

A new deal for long-term conditions



Putting movement at the heart of care



EXECUTIVE SUMMARY

£1.7 billion

projected social value generated from scaling free structured exercise programmes across Greater Manchester

delivered through better health outcomes and:



Analysis carried out by Nuffield Health, Frontier Economics and Manchester Metropolitan University (MMU) shows that scaling Nuffield Health’s free Joint Pain Programme across Greater Manchester (GM) would generate at least £1.7 billion in social and economic value.

This translates into substantial benefits across multiple areas. It is estimated to contribute £150 million to the economy, generate £11 million savings for the NHS, and deliver £860 million worth of better health outcomes. Additionally, family and carers would see a £650 million benefit through reduced care hours and improved wellbeing.

This represents a transformative opportunity to improve lives, ease pressure on the NHS, and boost Greater Manchester’s economy – by embedding free structured exercise programmes into standard NHS care.

Nuffield Health’s Joint Pain Programme has already supported over 40,000 people living with musculoskeletal conditions, delivering measurable improvements in pain, joint function, and quality of life. Delivered across 110 Fitness and Wellbeing Centres by a new workforce of Rehabilitation Specialists, the Joint Pain Programme has shown how exercise can be used safely and effectively to manage long-term conditions while delivering a significant boost to the nation’s health and economic resilience.

Building on this robust evidence base and tested model of care, Nuffield Health and MMU have co-developed an evolved programme open to a range of wider health conditions. Over the next three years, 50,000 free places will be offered nationwide, on the Long-Term Conditions Programme, giving thousands of people the tools to better manage their health and positioning Greater Manchester as a national leader in exercise-based care.

RECOMMENDATIONS

To maximise the transformative benefits of structured exercise programmes, coordinated action is needed:

-  **Policymakers**
Support national commissioning of exercise-based rehabilitation programmes delivered by Rehabilitation Specialists
-  **NHS leaders**
Embed this model in population health approaches and maximise uptake of the 50,000 free places
-  **Clinicians**
Refer eligible patients and champion prescribed exercise as a safe, effective treatment for people with long-term conditions



UNLOCKING £1.7 BILLION IN SOCIAL VALUE

The analysis for Greater Manchester was conducted collaboratively by Nuffield Health, Frontier Economics and MMU, following a structured and independently verified approach.

In Greater Manchester, the scale of opportunity is clear. The adult population is estimated at 2.65 million, with nearly 516,000 people living with a musculoskeletal (MSK) condition. The analysis examined how many of these people reported that their condition limits their ability to carry out day-to-day activities and how many people do not have a care plan in place to help them manage their condition.

By funnelling just over half of this unmet need into Nuffield Health's free Joint Pain Programme, Greater Manchester residents could access tailored support that improves their joint function, reduces pain, and helps them to stay active and in work. The projected social value of delivering the programme at scale across Greater Manchester is £1.7 billion, generating direct health benefits as well as measurable economic gains including:

- ◆ On average, participants' pain improves by 35%
- ◆ Preventing 900,000 sick days
- ◆ Avoiding 250,000 GP appointments
- ◆ Freeing up 160,000 carer days
- ◆ Supporting 3,000 people to return to work

Delivering the Joint Pain Programme at scale would represent a high-value, evidence-based intervention that supports the drive to move care into communities while strengthening the region's economic resilience.

2.65 million

estimated adult population in greater Manchester

OF WHICH

516,000 (19.4%)

live with a musculoskeletal (MSK) condition

OF WHICH

418,000 (81%)

report that their condition limits their day-to-day activities

OF WHICH

334,000 (80%)

have no care plan in place to manage their condition

IF JUST OVER HALF
WERE ELIGIBLE

184,000

would take part in Nuffield Health's
free Joint Pain Programme



DELIVERING

£1.7 billion

in projected social value
(See full calculation on p7)

MEASURING NUFFIELD HEALTH’S SOCIAL IMPACT

Table 1





To measure and communicate the impact of our free programmes, we use a robust social value framework developed in partnership with Frontier Economics. This enables us to monetise the benefits generated by the programmes, demonstrating their value to society and the economy.

Over 40,000 people have participated in Nuffield Health’s Joint Pain Programme to date, achieving excellent outcomes. Table 1 opposite summarises these outcomes and shows the associated monetary value generated.

