State of Sheffield 2012

Sheffield First
PARTNERSHIP

“ The State of Sheffield report provides a narrative of the state of the city in relation to how things are now, how things are changing and how Sheffield compares to other similar places. It does so with reference to the key themes of ensuring that Sheffield is – and remains – distinctive, successful, inclusive, vibrant and sustainable and considers the key themes of living, working and wellbeing in the city. The chapters in the report are not designed to be read in isolation - it is designed to be read as one, with other important themes being interwoven throughout the report. The report uses a wide variety of relevant, inter-related data to highlight the strengths of the city, but also to highlight any challenges that need to be addressed. A key feature of the report is that it goes beyond simple description; instead, it asks more challenging questions about what the data means for Sheffield. Ultimately, the intention is to help Sheffield's leaders understand more about Sheffield, how it is changing and what the priorities for the future should be as the city seeks to fulfil the ambitions set out in the Sheffield 2020 strategy.”

Contents

Overview

1.0

1.1 This report has been prepared at a point of time when the UK and Europe more widely is faced by continuing financial and economic uncertainty. Most immediately this sees the living standards falling for the majority of the city's population, the previous security offered by home ownership and employment being threatened for many people, and those communities who have only recently seen improvement in their life chances having those advances potentially reversed.

1.2 Whilst these economic conditions provide an immediate context to the State of Sheffield, the report also highlights improving conditions in the city and its recent transformation, as well as its longstanding positive attributes. Long term trends such as population change and the welfare of all residents are of equal importance as the current changes, and can provide the opportunities for achieving the outcomes as set out in the City Strategy for Sheffield.

1.3 We need to be aware of the broad picture of national and European macro-conditions, but there is also enormous variety in how individual cities and regions are being affected by these and in their ability to respond to the challenges. It is important to draw attention to the increasing significance put on cities world-wide as a desired way of living, and as a set of behaviours that can offer constructive and potentially positive responses to current social, economic and environmental issues.

1.4 This does not reduce the equal importance of rural areas and the people who live and work in these, but it rather demands that we seek greater understanding and an appreciation of relationships and inter-linkages between cities and rural areas, between cities and their surrounding areas, and between urban areas. Consequently, in this report reference is made to Sheffield as one of the Core Cities of England as defined by local authority boundaries, but also as the dominant core of the wider Sheffield City Region.

1.5 Major differences in our social and economic geographies also persist, and whilst it is the city of Sheffield that provides the basis of the narrative contained in this report, it is very important that potential segregation and divisions such as that of the East/West in the city and the re-emerging North/South in England are also highlighted where appropriate.

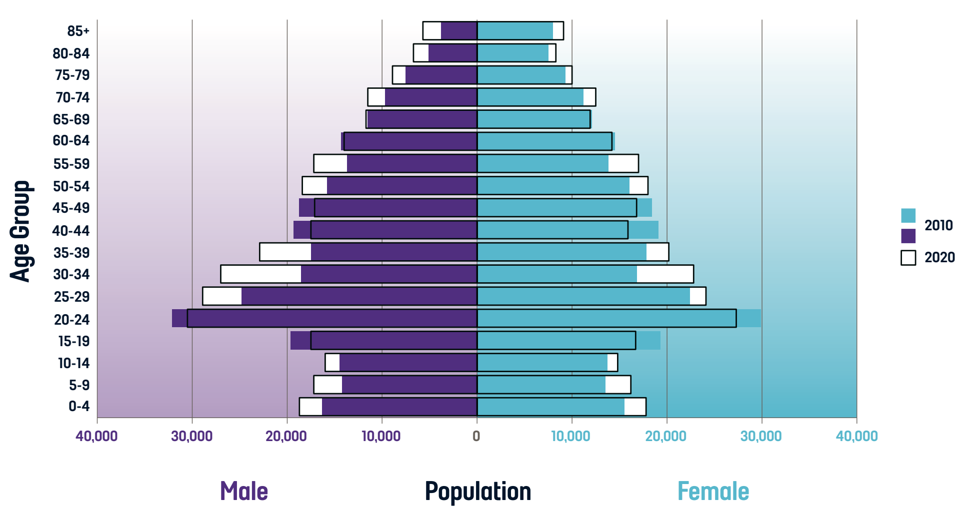
Living in Sheffield

2.0

2.1 Following decades of population decline, Sheffield has become a city of preferred location and lifestyle for thousands of new residents since 2005, and forecasts indicate that this is likely to continue in the foreseeable future. Outcomes of this growth vary across the city, with some new communities being created and other well established neighbourhoods seeing little change. For the majority of the Sheffield population it is increasingly a vibrant and lively place to live in, with the city's social and cultural base supporting and developing a rich offer, but for a substantial minority of those who also live in the city, both young and old, their local and personal situations can lead to less fulfilling opportunities and experiences of poverty. The last Place Survey showed that 81% of Sheffield residents said they were satisfied with the area where they lived, but this dropped to only 55% of residents in the North East area of the city. Sheffield is a strikingly spatially divided city, but it still fares significantly better than many of comparator cities in regards to social cohesion.

2.2 Sheffield has undergone a population growth above the national average, rising from 513,000 in 2001 to 555,000 in 2010. Much of this growth has been in the number of young adults choosing to live in the city with a 33,000 increase in people aged 20 to 29 years old, reflecting the net outcome of economic migration to Sheffield and a growing university student population. Longer life expectancy in the city has also seen a 24% increase in people aged over 75 years old and a 139% increase in the over-85 year old group. The number of births has also increased. Together these three factors have lead to a steadily rising population that is greater than the rest of the City Region.

Sheffield Population Pyramid: 2010-2020



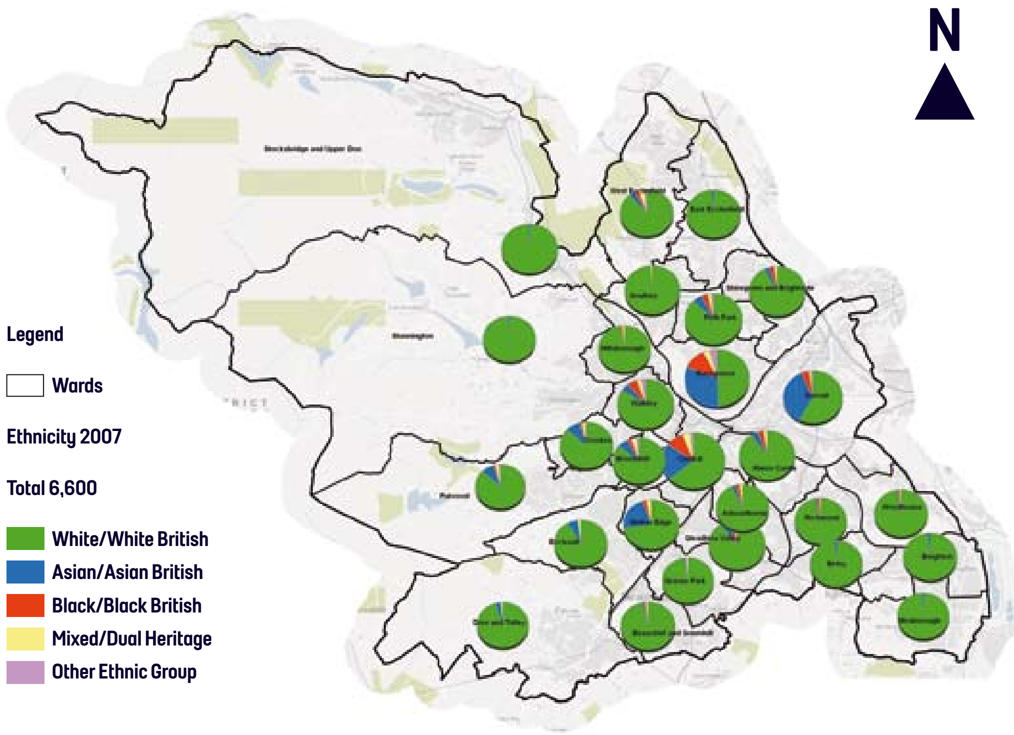
2.3 The population of Sheffield is projected to increase to over 600,000 people by 2020 with further structural shifts in the demographic structure of the city. These predictions suggest that an increasing number of older people will be living in the city with an increase of 13% of people aged 65 years and over, but at the same time Sheffield will experience a reduction in the average age of the total population as a result of increases in the number of children, a 14% increase above the 2010 population. The working age population of the city will grow less, and since the proportion of the resident population of this age is already one of the lowest of the Core Cities, the role of economic migration and commuting could have increasing importance within the wider labour market of the City Region.

