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1 Introduction

Arup has been commissioned by Bristol City Council to develop an inclusive and sustainable economic growth strategy. One of the main areas of emphasis is a robust and informative baseline study.

The intention for this baseline document is threefold.

- Firstly, to provide the economic development team (and wider teams within Bristol City Council) with an additional reference document that could be used to help inform projects and investments
- Secondly, as a tool for Bristol City Council to use for engagement with stakeholders, at a local and regional level
- Thirdly, the information contained in this document could be used for providing evidence to central Government when negotiating packages to deliver future projects or programmes, which might include funding, incentives or policy and financial powers.

This baseline document will examine, in detail, a number of social and economic drivers in the city using data analysis. It will focus on any significant trends that could present either a threat or opportunity. The analysis will also interrogate the built environment including housing delivery, commercial development and access to open space and quality public realm.

The work will also seek to document Bristol in comparison to both the wider region and England, to understand the role the city plays in the local, regional and national economy. This will assist in identifying the opportunities and challenges facing Bristol, the report will describe Bristol’s USP alongside competition from other parts of the country.

It is important to note that this work will examine trends over time, not provide economic projections but rather it will provide evidence to inform the actions that will need to be taken to deliver inclusive and sustainable economic growth. Moreover, the work will also seek to emphasise what the role might be for the public sector, in times of austerity, alongside the role of the private, third and social enterprise sectors. This will help to ensure that public sector intervention is directed in areas where there is a market failure or, long term entrenched issues.

This report will also set out, where possible, spatial considerations including looking at areas in the city, which might be in particular need of investment to chime with the ambition to deliver inclusive growth and providing sustained opportunities for social mobility. The data will seek to look at the LSOA level, unless this is not available and then the data will be analysed at MSOA level – they will be referenced throughout. This baseline report is also supported by a thorough review of local and national policy including the recently published Industrial Strategy and local planning considerations, to name a few examples.
2 Overview of Bristol and the study area

Bristol is a highly successful city in the West of England. It has experienced higher population growth than any other core city in the UK with growth rates of 4.5% between 2011 and 2015\(^1\). In mid-2016, The city represented the 8\(^{th}\) largest city in England and Wales with a population of 454,200\(^2\). Economically, the city also demonstrates a strong performance with higher GVA per capita rates than England and the West of England\(^3\). Between 2004/05 and 2016/17 the employment rate has also been broadly increasing from 72% to 77% and the city has had a higher proportion of highly skilled occupations than the national average.\(^4\)\(^5\)

Bristol also shows a strong performance in Wellbeing/Happiness. According to the Happy City Index, Bristol was ranked first in the UK for city conditions including work, health, education, place and community factors\(^6\). The Bristol Quality of Life Survey (2016) has also revealed that “location, leisure facilities and parks” are among the best things about living in Bristol\(^7\).

Bristol also faces several significant challenges. Housing is less affordable relative to workplace/based earnings in comparison to other core cities and the UK. It has been identified that the city has an urgent need for more affordable housing.\(^8\)

Secondary schools in Bristol performed relatively poorly in comparison to the national average with students achieving lower grades than in all three types of entry, A Levels, Applied General and Tech Level.\(^9\)

With regards to the city’s environmental performance, Bristol also faces several challenges. The annual average levels of nitrogen dioxide are above government standards across central areas of Bristol. Traffic congestion and journey time unreliability make Bristol one of the most congested cities in Great Britain\(^10\).

---

1. Bristol City Council, 2017, Population of Bristol September 2017
2. Ibid.
3. Source: ONS
4. Source: ONS Annual Population Survey
7. https://www.bristol.gov.uk/documents/20182/33896/Results+of+quality+of+life+in+Bristol+survey+2015+to+2016/2a83bda4-fed5-400d-b638-2d2c72f67507
10. Source: Claircity
Bristol also aims to benefit from the newly formed West of England Combined Authority (WECA). In February 2017, the combined authority was established and includes Bath, North East Somerset, Bristol and South Gloucestershire. Whereas previously, decisions regarding key challenges including transport, housing or skills have been made by central governments, these decisions will now be increasingly made locally through the combined authority.\footnote{http://www.southglos.gov.uk/council-and-democracy/devolution/} WECA aims to address these key challenges and to stimulate economic growth.\footnote{https://www.westofengland-ca.gov.uk/about-us-2/}

This baseline report aims to provide an in-depth analysis of Bristol’s key social and economic drivers. The report begins with analysing key demographic statistics of Bristol such as population (change), diversity and health, before education and employment will be investigated. This is followed by an examination of Bristol’s labour market and the city’s current performance with respect to economic inclusion. Subsequently, both the residential and commercial property market will be analysed before the general business environment will be studied. The report ends with an investigation of the city’s amenities and environmental performance and an in-depth analysis of Bristol’s accessibility and commuting patterns.
3 Demographics

This section provides a profile of the city’s residents including their average age, family structure, skills and educational training and, wages.

3.1 Population (change)\(^{13}\)

In mid-2016, the population of the Bristol local authority area was estimated to be 454,200, making it the 8\(^{th}\) largest city in England and Wales.