Our methodology focuses on four key areas, enabling us to measure the benefit to the individual participant and beyond:

- ◆ **Participants:** improvement in quality of life
- ◆ **Family and carers:** reduction in the care hours and improvement in wellbeing
- ◆ **The NHS:** reduced demand for services, resulting in fewer GP appointments.
- ◆ **The wider economy:** reduction in sick leave and number of participants able to return to work

We collect data across multiple time points for each area to estimate the average change in outcomes resulting from participating in our programmes.

Beneficiary	Measure	Outcome	% change	Value (£)
 Participant	Health outcomes	Average improvement in EQ-5D (health-related quality of life)	12.91	£6,680
 Family and carer	Carer hours	Average decrease of weekly care hours	21.29	£318
	Family wellbeing	Average increase of family life satisfaction	10.13	£4,765
 Health and social care	Burden on NHS services	Average annual decrease of GP appointments	28.92	£85
 Economy	Workforce productivity	Average decrease of sick days	47.19	£501
	Workforce participation	Unable to work or unemployed at the start of programme	27.72	£662
		Able to return to work after completing the programme	8.11	
Social value per participant from Nuffield Health Joint Pain Programme				£13,011
Social value per participant based on 70% completing the programme (70% of £13,011)				£9,108
Applying the Joint Pain social value to potential programme participants in Greater Manchester (184,000 x £9,108)				£1.7bn



LAUNCHING A NEW MODEL OF CARE

Building on this robust evidence base and tested model of care, Nuffield Health and MMU have co-developed an evolved programme open to a range of wider health conditions. Over the next three years, 50,000 free places will be offered nationwide, on the Long-Term Conditions Programme, giving thousands of people the tools to better manage their health.

Long-term conditions – the greatest health burden

There are over 25 million people in the UK who live with at least one long-term condition and 10 million who have two or more.¹ Multiple long-term conditions are costing health and social care services £115.2 billion a year, around 65% of health spend.¹ This growing multimorbidity burden is not just a clinical challenge, but also a driver of health inequality, economic inactivity, and avoidable NHS demand.

Additionally, there is widespread unwarranted variation in both the availability and quality of rehabilitation services. As a result, individuals are often left with limited options and resort to most expensive treatment options, such as A&E and secondary care, driving up costs and further straining already overstretched services.

¹Future Health [Here](#)

The Nuffield Health model

The Nuffield Health model offers people with long-term conditions a sustainable way to improve their health through the power of structured exercise. These programmes are already delivered in the community in 110 Nuffield Health Fitness and Wellbeing Centres across the UK by Rehabilitation Specialists, a new workforce developed by Nuffield Health.

Rehabilitation Specialists are qualified Personal Trainers who receive specialised training to support individuals with a range of chronic conditions. This dedicated workforce expands healthcare capacity without placing additional pressure on the NHS.

While these specialists are non-clinical, the programmes they deliver are clinically governed by a multidisciplinary team to ensure safety, efficacy, and alignment with best practice. Their expertise in physical activity enables them to offer tailored support that helps individuals to manage their conditions sustainably.

The Joint Pain Programme provides participants with two, one-hour group sessions per week for 12 weeks. Participants are offered free access to our Nuffield Health facilities for an additional 12 weeks of independent exercise to maintain these benefits and encourage long term behaviour change. Each structured session, led by a Rehabilitation Specialist, comprises a range of different exercises based on the core modalities of training: cardiovascular health, mobility, stability, and strength.



The Long-Term Conditions Programme

Nuffield Health's Long-Term Conditions Programme applies the same principles that made the Joint Pain Programme effective: structured, tailored exercise and education delivered by an expert workforce of Rehabilitation Specialists. The programme is currently open to people living with one or more long-term conditions who are suffering from chronic pain, long term fatigue and breathlessness.

At present, the programme is live at 10 Research and Development sites. These sites will provide MMU with real time data to test, learn, and adapt the intervention in order to bolster the evidence base for the programme and ensure scalability.

Over the next three years, Nuffield Health will provide 50,000 free places on this programme nationwide. With MMU as the research partner, Greater Manchester could be at the forefront of these innovations by embedding the programme into local area pathways, driving measurable health, social, and economic benefits, and establishing itself as a national leader in exercise-based intervention.

Leading the way in developing a new workforce

Nuffield Health and MMU will further develop, and accredit the training of the Rehabilitation Specialist, establishing a structured pathway for career progression and enhancing the role's credibility and appeal. This model could provide a new avenue for individuals seeking to work in health and rehabilitation.