2.4 A key feature of the demographic changes in Sheffield over the last decade has also been a shift in the attraction and retention of well educated people. An illustration of Sheffield as a place of learning is the growth of the two universities which now have around 58,500 students, and the role of Sheffield College which has some 26,600 students. Furthermore, the educational profile of Sheffield's population has seen a major improvement in recent years, with the proportion of the city's residents with no qualifications falling from 16.6% in 2008 to 12.4% in 2009, bringing the city in line with the national average, representing a material improvement in the Sheffield economy. The proportion of the Sheffield's population with a degree level qualification (27.7 % with NVQ4+) also compares well with many cities, although it is still below the national average and some other cities in the south of England, such as Oxford, Brighton and Reading where some 40% of their working age residents have this level of qualification. However, communities living in neighbourhoods in the North and East of the city also experience concentrations and persistence of deprivation in respect to education, skills and training.

2.5 Such wider educational and early learning experiences also provide a key link between individual aspirations and ambitions and the city's demographic and socio-economic features. In line with the general changes noted above, the key indicators of educational achievement have been improving at a rate similar to, or somewhat faster than the national rate of improvement over the last four years up to 2010. However this improvement has started from a low baseline, and Sheffield's comparative position against other cities and local authorities has in most cases worsened. Interim data for 2011 is concerning in respect of the attainment of 11 year olds (KS2) and 16 year olds (KS4), as it shows little or no improvement on 2010. Children from certain backgrounds also do less well on average. Only a third of children on free school meals, in care, or from a minority ethnic group achieve five higher grade GCSEs. The relative position of Sheffield could well worsen further in light of prevailing economic circumstances, compounding the current situation where the city also lags behind in terms of the proportion of 16-18 year olds not in education, employment or training. In Sheffield this proportion was 8.8% compared to the Core Cities average of 7.5% and the national average of 6%.

Ethnicity By Ward

Source: ONS



2.6 Sheffield is also a diverse city, both ethnically and culturally, and is becoming more cosmopolitan as a result of its changing population profile of more young people and increases in the population in BME groups, and an increase in the number of BME groups. The BME population in the city has increased significantly since the 2001 Census, from around 11% of the total population to 17% in 2009. Whilst Sheffield's BME population is increasingly dispersed across the city, the neighbourhoods of Burngreave, Fir Vale, Tinsley, Darnall and Sharrow have particularly high concentration of BME residents. The Pakistani community remains Sheffield's largest single non-white ethnic group, as new ethnic communities have emerged and existing communities have grown through immigration for employment and for education. In line with national trends, recent economic migration from Europe and an increasing number of refugees have further diversified the Sheffield population, alongside increases in the Indian, Chinese and Yemeni communities. Currently, more than 128 languages are now spoken by Sheffield's school children, and 23% of mothers giving birth to babies in the city are themselves born in countries outside the UK. The ethnic profile of the city will continue to change significantly in the future. This reflects both the higher proportion of BME people who are in the child-bearing age groups as well as higher age-specific birth rates among some groups.

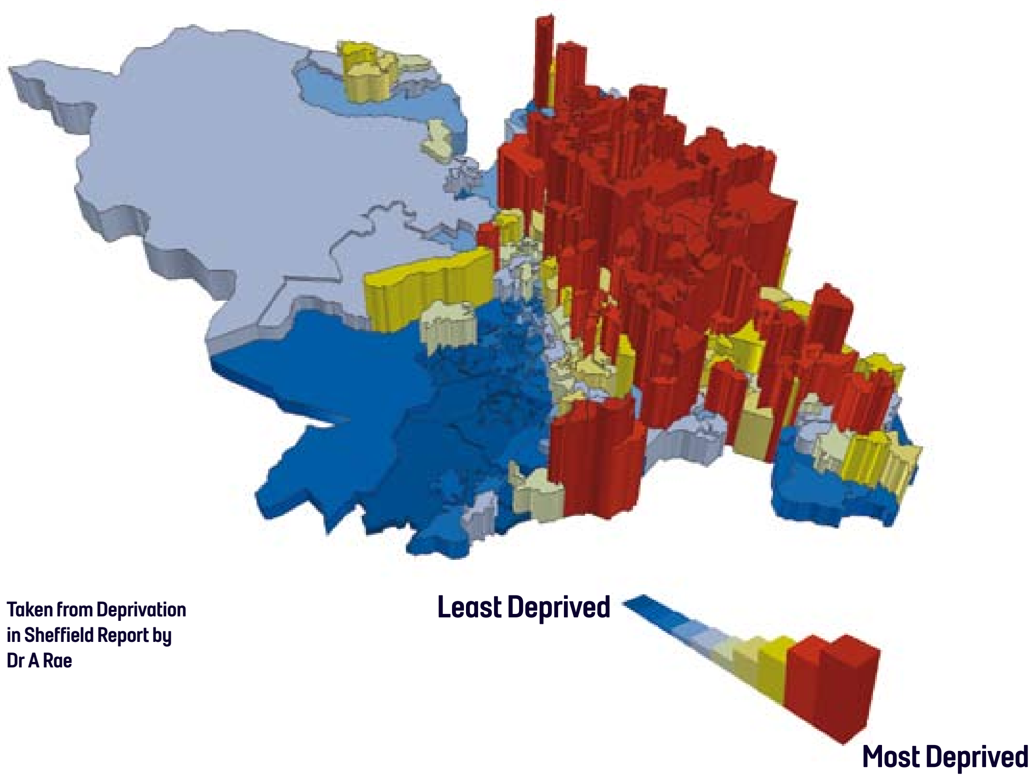
2.7 This growing and diversifying population has increased demand for housing in the city and led to the formation of new households. In common with the national picture, there has been a particularly strong increase in the number of smaller households, reflecting changes in social behaviours and demands from more young and professional people. In Sheffield now, one of the largest single types of household are the 32,000 (13%) classified as occupied by young and well-educated city dwellers. The majority of these are in the regenerated urban centre that now offers a distinctive lifestyle, common to all Northern cities, as new housing has recently been built in the city to meet demand from mainly smaller households and student accommodation. Two major types of household in the city remain middle income families living in moderate suburban semis (11%) and residents with sufficient incomes living in right-to-buy social housing (11%), but the varied conditions in the city are also illustrated by the 29,275 families living in low-rise social housing with high levels of benefit need (12% of households) and the 19,522 households made up of older people on state support (8%). Around 24% of Sheffield's dependent children live in households reliant on Housing and/or Council Tax Benefit, and 28% of the population over 60 years old. In the three Sheffield's wards of Burngreave, Firth Park and Manor Castle, over 40% of households are receiving housing benefits, and over 30% are also receiving other income related benefits. By contrast, in the Ecclesall and Fulwood wards, the equivalent figures are less than 10% and under 5% respectively.