Within Bristol the largest ward is Avonmouth and Lawrence Weston, with an estimated population of 21,200. The smallest is Hotwells and Harbourside, with a usual population of 5,400.

Bristol, like other industrial cities in the UK such as Manchester, Birmingham and Glasgow, experienced a post-war decline in population, however the city steadily started to grow again in the 1990s.

Population size has experienced significant increases in numbers throughout the 2000s, and since 2003/4 the population has grown every year by an average of 4,500. See Figure 1.

In 2004/5, when the A8 Accession countries joined the EU, there was an increase of around 9,700 residents, or a 2\(^{\circ}\) rise in the population\(^{14}\).

Natural change (births minus deaths) has contributed to the rising population trends more than net migration in recent years.

Unlike many places in the UK (where net international migration is the largest driver of population rise) between 2006 and 2016, natural change accounted for 65\(^{\circ}\) of the population change in the city.

\(^{13}\) Source for entire section (unless otherwise stated): Bristol City Council, 2017, Population of Bristol September 2017

\(^{14}\) ONS, Annual Population Survey 2004-2017
In 2016, the fertility rate in Bristol was 1.72 children per woman, compared to 1.82 for England and Wales.

From 2001 to 2016, births to non-UK born women increased from 13% to 29.5% as a percentage of total births. In 2015, the highest number of births to non-UK born mothers were to Somali-born mothers, and after that, to Polish-born mothers (see Figure 3).

---

15 Bristol City Council, 2017, Population of Bristol September 2017

16 Population estimates from the Office for National Statistics
If the trends continue, Bristol will surpass half a million residents by 2027, and will reach 545,600 by 2039. This equates to a 23.3% rise between 2014 and 2039, which compares to 16.5% in England for the same period.
While the population is expected to keep rising, the rate of change is expected to slow down. This has been put down to lower expectations of fertility levels, reduced international migration, as well as a slower rate of increase in life expectancy.

Figure 5: Annual population change 2001-2039

### 3.2 Age

Bristol has a relatively young population with a median age of 32.9, compared to 39.9 for England and Wales (see fig. 6). 19% of the city’s population is under the age of 16, compared to 13% who are aged 65 or over. 30% of the population is aged between 20 and 34, though this will be due in part to the students living in Bristol during term time.

The ward with the highest number of working age residents, between 16 and 64, is Central. Lawrence Hill has the highest number of children between 0 and 15. Westbury-of-Trym & Henleaze has the highest number of older people, aged 65 or over.

Between 2006 and 2016, the greatest change in population was in the 0 to 15 age bracket, at 17.4%. The growth in the number of under 5s in the same period is the fourth highest in the country after Leeds, Birmingham and Manchester, at around 6,500.

Between 2006 and 2016, those aged 65 or more rose by just 7.7%. This compares to 23% for the same period in England and Wales.

---

19 Source: Mid-Year Estimates and 2014 Sub-national population projections ONS
20 Bristol City Council, 2017, Population of Bristol September 2017
21 Ibid.
22 Ibid.
23 Ibid.
In terms of future projections, between 2014 and 2039, all age brackets are expected to increase in Bristol. Between 2014 and 2039, there will be a 25% increase in the number of those aged between 0 and 15, from 82,800 to 103,300. In the same period, the number of those aged over the age of 75 will increase from 28,200 to 45,300, a 61% increase. Of all those aged 65 and above, there will be an increase of about 43%.

The percentage change in the working age population, those aged 16 to 64, will be 19%, compared to an increase in the dependent population, those aged from 0 to 15, and from 65 and over, with an increase of 32% (see Table 1)

Table 1: Growth - Working age population

<table>
<thead>
<tr>
<th>Age Group</th>
<th>2014 pop</th>
<th>2039 predicted pop</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working age population</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16 to 24</td>
<td>68,400</td>
<td>81,700</td>
<td>19%</td>
</tr>
<tr>
<td>25 to 49</td>
<td>167,900</td>
<td>201,600</td>
<td>20%</td>
</tr>
<tr>
<td>50 to 64</td>
<td>64,600</td>
<td>74,700</td>
<td>16%</td>
</tr>
</tbody>
</table>

24 Source: ONS 2016 Mid-Year Population Estimates
25 Bristol City Council, 2017, Population of Bristol September 2017
26 Ibid.
Table 1 could be updated with 2016 data

### Population projections - local authority based by single year of age

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<table>
<thead>
<tr>
<th>Age</th>
<th>2016</th>
<th>2039</th>
<th>2041</th>
<th>Change between years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aged 16 to 24</td>
<td>70,926</td>
<td>83,727</td>
<td>84,290</td>
<td>18.0</td>
</tr>
<tr>
<td>Aged 25 to 49</td>
<td>174,443</td>
<td>207,571</td>
<td>208,802</td>
<td>19.0</td>
</tr>
<tr>
<td>Aged 50 to 64</td>
<td>66,153</td>
<td>71,946</td>
<td>74,567</td>
<td>8.8</td>
</tr>
<tr>
<td>Total aged 16 to 64</td>
<td>311,522</td>
<td>363,244</td>
<td>367,659</td>
<td>16.6</td>
</tr>
<tr>
<td>Aged 0 to 15</td>
<td>84,828</td>
<td>102,515</td>
<td>103,565</td>
<td>20.9</td>
</tr>
<tr>
<td>Aged 65-74</td>
<td>31,597</td>
<td>37,187</td>
<td>36,298</td>
<td>17.7</td>
</tr>
<tr>
<td>Aged 75 and over</td>
<td>28,019</td>
<td>41,781</td>
<td>43,560</td>
<td>49.1</td>
</tr>
<tr>
<td>Total dependant</td>
<td>144,444</td>
<td>181,483</td>
<td>183,423</td>
<td>25.6</td>
</tr>
</tbody>
</table>

In the last Census, it was found that students comprise around 8.3% of the population of Bristol.