Greater Manchester has the potential to become a national hub for training this workforce, serving as a centre of excellence where specialists can receive hands-on education and further develop their skills.

This means Greater Manchester can lead the way in shaping this new profession, setting the standard for rehabilitation training across the UK.



[Click here](#) for more information on the Long-Term Conditions Programme



RECOMMENDATIONS

To maximise the transformative health and economic benefits of structured exercise programmes, coordinated action is required.

The following recommendations set out how policymakers, NHS leaders and clinicians can support this model to scale the intervention to those who need it the most, fulfil the Government's ambitions of delivering care closer to home, and deliver measurable benefits to patients, the NHS and the wider economy.

Policymakers



Scale exercise-based programmes delivered by Rehabilitation Specialists and support national commissioning

How: use these programmes to deliver the Government's ten year plan ambitions of moving care into communities and embed programmes into national guidance and commissioning frameworks.

NHS leaders



Embed this model into population health approaches and maximise uptake of 50,000 free places offered by Nuffield Health and MMU

How: include structured exercise programmes in best practice guidance and ICB planning priorities and encourage NHS Trusts and PCNs to use existing referral systems to integrate these programmes within community rehabilitation pathways.

Clinicians



Refer eligible patients and champion prescribed exercise as a safe, effective treatment for people living with long-term conditions

How: integrate programme into patient referral pathways, highlight the programme through best practice guidance, and showcase clinical champions already endorsing movement as medicine.



APPENDIX: METHODOLOGY

The analysis for Greater Manchester was conducted collaboratively by Nuffield Health, Frontier Economics and MMU, following a structured and independently verified approach.

1. Data source and prevalence estimates

Desk-based research was undertaken to estimate the prevalence of long-term conditions across Greater Manchester. MSK conditions were specifically considered to identify the disease burden. Population-level statistics through the GP patient survey tool were used to calculate the total number of people who could potentially benefit from the intervention.

2. Programme participation assumptions

Assumptions were applied to estimate the proportion of individuals who would access and complete the programme. These assumptions in Table 2 (right) include uptake, adherence, and completion rates, based on observed delivery of the intervention to date.

The GP Patient Survey was used to refine the participant pool by identifying individuals who experience difficulties conducting day-to-day activities, did not have a healthcare plan for their condition, and have not had any conversation with their healthcare provider on management of their condition.

3. Application of the Nuffield Health Social Value Framework

Nuffield Health’s Social Value Framework was then applied to these population estimates. Based on 2023 calculations, the social value was estimated to be £9,108 per participant.

The framework quantifies outcomes across participant health-related quality of life, savings to the healthcare sector, indirect benefit to participants family and carers, and economic productivity.

4. Independent verification

The Social Value Framework has been developed and independently verified by Frontier Economics. Frontier Economics also reviewed and validated this analysis to ensure the methodology, assumptions, and outcomes are robust and transparent.

Projected impact of scaling Nuffield Health Joint Pain Programme in Greater Manchester

Table 2

Item	Discount rate	Estimated population	Source	Survey questions
Estimated total adult population of Greater Manchester		2,657,365	Total Manchester population Adult Manchester population (With applied 0.69% average growth rate from mid-2022 to mid-2025)	
Estimated burden of MSK in Greater Manchester	19.4% of adult population	515,527	Fingertips Department of Health and Social Care	
Population with functional limitations	81% of MSK population	417,576	GP Patient Survey - Analysis Tool	“Do any of your conditions or illnesses reduce your ability to carry out day-to-day activities?”
Identifying the unmet need (no care plan)	46% have had a conversation with their healthcare provider and 43% have agreed a plan with their provider. Therefore, 80% would benefit from the programme $1 - (0.46 \ 0.43) = 0.8$	334,061	GP Patient Survey - Analysis Tool	“Have you had a conversation with a healthcare professional from your GP practice to discuss what is important to you when managing your conditions or illnesses” “Have you agreed a plan with a healthcare professional from your GP practice to manage your conditions or illnesses?”
Nuffield Health conversation rate	Assuming 50-60% of all referrals are converted onto the programme (considering a mid-point i.e. 55% for this calculation)	183,734	Internal Nuffield Health assumptions	

Applying Nuffield Health social value to estimate the potential benefit we can generate in Greater Manchester (based on Nuffield health 2023 social value calculations)

Per participant value	9,108
Total value generated in Greater Manchester	£1.67bn

PARTNERS



Nuffield Health is the UK’s largest healthcare charity, dedicated to building a healthier nation