2.8 Like all former Northern industrial cities, the varied living experiences outlined above result in Sheffield having a disproportionate share of the most deprived areas in the country. There are 29 neighbourhoods in the city that equate to the most 20% deprived within England, in total accounting for 28% of the city's population. These areas are geographically clustered to the northern and eastern edges of the city, with the exception of Low Edges and Batemoor / Jordanthorpe on the Southern fringes. These deprived areas are located within larger concentrations of potential poverty, are more isolated, and the persistence of deprivation is perhaps as much a problem as its spatial concentration. In contrast are the well-off Western suburbs - Ecclesall is the least deprived neighbourhood in Sheffield, followed by Fulwood, Bents Green, Crosspool, Whirlow / Abbeydale and Millhouses – all within the 10% least deprived locations in England. As a result, Sheffield is more spatially divided than any of its comparator cities, and owes much of this to its history and topography. Despite this obvious spatial imbalance between rich and poor, Sheffield is actually considerably more balanced socio-economically than most comparable cities, particularly Manchester, Nottingham and Liverpool.

2.9 Sheffield also has a number of rural and smaller settlements, some of which are distinctively situated within the Peak District National Park. These communities are diverse in their characteristics and the challenges they face. Housing affordability is a common issue, but has subtle distinctions: Bradfield has the greatest affordability gap but very little social housing, whilst Oughtibridge and Stocksbridge have a greater supply of social housing but it is still not always possible for local people to access it. Whilst many residents have made a lifestyle choice to live in remote areas, the difficulties of accessing shopping and other facilities can present a significant barrier for those on a low income and for people who rely on public transport, particularly younger and older people.

2.10 Despite the level and degree of social and economic inequalities being as great as many other cities in England, Sheffield would appear to exhibit greater social cohesion, in that the city did not experience the types of social unrest that occurred in English urban areas this summer, or in previous times when various inner cities experienced riots and violence. It is believed that Sheffield has avoided much of the tensions seen in other cities in recent years, in part as a result of community engagement and the integration of its diverse population. Community safety also remains high in the city, with recent improvements measured through decreases in recorded crimes and anti-social behaviour being maintained. Sheffield has the lowest rate of recorded violence against

The geography of deprivation in Sheffield



Taken from Deprivation in Sheffield Report by Dr A Rae the person of all of the core cities at 11.4 per 1,000 people at the end of 2010. The next lowest are Leeds and Newcastle at 14.5; the highest is Bristol at 25.6. In the 2008 Place Survey, 51% said that they feel very or fairly safe whilst out at night, the highest proportion of all the core cities.

2.11 It might also be argued that the topography and history which has shaped the spatial division of living in Sheffield also reinforces the importance and role of the local community in the perceptions and experiences of Sheffield people. Residents identify closely with their communities and it is not uncommon to find several generations of the same family living in the same area. Many Sheffield residents also use and depend on a number of district centres which provide for many of the needs of their local residents, and are used more than the city centre itself. District centres vary, reflecting their location and local population. Some, like Stocksbridge, Chapeltown and Crystal Peaks, are on the edge of the city and represent town centres in their own right. Others, like Woodseats and Hillsborough, are distinct centres within the city and provide a full range of shops and facilities. Others, such as the socially diverse London Road and Sharrow neighbourhood, are close to the city centre and provide a more specialist extension to it, especially in the evenings.

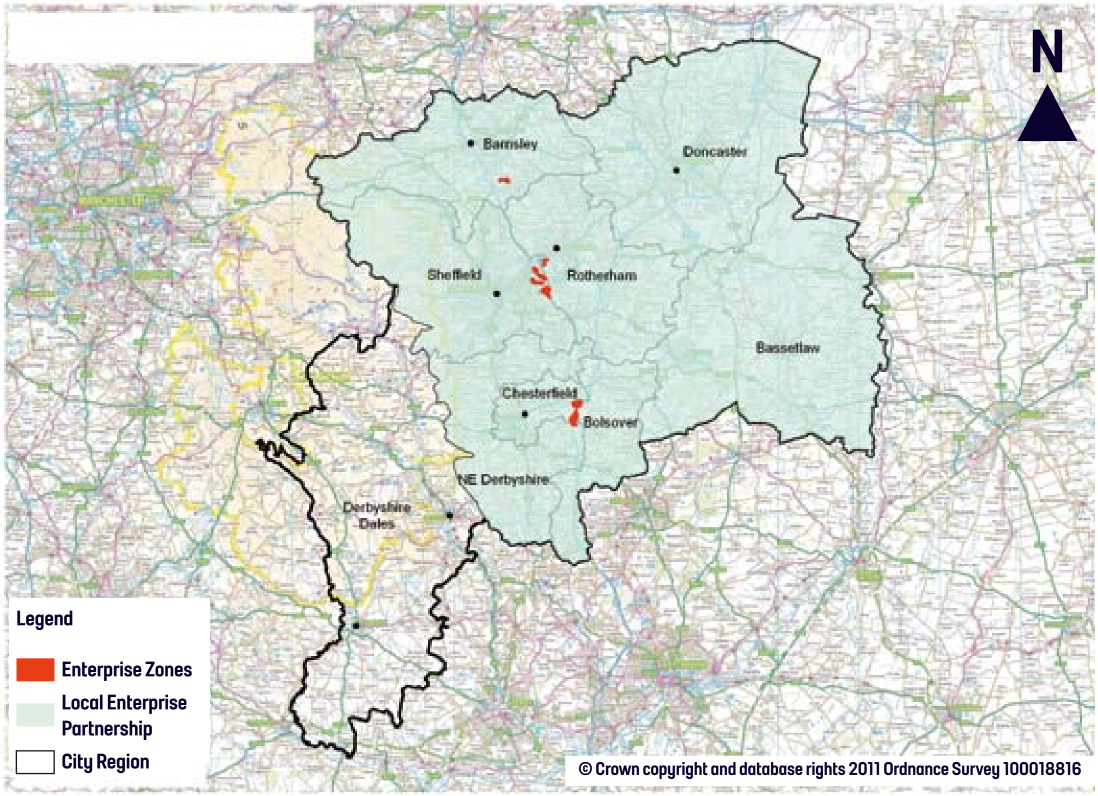
2.12 Whilst social cohesion has to date remained positive in the city, the continuing financial and economic crisis is beginning to impact on the extent to which people who want to live in Sheffield can secure their home of choice, and could also influence the previous growth in single person households. Sheffield currently has a housing stock of around 238,400 homes, of which three quarters are in the private sector and just over 41,600 are council homes. New housing completions have been falling from a peak of 2,882 completions in 2007/8, to 919 in 2010/11. House prices and property sales have remained fairly static in the last two years, but sales have fallen by over 20% in the last year. This is largely due to difficulties for first-time buyers in finding deposits. In the last four years there has been an increase in new affordable homes in the social sector, but this has not been sustained, and the number of affordable homes provided through developer contributions has also declined. The demand for affordable homes far outstrips the supply. Demand for single person households could also be affected by changes to welfare reform, ongoing restricted access to mortgage finance, and the high levels of private rent deposits. This could mean that young people will be staying at home for a lot longer than in previous years. The number of homeless presentations to the council has halved over the past five years. However, despite this fall the number of people becoming homeless has increased considerably in the past year. A key concern for the city is the number of young people becoming homeless with almost half of priority homeless cases aged 16 to 24 years old.

