30 Therefore, on average each student receives 6 visitor days per year.

4.31 To estimate the daily expenditure by each student visitor we used average visitor spending data for Greater Manchester from the North West Visitor Survey<sup>9</sup>. This gives an average spend of £18.19 per day for visitors staying with friends and family.

4.32 Our estimate is that annual student visitor spend would be approximately £897,100 in the local economy. This supports 6 jobs (5 FTEs) based on un-weighted average UK PLC sales per employee estimates.

### *2014 Findings*

4.33 This interim update of the impact assessment applies the same approach as in 2009 and discussed above. The only changes to this approach are to:

- Take account of inflation in spending figures;
- Take account of updated staff and student numbers; and
- Apply the latest turnover per employee data in calculating the number of jobs generated.

4.34 On this basis, it is calculated that spending by staff at the Birley Campus in the Moss Side and Hulme economy is £881,624 and that this expenditure would support 10 local jobs. Similarly, student spending is calculated to amount to £12.2 million, which supports some 153 jobs. Spending by student visitors amounts to £1.4 million, which would support 15 local jobs.



<sup>8</sup> This uses RPI grossed up 2008 figures based on 2006 Sales per Employee by Sector information from UK PLC, A Financial Analysis of Corporate Britain, 2005, Hampton, The Prospect Shop

<sup>9</sup> 2003-04 North West Visitors spend survey. <http://www.nwriu.co.uk/tourism/335.aspx>

## Summary & Comparison

- 4.35 Table 4.3 below shows the induced job and GVA impacts as assessed in 2009 and in 2014.

**Table 4.3 Induced GVA generated by Birley Campus**

	Jobs Supported (2009)	Jobs Supported (2014)
Staff	8	10
Students	114	153
Visitors	6	15
<b>Total</b>	<b>129</b>	<b>178</b>
<b>Induced GVA</b>	<b>£4,295,822</b>	<b>£7,105,280</b>

Source: PBA, MMU and UK PLC

## Gross Multiplier Impact

- 4.36 The final stage of the model is to account for multiplier impacts. These are the additional incomes and jobs created due to an initial injection into the economy. For example spending by Birley Fields staff at a local newsagent enables the shop owner to pay for supplies and labour, which in turn provide the employees of the newsagent with money to purchase their groceries and so on, generating further economic activity. This is called the multiplier effect.
- 4.37 As an aid to economic impact studies, English Partnerships (now HCA) produced a best practice guide with standard multipliers to estimate unknown multiplier impacts. We apply the multiplier impacts to the indirect and induced impact. The multipliers at the neighbourhood level range from 1.05 to 1.15<sup>10</sup>.
- 4.38 We apply the high neighbourhood level factor of 1.15<sup>11</sup> because the local business survey results showing Hulme and Moss side businesses sourcing 19% of their supplies from other local businesses, and both staff and students spend a proportion of their income in the local economy.
- 4.39 On this basis we estimated in 2009 that the second round spending in the local economy would generate £17.3 million in revenue and that this would support 125 total jobs (97 FTEs) in Hulme and Moss Side jobs based on an un-weighted average turnover per employee ratio across all sectors in the economy.
- 4.40 Updating this assessment in 2014, and applying the same methodology shows the multiplier impacts of the campus to be £21.7 million in revenue, and that this revenue would support some 188 local jobs.

<sup>10</sup> English Partnerships, Additionality Guidance Method Statement, 2<sup>nd</sup> Addition, September 2004.

<sup>11</sup> Using the high composite (neighbourhood level) p.24 English Partnerships, Ibid.

4.41 In terms of GVA, we estimate the total GVA generated by the second round multiplier jobs in 2009 to be £4.2 million, based on a GVA figure of £33,300 per job. Applying updated GVA per job data shows that the multiplier GVA impact in 2014 is £ 9.4 million.

## Total Economic Impact 2009 v 2014

4.42 Table 4.4 provides a summary of the 2009 assessment showing the total impact of the new campus on the local economy based on our forecasts.

**Table 4.4 Estimated Total Economic Impact of Birley Campus (2009)**

	Spend	Total Jobs	FTE Jobs	GVA
<b>Direct Impact</b>	£26,603,000*	594	488	£19,790,000
<b>Indirect Impact</b>	£3,990,000	29	22	£950,000
<b>Induced Impact</b>	£11,130,000	129	101	£4,300,000
<b>Multiplier Impact</b>	£17,380,000	125	97	£4,160,000
<b>TOTAL</b>	<b>£59,103,000</b>	<b>877</b>	<b>708</b>	<b>£29,200,000</b>

Source: RTP and Manchester Metropolitan University.

4.43 Our forecasts suggested that the Birley Campus would create additional revenue of £59.1 million to the Hulme and Moss Side area. This would support 877 local jobs (708 FTE jobs), which would account for approximately 4% of existing total employment in the two wards<sup>12</sup>. These jobs are likely to generate a local workplace based GVA of £29.2 million per year.

4.44 These indicative values suggest that the MMU Birley Fields in Hulme campus provides an income multiplier impact equivalent to 1.74, i.e. for every £1 in turnover at MMU Birley Campus, a further £0.74 is generated in the local economy. The resulting employment multiplier is 1.47, i.e. for every 100 jobs at MMU Birley Fields a further 47 jobs are supported in the local economy.

4.45 While these results are very positive, it is likely that some students may occupy some of the new and existing jobs outside of the university at the expense of incumbent residents. Nonetheless, there remains a net addition of 708 FTE jobs in the Hulme and Moss Side economy, many of which will be filled by local residents. A broad estimate suggests that this may amount to 200 FTEs of the 708 FTEs jobs supported being filled

<sup>12</sup> Annual Business Inquiry data 2007 shows total employment in the two wards is 20,000. This excludes self employment.

by Hulme and Moss Side residents. Over time this may increase as new or existing staff may relocate to be closer to the campus.

**Table 4.4 Estimated Total Economic Impact of Birley Campus (2014)**

	<b>Spend</b>	<b>Total Jobs</b>	<b>FTE Jobs</b>	<b>GVA (£m)</b>
<b>Direct impact</b>	£30,100,000	592	529	£23,649,956
<b>Indirect impact</b>	£4,500,000	49	39	£1,955,099
<b>Induced impact</b>	£15,124,816	187	150	£7,479,461
<b>Multiplier impact</b>	£22,568,538	245	196	£9,772,698
<b>TOTAL</b>	<b>£72,293,353</b>	<b>1,072</b>	<b>913</b>	<b>£42,857,214</b>

- 4.46 The updated data shows that the new Birley Campus provides an income multiplier impact equivalent to 2.14 (i.e. for every £1 in turnover at MMU Birley Campus, a further £1.41 is generated in the local economy). The resulting employment multiplier is 1.81 (i.e. for every 100 jobs at MMU Birley Fields, a further 181 jobs are supported in the local economy).
- 4.47 Whilst the income multiplier is shown to be slightly below the level projected in 2009, it is clear that the employment multiplier is substantially higher than previously, and the GVA contribution to the local economy generated by the project is significantly higher than previously assessed.
- 4.48 It is also important to note that the counterfactual scenario (little or no development in the short-medium term, and the chance of incremental residential development in the longer term) would generate little economic benefit for the local community.



## 5 QUALITATIVE IMPACTS OF BIRLEY CAMPUS

### Introduction

- 5.1 This section of the report identified the qualitative impacts that the development of the new Birley Fields in Hulme campus is likely to have on the local area. The impacts have been established through consultation with a variety of local organisations and stakeholders. The impacts relate to social issues, physical regeneration and perceptions of the area as a place to do business.

### Social and Community Impacts

- 5.2 In assessing the likely social and community cohesiveness impacts of the new campus, we review the activities that MMU in the Moss Side and Hulme areas, now that the campus is operational, and compare this against the position if the Birley Campus had not been developed.

### Volunteering

- 5.3 MMU co-ordinates volunteering activity amongst its staff and students. It contacts local agencies and organisations in the not for profit sector to find out what volunteers they need and then seeks to match these opportunities with people interested in volunteering. In 2009, the university had over 800 organisations registered with its volunteering service. Of these, c15 had a geographic remit that is specific to Moss Side and/or Hulme and many more covering a wider geographic area including Moss Side and Hulme. At that time, it was estimated that the value of MMU volunteering in these areas was £13,060 (applying an hourly value of £6.53 and 30 hours per registered student over the year), but this could increase to £26,120 with increased focus on projects in the areas around the new Birley Campus.
- 5.4 Updated information shows that the university now has over 500 students registered as volunteers, plus students who volunteer specifically with Union-run projects. Last year, there were around 55 projects varying between one day activities and year long schools projects. On this basis, it seems clear that the amount of volunteering is significantly greater than suggested in 2009. Assuming the same number of hours per year as in 2009, we estimate total MMU volunteering in the region of 30,000 hours.



- 5.5 There is also evidence to support an increase in activity in Hulme and Moss Side. The Education Engagement project ran in several primary schools in Hulme and Moss Side with 20 volunteers who participated consistently for 2 hours a week, and others less frequently. The RNCM Summer School project also involved Birley Fields students who between them gave around 100 hours over one week during the school term and probably another 30 hours of planning time. Children in the Moss Side and Hulme area will also have benefited from the improvements to the Children's Hospital Roof Garden, which involved 24 students each volunteering for 5 hours. In total, it is estimated that approximately 1200 hours of volunteering time just from these projects was focused on Moss Side and Hulme. As such, it appears reasonable to assume that the targeted increase in volunteering activity in Hulme and Moss Side to 20% of total volunteering activity will have been achieved.
- 5.6 Assuming that 20% of total MMU volunteering is focussed in Moss Side and Hulme and/or significantly benefits residents, and applying an average value per volunteering hour of £8.06 (average of the national minimum wage for adults, the minimum wage for 18-20 year olds and the average hourly salary for residents of Moss Side and Hulme) gives a total value of MMU's volunteering activity in the area of £48,360. This is significantly higher than the £26,120 projected in 2009.

## Community Engagement & Development

### *Community Engagement*

- 5.7 As part of the planning stages for the new Birley Campus, a great deal of community consultation was undertaken. This included workshops, exhibitions and the establishment of a Community Forum including local members, representatives of various schools, colleges and community groups, as well as residents associations and others. The purpose of this activity was to disseminate information; to gather opinions on the new campus proposals to enable community aspirations to be reflected in future revisions to the proposals; and to ensure that the new campus formed a part of the community in which it was to be located. To facilitate this work, MMU created the post of Public Engagement Manager.
- 
- 5.8 This 'two-way' relationship between the local community in Hulme and Moss Side and the stakeholders and partners associated with the university has proven to be mutually beneficial, allowing the university to engage with the local community, creating a

partnership in which both parties can understand, reflect and take on board each other's needs and aspirations for the area.

- 5.9 This process constituted much more than just a 'marketing push' from the university towards the local community, but would provide an opportunity for the university to utilise its academic research facilities and expertise to undertake more participative research (see Public Engagement Fellowships below), which would enable the monitoring and study of the impact of the campus and how the partnership can be of benefit and continue to be developed. This process incorporated the strengths of MMU departments including Health and Social Change and Education and Social Research.

**Case Study:**  
**Birley Fields Community Consultation**

"We have been kept very well informed. Local people are very interested in the proposals and the more they learn, the more they are warming to it"

**Tom McGee**, Loreto College

"It will help to develop community cohesion, increase community spirit, more diverse business and positive activities in the area"

**Resident** commenting on the Birley Fields campus proposals

- 5.10 It is clear that the community engagement activities undertaken as part of the Birley Campus proposals go well beyond the normal consultations that take part as part of planning applications (i.e. that likely to have been undertaken in the longer term counter-factual scenario). Significant changes were made to the original masterplan to reflect the views and aspirations of the local community, including the relocation of the multi-storey car park and reducing the height of accommodation blocks. This kind of genuine engagement with local people in Moss Side and Hulme, and flexibility in the masterplan and development characteristics has been critical in establishing a relationship of trust between MMU and residents, such that an initially sceptical community was almost entirely supportive by the time construction commenced.

### *Public Engagement Fellows*

- 5.11 In September 2008, MMU launched its Public Engagement Fellowship Scheme, offering £10,000 each to 6 fellows. The scheme is intended to support key aspects of MMU's Public Engagement Strategy, Strategic Plan and complement the aims of the Manchester Beacon for Public Engagement through genuine two-way exchange of knowledge and expertise with the wider community. All of the six fellowships will benefit residents of Hulme and Moss Side and significantly enhance cohesiveness between MMU and the communities within which the new Birley Campus will be located. A short description of each of the fellowships is set out below:

- **The Manchester Conference for Black Parents, Children and Young People -**  
As part of Black History Month, MMU hosted a major event that brought together a range of teachers, academics and policy makers with parents, young people and community groups aimed at addressing the lower qualifications and disproportionate

exclusions experienced by children from some black and minority ethnic communities in Manchester.

- **MMU Web Angels** - This project aimed to provide a user-maintainable web presence for community groups in Crewe, Hulme and East Manchester to enable them to market their activities and communicate with funders, volunteers, client and stakeholder groups. The programme was delivered through co-ordinated volunteering opportunities for students from the Department of Information and Communication's BSc. Web Development Programme.
- **Moving Memories** - Moving Memories was an inter-generational exploration of life in Hulme and Moss Side in the 1960 – 80s through contemporary BBC North West television features, particularly reflecting immigration from the Caribbean and Asia from the 1940s. The project took BBC North West regional archive programmes into communities in Hulme and Moss Side to inspire story-sharing – reconnecting this footage with the communities it portrays and seeking new perspectives.
- **Manchester MetHODS: Hulme Open Design Studio** – This project aimed to teach people to write simple software and to demystify computers. The project showed, using workshops, how easy it is to create (rather than simply use) interesting and useful software working alongside ArcSpace Manchester, a community cluster based in Hulme. In the spirit of other community projects, open-source software was to be used and, in a more general sense, the project was to be open to all.
- **Moss Side Stories** - Moss Side Stories was a multimedia project that enabled the pupils of The Manchester Academy to explore their own, often extraordinary, life stories in the form of autobiographical writing, video art and dramatic performance. Opening up the facilities and expertise of the university through a series of professionally facilitated workshops, video shoots and rehearsals, Moss Side Stories culminated in a multimedia exhibition hosted by MMU in the summer of 2009. The project allowed MMU students to gain experience in creative writing, drama and video production whilst giving Academy students a personal knowledge of their local university and the self-esteem necessary to apply for a place in higher education.
- **Hulme Sweet Hulme** - This collaboration celebrated Hulme past, present and future. It explored the stories and histories of its people using the notion of home. Creativity, making, skill sharing, and joint endeavour are all key. Old and new maps of Hulme were stitched and drawn as well as an exploration of what 'the threshold' means for different cultures by making and documenting features such as doormats, graffiti, hanging baskets and house numbers and names. Its culmination was an event showcasing the outcomes - a celebration of the strength and diversity of Hulme throughout many changes.



*MMU Public Engagement Fellow Linnie Blake talking about her multimedia project Moss Side Stories*

- 5.12 Each of these fellowships has now been delivered and feedback has been extremely positive. This kind of proactive engagement and community development activity are almost certain to have been a factor in the gradual acceptance and increasing enthusiasm for the campus amongst the local community. These fellowships contributed significantly to engendering close and mutually beneficial links between local communities in Moss Side and Hulme and MMU, to the extent that the new campus is becoming an integral part of the area. These projects also provided residents with new and improved skills, knowledge and experience, as well as confidence to engage further with MMU and other higher education opportunities.

## Sports & Leisure

- 5.13 Through the development of the Birley Fields in Hulme campus, the opportunity exists to promote Sports and Leisure within local communities. The principal community use sports and leisure facilities in the Moss Side and Hulme area include Moss Side Leisure Centre, Trinity Sports Centre, the Active Lifestyles Centre, The Powerhouse in Moss Side and Manchester Academy. Moss Side Leisure Centre has a swimming pool, large sports hall, fitness suite and cricket nets. Trinity Sports Centre (attached to Trinity School) has one large and one smaller sports halls, a 125sq. m dance studio, a fitness suite, an outdoor AstroTurf pitch for 11-a-side football or hockey (or 2 x 5-7 a side) and three outdoor multi-use courts.
- 5.14 In addition, just outside of the Moss Side and Hulme ward boundaries is the Sugden Centre, which is operated jointly by MMU and the University of Manchester. It has a new 100 station fitness and weights area; 6 refurbished squash courts; two large sports halls; two multi-activity rooms; and one outdoor 5-a-side football court.
- 5.15 Currently, there is no formal use of Moss Side Leisure Centre by MMU sports teams, and only occasional use of Trinity Sports Centre by MMU sports teams. In addition, informal use of these facilities by students is limited. Similarly, use of the Sugden Centre

by non-students and staff equates to just 5% or 3,000 users per month. That said, this facility is very well used and operates at or near capacity much of the time.

- 5.16 The development of the Birley Campus is likely to lead to increased informal usage of both Moss Side Leisure Centre and Trinity Sports Centre by students and staff, hereby improve their viability. MMU is working with the operators of these two facilities so that future use by students is recorded and can be measured. It is also working with the operators of Moss Side Leisure Centre, as part of a review of the facility, to influence the facility mix and pricing strategies to encourage additional student use.
- 5.17 This process of engaging with existing providers in the area ensured that any provision as part of the campus is complimentary to, rather than competing with, existing facilities. Increased usage of existing facilities by students and staff has not only improved their viability and, as a result, the range and quality of facilities and services they provide, but has also lead to increased mixing between university and local communities.
- 5.18 Furthermore in this regard, MMU now has a partnership with Manchester City Council in relation to sports coaching and volunteering. Although this is a city-wide initiative, it is understood that the relationship between MMU and MCC developed in large part through the delivery of the Birley Campus, was critical to this partnership coming into being. This partnership has led to MMU taking over the former Manchester City Football Club training facility in Moss Side/Fallowfield and maintaining the community use and programmes operated from there. Clearly, potential exists for MMU to focus efforts in this respect on projects that specifically relate to the Moss Side and Hulme wards.
- 5.19 It is also likely that the increased proximity of students and staff to high quality sporting facilities will increase overall participation in sports and leisure activities, given the more limited provision close to the existing campuses in Didsbury and Rusholme. This increased participation in sports and leisure activities will lead to direct health benefits and decreased burden on health facilities.

## Educational Impacts

- 5.20 MMU Partnerships with primary and secondary schools are well established and have strengthened as the Birley campus has developed. This is in part through the work of the Birley Campus Education Impact Group set up to maximise the benefits of the new campus. The work of this group and of MMU in Hulme and Moss Side has benefitted local schools as well as offering professional development for MMU students.
- 5.21 Webster Primary School's partnership with MMU includes collaboration on a number of activities. The Higher Futures 4U programme is a transition project for Year 6 pupils preparing for secondary school. The school has worked with the Tutor Trust to support additional learning tutors in Maths, English and Science for Yr 6 SATs students, which is an expansion of the Tutor Trust offer to primary schools.

5.22 The Tutor Trust is a not-for-profit social enterprise based in Manchester. Its purpose is to link undergraduates and other potential tutors with disadvantaged schools that wish to provide tuition for their pupils. It selects, trains, and insures tutors, and also handles the logistics of organising lessons to support student attainment in schools. The Faculty of Education has been actively working with Tutor Trust to place MMU students into the local schools, and has provided both financial and practical support to its activities in the area.



5.23 Webster Primary School now has an after school code club which is supported by MMU ICT students and MadLab. Code clubs will be rolled out across all Hulme and Moss Side primary schools. Webster Primary School has also produced an art exhibition at the former Didsbury campus. MMU and Loreto College have worked with the school to organise a lunchtime writing club.

5.24 Loreto College itself is also a partner with whom MMU is working closely to maximise the impacts of the new campus. The aim of the link between MMU and Loreto is to bridge the transition from college to university. Activities in this respect have included:

- Education Studies Transition Project
- Presentation and workshops on Personal Statement writing
- MMU representation at Loreto College Open Days
- Representatives of MMU's Youth and Community course visited the college to give students information about the Youth and Community course
- A textiles workshop for all AS level students, that was provided by MMU
- MMU representation at the Loreto College Careers Fair
- Loreto Pathways department is working with MMU to build work placements for students with learning difficulties.