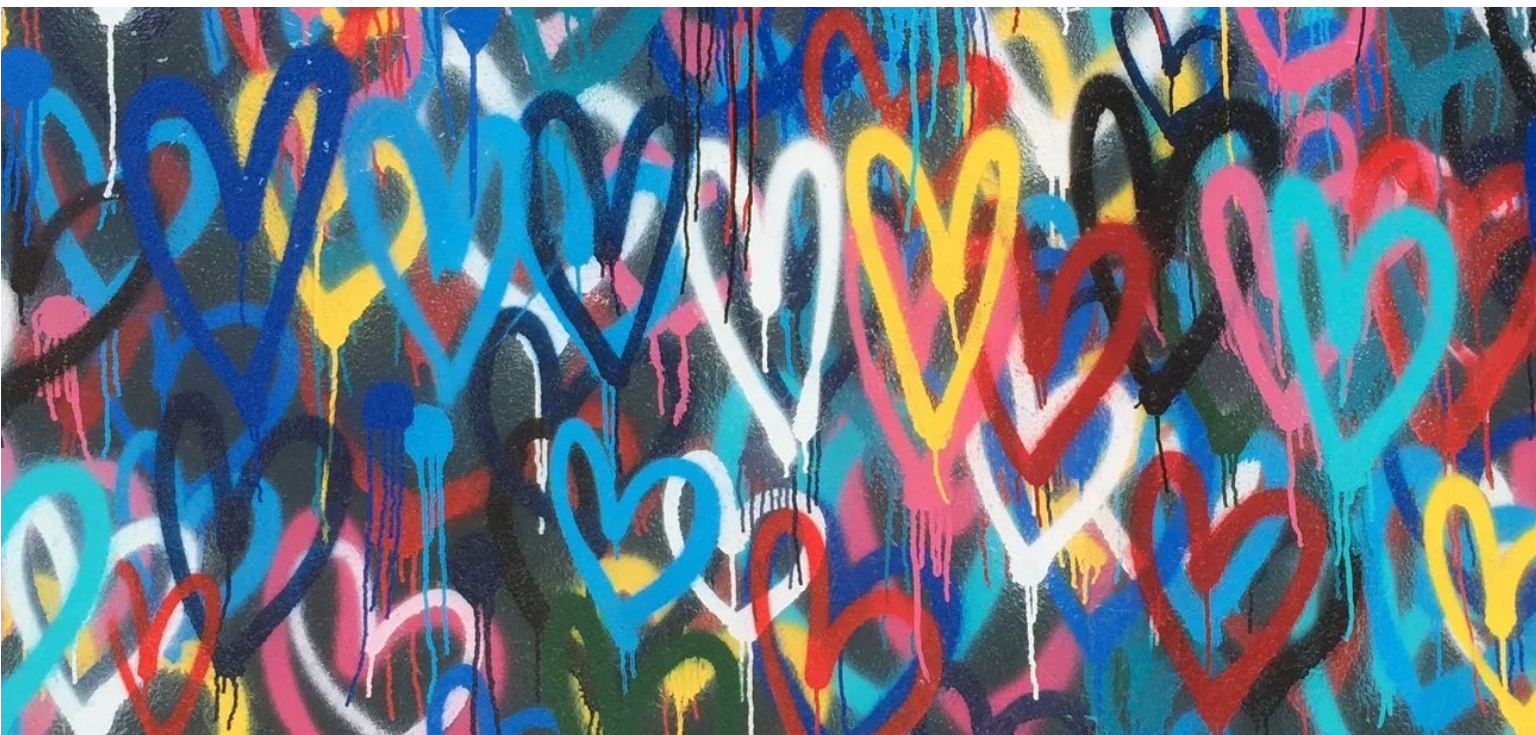
For over 65 years, we have been at the forefront of providing exceptional healthcare, including Health Assessments, physiotherapy, GP appointments and personal training, through our network of 36 hospitals and 110 Fitness and Wellbeing centres.

We work together as a team to help you achieve your health and wellbeing ambitions, championing free health and wellbeing programmes in local communities by giving more people the tools they need to live a healthy life. These programmes help people understand and improve their own health, from those living with joint pain, to helping rehabilitate people experiencing the long-term effects from COVID-19.