2.13 In addition to providing new homes for the growing and diversifying population of the city, the condition of the private housing stock has become a concern. Recent years have seen the condition of housing stock in the social sector improving, as many run down areas have benefitted from investment such as Housing Market Renewal programmes. However, the increasing cost of living in relation to earnings means that property maintenance in the owner-occupier housing often takes a lower priority. More than 36% of the private sector housing was classed as non-decent in 2009, and the level of the private rented stock which was non–decent was higher at 45%. The total cost of bringing all private sector homes up to the decency standard is estimated to be £447 million. The highest level of non-decency at 48% was in the South West Community Assembly area. For properties inhabited by people over 75 years old, the rate was 44%. There is a potential situation where people live in asset rich but income poor households. Many older residents might be living in high value homes but unable to afford to maintain them properly, and also experiencing fuel poverty since 19% of private households in the city experience this compared to 13% in England as a whole.

Working in Sheffield

3.0

Sheffield City Region



3.1 Sheffield has been transformed over the last 15 years. Facing a legacy of declining heavy industry, with 120,000 jobs lost in the manufacturing sector between 1971 and 2008, and a city centre in urgent need of renewal, the city has successfully altered its economic trajectory. New employment opportunities and businesses have been created, the two Universities have significantly increased both their student numbers and capital investment and employ almost 10,000 people, and the city's image has been radically reshaped with a series of high profile improvements to the built environment. Now, in common with the rest of the UK's cities, the 2008 economic crisis has created a severe challenge to this transformation. The recession has in particular brought an end to the long property investment boom that helped to revitalise the city centre and many other run down areas of the city. Sheffield's immediate economic future will be largely influenced by how resilient this transformed economy can be in reacting to further economic shocks and the growing global competition.

3.2 Some 240,000 people work in Sheffield in approximately 20,000 businesses, of which some 80% employ ten or less people. Just over

30% of people work part time. Only 11% of employees now work in manufacturing businesses, close to the national average. The majority of people work in services, with the 85% of workers in this sector also being close to the national average, but the highest in the City Region in which Sheffield plays an important role. In fact, Sheffield must be considered in such wider economic geographies and in the context of national trends which see more people travelling and travelling longer distances to work. Some 35% of jobs in the City Region are within Sheffield, compared to 31.5% of the working age population, and the city is the only district in the city region that experiences a net inflow of journeys to work each day, the majority from Rotherham and a significant number from North East Derbyshire. Similarly many people who live in the city work outside its boundaries.

3.3 Despite these general trends in working and travel, the city also has certain distinctive features when compared to other major cities in the north. In Sheffield, the majority of residents live and work in the city (85%) and these people take some 72% of the jobs in the urban area, compared to say Manchester where 73% work and live in the city, and take only 31% of the jobs. This can be partly explained by the low density of population in the immediate hinterland of Sheffield – 450,000 households can be reached by a 45 minute drive from the city, compared to 710,000 households around Leeds and 860,000 households within the same drive time from Manchester. These patterns highlight the complex relationships between the places in which people live and work and the means available to access employment opportunities, but employment growth within the city is paramount for the majority of a Sheffield population that is also growing.

3.4 Sheffield's recent transformation was built upon a period of above national average employment growth, with jobs in the city increasing by 22% between 1995 and 2008. The growth of Sheffield's private sector jobs between 1995 and 2000 was broadly similar to most other Core Cities, as the city benefitted from the national and global economic conditions, but it experienced particularly strong growth between 2000 and 2005. This economic recovery was based on the strong performance of business services (16,000 new jobs), and there was also significant growth in retail, real estate and software consultancy services. This employment growth has also been associated with an increase in those employed in managerial, professional and technical skilled occupations alongside a larger number of people in sales occupations. In contrast there have been declines in the number of people in skilled manual and semi-skilled occupations, and in the lowest grade of administrative and clerical jobs.

3.5 Therefore, despite the relatively robust jobs growth seen in Sheffield over the past decade and a half, the city's economy still exhibits certain structural weaknesses and a potential dual labour market. Perhaps unexpectedly, private sector employment began to fall at an average rate of 2% between 2006 and 2008 before the recession, unlike Bristol and Leeds that saw continued growth. The explanation of this trend is not obviously apparent, but Sheffield has a long standing low level of entrepreneurship (29.9 business births per 10,000 people in 2008, compared to the UK average of 44), and a weak performance in respect to business investment in research and development (R&D). In addition much of the total growth in jobs was also attributed to increases in public sector employment. In fact, 52% of jobs created between 1995 and 2008 were in this sector, 10 percentage points above the national average, but a feature shared with many other core cities, in particular Liverpool (60%) and Newcastle (54%).

3.6 The identification and support for 'Priority Sectors' has been part of the approach of the city to address these underlying underperformances in productivity and private sector employment creation. These are the advanced manufacturing, creative and digital, and healthcare technologies sectors, and they currently contribute around 15.6% of Sheffield's employment, down from 18.5% in 1998, caused by employment shrinkage in advanced manufacturing. The other two sectors are smaller, but have exhibited strong employment growth. Although the priority sectors provide a relatively small proportion of overall employment, they are important in terms of their contribution to the city's productivity and value added, and advanced manufacturing is still a sector in which the city has the greatest specialism and potential to retain a comparative advantage relative to other cities.

3.7 Universities are also increasingly seen as a key economic asset for innovation and technological development in cities, and Sheffield's two universities – the University of Sheffield and Sheffield Hallam University - do fairly well on engaging with small and medium enterprises (SMEs) and creating their own spin-out businesses relative to other cities. Between 2004 and 2008 a quarter of their commercial income came from SMEs, and they had the second highest number of active spin-outs of the university cities group in 2007/8. However, this was only a small share of the total number of active firms in Sheffield and of equal significance has been collaboration with major international corporations such as Boeing, Rolls Royce and Siemens.

3.8 Sheffield's skills and learning profile has shown considerable improvement over the last fifteen years, being both a cause and outcome of the wider economic transformation in the city. Interestingly, Sheffield has had a higher ratio of graduates in employment than other Core Cities, suggesting that graduates in Sheffield are more likely to find jobs in the city. However, employment prospects for people with less skills and qualifications appear to be weaker, suggesting they find it difficult to find jobs or compete with others in the wider labour market. Given also that Sheffield in 2008 had a lower ratio of higher to lower skilled jobs (1.3 compared to 1.7 in the UK), under-employment of graduates might be taking place. Since the number of high-skilled jobs in the city is limited, some graduates working in Sheffield may be working in occupations which fail to fully utilise their skills. This would also correlate with the initial high retention of graduates in the city, which appears to occur for two years after graduation before larger numbers leave the city to seek employment elsewhere. The lack of higher skilled employment is also likely to be one of the factors that have led to consistently low wages in Sheffield. At £410 per week, the mean wage in the city was the lowest out of all Core Cities in 2008.