More than 50,000 students are registered between University of Bristol and University of the West of England. They make up more than half the population in LSOAs Woodland Road, St James Barton and University in the Cabot ward, and University Halls in Stoke Bishop.

Around 17% of these students now come from overseas. 

### 3.3 Diversity

Between 2001 and 2011, the population of Bristol of those who do not identify as ‘White British’ has increased from 12% to 22%. 
The Black or Minority Ethnic (BME) population is distributed differently throughout the city. In Lawrence Hill for example, 55% of the residents identify as BME, and 37% were not born in the UK. However, in Whitchurch Park, just 4% of the population is BME. Of those born outside of the UK in 2011, 6,415 were from Poland originally, and 4,947 were born in Somalia. 29

Bristol’s population is becoming more ethnically diverse, with the number of people who are not ‘White British’ rising from 12% to 22% between 2001 and 2011. Of those foreign-born, Polish and Somalian residents are the largest populations. The increased diversity of the city is not evenly spread, with areas like Lawrence Hill having 55% BME residents, and areas like Whitchurch Park having just 4%. 30

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27 Bristol City Council, 2017, Population of Bristol September 2017
28 Ibid.
29 Ibid.
30 Ibid.
The Black and Minority Ethnic (BME) population in Bristol has increased from 8.2% to 16% between 2001 – 2011. This compares to around 34% BME population in Nottingham, 19% in Leeds, but only 12% in Glasgow.  

In Bristol, 1.5% of people over the age of 3 cannot speak English at all, or cannot speak English very well.

---

31 Source: 2011 Census Office for National Statistics
32 Bristol City Council, 2017, Population of Bristol September 2017
33 Source: Population estimates from the Office for National Statistics
Those identifying with a religion in Bristol fell between 2001 and 2011, ranking 7th in England and Wales. In the 2001 Census, 25% stated that they had no religion, rising to 37% in 2011. 47% of those living in Bristol in 2011 identified as Christian, and Islam rose from 2% in 2001 to 5% in 2011. \(^{34}\)

Between 2006 – 2016, the percentage of the working age population who are ethnic minorities rose from 9.1% to 14% (almost 18,000 people). Between 2006 – 2016, the ethnic minority population rose from 8.7% to 14.2\(^{35}\). 

The 2011 Census found that 940 people in Bristol reported themselves as being in a same sex relationship. \(^{36}\)

Central Government estimates that between 5% and 7% of the population are LGBT\(^{37}\), equating to between 22,000 and 31,000 people in Bristol. Similarly, the Gender Identity Research and Education Society (GIRES) suggest that the Transgender population of the UK is around 1%, equating to about 4,500 in Bristol.

### 3.4 Family structure

In 2011, there were 14,919 lone-parent households with dependent children (aged 0 to 15) in Bristol, around 8% of all households in the city\(^{38}\). The lone parent was not in employment in 7,110 of them. \(^{39}\)

Table 2: Percentage of lone parent households where the lone parent is not in employment\(^{40}\)

<table>
<thead>
<tr>
<th>City</th>
<th>Lone parent households</th>
<th>Lone parent not in employment</th>
<th>% of households</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bristol</td>
<td>14,919</td>
<td>7,110</td>
<td>48%</td>
</tr>
<tr>
<td>Leeds</td>
<td>24,368</td>
<td>9,800</td>
<td>40%</td>
</tr>
<tr>
<td>Birmingham</td>
<td>41,207</td>
<td>20,312</td>
<td>49%</td>
</tr>
<tr>
<td>Cardiff</td>
<td>10,881</td>
<td>5,000</td>
<td>46%</td>
</tr>
</tbody>
</table>


\(^{35}\) ONS annual population survey

\(^{36}\) [https://www.bristol.gov.uk/documents/20182/33159/Profile%20-%20LGB%20v5.pdf/451979eb-5517-4ce1-adbb-7b54b83cd650](https://www.bristol.gov.uk/documents/20182/33159/Profile%20-%20LGB%20v5.pdf/451979eb-5517-4ce1-adbb-7b54b83cd650)

\(^{37}\) Ibid.


\(^{40}\) Source: based on Bristol 2011 Census
11% of households in the city consisted of a single person aged over 65.41

The average size of a Bristol household was 2.3 people in 2011 (the same as the England and Wales average) with an average size of 2.6 bedrooms (just below the England and Wales average of 2.7).42

3.5 Health

3.5.1. Life expectancy

The average life expectancy for a man in Bristol is 78.4. This compared to 82.7 for females.43 In the UK, the average male life expectancy is 79.2, and 82.9 for females.44

At a ward level, there is significant disparity in terms of life expectancy in the city.