5.25 Other activities of the Education Impact Group have included organising the 'Making Education a Priority Conference'. MMU supported and arranged speakers for the conference, including Dr Ornette Clennon (MMU Crewe) and Diane Abbott MP. Cllr Mary Murphy also attended the conference plus a number of community representatives from Hulme/Moss Side. One of the outcomes from the conference was a proposal to set up a Saturday School at the Birley Campus. It was recognised that Saturday Schools were a good tool to help support young people in Hulme and Moss Side with their learning. The Birley site and location offered potential for such an initiative.

In addition, MMU's Community Audit & Education Centre (part of the Faculty of Education) and the Somali Adult and Social Care Agency (SASCA) recently launched the report 'Hope for the Future' at an event attended by representatives of MMU, Manchester City Council's public health, equalities and education departments, GMP

and the Somali High Commission. The report is the result of participatory research within the Somali community and is the first to offer an insight into the experience and social needs of the community. The report covers issues around health and health services, child education and issues facing young people. CAEC provided training and support to the 21 Somali community researchers who carried out this research. Manchester City Council provided funding for this project.

- 5.26 Further, in June 2014 CAEC and Manchester Mind ran 'Introduction to Mentoring', a 6 week training course which trained people to successfully become mentors who could help others achieve their goals. The course was run in response to demand from local community groups including SASCA, Women Against Violence and the Louise Dacacodia Education Trust's 'Getting Ahead' programme. 18 delegates in total attended the course, which covered areas such as relationship boundaries, confidentiality, equality and diversity, communication skills and safe working. All students rated the training as 'very good' or 'excellent', with many saying they would be applying the techniques in their various workplaces.
- 5.27 Following requests submitted to the MCC regeneration team for community development training, CAEC and the Workers' Education Association co-delivered the Hulme Community Development course between April and June 2014. 12 people were recruited to the course, mostly from Hulme and Moss Side. Tutoring covered the roles of different organisations with which community development workers interact, how community development workers can act to improve equality and justice in their local community, and how reflecting on such actions can improve practice.
- 5.28 Between April and June 2014, the 'Women in Hulme School of Participation' project was run by the Gender and Participation Unit. The course brought together 10 women from Hulme to identify issues of local concern and (using a methodology inspired by the popular education approach of Paulo Friere) discussed what positive changes they could make in the short term. The participants decided to create a new Women's group. Since the conclusion of the course, the group has continued to meet weekly and is still actively campaigning on this issue.
- 5.29 MMU's Faculty of Education has agreed to support the Birley Community Education Programme for another year. Current and upcoming projects include:



- Digital Media Training Project - training local people in digital audio visual production, scriptwriting and vocational training, combined with advice and guidance about the media industry. This course is being run in conjunction with First Cut Media.

- A course entitled 'Is Uni For Me?' in conjunction with Manchester Adult Education Service for people considering higher education. A successful pilot of this course was delivered in early 2014.
  - Delivered in conjunction with GAP Unit, 'Hulme Community Mapping' will train local residents in participatory research techniques so that they can use them to gain a historical view of the formation of their communities. The programme and research will run concurrently.
  - Working with Manchester Foyer and local residents on a food programme. The Foyer provides advice and support to homeless young people.
  - A further Mentoring course offered through the Birley Community Education Programme with members of local community organisations.
- 5.30 MMU Ambassadors supported the Manchester Academy Transition Summer School over the summer; supporting the schools event for their new Year 7s. A group of Year 6 pupils from Heald Place Primary School visited MMU as part of the Transition Project which started last year. Planning is now in place for the Transition Project for this year which involves Academy Year 7 pupils working with MMU students before going into the Primary schools to work with Year 5/6 pupils. In addition, some Manchester Academy Year 10 pupils took part in the MMU Residential Summer School in July, where the students stayed in Cambridge Halls for two nights.
- 5.31 MMU's Faculty of Education is working with Martenscroft Nursery School and Children's Centre on the potential to develop a research and best-practice hub on a site adjacent to Birley campus. Whilst not yet confirmed, this proposal would provide practice experience for MMU Early Years students, training/CPD for early years staff across Manchester, a research hub, 48 places for 2 – 3 year olds and 15 places for under twos. It is also intended to be a flagship project which marks out Manchester and MMU as centres of excellence for early years provision, practice and research.

## Health Impacts

- 5.32 In 2009, one of the options being considered for inclusion as part of the Birley Campus development was the inclusion of a health centre. Ultimately, this was not included in the final development mix as a result of re-organisation within the NHS.
- 5.33 Nonetheless, MMU has sought to maximise the health impacts of the new campus. To this end, it established a Health Impact Group. This group has led a number of health focussed activities aimed at benefiting local communities and improving health outcomes.
- 5.34 Most notable amongst these activities has been a programme of free health screenings. This involves third year cohorts of pre-registration nurses, supervised by the Centre for Public Health MMU and registered nurse tutors, providing health checks in the nearby Zion Centre. These health checks have included blood pressure checks, weight,

smoking advice and other general health advice. The students who volunteer, undertake these days as counted practice hours towards their training programme, and are required to complete a short reflective exercise following the sessions. Over 230 clients have attended the sessions which have also been supported by external agencies such as Cancer Relief and LUSH. The sessions are provided regularly in February and July every academic year. In 2015, physiotherapy and nutrition students will join the sessions.



- 5.35 In addition, a group called 'Our Moss Side and Hulme Health and Wellbeing Group (OMS Group)' has also been set up. This group has identified a number of over-arching health and wellbeing priorities including:
- Helping to improve people's mental health and wellbeing
  - Supporting the community to improving their own health and wellbeing through education, information and involvement
  - Getting the youngest people off to the best start
- 5.36 Representatives from the Faculty of Health, Psychology and Social Care have regularly attended the Group meetings and actively supported work under these priorities. For example, MMU academic staff are supervising a PhD student who is exploring community resilience. A large part of this work involved the development of a community map of services, which support the health, and wellbeing of the community. This student is working with the OMS Group to expand the map, which will be freely available for the community, services and the local authority to use.

5.37 A brand new facility within the Birley campus is the MMU Clinic, which is available to staff, students and the public. Various treatments are available at competitive prices for sports injury, headaches, back pain, physiotherapy, neurological conditions, women's health, headaches and acupuncture.

5.38 The future activities promoted and delivery by the Health Impact Group will aim to:

- Actively promote Birley as a community campus
- Open up channels of communication and engagement with local communities
- Build strong and vibrant community engagement activities
- Work in partnership with the local community to support health and wellbeing
- Enhance student and staff experience of community engagement



5.39 These aims will be achieved through:

- Developing strong community partnerships
- An integrated programme of events across faculties with community partnerships
- Continued support for the Our Moss Side and Hulme Health and Wellbeing Group
- A proposed networking event for community and voluntary services based in Hulme and Moss Side to share information about services available in Spring 2015
- Running health screening days every Feb and July and will be expanded into nutrition and physiotherapy support for clients.
- Responding to requests for additional days in different community centres in Hulme and Moss Side
- Explore how Birley Campus can support local health and wellbeing needs
- Identifying opportunities for external funding for community engagement

## Business Perception Impacts

5.40 As part of the 2009 report, an extensive programme of consultations was undertaken with a range of key organisations involved in economic development, investment and business support across Manchester, including:

- Greater Manchester Chamber of Commerce – who provide business support to companies across the city region;
- Manchester Enterprises – the economic development agency for Greater Manchester;

- Manchester Science Parks – agents for Manchester Science Park, a Hulme based science and technology community providing business support to tenants;
- MIDAS – Manchester’s inward investment agency, working to attract investment into the city region; and
- Innospace - MMU’s graduate business incubator offering subsidised office space and business support.

5.41 This exercise sought to gather opinions on perceptions of the area from a business perspective, and how these may be affected by MMU’s relocation scheme. All consultees were positive about the scheme and offered views largely in agreement on the current issues affecting the area and the effects of the new campus.

### Business Perceptions of Birley Fields in 2009

5.42 At the time, the area was not perceived favourably by businesses and the cluster of office buildings in Birley Fields was far from fully occupied. Manchester Science Parks were finding it difficult to attract companies to this location.

5.43 Birley Fields was seen as encroaching into a residential area and not as a business area. It is outside of the city centre yet not far enough out to offer all the benefits of a business park. As such, it was not considered a prime employment area and although it may be able to offer lower rates and rental costs, it had no unique selling point.

5.44 Although there is some retail in the local area, there are many vacant units. Businesses considering relocating to Hulme are disappointed at what they perceive to be a lack of shops, which makes it more difficult to attract staff. There were also issues around (perhaps outdated) perceptions of high levels of crime and unemployment.

5.45 The site itself was viewed as a wasteland that contributes to a particularly dark environment at night. The issue of safety too affected the ability of the area to attract staff and thus businesses into Birley Fields. The local area was also perceived to suffer from poor public transport links. Birley Fields was seen as not quite close enough to the bustling Oxford Road corridor with Princess Road additionally acting as barrier to movement between the two areas. Indeed, Manchester Science Park considered that this lack of connectivity was the main issue in attracting tenants to the existing office accommodation near the site.

### Impacts of the New Campus envisaged in 2009

5.46 It was envisaged that the new Birley Campus would help to attract new retail businesses into the area along with other businesses to support students such as cafes and sandwich shops. The scheme will increase pedestrian and traffic flows, resulting in a much more vibrant environment; an impact which will reap benefits for the area. Moreover, this creation of a ‘24-hour’ atmosphere will be largely beneficial; making the

area seem safer at night. Anticipated negative effects of the increase in people were an increase in litter and possible tensions between students and local residents.

- 5.47 In terms of attracting professional businesses, the new campus was also expected have an impact. Perceptions of the area were expected to improve, with the campus providing an anchor for the site that would attract other businesses to the area.

Manchester Science Parks anticipated that this scheme would help to fill their building in Birley Fields.



- 5.48 MIDAS considered that the specialist nature of the facilities would be particularly beneficial for the area in terms of

attracting investment. Together with healthcare establishments already in the area, the new campus would create a cluster of health related businesses and help stamp a character on the area. In addition, the new campus would ensure a local labour pool of specialist health graduates. This would help increase investment in the local area and attract further health sector businesses. Healthcare is one of the three priority sectors MIDAS is currently marketing and the new campus would be included in their marketing material used to attract businesses to the Manchester area.

- 5.49 Other potential benefits cited in 2009 included improved appearance of the site and the creation of local job opportunities.

### Have the expected impacts materialised?

- 5.50 With the campus only having been open a few months it is, perhaps, too early to determine this with certainty, and to draw cause and effect relationships. In addition, it has not been possible to undertake such an extensive programme of consultations as part of this Interim Update of the Impact Assessment. Nonetheless, the level of vacancies in retail units along Stretford Road has reduced significantly. The rateable value and achieved rental levels of retail properties in this location have also increased. Anecdotal evidence also suggests an improved business environment for retail businesses with the Post Office facing the new campus having recently benefited from a significant investment in a major refurbishment. It has also extended its opening hours.

- 5.51 Similarly, it is understood from the agents of the retail premises developed as part of the new campus, that there has been good levels of interest from prospective tenants and that there is an expectation that lettings on some or all of the new premises will take place in the coming months.

- 5.52 Taken together, it seems likely that there is a general pattern of improvement in the retail sector in areas immediately around the new campus. It also stands to reason that the

additional activity in the area, firstly through the construction stages and now through the operation of the campus has added to the footfall and turnover of local businesses. Whilst the national economy has also emerged from recession during the construction period and this may explain improved market conditions to some extent, the retail sector in many similar locations to Hulme and Stretford Road in particular remains depressed. As such, it is reasonable to assume that Birley Fields is at least partially responsible for these improvements.

- 5.53 Outside of the retail sector, areas around Birley Fields also seem to have become more attractive to business. The last vacant building at the Birley Fields office development has recently been bought in it's entirety to UK Fast. Several consultees suggested that the investment in the new campus and the availability of a young, skilled workforce in close proximity was a significant factor in UK Fast's decision to relocate to Hulme. Office rental values have also increased slightly since 2009, despite there having been a general fall in office rental values during this time as a result of the recession.



## Physical Regeneration Impacts

- 5.54 The site of the proposed Birley Campus is located at the heart of the Hulme area, which has undergone significant regeneration and development over the last 10-15 years. Prior to the investment by MMU, it was considered by many consultees to be the last major piece of land in the Hulme area that remains to be developed. It is bounded to the north and west by new residential development and to the south by new office development, beyond which is Hulme High Street providing a range of retail and leisure facilities.
- 5.55 The majority of the land on which the campus was developed has been vacant since the demolition of Hulme's deck access flats in the early 1990s. This contrasts sharply to the remainder of the Hulme area which has been the subject of reasonably high density mixed use re-development to create active and vibrant streets and communities.
- 5.56 In many ways, therefore, the development of this land is the final 'missing piece' in the regeneration and development jigsaw of Hulme, occupying a crucial, central position in the area, as well as at a high profile gateway location to the City Centre. The vitality and activity generated by the campus was considered necessary by the Council and other local strategic partners at the time of the 2009 report, in order to enliven this part of Hulme. Indeed, the development of the Campus has delivered more in this regard than previous proposals for the area (for additional office, related employment generating

uses and housing), given the number of people likely to be living, working and learning in the area.



- 5.57 Whilst there were a number semi-mature trees on the sites prior to the campus development, a number of these have been retained and worked around in the design and layout of the campus, with a further 26 having been replanted along Princess Road. Furthermore, some 300 new trees have been planted across the campus site.
- 5.58 Prior to the campus development, the Birley Fields site was previously overgrown, unattractive and often the subject of littering and fly-tipping as well as other forms of anti-social behaviour. This poor environmental quality and amenity meant that the site acted as a barrier between the residential areas north of Stretford Road and the shops and services provided at Hulme High Street. The masterplan of the Campus ensures that there are now direct, safe and attractive routes between the residential areas north of Stretford Road to the west of the site, and the shops and services that support them principally those at Hulme High Street.
- 5.59 The detrimental impact these sites had on local environmental quality and amenity also discouraged investment in high quality shopping, restaurants, cafés and bars along the adjoining stretches of Stretford Road and Royce Road. The design quality of the campus development now appears to be



having the opposite effect, driving up local environmental quality, as shown by the reduced with vacancy rates along Streford Road and new uses being attracted to the area.

- 5.60 The campus is acknowledged by local members and community representatives as being a substantial enhancement on the on local amenity, with high quality architecture, new development and public spaces replacing forbidding overgrown scrubland.



Cllr Nigel Murphy

***“MMU made a lot of promises about this project, and it has delivered on every single one of them.”***

***“MMU is helping to bring Hulme back to life as a vibrant, sustainable and inclusive part of the City of Manchester.”***



Rob Croll, student activist

- 5.61 However, not all of the impacts of the MMU development have been or will be positive. During the construction phase of the new campus, there were issues arising from works being undertaken outside of permitted times by MMU's contractors. Residents' complaints were acted upon by MMU and the out of hours works ceased.
- 5.62 Similarly, areas with large student populations can have problems with integration and the relationships between student and local communities. Whilst in 2009, there were already a large number of students living in the Hulme area, there remained a risk that a significant additional influx of students could cause problems with anti-social behaviour.
- 5.63 MMU took a number of steps to try to reduce the scope for issues between students and local communities. For example, the design of residential blocks ensures that buildings have what appear to be front doors on to the road so as to define frontages, in line with the Hulme Design Guide.



5.64 In addition however, the principal points of access into the residences are from internal courtyards where noise is contained. In particular, the main taxi drop of point is within one such courtyard so that the noise of car doors being shut does not disturb residents outside of the campus.

5.65 Effective campus management and security is also critical in respect of maintaining good relationships between student and resident populations. MMU have put security and management structures in place that are intended to be proactive and ensure that any issues can be quickly addressed.

5.66 Birley campus student accommodation is designed to integrate into the wider Hulme landscape and compliments other existing buildings next to the campus. It is anticipated the construction of the Birley campus will generate interest from



investors in student housing. Already the City Council's Core Strategy sets out clear criteria to address the unregulated growth of new build student halls. Article 4 planning powers will also assist preventing the spread of new houses in multiple occupation.

5.67 It is important that new developments address this risk and maintain the character of Hulme as a residential neighbourhood. For example, the Council approved the development of the Leaf Street site immediately adjacent to the campus for a market rent scheme targeted at working households.

5.68 In addition, and as set out elsewhere in this report, the making available of sports and community facilities in the new campus, as well as the activities of MMU in the local area, are designed to ensure that the Campus and it's students and staff are effectively integrated in to the communities of Moss Side and Hulme.

5.69 Notwithstanding the above, both MCC and MMU are keen to ensure that the area around the campus does not become too densely populated with students. Applications for additional (private) student residential development are being resisted to ensure that the local area maintains a balance between student and non-student residents. To maintain this position, it will be important to carefully monitor the number and proportion of students living in the area to determine whether more needs to be done in this respect. This can be done through monitoring of applications for student exemptions from Council Tax.

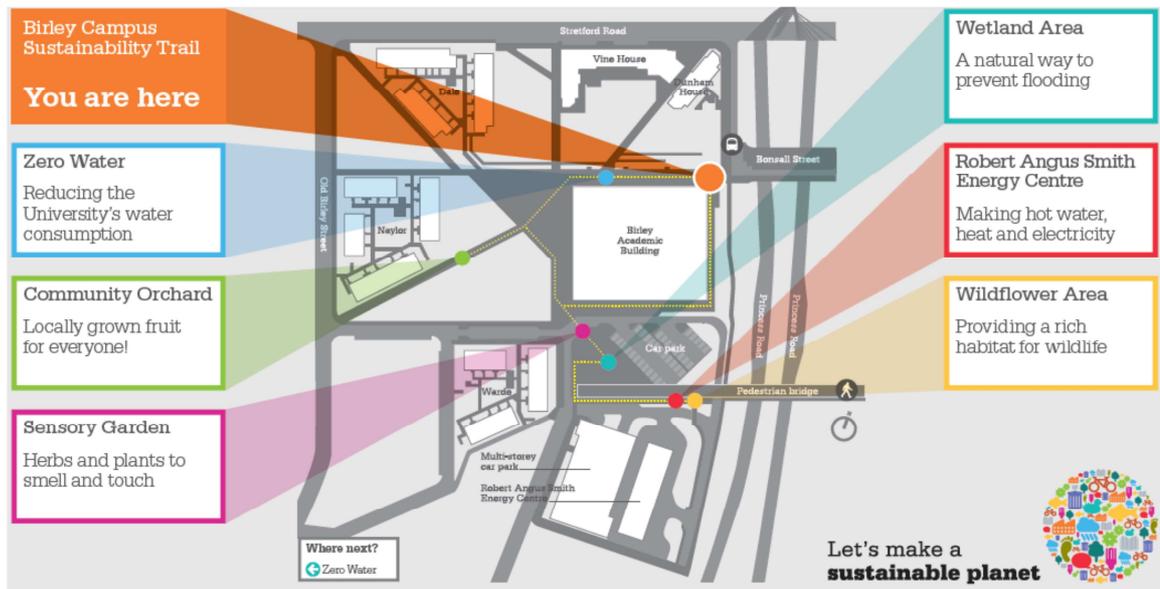
## Environmental Sustainability

5.70 In terms of environmental and sustainability credentials, the campus is an exemplar project. Sustainability considerations have been incorporated into every aspect of the project and the stated aims of the development is for the campus to be zero carbon, zero water and zero waste. Measures contributing towards achieving zero water include rainwater harvesting, grey water recycling and the use of a borehole to provide drinking water.



5.71 The layout of the buildings on the site sought to retain as many existing mature trees as possible and relocate good specimens where this was not possible. In total, 26 trees were relocated. In addition, a further 300 new trees were also planted. The main academic building will achieve BREEAM Excellent as a minimum and measures are being explored to achieve an Outstanding rating. The building particularly innovative in its use of a displacement air system with aero foils located over the atria on the roof to cool the building during summer, and a heat recovery system during winter months. The accommodation blocks will achieve a BREEAM Outstanding rating.

5.72 The campus also includes an Energy Centre that uses a natural gas Combined Heat and Power (CHP) system to meet needs in an efficient way unit and to provide centralised energy for the site. The Energy Centre is also an educational resource for the local community.



5.73 The inclusion of secure bicycle stores and electric car charging points, as well improvements to pedestrian and cycling routes and public transport networks all help to reduce the environmental impact of the development.