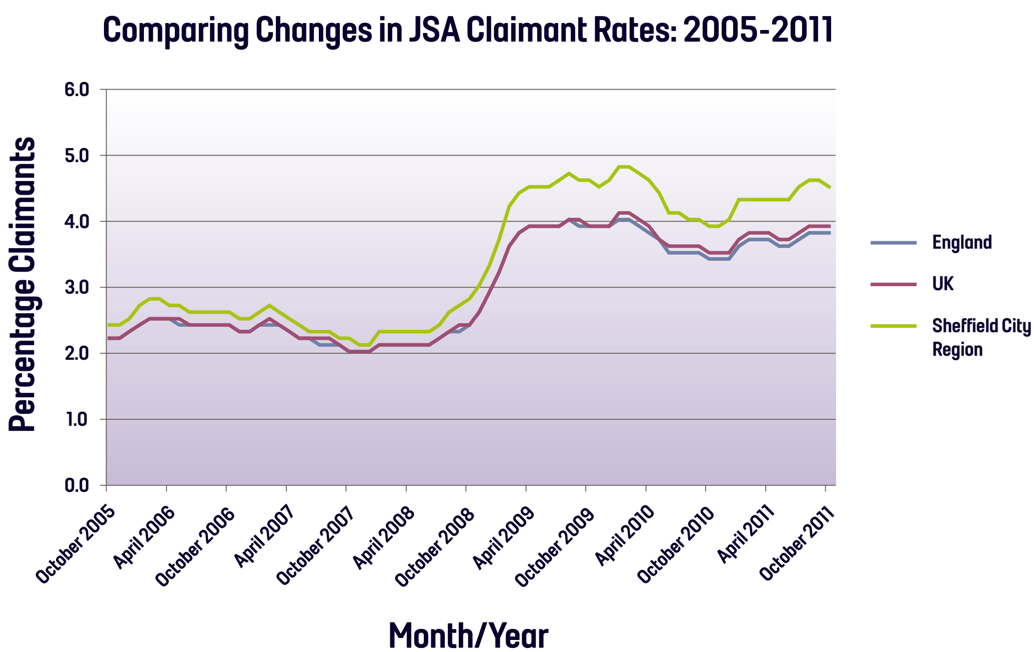
3.9 An assessment of economic resilience in 2008 revealed that of the 13 city regions whose resilience was assessed, Sheffield City Region performed relatively well, with an overall score of 67.0 (out of 100) which was line with the average for all of the city regions on the Index. This placed it in the middle group of City Regions and gave it a resilience score comparable to Tyne and Wear City Region and Bristol City Region. The current performance of the economy is difficult to assess from current snapshots, but the ability to create new jobs in significant numbers appears fragile.

3.10 This economic fragility is illustrated by the number of new vacancy notifications in Sheffield, which fell by 13.65% between 2007 and 2010, the largest decline in the Sheffield City Region, and they only increased by 2.6% during 2009 to 2010 compared to a 34% increase in England, a 37% increase in Yorkshire and Humber, and 28.5% increase in the city region. On the other hand, Sheffield along with Doncaster and Chesterfield experienced the fastest growth in new-start businesses in the City Region in the first half of 2010 compared to 2008, although proportionately more of these were sole traders or not for profit enterprises compared to England as a whole, and the overall level of growth remained well below the England average.

3.11 Similar divergent changes and trends exist with other measures. The employment rate in Sheffield has not fallen during the recession as much as most of the other core cities, and the fall of 2.2% is in line with the region (-2.1%) but higher than the average for Great Britain (-1.4%). Currently the employment rate of 68.3% is below the 72.9% national average. Given the contribution of public sector jobs to the previous period of employment growth, the city is also vulnerable to losses in this sector as a result public expenditure cuts, and by applying the Office for Budget Responsibility's assumptions, there could be between 6,000 and 8,000 jobs lost in the city by 2014/15. These estimates exclude any knock-on effects in the private sector through direct contracts and their supply chains.

3.12 The impact of the recession and shape of the recovery has varied significantly across the UK, with much of this variability being explained by different starting points, often accelerating pre-existing trends. Changes in unemployment can demonstrate these trends. Claimant unemployment in Sheffield has risen from 7,695 (2.3%) in December 2007 to 15,285 (4.5%) in June 2010 which is comparable to trends in both the City Region and wider Yorkshire & Humber Region, but exhibits a widening gap to the England average (2.1% in 2007 and 3.7% in June 2010). The city has also had one of the lowest falls in unemployment in 2009-10 (-1.0%) resulting from the national economic stimulus measures, compared to the City Region (-8.3%) and England (-8.6%). Male unemployment in the city has only fallen by 4%, and female unemployment has rise by 9% in Sheffield since June 2009, perhaps reflecting growing difference and diversity in the labour market.

3.13 Whilst the impact of the recession on Sheffield's labour market does not appear to be as severe as some other urban areas, there are still concerns. Levels of claimant long-term unemployment have significantly increased in the City Region and nationally. The numbers classified as long-term unemployed in Sheffield have increased from 940 in December 2007 to 3,095 in June 2010, and as a result the proportion of long-term unemployed has also increased in the city from 12.3% (below the England average of 15.2%) to 20.4% (above the England average 18.3%) over the same period. Youth unemployment in the city has also mirrored wider trends, growing dramatically between 2007 (2,435 people) and 2009 (4,775) but then declining slightly between 2009 and 2010 to 4,705, but less than the England average and all other local authority areas in the City Region.



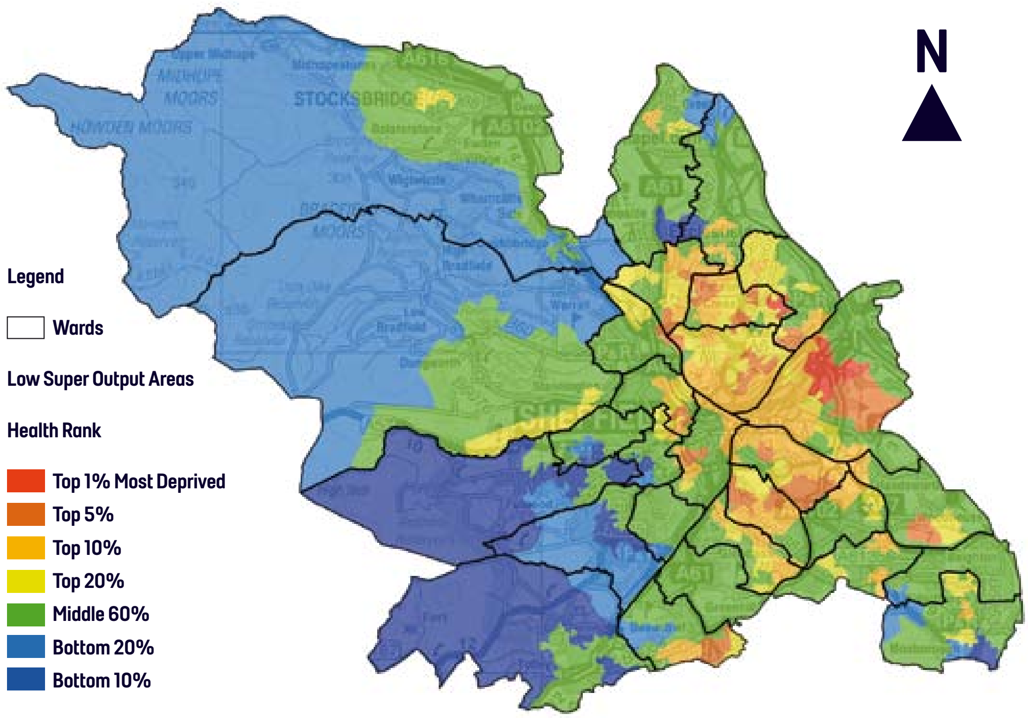
3.14 More recent data shows growing stress for individuals in the labour market, now that approximately 23,500 economic active people in Sheffield are unemployed and seeking work. Of these, some 16,225 are currently claiming Job Seekers Allowance (JSA), the remainder choosing not to claim benefit or they are not eligible as they are likely to be newly unemployed. In addition there are some 30,700 people classified as economically inactive or workless, including those who cannot work due to health problems or social circumstances such as acting as carers or single parents. As the recessions continues, further significant concerns will arise around potential deskilling and under-employment, displacement of the lower skilled, increasing inactivity for young people, and an increase in poor mental health. An analysis of incapacity benefit claimants shows 11,000 people in Sheffield stating that mental health conditions as the reason for claiming Employment Support Allowance, and 87% of current claimants with a mental health condition have been claiming for over two years. It is likely that these problems will be concentrated in those neighbours of the city which were already experiencing some of the marginalising and segregation effects of previous industrial restructuring. Deprived communities in the Northern and Eastern edges of the city are already characterised by persistent employment, income, and educational deprivation.