Data gathered by Public Health between 2013 and 2015 suggests that in Clifton, the life expectancy for a woman is 89.9, while in Southville it is just 77.7. In Lawrence Hill, the average life expectancy for a man is 74.6, while in Clifton Down, it is 83.3.45

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Liverpool</td>
<td>21,047</td>
<td>10,381</td>
<td>49%</td>
</tr>
<tr>
<td>Manchester</td>
<td>20,125</td>
<td>10,363</td>
<td>51%</td>
</tr>
<tr>
<td>Newcastle</td>
<td>8,868</td>
<td>42,05</td>
<td>47%</td>
</tr>
<tr>
<td>Nottingham</td>
<td>11,957</td>
<td>5,703</td>
<td>48%</td>
</tr>
<tr>
<td>Sheffield</td>
<td>16,610</td>
<td>6,977</td>
<td>42%</td>
</tr>
</tbody>
</table>

41 https://www.nomisweb.co.uk/census/2011/KS105EW/view/1946157348?cols=measures
43 Ibid.
The healthy life expectancy\textsuperscript{47} for men and women in Bristol is similar to that of England, at 63 years and 64 years respectively.\textsuperscript{48}

According to the Director of Public Health’s Annual Report in 2016, men living in the least deprived areas of the city live 16 years longer in ‘good health’ than their counterparts living in the most deprived areas. The gap is 17 years for women.\textsuperscript{49}

### 3.5.2. Disability

According to the 2011 Census, just under 17\% of those living in Bristol at the time had a health problem or disability that limited them in their day-to-day activities either a little or a lot. Of the Core Cities, Bristol ranks second for this, after Leeds. Glasgow and Liverpool had the highest percentage of their population limited a little or a lot by long term illness or disability, at 22\%. 8\% were limited a

\textsuperscript{46} Ibid.

\textsuperscript{47} Healthy Life Expectancy is the average number of years a person might expect to live in ‘good’ health during their lifetime.

\textsuperscript{48}https://www.bristol.gov.uk/documents/20182/1032244/Director+of+Public+Health+annual+report+2016/

\textsuperscript{49} Ibid.
lot in Bristol, and in Leeds, while 13% were limited a lot in Glasgow and Liverpool.\footnote{50} \footnote{51}

There is a slight gender gap, associated to women living longer, with 17.8% of women living with a disability in Bristol, compared to 15.6% of men.\footnote{52}

Filwood performed much worse than the city average, with 20.9% of residents living with a disability. In Filwood, according to the 2015 IMD, 35% are income deprived, and five LSOAs in the ward are ranked in the 100 most deprived LSOAs in England.\footnote{53} The lowest was Clifton East, with just 5.3%. This is attributed to the high number of students and younger age profile.

47.9% of disabled people aged over 16 had no qualifications according to the latest Census, compared to 13.4% of those without a disability. 16.5% of the disabled population had a degree or higher, compared to 36.7% without a disability. The reasons for this disparity are not clear cut. A 2016 survey carried out by the Association of Teachers and Lecturers found that 83% of respondents believed that students with Special Educational Needs and Disabilities were not receiving appropriate support in school. Bullying is also reportedly more prevalent among disabled students.\footnote{54}

Just 21.7% of those whose day-to-day activities are limited were in employment in 2011, compared to 69.7% of those whose activities are not limited.\footnote{55}
Figure 10: Economic Activity\textsuperscript{56}

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{economic_activity.png}
\caption{Economic Activity}
\end{figure}

\textsuperscript{56}Ibid.
3.5.3. Mortality

Infant mortality had been rising from 2009 to 2014, however between 2013 and 2015, it was at 3.4 deaths per 1,000, similar to the England average (3.9 per 1,000). Bristol has one of the lowest infant mortality rates compared to the English Core Cities. 58

The four main causes of early death are cancer, cardiovascular diseases, respiratory diseases and liver disease. On average between 2011 and 2015, 439

57 Source: ONS 2011 Census
58 JSNA 2016-17 data profile report
premature deaths a year were caused by cancer, and there were 230 premature deaths caused by cardiovascular disease, including strokes and heart attacks.  

Around a third of people living in Bristol die prematurely, before the age of 75, higher than the England average (see Figure 12).