## Travel Patterns

- 5.74 The relocation of campuses, including both residential and teaching accommodation, from Didsbury and Rusholme to Birley Fields has significantly reduced the need to travel for many students, given its closer proximity to the existing main campus at All Saints. This proximity should enable many students to use more sustainable modes of travel, particularly walking and cycling.
- 5.75 A Resident Parking Scheme costing £360,000 was funded by S106 funding (£270,000) and MCC parking reserves. This will mitigate the negative impacts, on residents and businesses, of additional traffic and congestion created by such a large influx of students and staff.
- 5.76 In addition, approximately £200,000 has been spent on Section 278 works which will provide enhanced public realm around the campus and improvements to bus and cycle routes. This investment is important to ensure Hulme continues to offer an attractive environment for businesses and residents. New pedestrian and cycling routes are being developed which will provide safe and attractive routes between the Birley Campus and the All Saints campus.
- 5.77 The Birley Fields Transport Working Sub Group focuses on transport needs in the Hulme area and regular updates on the resident parking scheme. The group has produced a transport impact assessment which identifies the needs of a number of organisations in the vicinity of Birley campus. Its priorities include the need to improve public transport; secure funding for cycling and monitor the transport needs & impact of

the increased number of people living and working in Hulme as a result of Birley campus.

5.78 Moreover, the recruitment of a new role of MMU Travel Manager will enable the further development of strategic and operational aspects of the university's Travel Plan.

## Travel Plan

5.79 The Birley Fields & All Saints Travel Plan produced by Aecom in March 2013 provides an update on the Travel Plan Document that was in place at the time of the 2009 study. The report provides a comprehensive update to the travel patterns of both staff and students.

5.80 Aecom assess the impact the previous travel plan had on changing people's travel patterns, examine the needs of the building occupants and how it will impact on travel patterns, consider the Universities fleet operations and ways to reduce its environmental impact, provide an audit of the surrounding sustainable infrastructure, undertake a new survey and travel patterns as well as identifying aims, objectives and targets for staff. They then provide a revised travel plan and a monitoring plan.

5.81 The update concludes that the travel plan that was in place previously has had a positive impact on the travel patterns of staff and students. Single occupancy trip numbers have reduced and the percentage of students driving to the University is relatively low. The updated survey provided the following results:



### *Bicycle*

5.82 The 10% target for staff is consistent with current travel patterns and the detailed survey data. Furthermore, the delivery of 329 cycle parking spaces acknowledges 10% of staff and 8% of students travelling by bicycle in Year 5. The 8% target for students reflects a doubling of the current 4% which is a challenging target but reflects cycle parking provision at the new campus.

### *Car*

5.83 MMU has already achieved significant changes in modal share, this is a notable achievements and reflects the success of the Travel Plan. A 30% target for Single Occupancy Vehicles (SOV) acknowledges travel patterns to the All Saints Campus (31%

in 2010) and the likely initial increase in travel by car due to journeys to Birley Fields which are reallocated from wider catchments associated with the Didsbury Campus. The student target is more rigorous, as the opening year reflects current Manchester trends (14%) whilst year 5 targets a 6% reduction to 8%. This is combined with an increased car share percentage to give a total of 11% via car by Year 5. The wider sustainable connections and policy against student parking permits will reinforce this target.

### *Bus*

- 5.84 The student percentage of Bus users has been consistently around 35% and this is likely to continue subject to an increase in Metroshuttle use. However this may be offset by increases in cycling, especially when acknowledging current trends and the dissatisfaction shown in responses from the Staff/Student Survey. It is envisaged that the staff use of bus will increase (18% from Year 1 to 19% Year 5) given the relative fall in SOV. A key element of this will be through Metroshuttle and existing services (most notably along the Oxford Road corridor).
- 5.85 Since the writing of the Travel Plan, MMU has committed to funding the provision of a new bus service from Parrs Wood to Birley Fields, connecting the former campuses to their new location at Birley Fields. This service is understood to be well-used.

### *Tram*

- 5.86 With the existing services and the recently opened extension to Chorlton and Didsbury, the Travel Plan envisaged that tram usage will rise amongst both staff and students. The initial base line figures have been appraised alongside the additional catchments to set a target of 5% of staff for year 5 and 3% for students.

### *Walking*

- 5.87 The targets for staff that walk to work are heavily dependent upon the catchment. It is therefore felt that there is only a small opportunity to encourage increased modal share. It is considered that the greatest increase will be in Public Transport and Cycle use given the distances involved. The staff target remains broadly consistent with the current numbers who choose to walk. The student walking target is also broadly consistent with the current percentage with a 29% target for year 5, this is predicted to rise year on year.
- 5.88 To achieve these targets, MMU is investing in a new walkway between the All Saints and Birley Campus to be delivered in 2015. Work is already underway on works between Cambridge Street and Boundary Lane to improve connectivity to the campus, with completion of this work in May 2015.

### *Train*

- 5.89 The 5 year targets for train travel reflect current demand due to the changing catchments. The opening year through to year 5 targets are seen to increase accordingly. There is likely to be more movements on train from the former Didsbury

Campus users so as to reflect the increased distances travelled, therefore mirroring current Manchester demand. National Rail Forecasts also show increases in demand so the 14% target for students will need to be carefully monitored as it could potentially be exceeded, especially if students choose to commute from home and not from a term time address (which would likely be in a local catchment more suited to walk/cycle/bus).

### *Objectives & Action Plan*

- 5.90 Notwithstanding the above, the report states that opportunities to further improve the sustainability of travel patterns and to reduce the University's carbon footprint remain. A review of the current fleet policy is proposed in order to bring further improvements. The review of the surrounding sustainable infrastructure identified a number of areas of potential improvement and development of the sustainable travel routines of staff and students.
- 5.91 Following this updated analysis, a number of targets and objectives are set out to inform decisions around the updated travel plan. The core targets identified include increasing the number of staff and students travelling on public transport, increasing the number of staff and students travelling on foot, increasing the number of staff and students travelling by bike and reducing the number of staff and students travelling by car, especially single occupancy trips. An action plan is set out to facilitate the implementation of the travel plan as well as a monitoring framework which is suggested to be undertaken on an annual basis.

## 6 CONCLUSIONS, MONITORING & ACTION PLAN

### Headline Impacts

- 6.1 The 2009 Impact Assessment estimated that the total economic impacts of the new campus (including direct, indirect, induced and multiplier impacts) would support 877 jobs, or 708 full time equivalent jobs. The 2009 data suggested that the Birley Campus would provide an income multiplier impact equivalent to 2.22 (i.e. for every £1 in turnover at MMU Birley Campus, a further £1.22 is generated in the local economy). The resulting employment multiplier is 1.47, i.e. for every 100 jobs at MMU Birley Fields a further 47 jobs are supported in the local economy.
- 6.2 This 2014 Interim Impact Assessment shows an increased level of jobs and GVA across each element of the economic impact which would support a total of 1072 jobs, or 913 FTE jobs. The updated data shows the new campus provides an income multiplier impact equivalent to 2.14 (i.e. for every £1 in turnover at MMU Birley Campus, a further £1.41 is generated in the local economy). The resulting employment multiplier is 1.81 (i.e. for every 100 jobs at MMU Birley Fields, a further 181 jobs are supported in the local economy).
- 6.3 The development of the campus has exceeded the qualitative impacts estimated in the 2009 study across the criteria assessed. The 2009 study estimated the value of volunteering in Moss Side and at £13,060 and that was likely to increase to over £26,000 following the campus relocation and targeting of projects in Hulme and Moss Side. This figure has been exceeded following the latest assessment, equating to £32,120
- 6.4 The local community was very closely involved with the development of the scheme design and subsequently a number of community engagement schemes have been set up to help integrate the campus into the local community and to enable them, as well as students and staff, to get the best use of the site.
- 6.5 The community engagement and development projects planned in 2009 were successfully delivered, most notably the public engagement fellowships that have helped to embed MMU within the Moss Side and Hulme Communities. The success of efforts in ensuring community cohesion are reflected in positive statements made by local residents and members who were previously sceptical about the project.
- 6.6 It is difficult and perhaps too early to cite statistical evidence that the new campus has had material impacts on educational attainment and aspiration. Attainment and participation rates in higher education for Hulme and Moss Side in 2009 were low and well below average rate for the wider region. These measures have shown improvement by 2014. The update to the area profile also shows that the proportion of NEETs has reduced significantly in both Hulme and Moss Side since 2009. The Education Impact group continues to identify and implement an extensive range of projects and initiatives with local primary and secondary schools as well as FE colleges, aimed at improving educational performance and HE participation rates.

- 6.7 MMU has sought to maximise the health benefits of the Birley Campus by establishing a Health Impact Group. This group has overseen a programme of free health screenings. This involves third year cohorts of pre-registration nurses, supervised by the Centre for Public Health MMU and registered nurse tutors, providing health checks in the nearby Zion Centre. These health checks have included blood pressure checks, weight, smoking advice and other general health advice. In addition, this group has overseen the introduction of a brand new facility within the campus - the MMU Clinic, which is available to staff, students and the public and provides various treatments, including for sports injury, headaches, back pain, physiotherapy, neurological conditions, women's health, headaches and acupuncture.
- 6.8 Consultations with local business, economic development and inward investment organisations in 2009 revealed generally poor perceptions of Hulme and Moss Side as a place to do business. Whilst a new business survey has not been undertaken as part of this interim assessment, anecdotal evidence suggests that the Birley Fields development played a significant role in attracting the UK Fast to the Birley Fields office park.
- 6.9 It is perhaps too early to understand the business impacts of the campus having only recently opened. However the data gathered suggests a much improved picture in terms of reduced retail vacancy rates, higher rateable values, and higher achieved rental values. Outside of the retail sector, the areas surrounding the campus appear to have become more attractive to businesses.
- 6.10 In physical regeneration terms, the 2009 study identified the site of the campus as the final 'missing piece' in the regeneration of Hulme. Now that the development of the campus is largely complete, it is clear that its impact on the built form and function of the area is considerable and hugely beneficial. The main academic building is a landmark building that creates a high quality gateway not only to Hulme and Moss Side, but also to the City Centre. The design and layout of the campus encourages mixing between students and residents and provides safe, attractive and direct routes between residential areas and the shops and services that support them. This contrasts sharply with the overgrown and derelict land on which the campus was built.
- 6.11 The campus's sustainability standards are very high. MMU set an aspiration of the three zeros: zero carbon, zero water and zero waste. It is on track to achieve this. The main academic building will achieve BREEAM Excellent as a minimum and measures are being explored to achieve an 'Outstanding' rating. Its innovative use of a displacement air system with aero foils located over the atria on the roof and heat recovery during winter months, as well as CHP on site demonstrate this commitment to environmental sustainability.
- 6.12 The University's Green Travel Plan promotes sustainable forms of transport such as walking, cycling and public transport, will significantly reduce reliance on travel by private car and assist in achieving sustainability objectives. Ambitious targets for modal shift towards more sustainable modes have been set and are being monitored.

Whilst it is too early to determine the extent to which the travel patterns have changed, the relocation of the campuses to Birley Fields and closer to the existing core MMU campus at All Saints will, in itself, reduce the need to travel and provide the opportunity to promote non-car modes by virtue of increased proximity. A number of measures, including extensive provision for cycle parking and the funding a bus route connecting Didsbury to the new Campus, have been implemented as part of the opening of the Birley Campus.

## Monitoring

- 6.13 The starting position for measuring the impact of the campus on the local Hulme and Moss Side area of Manchester was put in place as part of the 2009 report in the form of a Baseline Profile. This profile has now been updated and is appended to this report, enabling comparison between the position in 2009 and 2014.
- 6.14 Of course, many of the impacts of the campus will not be fully felt until the campus has been operational for several years, so this exercise should be repeated in due course to show how this area profile and a range of key, measurable characteristics have changes over the period between planning the new campus, making the investment and it being in a stable operational phase.
- 6.15 To assist the measurement of the impact of the new campus, the factors to be monitored and measured that will help to show the impact of the campus are set out in the Monitoring Framework below. This framework establishes all of the information to be monitored; the sources of the information; the organisation that is best placed to gather the information; and the timing of data collection.

**Table 6.1 Monitoring Framework**

Data	Source	Organisation	Frequency
<b>Economy and Property</b>			
Employment Structure	BRES	Consultants	At time of next impact assessment
Employment Change	BRES	Consultants	At time of next impact assessment
Business Sizes	Nomis	Consultants	At time of next impact assessment
Commercial Property Values	CoStar (or equivalent)	Consultants	At time of next impact assessment
Residential Values	Land Registry, Property Websites	Consultants	At time of next impact assessment
Housing Mix	Census	Consultants	At time of next impact assessment
Housing Tenure	Census	Consultants	At time of next impact assessment
Student Council Tax exemptions in Moss Side & Hulme wards	MCC	MCC	Annual
<b>People and Society</b>			

Population	ONS	Consultants	At time of next impact assessment
Ethnicity	ONS	Consultants	At time of next impact assessment
Age	ONS	MMU	Annual
Index of Multiple Deprivation	CLG	MCC	Summer 2015 (new IMD data due) and subsequent data release
Life Expectancy	ONS/JSNA	Consultants	At time of next impact assessment
Mortality Rate	ONS/ Public Health Manchester	Consultants	At time of next impact assessment
Under 18's Conception	ONS/Teenage Pregnancy Unit Manchester	Consultants	At time of next impact assessment
Incapacity Benefit Claimants	ONS	Consultants	At time of next impact assessment
Economic Activity	ONS/Census	MCC	Annual
Occupational Categories	Census	Consultants	At time of next impact assessment
ILO Unemployment Rate	ONS/Census	Consultants	At time of next impact assessment
<b>Education and Aspiration</b>			
Qualifications	Census	MCC	At time of next impact assessment
Primary, GCSE and A-Level Performance	Department of Education	MMC	Annual
Skills Deprivation	Connexions Activity Survey	MMC	At time of next impact assessment
Participation in Higher Education	UCAS Applications/MMU Statistics	MMU/MCC	Annual
Higher Education Aspirations	Connexions / schools consultations	MCC	At time of next impact assessment
MMU Students from Moss Side and Hulme wards	MMU	MMU	Annual
<b>Birley Campus</b>			
Campus employment numbers by type	MMU	MMU	At time of next impact assessment
Proportion of campus employment by type taken by Hulme & Moss Side residents	MMU	MMU	Annual
Total campus turnover	MMU	MMU	At time of next impact assessment
Proportion of campus turnover to local suppliers	MMU	MMU	At time of next impact assessment
Staff and Student local expenditure	Student & Staff Surveys	MMU	At time of next impact assessment

Complaints to MMU/Police re: student behavior at campus	MMU/GMP	MMU	Annual
Have 'zero carbon, zero waste, zero water' target been met?	MMU	MMU	At the time of the next impact assessment
Are the Travel Plan targets being met?	MMU	MMU	At the time of the next assessment

- 6.16 It is clear from the monitoring framework set out above that not every element of the monitoring data must be gathered annually. Some measures should be monitored annually as a function of their importance in tracking the progress of the Moss Side and Hulme areas as they evolve following the campus investment, and in respect of effectiveness of the actions and activities being undertaken to maximise beneficial impacts. Structures may need to be established to ensure that, if remedial actions are shown necessary through the monitoring, they can be implemented quickly and efficiently.
- 6.17 Many of the others measures set out above do not need to be monitored on an annual basis. Rather, it would be more efficient to collate this data at the next of the final impact assessment/evaluation of the campus. In these cases, it is likely that this data gathering exercise will be undertaken by consultants.
- 6.18 The timing of the final impact assessment/evaluation of the Birley Campus is important. In order for the stable impacts to be assessed, particularly in respect of educational factors such as higher education participation, it will be necessary to allow enough time for the current cohort of local school students that have educated during the construction and early operational stages of the campus to have reach higher education age. Similarly, other measures are expected to change gradually over time and an early final evaluation may fail to fully capture them. One example of this would be deprivation indices.
- 6.19 On this basis, it is recommended that a final impact assessment/evaluation, including a further update of the area profile, is undertaken in late 2017 or early 2018.

## Action Plan

- 6.20 The 2009 report set out a palette of actions that would help to maximise the economic and regenerative impacts of the new Campus. The large majority of these were successfully implemented (as set out in the Executive Summary to this report). Now that the campus is operational there are some additional actions and activities, building on those already taken, that will further enhance the beneficial impacts and minimise any negative impacts. These are set out below:
- Continued targeting of Hulme and Moss Side residents for MMU jobs, and broadening focus from entry level positions to other posts;
  - Maximise indirect benefits by prioritising local businesses when reviewing supply chains to the new campus;
  - Encourage increased induced economic benefit through a 'shop local' initiative aimed at ensuring students and staff expenditure is retained in the local economy;

- Maximise multiplier economic impacts by prioritising businesses that themselves have local supply chains and work-forces, when reviewing supply chains to the new campus;
- Continue to increase the overall level of volunteering by MMU students and staff by promoting its value in improving employability and enhancing community cohesion;
- Continue to increase the proportion of MMU volunteering activity that takes place in Moss Side and Hulme by targeting local beneficiary organisations and projects;
- Work with local schools and FE institutions on initiatives to further increase educational aspirations and HE participation rates;
- Enable the use of the community orchard, sensory garden and energy centre as educational resources for local school and community groups
- Promote access to health check and facilities at Birley Fields to local residents, to improve their health outcomes;
- Promote use of the facilities at Birley Fields by local community groups;
- Ensure that effective and responsive mechanisms are in place for residents to raise and have resolved any issues that might arise. Develop a 'two way' relationship between the local community, the university and other partners and stakeholders.

# APPENDIX A UPDATED BASELINE REPORT



Manchester  
Metropolitan  
University



MANCHESTER  
CITY COUNCIL

## **Birley Fields Campus Interim Impact Assessment**

**Peter Brett Associates**

October 2014

61 Oxford Street, Manchester, M1 6EQ T: +44 (0)161 245 8900 F: +44 (0)161 245 8901

E: [manchester@peterbrett.com](mailto:manchester@peterbrett.com)

## Document Control Sheet

Project Name: **Birley Fields Campus**  
 Report Title: **Interim Impact Assessment**  
 Project Ref: **31905**  
 Doc Ref:

	Name	Position	Signature	Date
<b>Prepared by:</b>	Tom Marshall	Planner	TM	09/10/14
<b>Prepared by:</b>	James Ashford	Planner	JA	10/10/14
<b>Reviewed by:</b>	Matt Whiteley	Senior Associate	MW	10/10/14
<b>Approved by:</b>				
<b>For and on behalf of Peter Brett Associates LLP</b>				

Revision	Date	Description	Prepared	Reviewed	Approved

Peter Brett Associates LLP disclaims any responsibility to the client and others in respect of any matters outside the scope of this report. This report has been prepared with reasonable skill, care and diligence within the terms of the contract with the client and taking account of the manpower, resources, investigations and testing devoted to it by agreement with the client. This report has been prepared for the client and Peter Brett Associates LLP accepts no responsibility of whatsoever nature to third parties to whom this report or any part thereof is made known. Any such party relies upon the report at their own risk.