Manchester Metropolitan University’s world-class Institute of Sport champions everything sport can do from strengthening communities and building a healthier society, to inspiring the next generation, and pushing the limits of human performance

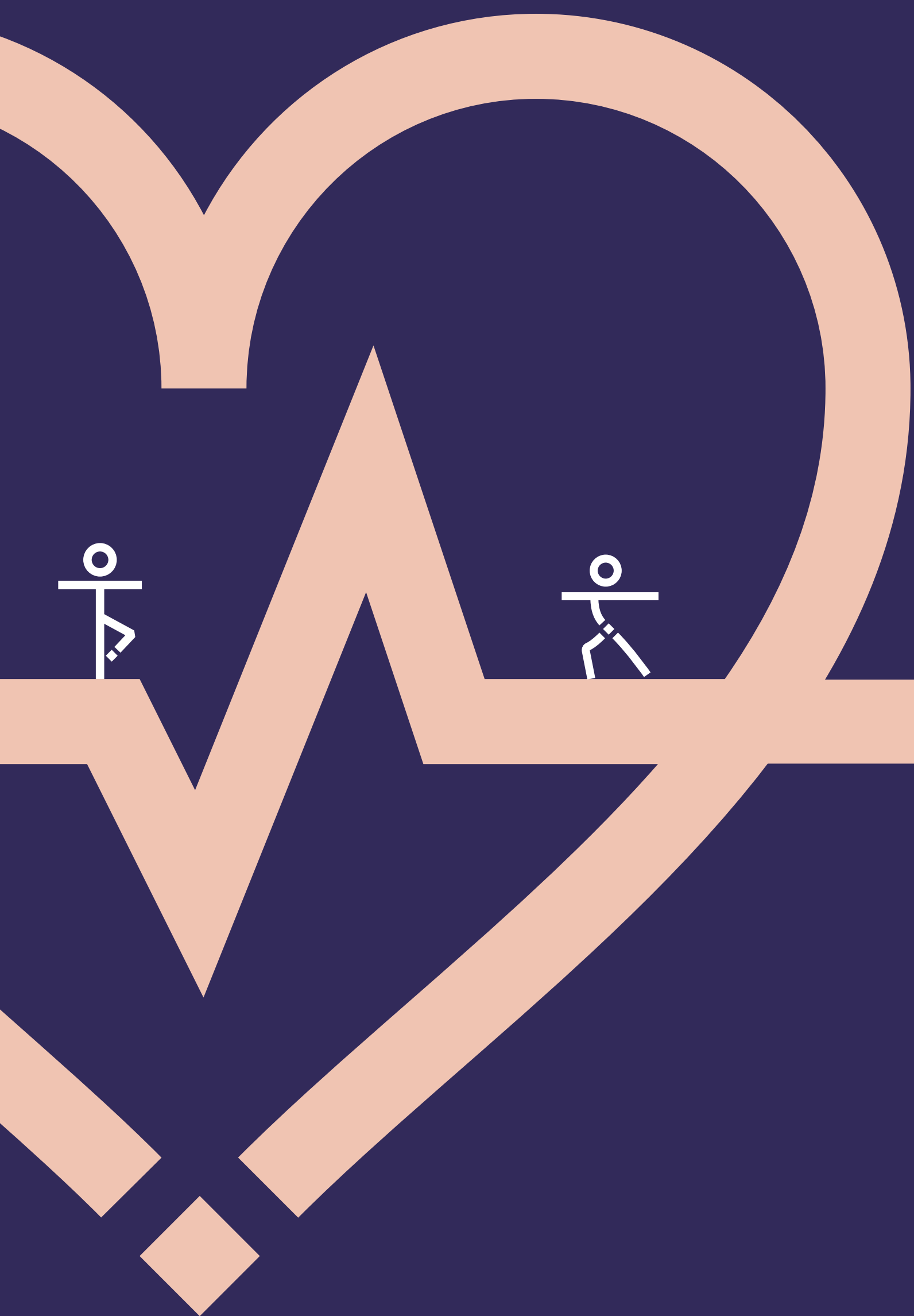
The team at the Institute are pioneers of sport research, cutting through disciplinary boundaries and drawing together leading minds from a range of research, themes, and specialisms. From the science of human movement to sport’s role in our society, the world is being explored through the lens of sport. This work is influencing policies at the highest level, by forging links across academia, government, and business to make change. The Institute forms part of a university that balances a 200-year heritage with a modern, ambitious approach.



Frontier Economics is an economic consultancy with energy, imagination and flair

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