Figure 12: Under 75 years old mortality rate for Bristol compared to the English average

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59 https://www.bristol.gov.uk/documents/20182/1032244/Director+of+Public+Health+annual+report+2016/b3dd70c2-72c8-4e2b-9fcb-a1aae6d08931
60 https://www.bristol.gov.uk/documents/20182/1032244/Director+of+Public+Health+annual+report+2016/
61 Source: Health and Social Care Information Centre, via Bristol City Council
Figure 13: Contribution of diseases to the differences in life expectancy between the most and least deprived areas in Bristol.\textsuperscript{62}

In 2014/15, 416 people were treated for alcohol misuse. Estimates suggest that of adult drinkers, 7.5% drinks at levels which harm either themselves or others.\textsuperscript{63}

Bristol has the highest number of opiate and/or crack users of the English Core Cities, estimated at between 4,190 and 5,980. Between 2013 and 2015, it was estimated that 6 deaths per 100,000 were caused by drug abuse, compared to 3.9 per 100,000 nationally. On the other hand, Bristol has one of the highest success rates in treating opiate addictions, with around 7.5% of patients leaving drug treatment successfully and not re-presenting to treatment within six months, compared to 6.7% nationally.\textsuperscript{64}

A survey of 15-year-olds in Bristol in 2014 found that 8% are regular smokers, 6% drink alcohol at least once a week, 47% do not eat enough fruit and vegetables and 83% don’t get enough physical activity.\textsuperscript{65}

The Active People Survey, carried out on behalf of Sport England in 2015 found that 62.2% of those in Bristol were achieving at least 150 minutes of physical activity per week, compared to a 57% average in England. However, again there is a disparity in these results between wards. In Hartcliffe and Withywood, just 48% of respondents to the 2015/16 Quality of Life Survey were getting the right level of exercise in a week, compared to 80% in Hotwells and Harbourside. 88% \textsuperscript{66}

\textsuperscript{62}https://www.bristol.gov.uk/documents/20182/1032244/Director+of+Public+Health+annual+report+2016/
\textsuperscript{63}Ibid.
\textsuperscript{64}https://www.bristol.gov.uk/documents/20182/34740/JSNA+2016+to+2017+final+version
\textsuperscript{65}Source: Health and Social Care Information Centre, via Bristol City Council
of respondents stated that their health had been good or fairly good in the past 12 months. 66

The Joint Strategic Needs Assessment (JSNA) 2016-2017 reported that almost six out of 10 adults in Bristol (57.8%) are overweight or obese, though this is significantly lower than nationally (64.8%) and the lowest of Core Cities. However, rates of children leaving primary school with excess weight have now reached 35.4%. And in some wards, such as Filwood, Avonmouth and Southmead, the prevalence of obesity is 5 to 15% above the national average.67

Figure 14: Obesity Rate in Bristol 2005-2013 68

Based on the 2011 Census, it was reported that more people in Bristol commute to work on foot or by bicycle than in any other local authority in England and Wales.69 However, the JSNA 2016-2017 suggests that the highest rates of active travel are concentrated amongst more affluent groups. 70

The overall suicide rate in Bristol is higher than that of England. Between 2013 and 2015, the mortality rate from suicide and injury of undetermined intent was 12.8 per 100,000 population, compared to an England average of 10.1 per 100,000. 71

Research carried out by the Diversity Trust between 2014 and 2015 found 61% of 400 LGBT+ respondents had sought help for anxiety or depression, and 32% had self-harmed. 59% had thought about or attempted suicide.72

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66 Bristol Unitary Authority Health Profile 2017, Public Health England
68 https://www.bristolisopen.com/bristols-obesity-map/
70 https://www.bristol.gov.uk/documents/20182/34740/JSNA+2016+to+2017+final+version
## 3.6 Wellbeing/Happiness

In 2016, Bristol was ranked 1st for ‘City Conditions’ by the Happy City Index (see Appendix B), incorporating work, health, education, place and community factors. It scored poorly for quality of work, mental health, safety and housing.\(^{73}\) It was also ranked first for sustainability. However, it only ranked fifth for equality, behind London, Birmingham, Nottingham and Manchester.\(^ {74}\)

The Happiness Pulse study, piloted in Bristol, also found that mental health followed by work satisfaction were the two largest contributors to wellbeing.\(^ {75}\)

Figure 15: Happy City Index\(^ {76}\)

### 3.7 Crime

The 2015/16 Quality of Life Survey\(^ {77}\) found that between 2013 and 2015, there had been a reduction in the number of respondents who felt that crime affected

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\(^{74}\) Ibid.

\(^{75}\) Ibid.

\(^{76}\) Ibid.

\(^{77}\) The Quality of Life survey is an extensive annual resident’s survey, capturing key public perception indicators for Bristol. It provides local insight on issues, opinions and lifestyles. Source: [https://www.bristol.gov.uk/documents/20182/33896/Results+of+quality+of+life+in+Bristol+survey+2015+to+2016/2a83bda4-fed5-400d-b638-2d2c72f67507](https://www.bristol.gov.uk/documents/20182/33896/Results+of+quality+of+life+in+Bristol+survey+2015+to+2016/2a83bda4-fed5-400d-b638-2d2c72f67507)
their day-to-day life, from 16% to 12%. Similarly, those who responded that anti-social behaviour was a problem in their local area had reduced from 30% to 24% and 70% of respondents in 2015 stated that they felt safe in their neighbourhoods after dark, up 3% from 2013. However, just 30% felt that the police and other public services were doing enough to tackle crime and anti-social behaviour, down from 37% in 2013. 78

The number of people who were a victim of crime has also been falling over the last decade. 79