© Peter Brett Associates LLP 2014

**THIS REPORT IS FORMATTED FOR DOUBLE-SIDED PRINTING**

# CONTENTS

<b>1</b>	<b>INTRODUCTION.....</b>	<b>1</b>
	Introduction .....	1
	Report Structure.....	1
<b>2</b>	<b>ECONOMY AND PROPERTY.....</b>	<b>2</b>
	Employment Structure.....	2
	Sectoral strengths .....	3
	Employment change.....	5
	Sectoral changes .....	5
	Size of businesses .....	6
	Commercial Property Values.....	7
	Residential Values.....	8
	Housing Mix .....	9
	Housing Tenure.....	11
	Summary.....	12
<b>3</b>	<b>PEOPLE AND SOCIETY .....</b>	<b>14</b>
	Population .....	14
	Ethnicity .....	14
	Age .....	14
	Index of Multiple Deprivation .....	16
	Health.....	18
	Economic activity rates.....	21
	Occupational Profile .....	22
	Unemployment .....	23
	Summary.....	26
<b>4</b>	<b>EDUCATION AND ASPIRATION .....</b>	<b>28</b>
	Qualifications.....	28
	Primary, GCSE and A level performance .....	29
	Primary Performance .....	29
	GCSE Performance.....	30
	A Level Performance.....	32
	Skills deprivation .....	32
	Participation in Higher education .....	33
	Aspiration towards Higher education .....	34
	Summary.....	34

<b>5</b>	<b>CONCLUSIONS AND NEXT STEPS .....</b>	<b>35</b>
	Conclusions.....	35
	Next Steps .....	35

## TABLES

Table 2.1	Total employment by industry .....	2
Table 2.2	Top 3 employment industries (as a % of total) .....	3
Table 2.3	Total employment growth (2009-13) .....	5
Table 2.3	Change in proportion of employment by industry (2009-13).....	6
Table 2.4	Housing type.....	10
Table 2.5	Housing tenure .....	11
Table 2.6	Housing tenure: proportion of residents classed as social rented.....	12
Table 3.1	Ethnic Group Population Estimates .....	14
Table 3.2	Age Structure (numbers) .....	15
Table 3.3	Index of Multiple Deprivation Rankings (% , IMD 2010) .....	17
Table 3.4	Life Expectancy at Birth (Years, 2010-2012).....	18
Table 3.5	Mortality Rate 2010-2012.....	19
Table 3.6	Under-18 Conceptions (2009-2011).....	20
Table 3.7	Incapacity/Severe Disablement Benefit Claimants (2014).....	20
Table 3.8	Economic Activity Rate (% People aged 16-74, 2001) .....	21
Table 3.9	Occupational Categories (Persons, 2001) .....	22
Table 3.10	ILO Unemployment Rate (2011) .....	24
Table 3.11	Claimant Count (2014).....	24
Table 3.12	Sought Occupations (% Claimant Count, 2014).....	25
Table 4.1	Change in GCSE attainment 2008 - 2012.....	30
Table 4.2	Average A-level score per pupil .....	32
Table 4.3	Connexions User survey regarding purpose for visit .....	34

## FIGURES

Figure 2.1	Location Quotient chart .....	4
Figure 2.2	Change in employment growth between 2009 and 2013. (Base year = 2009) .....	5
Figure 2.3	Change in business size.....	7
Figure 2.4	Average House Price July 2011 to July 2014 (£000's).....	8
Figure 2.5	Housing type (% of total) 2001 and 2011 Census Comparison.....	10
Figure 2.6	Housing tenure (% of total).....	11
Figure 3.1	Age Structure (% of total) .....	15

Figure 3.2 Life Expectancy at Birth 1999-2003 and 2010-2012 .....18

Figure 3.3 Mortality Rate 2004-2006 to 2010-2012.....19

Figure 3.4 Under 18 Conceptions Rate 2003-2005 and 2009-2011 .....20

Figure 3.5 ESA and Incapacity Benefits Claimants Rate 2009-2014.....21

Figure 3.6 Economic Activity Rate 2001 to 2011 .....22

Figure 3.7 Occupational Categories (% Persons, 2011) .....23

Figure 3.8 ILO Unemployment Rate 2001 and 2011.....24

Figure 3.9 Claimant Count Rate 2009-2014 .....25

Figure 3.10 Occupations Sought (2009-2014) .....26

Figure 4.1 % of residents gaining no qualifications and those gaining NVQ level 4+ .....28

Figure 4.2 % of pupils gaining level 4+ at KS2 by ward .....29

Figure 4.3 % of pupils gaining level 4+ at KS2 by primary school .....30

Figure 4.4 and 4.5 GCSE attainment against baseline report .....31

Figure 4.6 GCSE attainment in main secondary schools in study area.....31

Figure 4.7 Average A-level score per pupil.....32

Figure 4.8 % of 16-18 year olds classed as NEET's .....33

Figure 4.9 % of 16-18 year olds classed as NEET's .....33



# 1 INTRODUCTION

## Introduction

- 1.1 In 2009 Roger Tym & Partners, now Peter Brett Associates, were appointed by Manchester Metropolitan University (MMU) and Manchester City Council (MCC) to undertake an impact assessment of a new campus for MMU at Birley Fields in Hulme.
- 1.2 It was anticipated that MMU's Faculties of Health, Psychology and Social Care and Institute of Education, together with other ancillary and complementary uses, would cater for approximately 6,900 full time and part time students and staff.
- 1.3 The original study investigated the potential impacts associated with relocating the campuses, along with other ancillary and complimentary services, on the Hulme and Moss Side wards specifically, and considered the impact on the Central SRF area (the Strategic Regeneration Framework covering Ardwick, Hulme, Longsight, Moss Side and Rusholme), and Manchester.
- 1.4 In particular, the study focused on the additional benefits the new campus would likely bring to the local communities in terms of built spaces, enterprise, employment, up-skilling of the local labour force and improved community services, all of which will raise the quality of life in some of the most deprived communities in the city.
- 1.5 This report provides an updated baseline profile of the Hulme and Moss Side wards that will enable the economic and social impacts of the proposals to be measured over 5, 10 and 15 year periods.

## Report Structure

- 1.6 To act as a comparison, the remainder of the report follows the same structure as the original document and is set out as follows:
  - **Section 2** - Economy and Property
  - **Section 3** - People and Society
  - **Section 4** - Education and Aspiration
  - **Section 5** - Manchester Metropolitan University
  - **Section 6** - Conclusions and Next Steps

## 2 ECONOMY AND PROPERTY

2.1 This section addresses economic and property related factors. Economic factors include the employment and business structure of the two wards, recent changes in the number of jobs each ward provides and the size profile of local businesses. Property factors include office and retail rental values, average house prices and the housing type and tenure mix of the area.

### Employment Structure

2.2 Table 2.1 shows employment by industry in the Moss Side as Hulme wards, as well as the Central Manchester SRF area, the city as a whole and the North West region.

**Table 2.1 Total employment by industry**

	Hulme	Moss Side	SRF	Manchester	North West
Agriculture, forestry & fishing	0	0	60	120	35,340
Mining, quarrying & utilities	10	0	100	1,380	36,670
Manufacturing	320	20	2,240	13,570	309,310
Construction	220	50	720	7,490	149,010
Motor trades	50	10	490	1,650	50,520
Wholesale	40	60	840	11,490	136,550
Retail	700	200	2,290	29,470	322,140
Transport & storage	150	20	1,610	22,550	146,610
Accommodation & food services	320	40	2,690	28,070	207,580
Information & communication	540	10	890	10,840	84,650
Financial & insurance	60	30	330	23,090	99,700
Property	310	310	1,100	9,340	61,160
Professional, scientific & technical	840	90	1,730	39,710	237,890
Business administration & support services	410	80	2,050	35,830	246,770
Public administration & defence	230	20	1,970	15,870	150,040
Education	3,680	440	14,920	34,560	275,010
Health	1,270	280	13,840	44,030	447,020
Arts, entertainment, recreation & other services	730	120	1,800	12,510	131,290

<b>Total</b>	<b>9,880</b>	<b>1,780</b>	<b>49,670</b>	<b>341,570</b>	<b>3,127,260</b>
--------------	--------------	--------------	---------------	----------------	------------------

Source: BRES (2013)

- 2.3 Employment in Hulme is approximately five times higher than that of Moss Side. As a proportion of the total area, employment in Hulme and Moss Side accounts for 23% of the total employment in the SRF area.
- 2.4 Using the data in Table 2.1, the below table 2.2 identifies the highest employment sections in Hulme, Moss Side and the SRF area.

**Table 2.2 Top 3 employment industries (as a % of total)**

	<b>Hulme</b>	<b>Moss Side</b>	<b>SRF</b>
Highest employment sector	Education	Education	Education
Second Highest	Health	Property	Health
Third Highest	Professional, scientific & technical	Health	Accommodation & food services

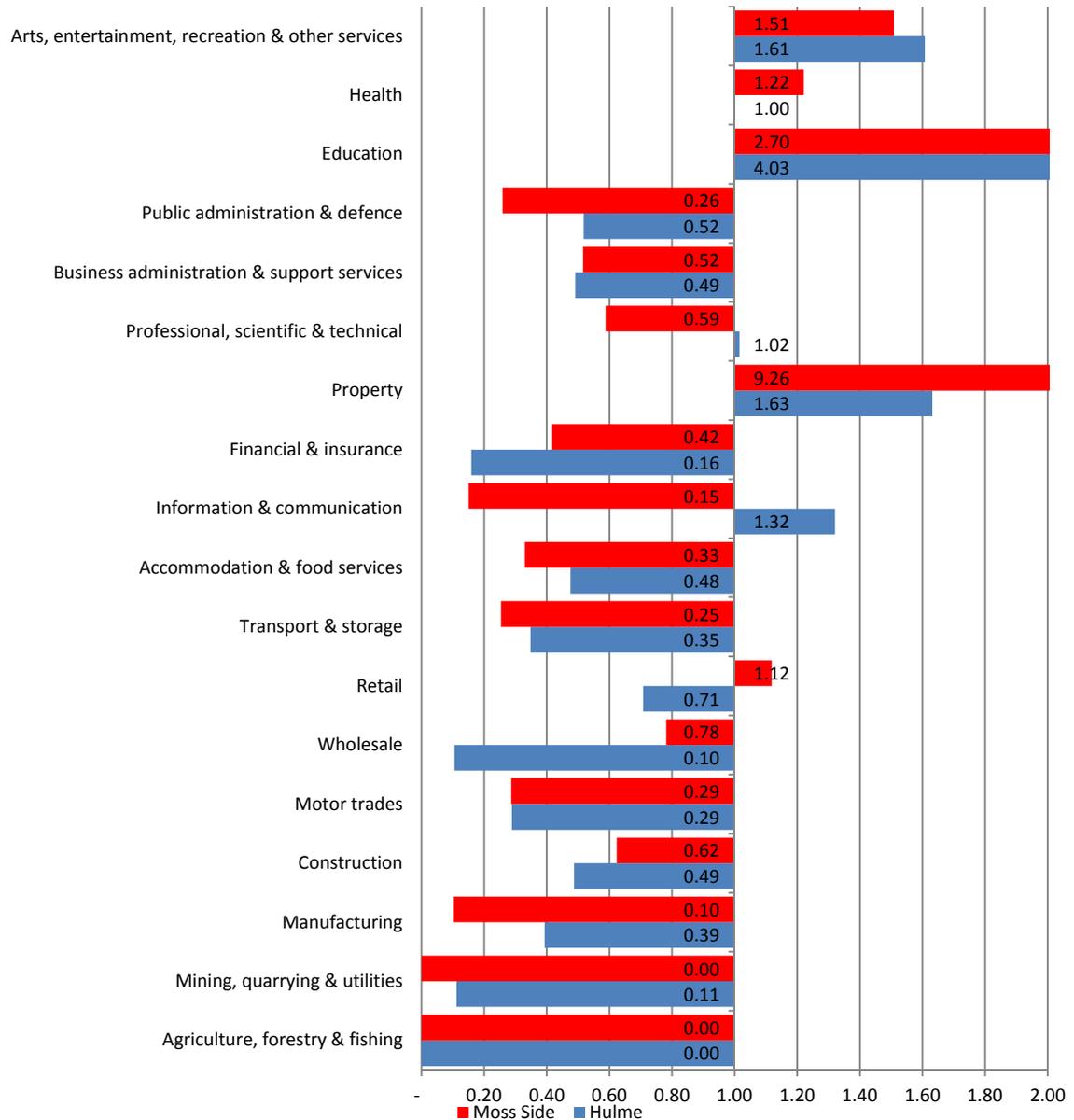
Source: BRES 2013

- 2.5 Education is the highest employment sector in all three areas, showing the critical and increasing importance of the sector to the local economy. Employment in Health is also a significant employer and features in the top three in each area. Combined, health and education account for over half of the total employment in both Hulme and the SRF area, and approximately 40% in Moss Side.

## Sectoral strengths

- 2.6 Table 2.3 below examines the industrial structure in more detail with the aim of identifying particular strengths in the two wards. The table uses location quotients to compare the wards employment in an industry as a proportion of the total against the national proportions of employment of an industry. This indicates whether there are more or less employees at a local level in an industry than at the national level, and therefore reveals where the local areas has strengths or weaknesses in specific industries.
- 2.7 Therefore, where the location quotient is 1, it can be concluded that there is an equal representation in that industry at the local level as is found nationally. A location quotient of less than 1 indicates that the local area is poorly represented in an industry, compared to the national figure, and conversely a location quotient of greater than 1 indicates a greater number of employees in an industry at the local level.

**Figure 2.1 Location Quotient chart**



Source: BRES 2013

2.8 It can be seen that 'Education' is not only the highest employer, it is also very well represented in both Hulme and Moss Side. Conversely, whilst Health was seen in the previous section as a large employer, this is in line with the national level in Hulme and marginally higher in Moss Side.

2.9 The Figure highlights that employment within the property industry is particularly well represented in Hulme, and exceptionally so in Moss Side, when considered against the national picture. Arts, Entertainment and recreation are another sector that appears to show a sectoral strength.

## Employment change

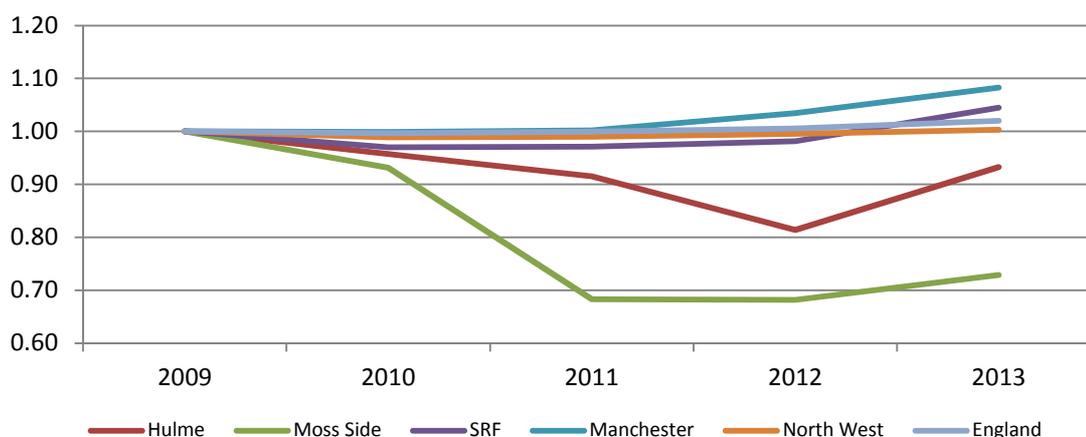
- 2.10 Table 2.3 identifies the changes in employment in the study area, and wider areas, over the last five years since the baseline study was undertaken. Figure 2.2 considers the same trends and shows the change in employment over the five year period using 2009 figures as the base.

**Table 2.3 Total employment growth (2009-13)**

	Hulme	Moss Side	SRF	Manchester	North West	England
2009	10,600	2,400	47,500	315,400	3,118,300	24,068,100
2010	10,100	2,200	46,100	315,100	3,083,200	23,982,000
2011	9,700	1,600	46,200	316,000	3,086,100	24,062,600
2012	8,600	1,600	46,600	326,300	3,104,500	24,208,200
2013	9,900	1,800	49,700	341,500	3,127,200	24,552,400

Source: BRES 2009 – 2013

**Figure 2.2 Change in employment growth between 2009 and 2013. (Base year = 2009)**



Source: BRES 2009 – 2013

- 2.11 Most notably, it is apparent from table 2.3 that employment in Hulme and Moss Side has fallen, whilst employment has grown in the SRF area as a whole, as well as at a regional and national level.
- 2.12 Figure 2.2 shows that in the SRF area, Manchester, North West and England, the rate of change in employment has gradually increased, whereas for Moss Side and Hulme, the rate has fluctuated considerably, falling considerably lower than the 2009 figures.

## Sectoral changes

- 2.13 Table 2.4 shows how the change in the proportion of employment of the total has changed between 2009 and 2013.

**Table 2.3 Change in proportion of employment by industry (2009-13)**

	Agriculture, forestry & fishing	Mining, quarrying & utilities	Manufacturing	Construction	Motor trades	Wholesale	Retail	Transport & storage	Accommodation & food services	Information & communication	Financial & insurance	Property	Professional, scientific & technical	Business administration & support	Public administration & defence	Education	Health	Arts, entertainment, recreation
Hulme	0%	-2%	2%	-2%	0%	0%	-2%	1%	1%	1%	1%	1%	1%	1%	-6%	3%	3%	0%
Moss Side	0%	0%	-2%	-3%	1%	2%	5%	-22%	0%	0%	0%	0%	0%	4%	1%	4%	-1%	4%
SRF	0%	-1%	2%	-2%	0%	0%	-1%	-1%	1%	0%	0%	0%	0%	2%	-1%	0%	2%	-1%
Manchester	0%	0%	0%	-1%	0%	0%	0%	-1%	0%	-1%	-1%	-1%	-1%	3%	-2%	-1%	1%	-1%
North West	0%	0%	-1%	-1%	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%	-1%	0%	1%	0%
England	0%	0%	0%	-1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	-1%	0%	1%	0%

Source: BRES 2009 – 2013

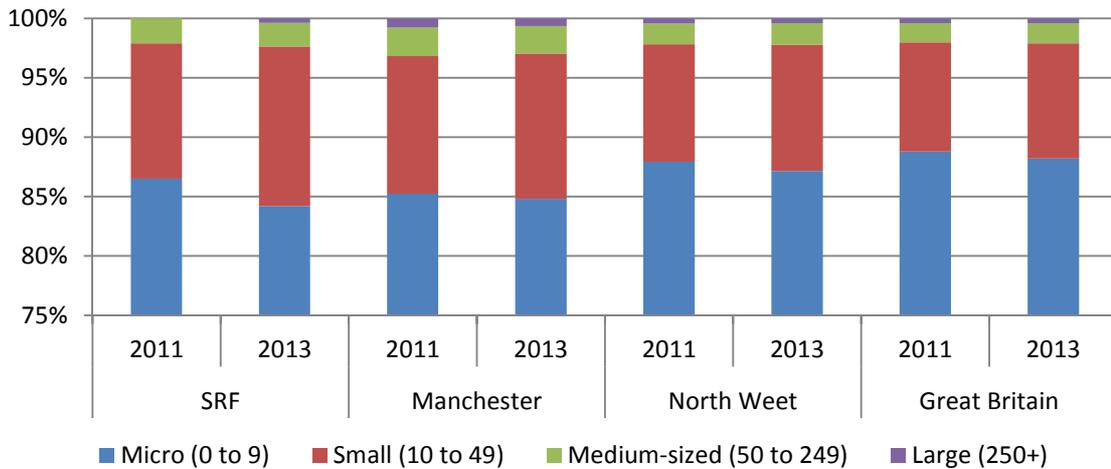
2.14 Table 2.4 reveals a number of important findings, most notably:

- High employment sectors such as ‘Education’ and ‘Health’ are growing in Hulme, whilst ‘Education’ is also growing in Moss Side. Comparatively, the employment in Education appears to be static or declining on a wider regional and national level.
- Employment in transport & storage has fallen drastically over the period in Hulme. This is predominantly due to the relocation of the ‘Stage Coach’ bus depot from Moss Side in 2010 which was a major employer in the area prior to that date.
- Whilst the proportion of employment in higher skilled industries such as ‘Information & communication’, ‘Financial & insurance’, ‘Property’ and ‘Professional, scientific, & technical’ has fallen in Manchester, it also looks to have increased in Hulme.
- ‘Retail’ and ‘Arts, entertainment & recreation’ represent growing employment areas in Moss Side, whereas these are declining or static in the wider SRF and Manchester area.

## Size of businesses

2.15 Figure 2.3 shows the change in size of businesses in the SRF area, across Manchester, the region and nationally, in terms of their number of employees.

**Figure 2.3 Change in business size**



Source: Nomis 2009 – 2013

- 2.16 The proportion large businesses in the SRF area (defined as those with over 250 employees or more) was zero in 2011, but has grown in recent years. In the SRF area it can also be seen that the number of small businesses (classified as having between 10 and 49 employees) has increased slightly too, perhaps suggesting increase levels of micro-entrepreneurship.