Wellbeing in the City

4.0

4.1 The improvement of people's health goes beyond the goal to provide high-quality accessible health care to also encompass a city that can offer an environment that encourages collective well-being and a quality of life for individuals. This is probably long acknowledged in Sheffield whose history can readily recall the introduction of the Clean Air Act in 1956 and the establishment of the first National Park in 1951. However, as in other modern cities, threats to Sheffield's general wellbeing remain in respect to longstanding health inequalities, the social effects of the economic crisis, and in new challenges, such as mental health, disabilities and obesity, and wider changes in our physical urban environment linked to climate change, our disposal of waste and use of energy.

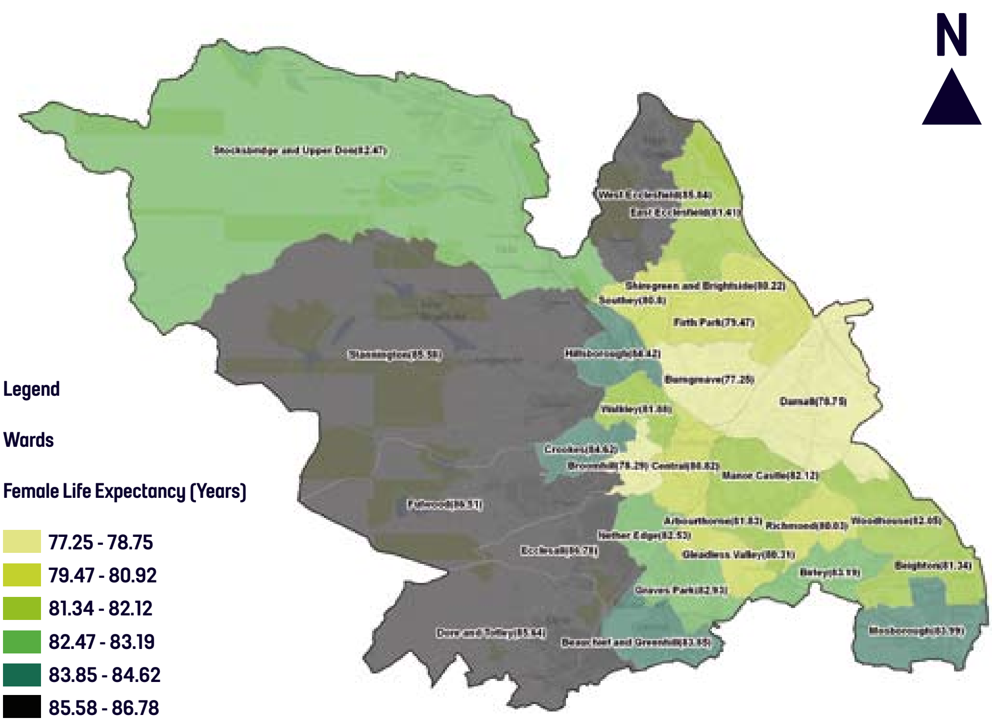
Indices of Multiple Deprivation 2010 - Health Deprivation and Disability Rank



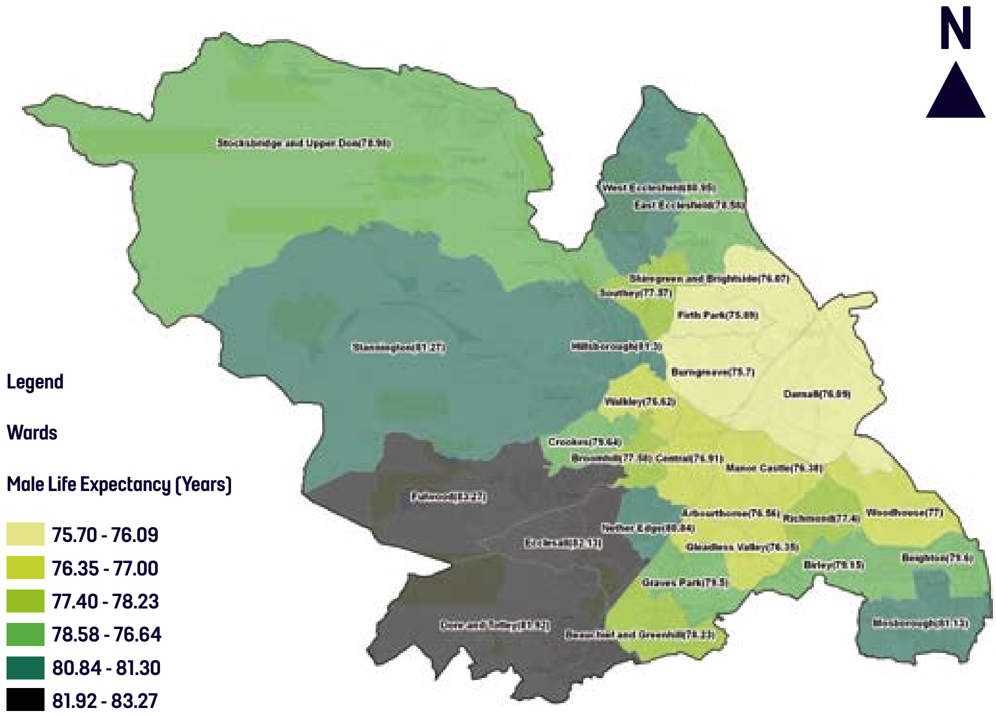
4.2 In general, the health of people in Sheffield has shown consistent improvement for a number of years, as measured by simple mortality rates or life expectancy. Although the city is becoming healthier for most people, health inequalities across neighbourhoods remain and are in some cases widening, with particular individuals and groups remaining or increasingly vulnerable, in particular older people, the young and some women. People in the most deprived parts of Sheffield still experience a greater burden of ill health and early death. This reflects the key issue that inequalities in health and wellbeing are intrinsically linked with wider social, cultural and economic conditions. Society behaviours are also contributing to new problems, such as obesity, low levels of physical activity, heart health, respiratory diseases, diabetes, preventable cancers, alcohol and substance misuse, sexually transmitted diseases and poor health in children and young people. Compared to the national average and the Core Cities, Sheffield has high diabetes and obesity rates and low levels of healthy eating. Sheffield has the lowest level of physical activity in adults of the major cities. Complex relationships between social behaviours, life choices and health outcomes are also illustrated in the improvement in teenage pregnancy rates, and the trend has been steadily downwards since 2004, and Sheffield now has the lowest rate of all Core Cities and is close to the national average.

4.3 After falling behind in the 1980s, the overall health of Sheffield's population is once again near the national average and better than other major cities. Compared to the other Core Cities, Sheffield has the longest overall life expectancy and the lowest levels of early deaths from cancer, heart disease and strokes. People in all parts of the city are living longer, deaths from major illnesses, especially heart disease and

Sheffield: Female Mean Life Expectancy (2008/10)



Sheffield: Male Mean Life Expectancy (2008/10)



cancer, have reduced markedly, and there has been a reduction in the number of people, particularly children, killed or seriously injured on the roads. Consequently, mortality rates for men have halved since 1975 and for women reduced by 40%. Life expectancy, at 81.8 years for women and 78.2 years for men, is only a little below the national average. Overall health in Sheffield continues to improve, including a narrowing of the gender gap but improvements in women's health have slowed over the last few years. This is a matter of concern and may be due in part to changing employment and lifestyles, since levels of smoking and drinking alcohol to excess have been increasing in young females.