Figure 16: Victims of crime in Bristol 80

Between 2012/13 and 2013/14, crimes which involved violence against the person rose by 8%, and sexual offences rose by 36% in line with England and Wales changes. Robbery fell by 25%, but possession of weapons offences rose by 32%. In 2013/14, around 7,000 domestic violence and abuse incidents were reported to the police. 81

78 https://www.bristol.gov.uk/documents/20182/33896/Results+of+quality+of+life+in+Bristol+Survey+2015+to+2016/2a83bda4-fed5-400d-b638-2d2c72f67507
79 Ibid.
80 Source: Bristol is open
81 https://www.bristol.gov.uk/documents/20182/35136/Crime+%26+Disorder+Strategic+Assessment.pdf/b56afc10-d3fb-49d4-b0c1-9f3521b2ae2ac
Figure 17: Crimes reported - Bristol 2015-2017

<table>
<thead>
<tr>
<th>Difference in reported crimes in Bristol between 2015 and 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Possession of weapons</td>
</tr>
<tr>
<td>Theft from the person</td>
</tr>
<tr>
<td>Drugs</td>
</tr>
<tr>
<td>Criminal damage and arson</td>
</tr>
<tr>
<td>Violence and sexual offences</td>
</tr>
<tr>
<td>Anti-social behaviour</td>
</tr>
</tbody>
</table>

0 200 400 600 800 1000 1200 1400 1600
Oct-17 Oct-16 Oct-15

Source: Avon and Somerset Constabulary

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82 Source: Avon and Somerset Constabulary
4 Education and employment

This section will look at the performance of schools, further education colleges and higher education in Bristol.

4.1 Early years and primary education

66% of children in Bristol at the Early Years Foundation Stage achieved a good level of development in 2016, up from 50% in 2013. Bristol is below the England average (69%) but just above the Core Cities average (65%).

There is a disparity in results between those students from the 30% most disadvantaged LSOAs, with 13% fewer of them achieving a Good Level of Development.

At Key Stage 1 (KS1) in 2016, the percentage of non-Special Educational Needs students reaching the expected standard were as follows:

Table 3: The percentage of non-Special Educational Needs students reaching the expected standard at KS1 in 2016.

<table>
<thead>
<tr>
<th>Subject</th>
<th>Bristol</th>
<th>England</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reading</td>
<td>71%</td>
<td>74%</td>
</tr>
<tr>
<td>Writing</td>
<td>62%</td>
<td>65%</td>
</tr>
<tr>
<td>Mathematics</td>
<td>70%</td>
<td>73%</td>
</tr>
<tr>
<td>Science</td>
<td>80%</td>
<td>82%</td>
</tr>
</tbody>
</table>

Girls outperform boys in all subjects, with the biggest gap in writing.

In every subject, there are fewer students who are eligible for Free School Meals achieving the expected standard at KS1. However, compared to the rest of England, those in pupils eligible for Free School Meals in Bristol are more likely to achieve the expected standard:

Table 4: The percentage of pupils eligible for Free School Meals students reaching the expected standard at KS1 in 2016.

<table>
<thead>
<tr>
<th>Subject</th>
<th>Bristol</th>
<th>England</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reading</td>
<td>65%</td>
<td>60%</td>
</tr>
<tr>
<td>Writing</td>
<td>58%</td>
<td>50%</td>
</tr>
</tbody>
</table>

83 all information in this section comes from https://democracy.bristol.gov.uk/documents/s11147/Education%20Performance%20Report%202016.pdf unless stated otherwise
At Key Stage 2 (KS2) in 2016, the percentage of all pupils reaching the expected standard was as follows:

Table 5: The percentage of all pupils reaching the expected standard at KS2 in 2016.

<table>
<thead>
<tr>
<th>Subject</th>
<th>Bristol</th>
<th>England</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reading</td>
<td>66%</td>
<td>66%</td>
</tr>
<tr>
<td>Writing</td>
<td>73%</td>
<td>74%</td>
</tr>
<tr>
<td>Mathematics</td>
<td>68%</td>
<td>70%</td>
</tr>
<tr>
<td>Science</td>
<td>78%</td>
<td>81%</td>
</tr>
</tbody>
</table>

Figure 18: The percentage of all pupils from different ethnic background achieving the expected standard at KS2 in reading, writing and maths combined in 2016.
Figure 19: Ofsted ratings for primary schools

Bristol is just ahead of the England average when it comes to primary schools categorised by Ofsted as ‘good’ or ‘outstanding’ in 2016.

Figure 20: Ofsted ratings, statistical neighbours, primary schools
4.2 Secondary education

Secondary schools in Bristol performed relatively poorly in the first year of the new Progress 8 score.\textsuperscript{84} The national average score was -0.03, indicating a negative progress between the same pupils’ results at KS2 and GSCE level. Bristol came 6\textsuperscript{th} out of the 8 Core Cities in 2016 for Progress 8.

The Bristol average was -0.18, the lowest of which was Merchants’ Academy, while the best performing school was Bristol Metropolitan Academy. Fig. 21 shows the difference between disadvantaged and non-disadvantaged pupils progress.

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\textsuperscript{84} Progress 8 was introduced in 2016 to capture the progress a student makes between the end of primary school and the end of secondary school. Attainment 8 measures achievements across eight qualifications, normally GCSE levels. See this link for more information.
The gap is higher than England average, and has increased from 30% in 2012 to 34% in 2016 (see Table 6).