## Commercial Property Values

### Retail

- 2.17 Transactional evidence of retail lettings of units along Stretford Road in Hulme, dating from January 2009 shows an improving picture in terms of the achieved rent levels. The initial baseline study identified that achieved rents were in the region of £11.00 per sq. ft. A review of transactions after this study shows that achieved rent levels have increased. A number of transactions have been in the region of £12.00 per sq. ft. with the most recent transaction in 2013 achieving a rent of over £15.00 per sq. ft.
- 2.18 Elsewhere in the area, lettings have taken place at a number of larger units on Princess Road. These larger units tend to achieve a lower rent and this is the case here with achieved rents being in the region of £9.00 per sq. ft.
- 2.19 Information on property values is also available on the rateable value of each property. This information is available through the VOA database. The latest set of available data is from 2010 and can be defined to small geographical areas. We have identified an area that incorporates Stretford Road. The original study identified that the rateable value at the time for retail was £129 per sq. m (£11.98 per sq. ft.). A review of this data shows that this figure has increased. The rateable value is now at £150 per sq. m (£13.90 per sq. ft.)
- 2.20 Given the improving picture presented in the data, it is possible that retailer confidence and performance have improved as a result of additional custom arising from construction workers at the Birley Fields Campus. In addition, that once the

campus is fully occupied, there will be further increases to footfall and passing trade in the area. This may lead to further improvements in trading conditions and increased confidence in the market.

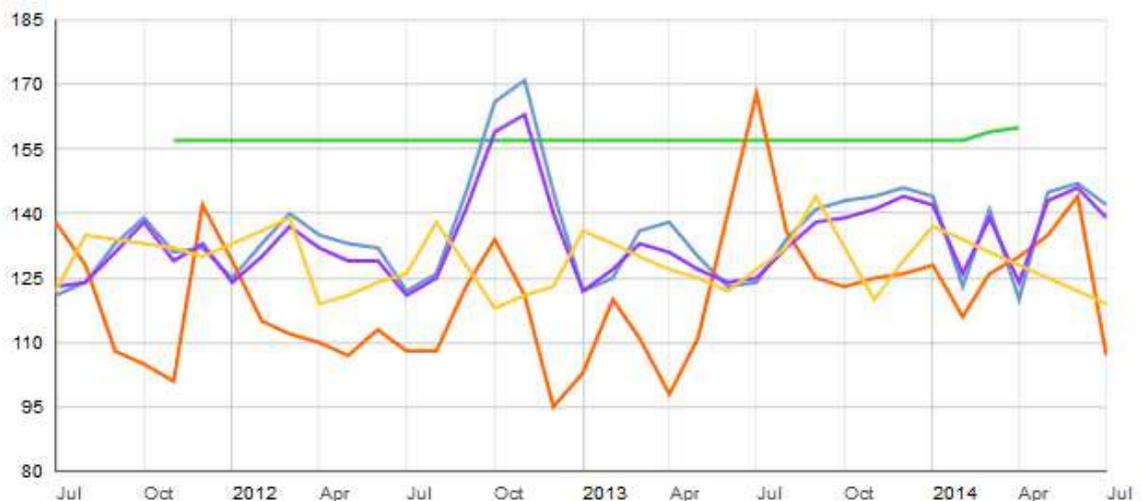
## Offices

- 2.21 Clearly, the vast majority of the office accommodation in the Moss Side and Hulme area is at Manchester Science Partnerships' Technopark. This is reflected in the transactional evidence available. The initial study identified that asking rents were in the region of £16.50 to £17.50 per sq. ft. Whilst there was little transactional data available at that time, it is reasonable to assume that achieved rents may have been somewhat below this level. The majority of these advertised rents were for space within Turing House located near to the new campus development.
- 2.22 A review of the most up-to-date data shows that Turing House remains the most active in terms of space available to let. The data suggests that there has been little movement in the achievable rents in the area. The examples that have been found show achieved rents in the range of £16.50 to £17.50 per sq. ft., suggesting some increase in values since the previous study.
- 2.23 There has been one significant transaction that has taken place recently at Number 1 Archway. UK Fast, a web server provider, has purchased the freehold interest of the entire building – a total of 45,000 sq. ft. It was purchased for £3.2m in January 2013 and represents the biggest occupier in the area since the previous study was completed.

## Residential Values

- 2.24 Figure 2.4 below shows recent trends in average house prices by type in the M15 postcode area, which is the best fit to the wards of Moss Side and Hulme.

**Figure 2.4 Average House Price July 2011 to July 2014 (£000's)**



Source: [www.home.co.uk](http://www.home.co.uk)

- 2.25 The graph appears highly erratic, this is due to the limited amount of data contained within the area defined. The orange line shows terraced properties, the yellow line

shows semi-detached properties, the blue shows flats and the green line shows detached. The purple line represents all transactions.

2.26 In general terms, the graph shows an upward trend in the achieved sales prices. The average price achieved for semi-detached properties increased by 6% from £112,000 to £118,500 in the three year period. Flats increased by 19% from £118,771 to £11,769 but terraced properties decreased by 29% from £150,750 to £106,500. However terraced properties are the most erratic of the datasets in the graph. Across all house types, the average price increased by 14% in the three year period from £121,922 to £138,534.

2.27 In addition to this trend data, analysis of the values of individual properties that have been sold more than once of recent years, whilst anecdotal, helps to show how values have changed, and has the benefit of comparing like with like. This analysis is summarised below.

- 90 Stretford Road
  - Sold in 2003 for £104,495
  - Sold in 2013 for £119,000
- 22 New Welcome Street
  - Sold in 2002 for £83,950
  - Sold in 2014 for £129,950
- 10 Loxford Street
  - Sold in 2004 for £107,950
  - Sold in 2013 for £187,000
- 72 Stretford Road
  - Sold in 2004 for £92,950
  - Sold in 2013 for £116,500

2.28 These transactions and others, show a consistent picture of value growth over the last 10 years. Whilst there are a range of factors that may account for the increase in value for properties, not least the significant regeneration that has continued in the area over this timeframe, it is also likely that the development of the Hulme Campus will have contributed to value growth to some extent. In particular, it is likely that demand for properties in this area from students and staff of MMU will have driven value increases.

## Housing Mix

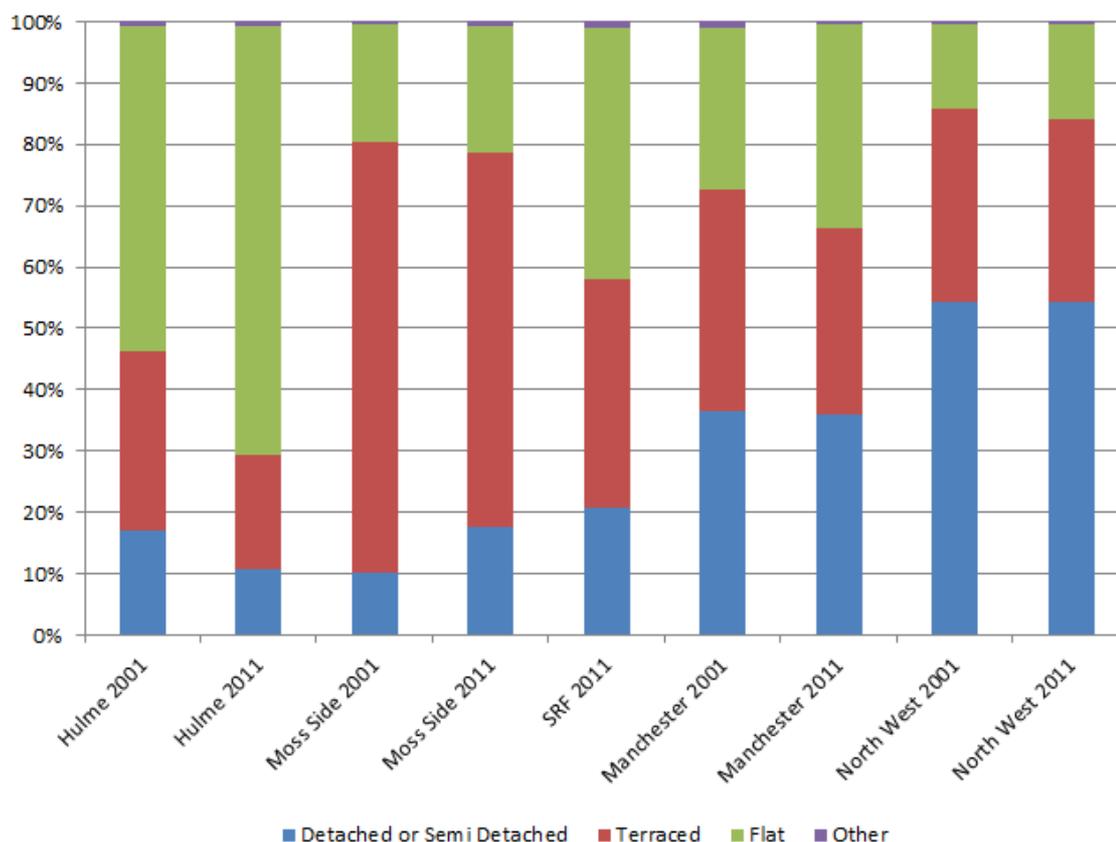
2.29 Table 2.4 identifies the mix of tenures in the study area. The 2009 baseline study identified that flats and apartments were considerably over represented within Hulme in comparison to the wider region.

**Table 2.4 Housing type**

Housing Type	Hulme	Moss Side	SRF	Manchester	North West
Detached or Semi Detached	784	1,211	6,177	73,721	1,635,180
Terraced	1,362	4,171	11,104	61,962	896,825
Flat, Maisonette or Apartment	5,117	1,425	12,280	68,227	463,477
Other Dwelling	46	40	266	1,059	14,067
<b>Total</b>	<b>7,309</b>	<b>6,847</b>	<b>29,827</b>	<b>204,969</b>	<b>3,009,549</b>

Source: Census data 2011

**Figure 2.5 Housing type (% of total) 2001 and 2011 Census Comparison**



Source: Census data 2001 - 2011

- 2.30 Analysis of the 2011 Census highlights that the proportion of flats within Hulme has grown considerably in the last five years, as can be seen in Figure 2.5, from approximately 55% to 70%. In fact, the number of ‘Detached or Semi-detached’ and ‘Terraced’ properties fell in Hulme over the time period whereas the number of flats doubled.
- 2.31 In Moss side, the proportion of ‘Detached or Semi-detached’ housing has increased notably, by 86% since the previous report which is considerably higher than the wider

trends. This is likely to be a function of the Maine Place development that has diversified the range of house types available in Moss Side significantly.

## Housing Tenure

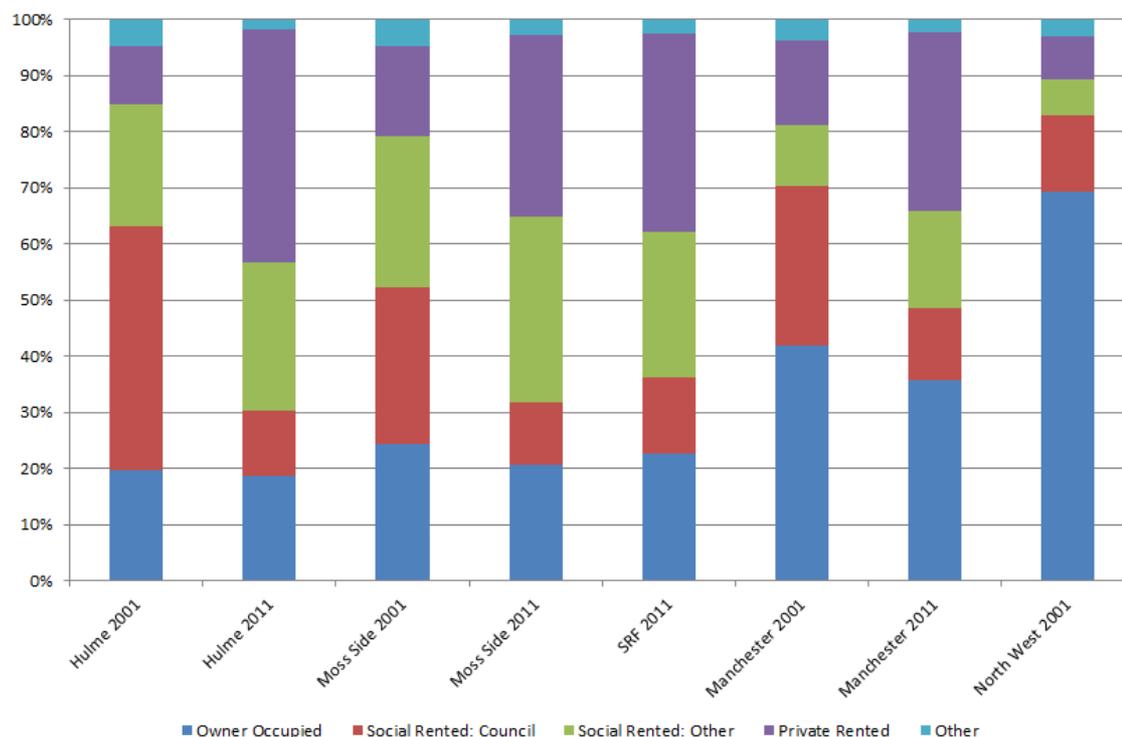
2.32 Table 2.5 shows the housing tenure mix across the study area and figure 2.5 compares the current figures with the findings from the previous report.

**Table 2.5 Housing tenure**

Housing Tenure	Hulme	Moss Side	SRF	Manchester	North West
Owner occupied	1,370	1,418	6,727	77,395	1,941,564
Social rented: Council	852	758	4,087	27,585	231,730
Social rented: Other	1,932	2,268	7,737	37,097	318,751
Private rented	3,018	2,214	10,522	58,170	462,899
Other rented	137	189	754	4,722	54,605
<b>Total</b>	<b>7,309</b>	<b>6,847</b>	<b>29,827</b>	<b>204,969</b>	<b>3,009,549</b>

Source: Census data 2011

**Figure 2.6 Housing tenure (% of total)**



Source: Census data 2001 – 2011

2.33 Both Table 2.5 and Figure 2.6 demonstrate that owner occupancy remains significantly lower than the regional and national level. For instance, the level of

owner occupancy in the SRF area is approximately 23% compared to 38% in Manchester, 65% in the North West and 63% nationally. However, Figure 2.5 also shows that owner occupancy has increased in both Moss Side and Hulme over the past five years. Again, this may be attributable to recent development in the area including Maine Place. In contrast, over the same period, the number of owner occupied dwellings fell at a regional and national level.

- 2.34 The number of 'Private rented' dwellings has grown considerably across the board, particularly so in Hulme (from 10% to 40%) and Moss Side (from 16% to 32%). Conversely, the number of dwellings categorised as 'Social rented: Council' has fallen dramatically as a proportion of all housing in both Hulme and Moss Side, most likely as a result of stock transfer to Registered Provider partners.
- 2.35 Table 2.6 highlights the proportion of residents categorised as living in either 'Social rented: Council' or 'Social rented: Other' accommodation. It indicates that in Hulme (38%), Moss Side (44%) and the SRF area (40%), the proportions of residents in both types of social rented (council and other) accommodation is considerably higher than the levels recorded across the North West and England. In fact, the proportions for Hulme and Moss Side are double the national level.

**Table 2.6 Housing tenure: proportion of residents classed as social rented**

Housing type as a proportion of total	Hulme	Moss Side	SRF	Manchester	North West
Social rented: Council	12%	11%	14%	13%	8%
Social rented: Other	26%	33%	26%	18%	11%
Social rented	38%	44%	40%	32%	18%

Source: Census data 2011

## Summary

- 2.36 The headline finding of the update is that the number of people employed in businesses located in Hulme and Moss Side has fallen since the baseline report. Importantly however, over the same period, employment has grown in the rest of the SRF area, Manchester, the North West and the nation as a whole.
- 2.37 As demonstrated in the 2009 baseline profile, the 'Education' sector is a key employer in the area, with the proportion of employed in this sector in Hulme and Moss Side being relatively high when compared against the national level. Furthermore, as a proportion of total employment, the number of people employed in education appears to be growing.
- 2.38 The rental market for commercial property has shown an improvement since the previous baseline study. Whilst a range of factors may explain this, it is likely that the development of the Hulme Campus will have already had some beneficial impacts on business performance and confidence through the construction phase, with further

benefits likely following completion and full occupation. In turn, therefore, further improvements may be seen in the coming years with increases to rental values and longer, more secure lease terms adding to the value of developments in the area.

- 2.39 The improving conditions are also evident in the local housing market with prices showing an upward trend from the previous study, despite turbulence in the local and national economy and housing markets. The housing mix and tenure has shown some notable changes since the previous baseline study. The proportion of residents in flats/apartments has grown considerably in Hulme, far in excess of the national or regional trend in this respect. Similarly, the proportion of residents living in detached or semidetached housing in Moss side has also increased, unlike the national and regional trends.
- 2.40 In terms of housing tenure, whilst the number of residents living in social rented housing has fallen in Hulme and Moss Side between the two studies, this proportion remains significantly higher than city-wide or regional comparators.

## 3 PEOPLE AND SOCIETY

- 3.1 This section profiles the demographic and social characteristics of Hulme and Moss Side covering issues such as age and ethnicity along with indicators of resident well-being, which include the Index of Multiple Deprivation, health, crime and employment need factors.

### Population

- 3.2 In 2011 the total population of the Central SRF stood at over 84,100. Within the SRF, the highest population growth between 2007 and 2011 has been within Hulme ward itself, which has increased by 33.9% to over 16,900 residents. This rate of population was significantly greater than those recorded across Manchester (9.8%) and England as a whole (3.8%). Over the same period the number of residents in Moss Side grew by 1,240 to approximately 18,900.

### Ethnicity

- 3.3 The ethnic group population estimates for Hulme and Moss Side compared to the city and national averages are shown in Table 3.1.

**Table 3.1 Ethnic Group Population Estimates**

Ethnic Group	Hulme	Moss Side	SRF	Manchester
White	9,610	6,200	34,220	335,110
Mixed	1,140	1,380	4,830	23,160
Asian or Asian British	2,860	3,500	25,620	85,990
Black or Black British	2,500	6,520	15,030	43,480
Chinese or Other Ethnic Group	800	1,310	4,430	15,390
<b>Total</b>	<b>16,910</b>	<b>18,900</b>	<b>84,130</b>	<b>503,130</b>

Source: ONS, 2011

- 3.4 Both Hulme and Moss Side have a strong and diverse minority ethnic mix with the white ethnic group making up a much lower proportion of the local population than the Manchester and England averages. A total of 43% of Hulme residents and 67% of Moss Side residents are from black and minority ethnic (BME) backgrounds, compared to the Central SRF (59%), Manchester (33%) and England (15%). Between 2007 and 2011 the proportion of all residents falling into black and ethnic minority (BME) backgrounds grew from 38% to 43% in Hulme and from 57% to 67% in Moss Side.

### Age

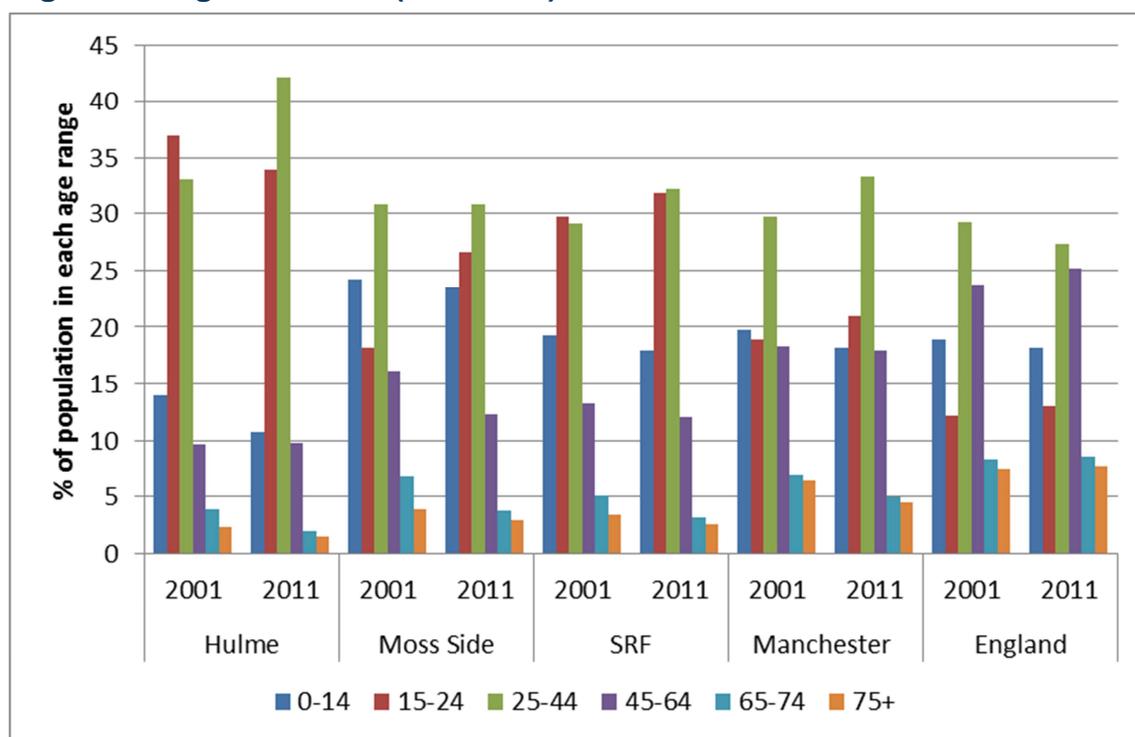
- 3.5 The age profiles of Hulme and Moss Side are shown in Table 3.2 and Figure 3.1. **Error! Reference source not found.** below.