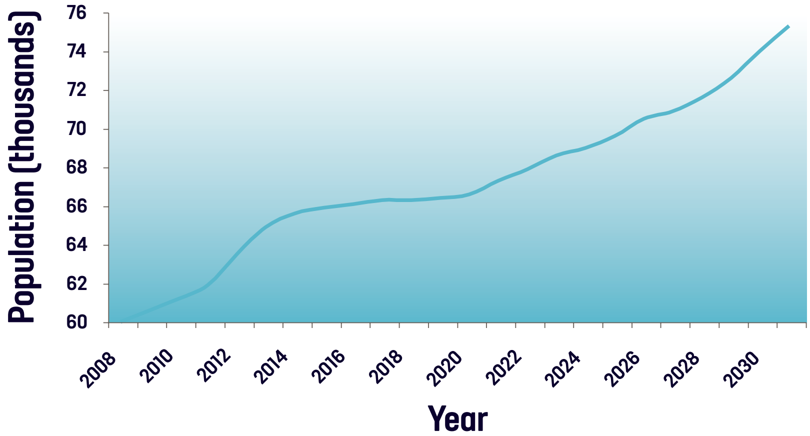
4.4 Similarly, mental health needs and problems have a range of causes, and generally, mental ill health has become prevalent across the city population. Many people with mental health problems also have higher levels of general ill health or physical health problems. Mental ill health is also more common in the deprived parts of the city, and this report has already shown links with the experience of unemployment, and people with mental health problems are also more than twice as likely to lose their job. These are not trends that are peculiar to Sheffield, but represent outcomes of wider stresses and relationships in society, but they can become more concentrated and persistent in some city neighbourhoods. The Mental Health Needs Index indicates that Sheffield has a 15% higher than predicted admission rate for severe mental health problems than England as a whole. Women are one-and-a-half times more likely to be affected by anxiety and depression; there are higher rates of depression in non-white ethnic groups; and men are more prone to suicide, mostly young men, although deaths from suicide and undetermined injury in Sheffield are lower than the average for England.

4.5 Whilst children and young people growing up in Sheffield today are generally healthier than ever, the health of the population in the future will in part be determined by the health and circumstances of the current generation of young people – and there are some emergent trends that raise particular issues in terms of exercise, diet and their general wellbeing. Evidence shows that breastfeeding significantly increases a child's chances of being healthy throughout life, and the proportion of mothers initiating breastfeeding at delivery has increased from 70% in 2004 to 78% in 2010, but there are wide variations across the city with as few as 42% of mothers breastfeeding in some areas compared to over 90% in other parts of the city. Of similar concern to the city is the rise in obesity in children, with 18% of 10-11 year olds classed as obese, and the prevalence once again higher in deprived areas where, for example, the rate rises to 22% in Arbourthorne /Manor /Darnall.

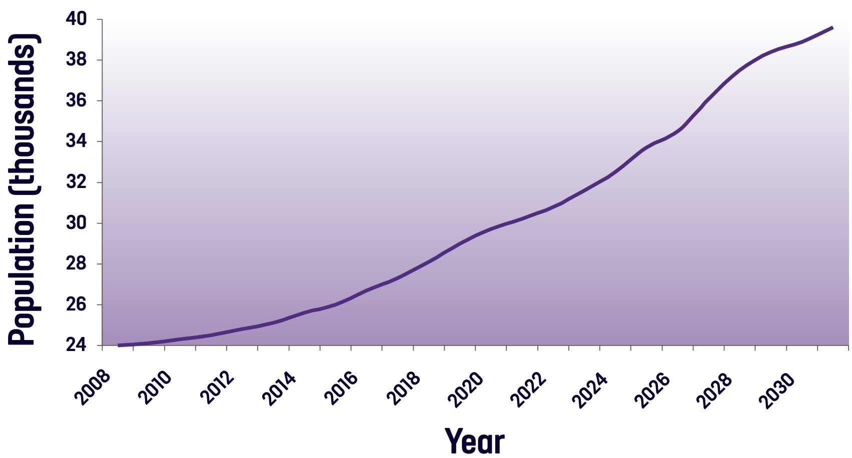
4.6 There has also been a large increase in the number of children and young people with a learning disability since 2000, and in the last ten years the number of 10 to 20 year olds with a learning disability increased by 120%, although in the last five years the number increased by 38%, suggesting that the rate of increase may be slowing. The number of young people affected is small compared to other health issues, but care costs are high. Data also indicates a significant increase in the number of people in Sheffield with severe or complex needs, and again particularly in younger age groups. The overall number of people with such needs rose by 17% between 1998 and 2008. However, the number of 15 to 19 year olds with severe or complex needs increased by 70% over the same time.

4.7 Similarly, the wider phenomenon of a growing older population in the city contributes to health and wellbeing issues. Without doubt our understanding and notion of wellbeing in later life is going through a re-assessment, and what constitutes 'old age' will continue to change, as will notions of 'career', 'retirement' and 'independent living'. Currently around 9,000 older people (12% of all in city) receive some support, and by 2025 it is estimated that there will be a 23% increase in people aged over 75 years living alone, and an increase of 21% in people over 65 years old unable to manage at least one self-care activity on their own. More of Sheffield's older population are in residential care than the national average, although most people would wish to be in their own home where they can. It is also estimated that nearly 7% of people aged over 65 years old suffer from some form of dementia. The proportion

The future older population in Sheffield 2008-2030



Source: ONS 2008-based population projections
Sheffield's 65-79 Population Projections



Source: ONS 2008-based population projections
Sheffield's 80+ Population Projections

increases as the population gets older – for the over 80s it is 17.6% and for the over 90s it is 30%. The increases projected in the city's population means that by 2020 there will be an increase of over a thousand older people projected to suffer from dementia; by 2030 there may be an additional 3,000 people with this illness. This is based on the assumption that the incidence of dementia will not increase, simply the number of older people.

4.8 It has already been referenced that Sheffield's BME population is growing and becoming increasingly diverse to include Pakistani, Irish, African-Caribbean, Somali, African, Indian, Kurdish/Middle Eastern, Yemeni, Chinese, Bangladeshi, East European and Gypsy and Traveller communities. There is clear evidence that individual BME communities have a range of specific health and wellbeing needs, reflecting the distinct communities of people with strong identities, and different cultural backgrounds, beliefs and experiences. Many of these communities, though not all, experience relatively poor health and wellbeing, and a number experience relative poor health in respect to coronary heart diseases (stroke is 70% more common among African Caribbean and South Asian populations); Type 2 diabetes (six times more common in South Asian communities); and mental health (31% of people detained under the Mental Health Act were from BME communities in 2006/7 and suicide rates are significantly higher among young Asian women).

4.9 In general terms then, health and wellbeing has improved significantly in the city and the majority of people feel their individual health is good, but health inequalities continue to persist. However, a well city also needs to be a sustainable city, and must look to how resources are used and the needs of future generations are considered. The quality of Sheffield's environment is important not just because people choose to live in pleasant places if they are able to, but because it has an important bearing on the health and wellbeing of all those who live and work in the city, and on wider global concerns such as resource use and climate change. The Sustainable Cities Index published by Forum for the Future ranks the UK's 20 biggest cities by tracking their progress on sustainability, using three broad 'baskets of indicators' covering environmental performance; quality of life; and how well each city is addressing issues such as climate change, biodiversity, and recycling. The index placed Sheffield 7th overall in 2007 but 10th in 2010, indicating mixed results for Sheffield which is described as a 'mid-table performer', and its performance is even more varied across individual indicators. Sheffield has done well to improve its overall environmental performance ranking from 10th in 2007 to 4th in 2010, and its overall quality of life ranking from 13th in 2007 to 5th in 2010. However its overall ranking for future proofing dropped from 3rd in 2007 to 17th in 2010.