85 Source: KEYPAS
Table 6: Trend in disadvantaged performance gap overall

<table>
<thead>
<tr>
<th></th>
<th>Bristol</th>
<th>England</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>32.1%</td>
<td>62.5%</td>
</tr>
<tr>
<td>2013</td>
<td>32.8%</td>
<td>64.3%</td>
</tr>
<tr>
<td>2014</td>
<td>34.0%</td>
<td>67.1%</td>
</tr>
<tr>
<td>2015</td>
<td>30.3%</td>
<td>67.5%</td>
</tr>
<tr>
<td>2016</td>
<td>29.5%</td>
<td>63.4%</td>
</tr>
</tbody>
</table>

Bristol’s average Attainment 8 score per pupil in 2016 was 47.5. Ten out of 21 secondary schools in Bristol scored above the national average score of 48.2 per pupil. Bristol ranked last out of the 16 local authorities in the South West.

At GCSE level, overall girls continue to achieve higher grades than boys.

Between the age of 16 and 19, Bristol students are achieving lower grades than the national average in all three types of entry, A Levels, Applied General and Tech Level. In 2016, the England Average Point Score for A Level entry was 31.52, compared to Bristol’s 30.04, though Bristol had a slightly higher average than the Core Cities at 29.

Figure 22: Average Points Score per entry (APS)

---

86 Source: DfE Performance Tables (21/06/2016), KEYPAS
87 Source: SFR 49 - 2016
95% of Bristol’s secondary schools were marked ‘good’ or ‘outstanding’ by Ofsted in 2016. This is far higher than the England average, just below 80%, and higher than the city’s statistical neighbours.

Figure 23: Ofsted ratings, statistical neighbours, secondary schools

Figure 24: Ofsed Ratings 2011-2016 secondary schools

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88 www.gov.uk Ofsted school inspections outcomes
89 www.gov.uk Ofsed school inspections outcomes
4.3 Further education

In October 2016, 11% of 16-17-year olds in the City of Bristol were Not in Education, Employment or Training (NEET) or their activity was not known. This compares to 7% in England as a whole, and places Bristol in the 5th quintile nationally.

76% of those in education or training were in full time education, 9% were taking part in apprenticeships and 3% were in another form of training. 10% of 16-17 year olds who had previously been NEET in Bristol were re-engaging in EET, up 1.4% from the previous year, compared to an England average of 8%, placing Bristol in the 2nd quintile nationally.

In 2016, the number of apprenticeship starts per 10,000 in Bristol was the lowest of the English Core Cities at 71, compared to Liverpool, the highest ranked, with 110 (see Fig.25).

Figure 25: Apprenticeship Starts per 10,000 of total population in the English Core Cities from 2012/13 to 2016/17

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90 Source: Department for Education
4.4 Higher Education Needs to include data on HE participation Rates

University Attendance Rates, by Ward, for Young People Resident in Bristol.

The attendance rate is defined as the proportion of young people (15 year olds) who entered HE by the age of 19 during the 2005-06 and 2010-11 academic years.

The proportions of young people in the UK and Bristol that attended university were 34.7% and 25.2% respectively.

There are 13 Bristol wards with attendance rates less than half the UK average. Attendance rates for the five worst and best performing wards in Bristol are:

<table>
<thead>
<tr>
<th>Ward</th>
<th>Attendance Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worst</td>
<td></td>
</tr>
<tr>
<td>Fillwood</td>
<td>5.3%</td>
</tr>
<tr>
<td>Hartcliffe</td>
<td>8.5%</td>
</tr>
<tr>
<td>Southmead</td>
<td>9.0%</td>
</tr>
<tr>
<td>Whitel church Park</td>
<td>9.8%</td>
</tr>
<tr>
<td>Bishopsworth</td>
<td>12%</td>
</tr>
<tr>
<td>Best</td>
<td></td>
</tr>
<tr>
<td>Clifton</td>
<td>83.5%</td>
</tr>
<tr>
<td>Clifton East</td>
<td>81.0%</td>
</tr>
<tr>
<td>Stoke Bishop</td>
<td>76.5%</td>
</tr>
<tr>
<td>Redland</td>
<td>71.0%</td>
</tr>
<tr>
<td>Cotham</td>
<td>70.7%</td>
</tr>
</tbody>
</table>

Legend

- Bristol UA boundary
- Ward boundaries
- University Attendance Rate
- Proportion (%) of young people attending
  - 5% to 10%
  - 10% to 15%
  - 15% to 20%
  - 20% to 25%
  - 25% to 30%
  - 30% to 35%
  - Over 50%

Source: http://www.hefce.ac.uk/walhe/do/wp/research/polar/
Ref: SQU-BCC-Policy-Research-12-14_00105

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The University of Bristol (U of B) and the University of the West of England (U of WE) had a combined total of around 50,000 students in 2015/2016.  

Based on leavers in 2012/2013, a survey in 2016/2017 found that 76% of graduates from the U of B were in some form of work, and 84.5% from the U of WE. This compares 82% for all Higher Education providers in England.