**Table 3.2 Age Structure (numbers)**

Age Structure	Hulme	Moss Side	SRF	Manchester
0 - 14	1,820	4,450	15,150	91,820
15 - 24	5,740	5,040	26,880	105,300
25 - 44	7,120	5,830	27,110	168,040
45 - 64	1,650	2,330	10,170	90,430
65 - 74	340	700	2,680	24,770
75+	250	550	2,150	22,780

Source: Census 2011

**Figure 3.1 Age Structure (% of total)**



Source: Census 2001/2011

- 3.6 Both Hulme and Moss Side have high proportions of residents under the age of 45. Some 76% and 57% of all residents in Hulme and Moss Side respectively are aged between 15 and 45, much higher than the national average of 41%. Only 11% of Hulme’s population is aged under 15, compared to the national average of 18%. Conversely, a high proportion of Moss Side residents are children, where 24% of the population is aged under 15. These trends have become even more pronounced since the last study was completed.
- 3.7 Between 2001 and 2011 the 0-14 and 15-24 age groups in Hulme have fallen as a proportion of the overall population whilst the 25-44 year old age group has grown considerably. The Moss Side population age profile has not fluctuated as much as

Hulme between 2001 and 2011, although the 15-24 year old age group has grown by 5 percentage points and the proportion of 65 and over age groups have decreased.

## **Index of Multiple Deprivation**

- 3.8 The English Indices of Deprivation 2010 are measures of multiple deprivation at the small area level. The model of multiple deprivation which underpins the Indices of Deprivation 2010 is based on the idea of distinct domains of deprivation which can be recognised and measured separately. Each domain represents a specific form of deprivation experienced by people and each can be measured individually using a number of indicators. Seven domains are identified, namely: Income Deprivation, Employment Deprivation, Health Deprivation and Disability, Education Skills and Training Deprivation, Barriers to Housing and Services, Living Environment Deprivation, and Crime.
- 3.9 The neighbourhood (Lower Super Output Areas (LSOA), which cover around 1,000 to 1,500 residents) rankings of Hulme and Moss Side in the overall IMD are summarised below. This shows each LSOA ranking as a percentage of all LSOA in England across each of the individual indicators as well as the overall IMD score, where 0% is the most deprived and 100% is the least deprived.

**Table 3.3 Index of Multiple Deprivation Rankings (% , IMD 2010)**

Lower Super Output Area (LSOA)	IMD 2010 DOMAIN RANK							
	IMD	INCOME	EMPLOYMENT	HEALTH DEPRIVATION AND DISABILITY	EDUCATION SKILLS AND TRAINING	HOUSING AND SERVICES	CRIME	LIVING ENVIRONMENT
<i>Hulme</i>								
E01005208	20	18	24	9	55	43	4	39
E01005209	16	25	33	2	33	42	3	27
E01005210	17	16	35	3	32	36	15	24
E01005211	15	24	29	4	36	10	7	27
E01005212	27	34	36	4	70	45	20	27
E01005213	4	5	3	1	22	50	8	62
E01005214	53	46	67	29	69	53	22	63
E01005215	27	27	33	15	40	54	16	24
<i>Moss Side</i>								
E01005240	4	2	5	6	28	45	5	9
E01005241	28	24	31	20	41	55	39	13
E01005242	12	7	16	5	25	44	23	20
E01005243	4	1	4	2	28	44	29	51
E01005244	14	14	28	6	39	32	6	9
E01005245	3	0	4	2	11	41	44	37
E01005246	4	1	3	9	18	41	38	25

Source: CLG

- 3.10 It is well reported that deprivation exists in the neighbourhoods of Hulme and Moss Side and this is exemplified by the IMD 2010 rankings, where many of the neighbourhoods in the two wards perform poorly across a number of domains and in the overall multiple deprivation ranking.
- 3.11 Four out of the seven LSOAs – over half of Moss Side – fall into the top 5% of most deprived neighbourhoods nationally. Hulme performs slightly better, with one of its seven LSOAs in the top 5% most deprived nationally and four LSOAs in the top 20%.
- 3.12 The LSOAs in both areas score particularly badly against the Health Deprivation and Disability domain, where all but three of the 15 neighbourhoods rank in the top 10% in terms of most deprived areas. Other areas of particular concern are Crime, Income and Employment. Performance in the indicator of crime and disorder is poor across both wards, with all neighbourhoods ranking in the top 50%, including six in the top 10% nationally. Income deprivation, although high in both wards, is particularly marked in Moss Side where six of the seven neighbourhoods fall in the top 20%. In the domain of employment, Moss Side also performs poorly with five of its neighbourhoods in the top 20% in terms of deprivation.

3.13 Given such a context, any benefits generated for these neighbourhoods that will improve economic conditions, educational standards and skills and reduce worklessness will be all the more important.

## Health

3.14 The overall health of a resident population is of prime importance to local authorities. Poor health is usually associated with a low standard of living, as those in poor health are often unable to work and dependent on the state. In terms of local infrastructure, poor health puts pressure on local health and GP facilities and leads to increased expenditure for local authorities. As highlighted by the IMD, the health of residents in both Hulme and Moss Side is of major concern.

## Life and Healthy Life Expectancy

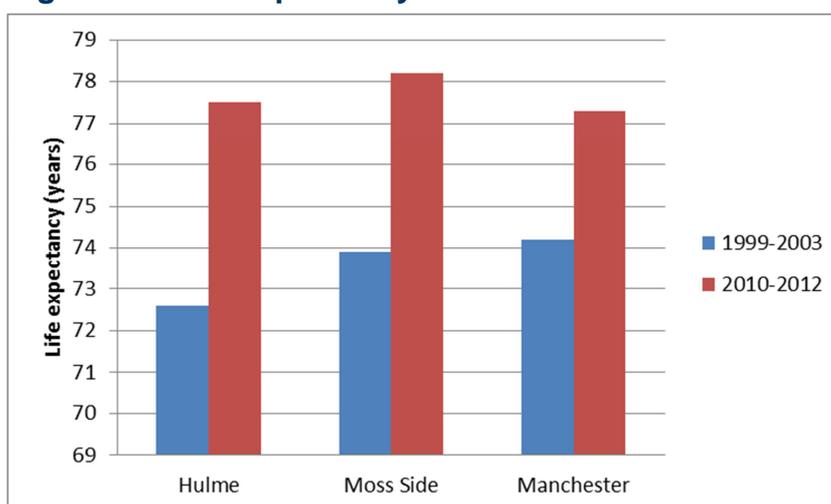
3.15 Table 3.4 and Figure 3.2 below show life and healthy life expectancy in the two wards as compared to the city averages.

**Table 3.4 Life Expectancy at Birth (Years, 2010-2012)**

	Hulme	Moss Side	SRF	Manchester
Life Expectancy	77.5	78.2	77.1	77.3

Source: ONS/JSNA

**Figure 3.2 Life Expectancy at Birth 1999-2003 and 2010-2012**



3.16 Since the last study, life expectancy rates have increased in both wards, from 72.6 to 77.5 years in Hulme and from 73.9 to 78.2 years in Moss Side. Across the SRF area as a whole, life expectancy now stands at 77.1 years, similar to the average recorded across Manchester (77.3 years).

## Mortality

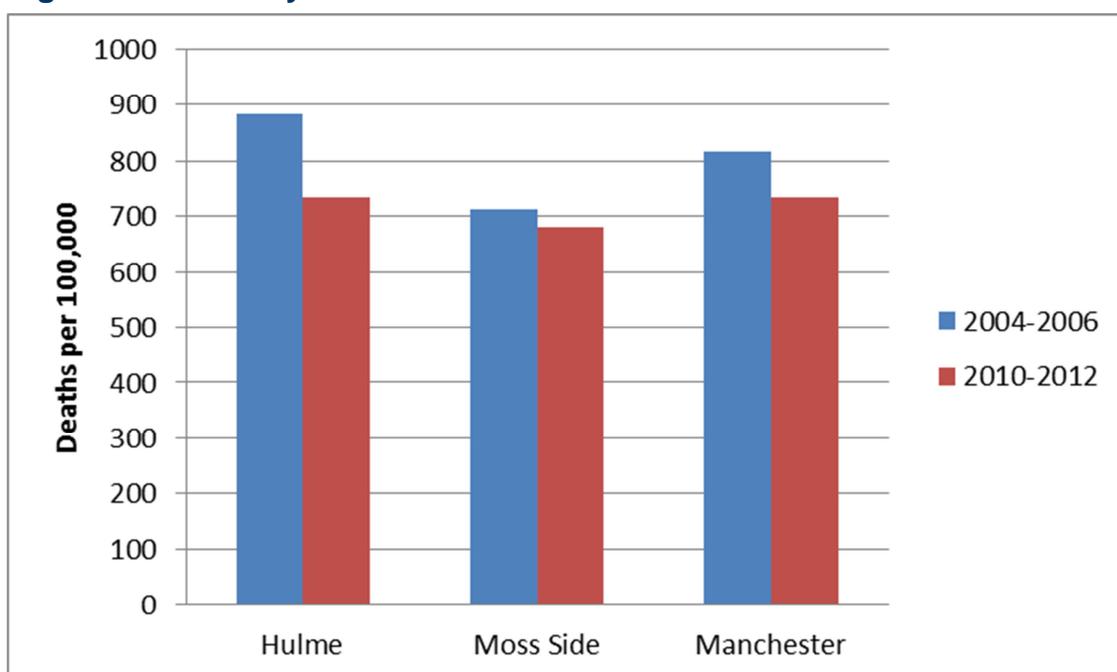
3.17 Mortality rates and causes in Hulme and Moss Side are summarised in Table 3.5.

**Table 3.5 Mortality Rate 2010-2012**

	Hulme	Moss Side	SRF	Manchester
Number of Deaths	142	265	1,112	10,660
Directly standardised rate per 100,000 population				
All Deaths	733	681	749	732
All Cancers	180	142	154	150
All Circulatory Diseases	117	109	114	106

Source: Public Health Manchester/ONS

**Figure 3.3 Mortality Rate 2004-2006 to 2010-2012**



Source: Public Health Manchester/ONS

3.18 In line with trends in life expectancy, mortality rates have improved across both wards since the previous study. In Hulme the mortality rate has improved from 883 to 773 deaths per 100,000 people. Over the same period Moss Side has experienced a reduction from 711 to 681 deaths per 100,000 people. The 2010-2012 mortality rate for the Central SRF is considerably higher at 749 deaths per 100,000 people, whilst the Manchester average stands at 732.

3.19 Incidence of death from cancer and, in particular, circulatory diseases have declined across both wards, and the city as a whole, between 2004-2006 and 2010-2012.

### Under 18's conception

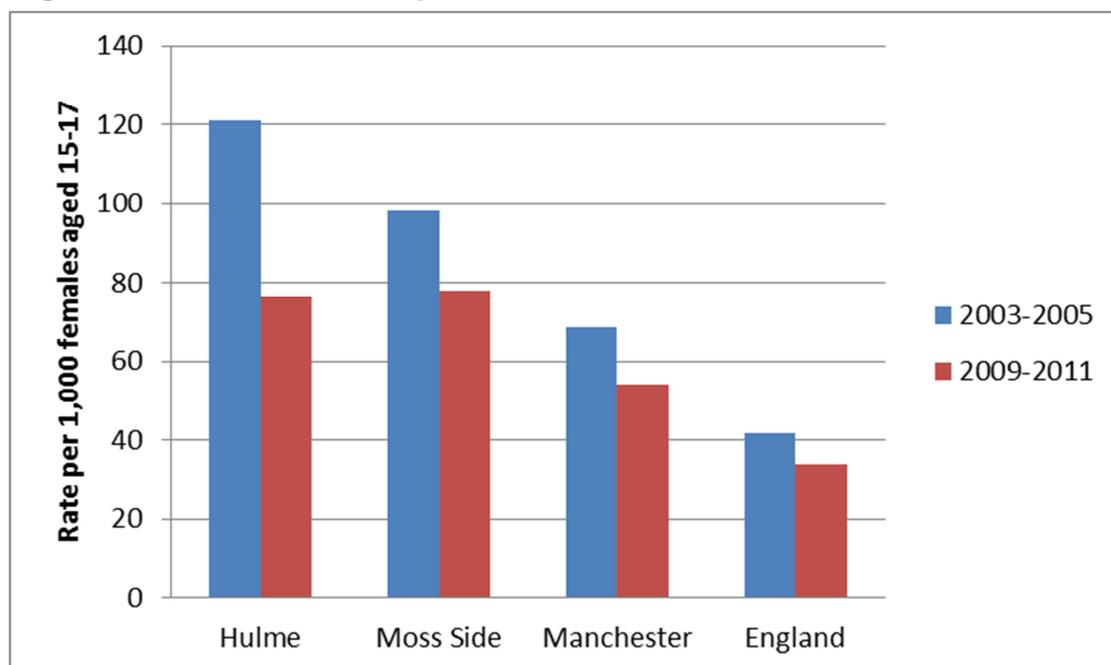
3.20 Table 3.6 and Figure 3.4 shows the levels of and trends in teenage pregnancy rates at a local, city-wide and regional level.

**Table 3.6 Under-18 Conceptions (2009-2011)**

	Hulme	Moss Side	Manchester	North West
Number of Conceptions	27	56	172	1,300
Rate per 1,000 females aged 15-17	76.7	78.1	57.1	54.1

Source: ONS and Teenage Pregnancy Unit, Manchester

**Figure 3.4 Under 18 Conceptions Rate 2003-2005 and 2009-2011**



Source: ONS and Teenage Pregnancy Unit, Manchester

- 3.21 Both Hulme and Moss Side have high levels of teenage conceptions – 76.7 and 78.1 per 1,000 females aged 15-17 respectively - compared to the city average of 54.1 and even lower national rate (34.0). However, in line with national trends, these rates have dropped considerably since the previous study, from 121.0 and 98.3 in Hulme and Moss Side respectively.

### Incapacity benefit claimants

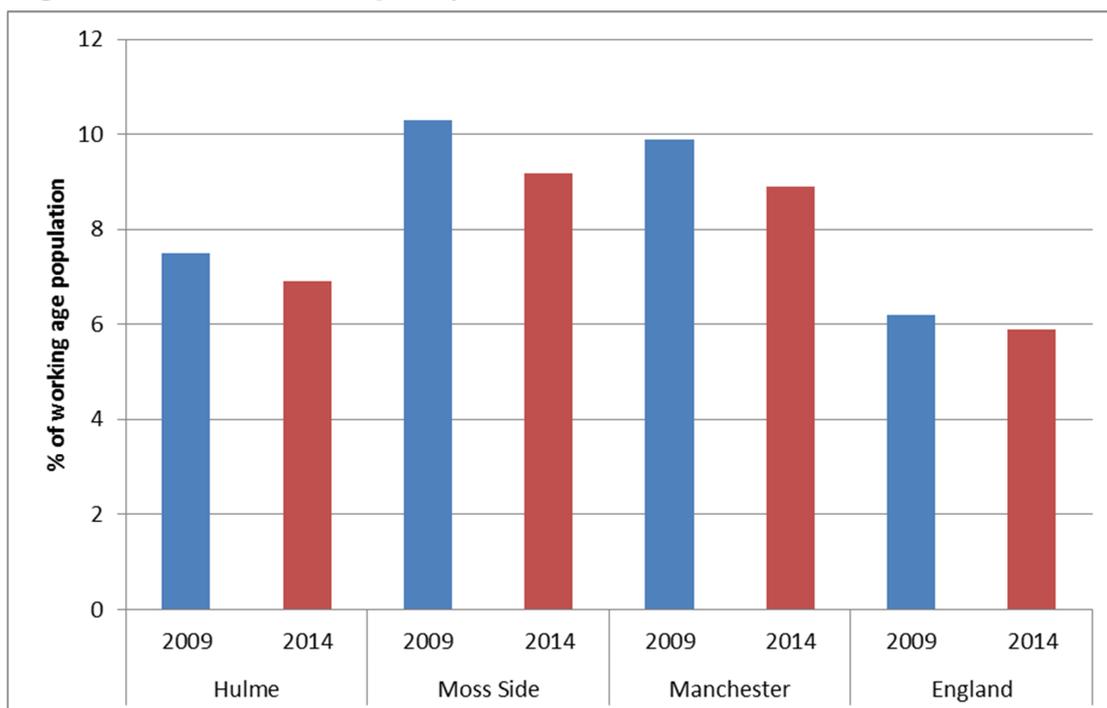
- 3.22 The number and rate of incapacity benefit claimants is shown in Table 3.7, providing a further measure of the health of Hulme and Moss Side residents.

**Table 3.7 Incapacity/Severe Disablement Benefit Claimants (2014)**

	Hulme	Moss Side	Manchester	England
Number of Claimants	995	1,050	32,240	2,021,690
Claimant Rate	6.9%	9.2%	8.9%	5.9%

Source: ONS 2014

**Figure 3.5 ESA and Incapacity Benefits Claimants Rate 2009-2014**



Source: ONS 2014

3.23 Since the last study benefit claimant rates have fallen in both Hulme and Moss Side, in line with city wide and national trends (see Figure 3.5). In February 2014 benefits rates stood at 6.9% and 9.2% of the working age population of Hulme and Moss Side respectively. Having previously had benefits claimant rate considerably higher than the benchmarks, Hulme is now lower than the city average and only 1 percentage point higher than that recorded across England.

## Economic activity rates

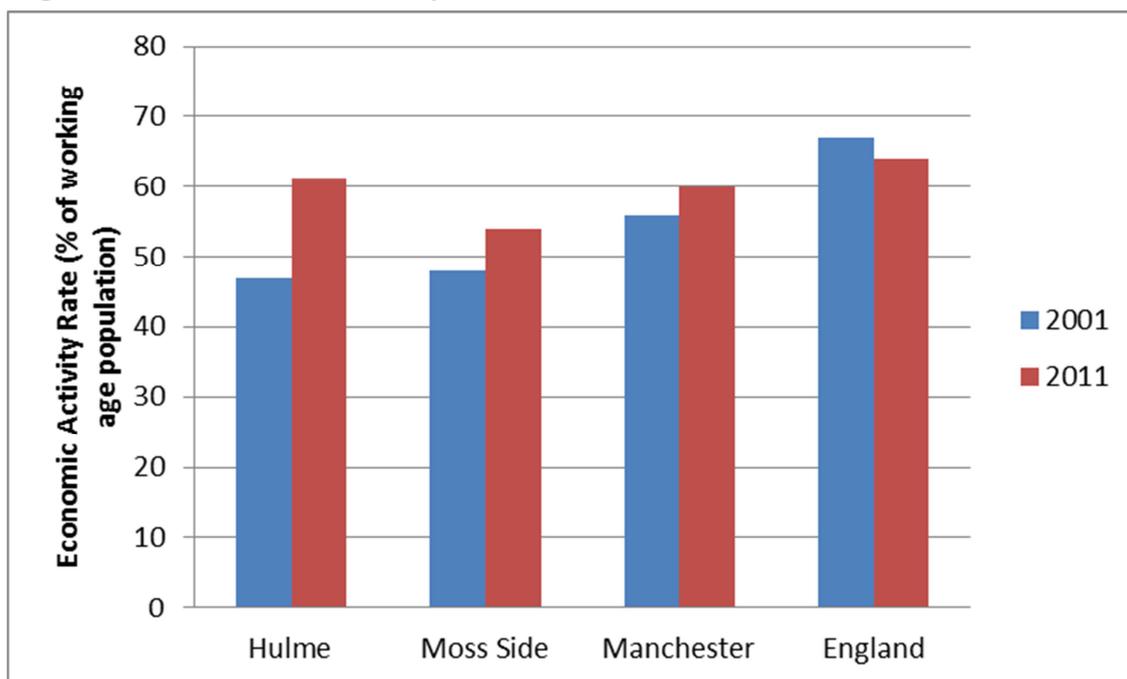
The economic activity rates presented in Table 3.8 show the proportion of residents in employment or actively seeking work, whilst Figure 3.6 below, shows how levels of economic activity have changes since 2001.