4.10 The city scores particularly strongly on the quality of life indicators, with high rankings given to educational, health, employment and green space performances. This resounds with the previous analysis of recent improvements in the themes of living and working in Sheffield over the last five years, and recent increases in publicly accessible green and open space that meet the 'Sheffield Standard' and the number of key nature sites that are positively managed. Sheffield also scores particularly well for air quality, with only Bradford performing better. This might be surprising given the known and severe problems of air quality in particular neighbourhoods of Sheffield, such as Tinsley and Broomhill where communities live adjacent to increasingly busy junctions and arterial roads, with associated ill-health consequences. Sheffield also scored reasonably well on levels of household waste, and with all other cities the waste generated by the average person has been reduced. However the city then scores poorly for recycling, since most waste is incinerated and this creates a requirement for a minimum quantity of paper, plastic and other potentially recyclable materials. As a result, only Birmingham of the Core Cities landfills less of its waste than Sheffield, and the city benefits from an award winning City Centre District Heating Scheme, with more than 45km of underground pipes delivering a low carbon energy source able to provide all the heating and hot water needs of over 140 buildings across the city centre. Buildings connected to the network range from offices and public buildings to hotels and residential premises.

4.11 Sheffield scores weakly on the 'economy' indicator which seeks to measure innovation and enterprise creation, factors known to be weak in comparison to many other cities and referred to in the Working Section of this report. The city also scores poorly on responses to climate change, but it is acknowledged that it sits alongside most other cities that are still getting to grips with the complexity of planning for climate change, since many have not published detailed adaptation plans or targets. Despite continuing investment in pedestrian and cycleway schemes, the Supertram and bus networks, and a growth in tram ridership (4% per annum), Sheffield scores weakly on transport indicators within the rankings. This reflects declining levels of bus use, although the bus is used for travel to work in Sheffield more than any other City Region district. Walking and cycling are growing, but relatively few people are currently travelling this way, with the majority of trips still undertaken by car. Cars and vans are still the dominant form of transport accounting for 96% of vehicles entering or leaving the city. It is believed that without intervention emissions from transport, which are already high, will keep rising. However, carbon emissions from transport, industry, commerce and domestic activities, a more general indicator of sustainability, have declined in total in Sheffield over the period 2005 to 2009, from 3.8 million tonnes to 3.1 million tonnes. Interestingly Sheffield has more micro-generation of electricity by households and small businesses from renewable resources than any other core city, mainly from solar production.

Looking to the Future

5.0

5.1 Reporting on the State of Sheffield through descriptions of living, working and wellbeing reveals a city on the cusp of potentially important and long-term change. These broader economic, social and environmental futures also have to be considered alongside the more immediate and equally demanding changes that are affecting the city currently and in the near future. The Sheffield 2020 Strategy seeks to ensure that the Sheffield of the future remains distinctive, successful, inclusive, vibrant and sustainable. By addressing the outcomes required in achieving these ambitions, the State of Sheffield in 2011 poses challenging questions in respect to the immediate and longer term priorities that Sheffield leaders might need to consider in achieving these:

- Can the city generate sufficient wealth to be self-sufficient for its core requirements?
- Can the city be a place where children and young people have the best possible start in life, and be successful, and have high aspirations?
- Can the city create more and better jobs for adults and young people, with employment rates at or better than the national average?
- Can the city achieve year on year reductions in poverty, deprivation and inequality?
- Can the city be a place where people are enabled to live healthy, independent and productive lives and where our vulnerable people are protected and supported?

5.2 The immediate challenges to Sheffield are those also faced by cities across the UK arising from the prevailing and immediate changes in wider and macro-economic conditions:

- **Creating jobs and promoting employment growth** – If it is to have a long-term future, the local economy must have a more sustainable balance and address persisting weaknesses. We can take advantage of the Sheffield City Region Local Economic Partnership (LEP) and the new Enterprise Zone as well as the Regional Growth Fund (RGF) and the Growing Places Fund to attract and support businesses in sectors that have real growth potential, like advanced manufacturing and low carbon industries, but responses are also required to maintain job creation that underpins wider benefits to the population within the city.

- **Responding to public sector contraction** – Spending cuts within the public sector not only affect levels of service provision. Public organisations in the city employ around 30% of the Sheffield workforce and spend very large sums in the local and wider economy. The impact of these spending cuts will be felt more and more in the coming year. Managing all aspects of that impact will be a severe challenge for the city.
- **Youth unemployment** – There are growing numbers of young unemployed people, some of who have never worked since completing their education. Continued and further education and training can help, improving the qualifications and skills of young Sheffielders, but what they really want and need is permanent employment.
- **Social cohesion** – when economies struggle, it is often the minority groups in society that lose out most. Ensuring that a diverse city like Sheffield maintains its social cohesion will be an on-going challenge. Increased unemployment, particularly affecting certain parts of the population will potentially have an impact, with increased risk of riots, threats and stress in some communities. An increase in deprivation will also be a challenge to maintaining cohesion.

5.3 In the longer term, as we work towards meeting the ambitions set out in the City Strategy, we must face up to a number of more general and sustained challenges.

- **Demographic change** – the Sheffield population is not in general getting older. Taking a simple average age, the population is set to get younger. What we will see is an increasing number of people at the extremes of the age range. An increasing number of older people will present a number of challenges for the city – in housing, health care, transport, culture and recreation, energy usage, pensions – that we must strive to meet. At the same time, we will see a reduction in the proportion of working age people in the city to provide the financial basis to meet those challenges.
- **Long-term care** – We are living longer, but with this often comes the need for greater levels of care. Some health conditions in younger adults, such as learning disabilities and mental illness, are also increasing the demands on the care services. Dementia is putting increasing strains on partners, both physically and emotionally. As a result an increasing number of people will become carers themselves at a time in their lives when they might also be struggling to cope. This increase in demand is coming at a time when the resources to deal with it are at best not increasing.

- **Education** – Learning and educational performance, of individuals, social groups and the city as a whole has become an increasingly important link in explaining relationships between demographic, social and economic change. It is a key expression of individual mobility, aspirations and achievement, but also a key to unlocking wealth creation and a vibrant economy. It is important that past trends in the improvement of many aspects of learning and education in the city are maintained.
- **Housing a growing population** – if Sheffield's population grows as projected and households continue to get smaller, then providing sufficient housing will present a significant challenge. The quality of the housing on offer, and the affordability of housing, are both key challenges to the city moving forward. The quality of private housing stock, both owner occupied and private rented, is an issue of great concern, as in the former you may find asset rich but cash poor residents unable to modernise, and in the latter the issue of quality of what is available and how to improve it is a key challenge.
- **Global Resilience** – modern cities need to build an increasing degree of resilience if they are going to survive, never mind prosper. We need to improve and develop the infrastructure that will allow the local economy to grow and be connected; housing, roads, transport links, support services, energy supplies all need to be maintained and improved. We have to be aware not only of our neighbours but also with an increasing global economic geography. Continuing innovation and enterprise in advanced manufacturing and high-technology industries are required to be able to compete in these global markets.
- **Sustainability** – There is clear evidence that our climate is already changing, and preparing for further change will be about adapting the city and mitigating the impacts that arise from changes, with action required in areas of transport, energy, housing, water, sewerage and flood control.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