**Table 3.8 Economic Activity Rate (% People aged 16-74, 2011)**

	Hulme	Moss Side	Manchester	North West	England
2011 Economic Activity Rate	61%	54%	53%	60%	64%

Source: Census 2011

**Figure 3.6 Economic Activity Rate 2001 to 2011**



Source: Census 2001 and 2011

3.24 The economic activity rates in Hulme and Moss Side stand at 61% and 54% respectively. These rates are considerably greater than those recorded in 2001.

## Occupational Profile

3.25 Occupation categories generally reflect workers' skill levels. Those employed within the occupational categories of managers and senior officials; professional occupations; and associate professional and technical occupations are typically highly skilled, whereas those employed within the occupational categories of elementary occupations; and process, plant and machine operatives typically possess a lower skill level.

3.26 As such, the categorised occupations of the Hulme and Moss Side residents as at the 2011 census, as shown in Table 3.9 and Figure 3.7 provide an indication of residents' skill levels in the two wards.

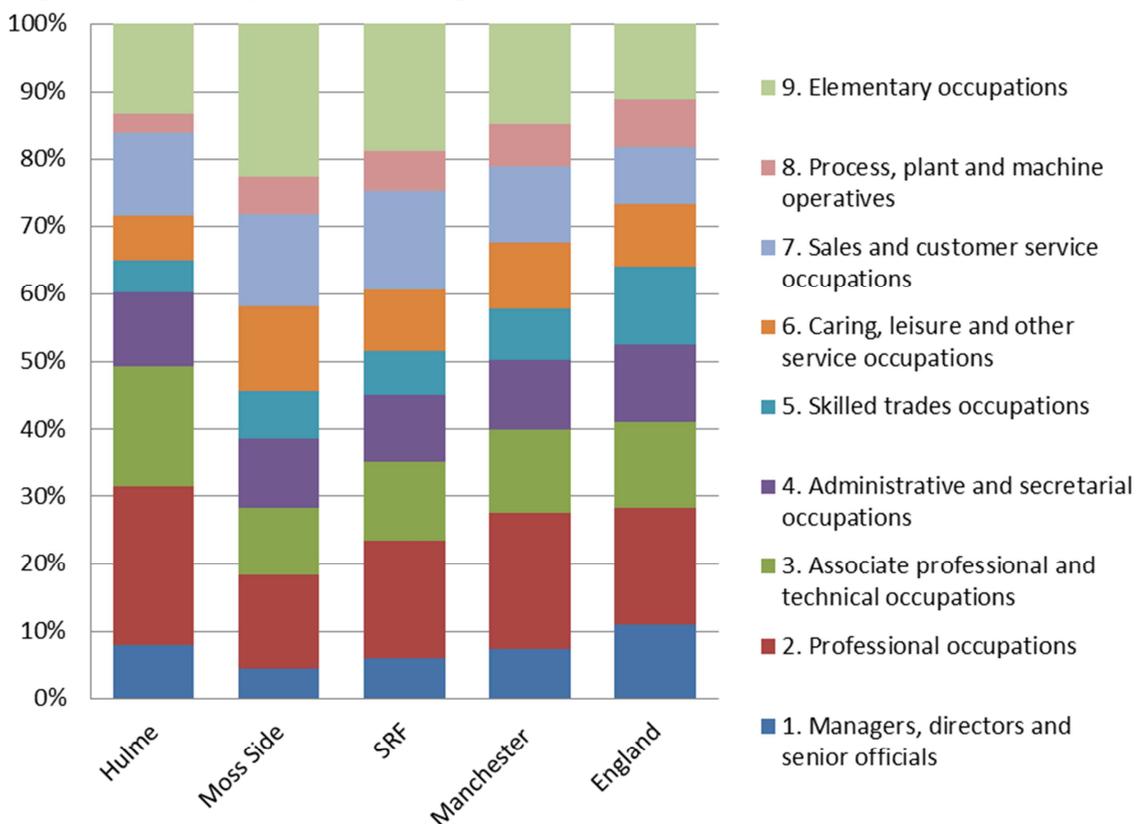
**Table 3.9 Occupational Categories (Persons, 2001)**

	Hulme	Moss Side	SRF	Manchester
Managers, Directors and Senior Officials	622	273	1,712	16,036
Professional Occupations	1,862	843	5,163	42,893
Associates Professional and Technical Occupations	1,408	613	3,485	26,661
Administrative and Secretarial Occupations	862	629	2,883	22,364
Skilled Trades Occupations	374	433	1,938	16,172
Caring, Leisure and Other Service Occupations	518	768	2,668	20,918

Sales and Customer Service Occupations	957	831	4,340	24,114
Process, Plant and Machine Operatives	229	340	1,688	13,468
Elementary Occupations	1,053	1,385	5,536	31,843

Source: Census 2011

**Figure 3.7 Occupational Categories (% Persons, 2011)**



Source: Census 2011

- 3.27 In comparison to all benchmarks, Hulme has a higher proportion of residents employed in the high-skill occupation categories cited above 49% compared to the city (40%) and national average of 41%). This difference has increased since 2001, when the proportion people in higher skilled occupations in Hulme stood at 43%.
- 3.28 In contrast, Moss Side (28%) has a high proportion of residents in the low-skill occupation categories compared to the city (21%) and national average of 18%.

## Unemployment

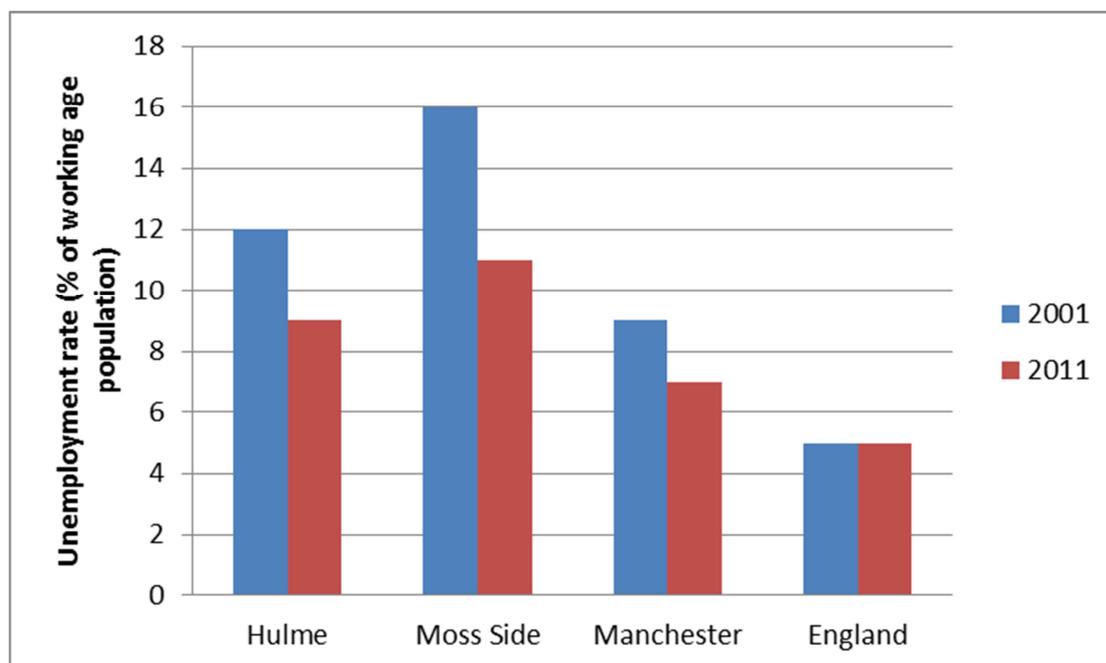
- 3.29 Unemployment is a count of jobless people who want to work, are available to work, and are actively seeking employment, as defined by the International Labour Organization (ILO). Official estimates of unemployment are based upon the ILO definition and are calculated using data from a Labour Force Sample Survey as shown in Table 3.10 and Figure 3.8. This measure allows consistent comparisons over time.

**Table 3.10 ILO Unemployment Rate (2011)**

	Hulme	Moss Side	Manchester	England
ILO Unemployment Rate	9%	11%	7%	5%

Source: Census 2011

**Figure 3.8 ILO Unemployment Rate 2001 and 2011**



3.30 According to the International Labour Organisation (ILO) definition, Hulme and Moss Side have higher levels of unemployment than the other economies - 9% and 11% respectively - compared to the larger benchmarks of less than 9%. However, since 2001 the gap has narrowed considerably, with unemployment rates falling from 12% and 16% in Hulme and Moss Side respectively.

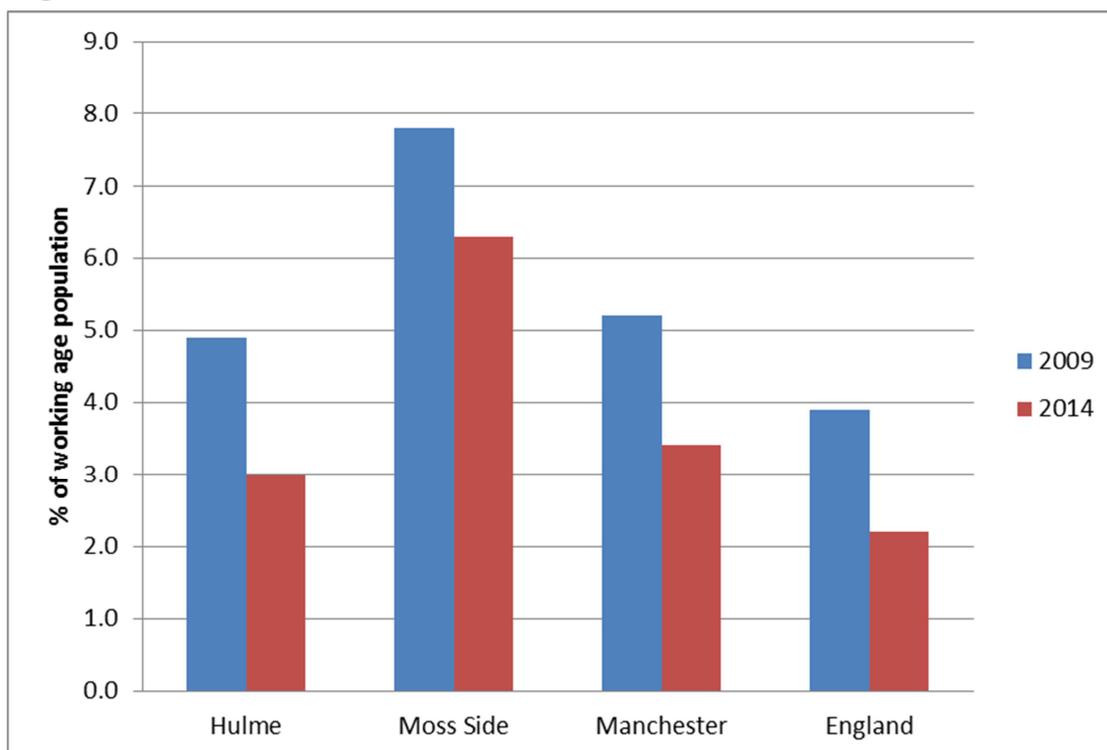
3.31 The claimant count measures how many unemployed people are claiming unemployment-related benefits (Jobseeker's Allowance and National Insurance credits). It is always lower than the ILO measure as some unemployed people are not entitled to claim benefits, or choose not to do so. Claimant counts for the study area together with a claimant count rate, which provide us with a more up to date measure of unemployment, are shown in Table 3.11 and Figure 3.9.

**Table 3.11 Claimant Count (2014)**

	Hulme	Moss Side	Manchester	England
Claimant Count	432	714	12,346	760,684
Claimant Count Rate	3.0%	6.3%	3.4%	2.2%

Source: ONS, August 2014 Claimant Count and ONS

**Figure 3.9 Claimant Count Rate 2009-2014**



Source: ONS Claimant Count

3.32 The Claimant Count rate in Moss Side has fallen from 7.8% to 6.3%, which is significantly higher than the national rate (2.2%). In contrast, the claimant count rate in Hulme is lower at 3.0%, having fallen from 4.9% in 2009.

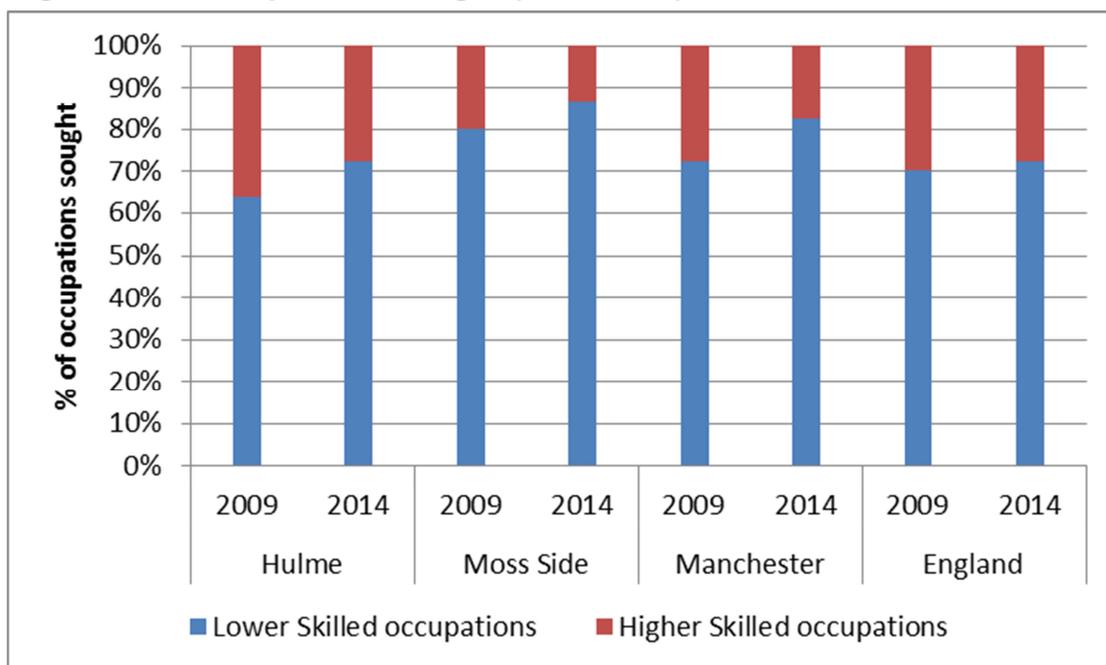
3.33 The occupations sought by claimants are shown in Table 3.14, whilst Figure 3.8 shows the proportion that are higher and lower skilled.

**Table 3.12 Sought Occupations (% Claimant Count, 2014)**

	Hulme	Moss Side	SRF	Manchester
Occupation Unknown	1	1	1	3
Managers, Directors and Senior Officials	2	2	3	6
Professional Occupations	2	1	1	2
Associates Professional and Technical Occupations	5	3	3	3
Administrative and Secretarial Occupations	12	7	8	9
Skilled Trades Occupations	2	1	4	5
Caring, Leisure and Other Service Occupations	2	5	4	4
Sales and Customer Service Occupations	50	45	43	39
Process, Plant and Machine Operatives	3	3	3	5
Elementary Occupations	21	34	30	24

Source: ONS, Claimant Count August 2014

**Figure 3.10 Occupations Sought (2009-2014)**



- 3.34 Around 9% of Hulme and 6% of Moss Side residents who are claimants are looking for work in the high-skill occupation categories. These proportions are less than that recorded across England (11%). Correspondingly, the proportion of Hulme (24%) and Moss Side (37%) residents in search of work in the low-skill occupation categories is lower than the city (33%) and national averages (29%).
- 3.35 Figure 3.8 highlights that the proportion of higher skilled occupations being sought in both Hulme and Moss Side fell between 2009 and 2014. From this trend it can be assumed that, as the economy recovers, fewer higher skilled residents are still searching for work in Hulme and Moss Side. This leaves greater numbers of longer term unemployed, who may have fewer qualifications, who are predominantly searching for lower skilled occupations.

## Summary

- 3.36 Although it is clear that a large proportion of residents of both Hulme and Moss Side still experience significant socio-economic hardship, analysis of data trends since the previous report was issued reveal that the deprivation gap between the wards and the city as a whole is narrowing. Since 2009 the resident population and economic activity rates in Hulme and Moss Side have increased, whilst unemployment levels have fallen. Furthermore, life expectancy levels have improved, and teenage conception rates and numbers of people claiming incapacity benefits have fallen.
- 3.37 These changes can be linked to the urban regeneration efforts aimed at economic development, physical and environmental improvements, enhancement in the local quality of life and community capacity building that began through the City Challenge programme of the 1990s. The regeneration programme, linked to the proximity of the areas in relation to the city centre, has made the wards particularly attractive to young

professionals. The opening of the new University campus marks a next phase of regeneration that will provide local employment opportunities and help to produce improved outcomes for local residents.

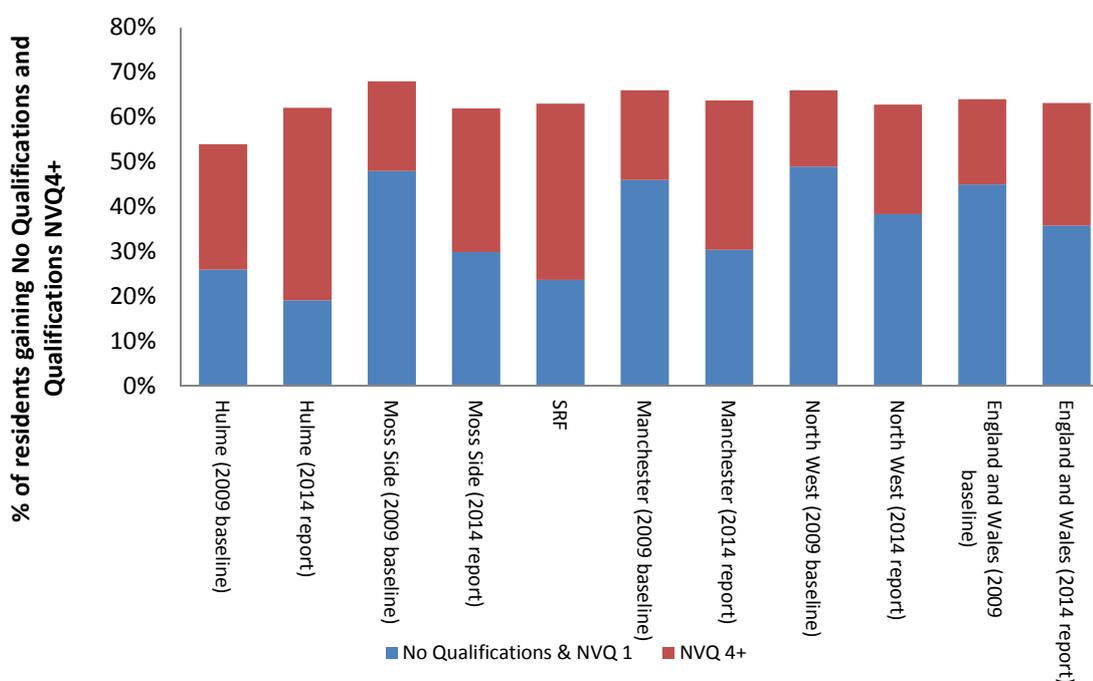
## 4 EDUCATION AND ASPIRATION

4.1 This chapter provides an analysis of the current educational characteristics of the local area, region and at a national level relative to the findings of the 2009 baseline report. It considers educational achievement at all levels, from primary school level through to participation in higher education.

### Qualifications

4.2 Figure 4.1 shows the change in the proportion of residents with NVQ level 4 and above, as well as those with no qualifications, between the previous report and now (based on Census data).

**Figure 4.1 % of residents gaining no qualifications and those gaining NVQ level 4+**



Source: Census data. Baseline report used 2001 values. Update report used 2011.

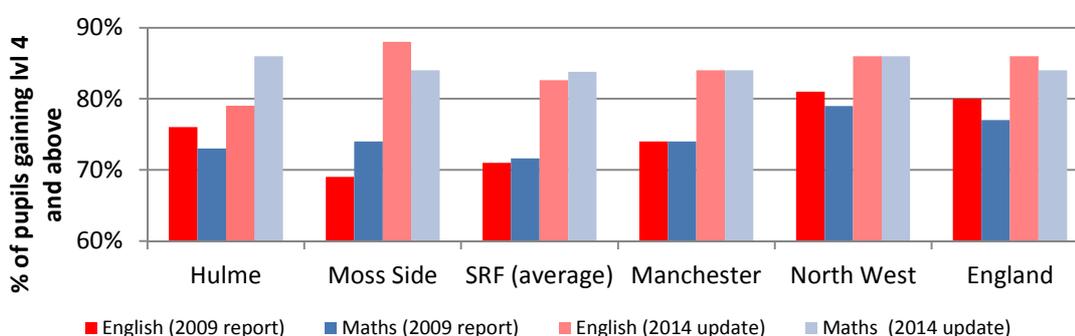
4.3 Figure 4.1 shows that the proportion of residents gaining at least an NVQ level 4 or above has increased in Hulme and Moss Side at a rate greater than those recorded across the North West region and nationally.

4.4 Importantly, the proportion of residents having either 'No Qualifications' or the lowest level of qualification 'NVQ 1' has fallen in both Hulme and Moss Side. This is particularly evident in Moss Side where the levels set out in the baseline report have fallen considerably, to lower than the national level, and is on par with the figure for the Manchester area.

## Primary, GCSE and A level performance

- 4.5 The original baseline report considered the proportion of primary school pupils achieving National Curriculum attainment level 4, the expected level of achievement at the end of Key Stage 2 (ages 4-11) in the three core subjects of English, Maths and Science. Figure 4.2 compares the values set out in the 2009 baseline report for English (Red) and Maths (Blue) with the latest attainment figures for English (light red) and Maths (light blue). It is understood that National Curriculum tests in Science for all pupils were discontinued after the 2009 academic year and therefore are not included in the comparison. The SRF figures are derived from an average of the five wards in the study area.

**Figure 4.2 % of pupils gaining level 4+ at KS2 by ward**



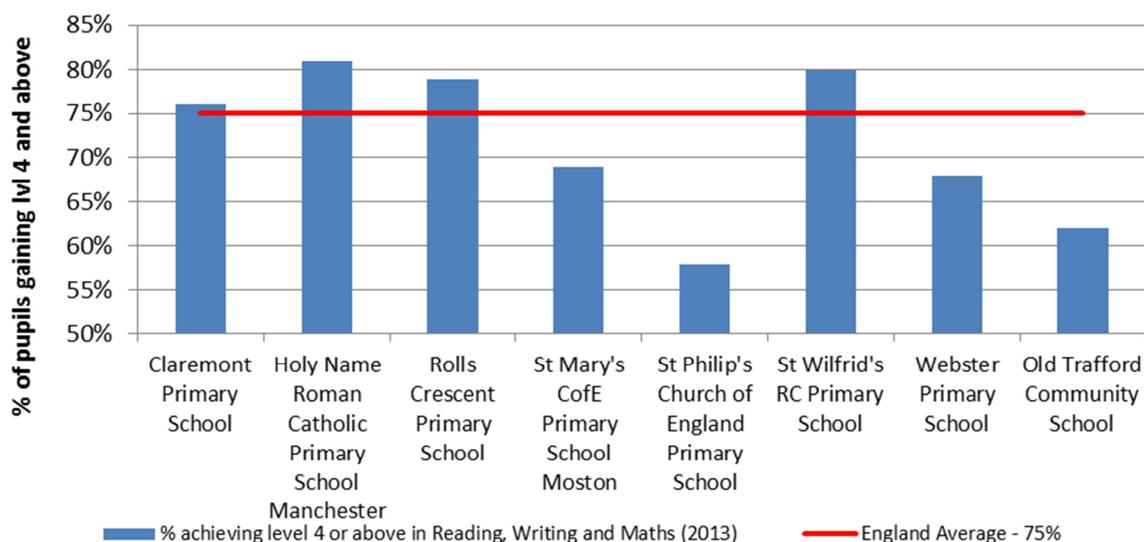
Source: Department for Education. Baseline report used 2007 values. Update report used 2012.

- 4.6 The data reveals that primary school attainment has increased in the five-year period in all categories. Moss Side, the SRF area and Manchester all appear to have closed the gap on the national level of attainment.
- 4.7 Over the five year period, Hulme and Moss Side have progressed from being below the national average to being above in Maths. In Moss Side, attainment in English has improved from being considerably worse in relation to the regional and national averages, to being significantly better. The progression in attainment in Hulme in English has, however, not been as successful and lags considerably below neighbouring, and wider areas.

## Primary Performance

- 4.8 Figure 4.3 shows the level of Key Stage 2 attainment at each of the primary schools within one mile of the M15 postcode (some primary schools were omitted as data was not available).
- 4.9 Due to differences in reporting methodology in the last five years it has not been possible to draw direct comparisons between the current and baseline data. However, in 2013, the percentage of pupils achieving Level 4 or above in reading, writing and Maths in a number of primary schools in the study area lagged behind the national average.

**Figure 4.3 % of pupils gaining level 4+ at KS2 by primary school**



Source: Department for Education. School Performance Tables. 2013

## GCSE Performance

- 4.10 Table 4.1 compares the performance of students at GCSE level in terms of the percentage of students achieving five or more Grade A\*-C and the percentage of students achieving Grade A\*-G.

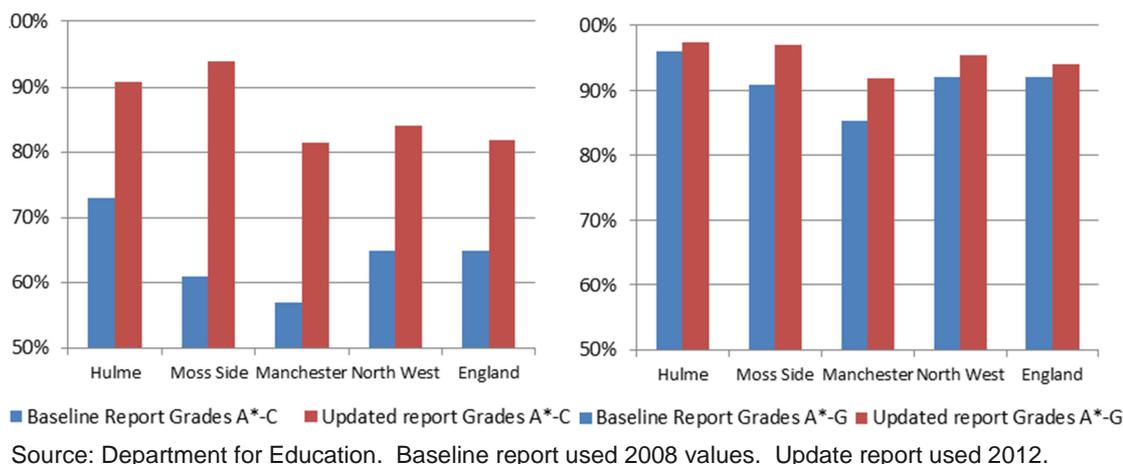
**Table 4.1 Change in GCSE attainment 2008 - 2012**

	Baseline report		2014 update	
	Grades A*-C	Grades A*-G	Grades A*-C	Grades A*-G
Hulme	73%	96%	91%	97%
Moss Side	61%	91%	94%	97%
Manchester	57%	86%	81%	92%
North West	65%	92%	84%	96%
England	65%	92%	82%	94%

Source: Department for Education. Baseline report used 2008 values. Update report used 2012.

- 4.11 The figures below separate the data, with Figure 4.4 showing the growth in attainment in the proportion of students gaining five or more grades A\* to C and Figure 4.5 indicating the change in proportion of students gaining five or more grade A\* to G.

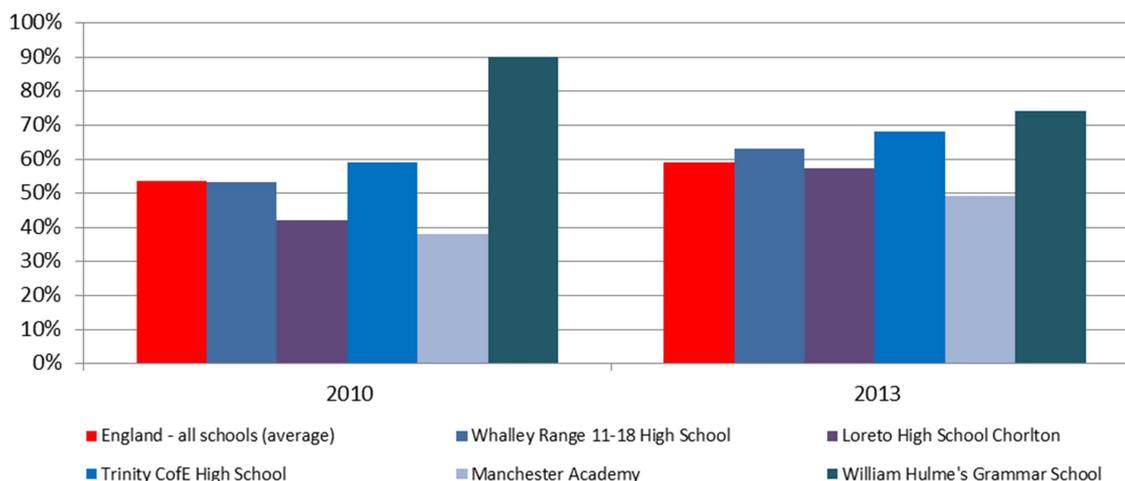
**Figure 4.4 and 4.5 GCSE attainment against baseline report**



4.12 Figure 4.4 shows that the attainment in grades A\* - C has increased considerably, with both Moss Side and Hulme appearing higher than the Manchester, regional and national averages. Similarly, Figure 4.5 identifies that the proportion of students attaining five or more grade A\* to G is, according to the latest data, higher in Hulme and Moss Side than the regional and national average levels.

4.13 Figure 4.6 shows the performance of individual high schools in the study area with regard to the percentage of students achieving five or more A\* to C GCSE's including English and Maths.

**Figure 4.6 GCSE attainment in main secondary schools in study area**



Source: Department for Education. School performance tables. 2010 -2013

4.14 As is the case with some primary schools, a number of high schools have not listed data and have therefore been omitted. The performance of high schools in the study area appears to have improved between 2010 and 2013, with many having either closed the gap, or in some cases, outperforming the national average (indicated in red).

## A Level Performance

- 4.15 In the five year period since the 2009 baseline study was undertaken, the average point score per pupil in Manchester has remained below the regional and national trend, as can be seen in Table 4.2.

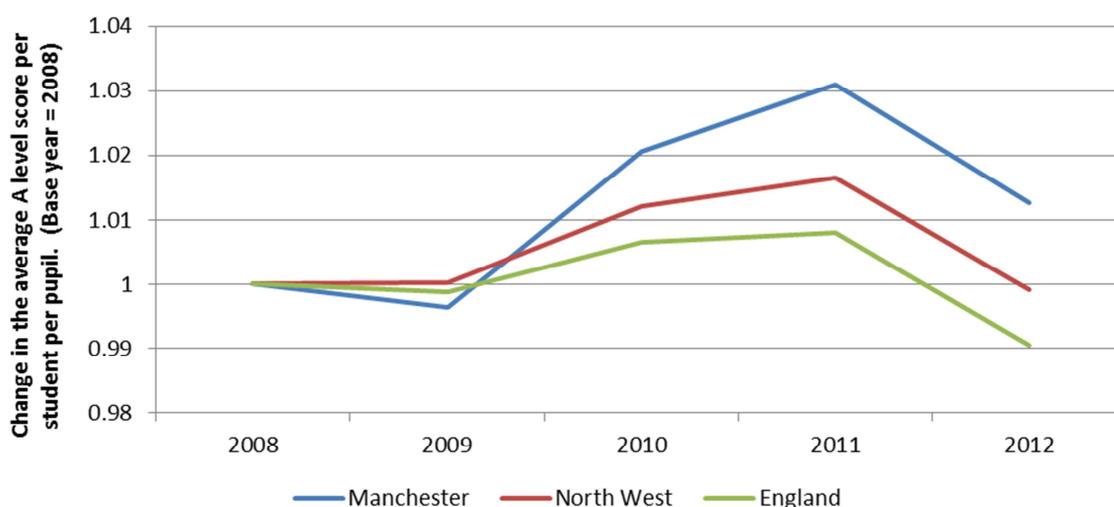
**Table 4.2 Average A-level score per pupil**

	2008	2009	2010	2011	2012
Manchester	689.9	687.4	704.1	711.3	698.6
North West	740.6	740.8	749.5	752.9	740
England	740	739.1	744.8	745.9	733

Source: Department for Education. Education and Skills in Your Area 2008 – 2012

- 4.16 Figure 4.7 shows that whilst the national and regional level have remained similar or slightly lower than the figures detailed in the 2009 baseline report, the average point score for Manchester has risen. This improvement was particularly evident between 2009 and 2011, but dipped in 2012 consistent with performance at the regional and national levels.

**Figure 4.7 Average A-level score per pupil**



Source: Department for Education. Education and Skills in Your Area 2008 – 2012

## Skills deprivation

- 4.17 The 2009 baseline report highlighted that Manchester has a number of wards with particularly high levels of young people classed as NEETs (Not in Education, Employment or Training). Figure 4.8 compares the change in the proportion of NEETs since the baseline year (in red) against the most current data of 2013 (in blue).

**Figure 4.8 % of 16-18 year olds classed as NEET's**



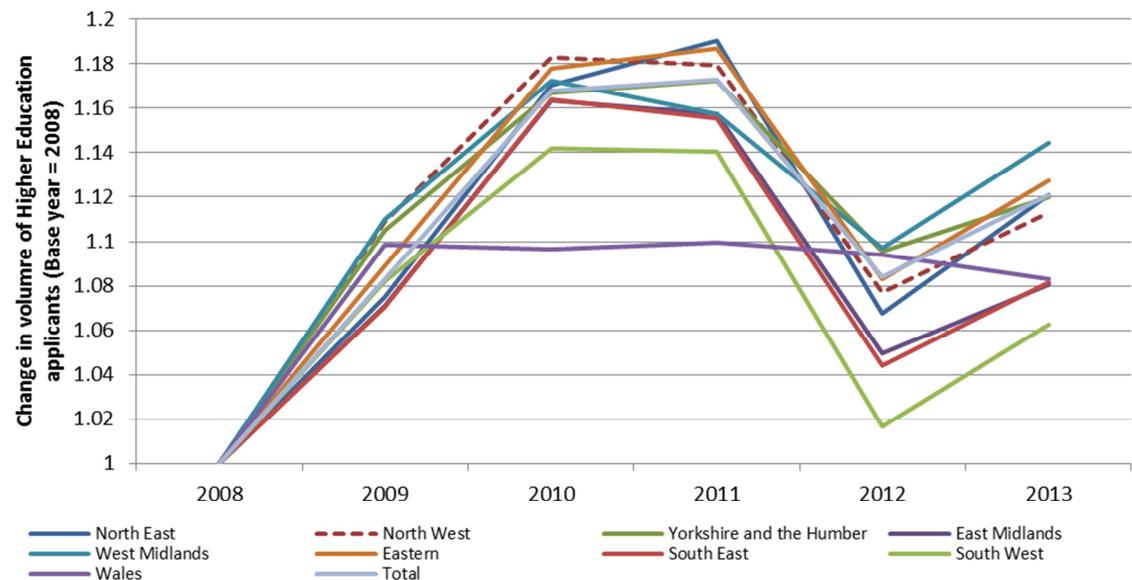
Source: Connexions Activity Survey. June 2013

4.18 The percentage of NEETs have fallen considerably in Hulme over the period, but still remain higher than that of Manchester. The proportion of NEET's in Moss side has also fallen slightly, and is below the average for the Manchester area.

## Participation in Higher education

4.19 In 2013, UCAS registered just under 65,000 applications from students from the North West for a place at University, representing 11.5% of the total applications compared against other regions. Figure indicates the change in the volume applicants from the since the base year of 2008. Applicants from the North West, indicated by the dashed red line, saw the highest rate of change from 2008 to 2010 of any other region, although this rate of growth has fallen in more recent years.

**Figure 4.9 % of 16-18 year olds classed as NEET's**



Source: UCAS applications 2008-2013

## Aspiration towards Higher education

- 4.20 As identified in the 2009 baseline report, assessing the aspirations towards higher education is particularly difficult. To gain an understanding of this, we have analysed a recent survey undertaken by Connexions, who are a nationally recognised service offering personal advice and support to young people on a range of matters, including both further and higher education.
- 4.21 Table 4.3 shows an extract from findings from their most recent user survey commissioned in 2012 for users of the Greater Manchester service. It indicates a substantial increase in the number of customers using the service to discuss options regarding both further education (increase of 38% since the previous year) and higher education (where there was a 41% increase in responses).

**Table 4.3 Connexions User survey regarding purpose for visit**

What information, advice and guidance did you ask for help with?	2011	2012	% change since previous year
College / Sixth Form	65%	90%	+38%
Higher education	29%	41%	+41%

Source: Connexions. Connexions User Survey (February 2012).

## Summary

- 4.22 It is clear that Hulme and Moss Side have seen considerable improvements in education across a number of age groups since the 2009 baseline report. Primary school attainment in English and Maths has closed the gap on regional and national standards, with attainment in Moss Side exceeding these in some cases.
- 4.23 Secondary school attainment, measured in terms of gaining five or more A\*-C's and gaining five or more grades A\* -G has also shown considerable improvement. Again, this has mostly been notable in Moss Side where the proportion of students achieving grades A\* -C has grown considerably.
- 4.24 Finally, the proportion of NEETs (Not in Education, Employment or Training) in Moss side has remained comparatively low during the period. In Hulme, data shows that the proportion has fallen notably in the last five years, although these are still higher than the average for the wider Manchester area.

## 5 CONCLUSIONS AND NEXT STEPS

### Conclusions

- 5.1 This report provides a detailed current profile of the Hulme and Moss Side wards in respect of a variety of indicators that have been impacted upon with the relocation of MMU campuses to the newly developed Birley Fields campus in Hulme. As this is an interim assessment there remains scope to amend and revisit the various indicators in the future. This will assist with understanding the impacts of the campus relocations.
- 5.2 Overall, this profile shows that whilst significant progress has been made against many indicators of economic and social well-being, particularly in Hulme, further improvements could be made. Of note, performance against measures of educational attainment and crime have made good progress, although indicators of health, levels of unemployment and the aspiration and ambition of residents to continue into further and higher education remain low.
- 5.3 The findings set out in this document show the issues and area where future actions and activities should be focussed in order to maximise the potential benefits to the local community of the Hulme Campus.

### Next Steps

- 5.4 This interim assessment has reviewed the impacts of the development of the Birley Fields campus up to the point at which the site officially opened. The work has developed on the indicators used in the baseline profile, which should also be used in further studies after the campus has been open.
- 5.5 This will again look at how the relocations have affected the local economy, surrounding property markets as well as the local population. In particular, the final impact assessment should look at:
  - Both the direct and indirect employment implications;
  - The indirect and induced expenditure generated by the university and its students;
  - The technology transfer and the potential for ongoing improvements in the surrounding science park;
  - The benefits to the community in terms of training potential on offer at the university;
  - The use of the campus for wider community uses;
  - The potential to increase FE and HE participation as a result of widening participation through university initiatives as well as the changing aspirations of the local community; and
  - The physical regeneration benefits of the completed campus and the impact it has on surrounding development opportunities.