In 2016, 48.5% of the city had an NVQ4 level and above, compared to the Great Britain average of 38%. This is the highest level of all the core cities (see Fig 26). The percentage of those without qualifications is 6%, the lowest of the core cities (see Fig. 27).

Figure 26: The percentage of the working age population of the Core Cities who have an NVQ4 level qualification or above

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92 Ibid.

93 ONS annual population survey, Jan 2016-Dec 2016, https://www.nomisweb.co.uk/reports/lmp/la/1946157348/subreports/quals_compared/report.aspx?

94 ONS annual population survey, Jan 2016-Dec 2016
Figure 27: The percentage of the working age population of the Core Cities who have no qualifications\textsuperscript{95}

<table>
<thead>
<tr>
<th>% of population with no qualifications (January 2016 to December 2016)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birmingham</td>
</tr>
<tr>
<td>0</td>
</tr>
</tbody>
</table>

At U of B, 61.4\% of students were educated in the state system\textsuperscript{96}. At the U of WE, 93.8\% of students came from a state school.\textsuperscript{97} Times Higher Education ranked the University of Bristol 9\textsuperscript{th} in the UK in their World University Rankings for 2018.\textsuperscript{98} U of B is home to a number of specialist research institutes including: The BioDesign Institute, which researches synthetic biology and innovation; the Composites Institute, which has strong links to industry; the Poverty Institute, who provide governments, NGOs and the private sector with practical solutions to ending poverty; and the Quantum Information Institute, helping to develop the next generation of quantum scientists and engineers.\textsuperscript{99} U of B was ranked first in the UK for Social Policy and Administration, 4\textsuperscript{th} for Anatomy and Physiology, and 5\textsuperscript{th} for General Engineering.\textsuperscript{100} The two universities have partnered to develop the Bristol Robotics Laboratory, an internationally recognised Centre of Excellence and the largest of its kind in the UK.\textsuperscript{101} They are both partners with the West of England LEP, developing one of the first University Enterprise Zones in the UK. The West of England

\textsuperscript{95} ONS annual population survey, Jan 2016-Dec 2016
\textsuperscript{96} https://www.theguardian.com/education/2009/may/10/universityguide-university-bris}
\textsuperscript{97} https://www.theguardian.com/education/2009/may/10/universityguide-university-west-england-bris}
\textsuperscript{98} https://www.timeshighereducation.com/world-university-rankings/2018/world-ranking#!/page/0/length/25/sort_by/rank/sort_order/asc/cols/stats
\textsuperscript{99} http://www.bristol.ac.uk/research/institutes/
\textsuperscript{100} https://www.theguardian.com/education/ng-interactive/2017/may/16/university-league-tables-2018
\textsuperscript{101} http://www.brl.ac.uk/aboutus.aspx
University Enterprise Zone is expected to create more than 500 new jobs and boost the local economy by around £50 million.\(^{102}\)

In 2013/2014 to 2014/2015, the percentage of higher education students who returned to Bristol having graduated in order to work in the city was 50%. This compares to 74% in London, 58% in Manchester, 53% in Birmingham and 52% in Newcastle.\(^{103}\)

### 4.5 Employment

Bristol has one of the highest employment rates of the Core Cities, just above that of Leeds (see Figure 28).

The employment rate has been broadly increasing for the last 12 years, from 72% in 2004/05 to 77% in 2016/17.

Figure 28: Employment Rate for Core Cities 2004-2016/17\(^{104}\)

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\(^{102}\) UWE LEP. [http://westofenglandlep.co.uk/news/university-enterprise-zone](http://westofenglandlep.co.uk/news/university-enterprise-zone)


\(^{104}\) ONS Annual Population Survey
As of 2016, there were around 265,000 people in employment in the city. Of those, about 48,000, or 18%, were in the public sector, and the rest were in the private sector. This percentage is comparable to many of the core cities, including Manchester, Leeds and Nottingham.\textsuperscript{105}

16\% of workers in Bristol are employed in Human Health and Social Work Activities, and 14\% are involved in Wholesale and Retail Trade, including the Repair of Motor Vehicles and Motorcycles. These are broadly similar to the rest of the Great Britain at 13\% and 15\% respectively.\textsuperscript{106} In Bristol, 1.8\% of jobs are in the civil service, comparable to Great Britain as a whole at 1.4\%.

Figure 29: The percentage of all persons in employment over the age of 16 according to their Standard Occupation Classification 2010, for Bristol, the South West and Great Britain\textsuperscript{107}

<table>
<thead>
<tr>
<th>Area</th>
<th>SOC10 Major Groups 8-9</th>
<th>SOC10 Major Groups 6-7</th>
<th>SOC10 Major Groups 4-5</th>
<th>SOC10 Major Groups 1-2-3</th>
<th>Sum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Great Britain</td>
<td>17</td>
<td>16.8</td>
<td>20.7</td>
<td>45.5</td>
<td>100.0</td>
</tr>
<tr>
<td>South West</td>
<td>16.2</td>
<td>16.3</td>
<td>21.6</td>
<td>45.9</td>
<td>100.0</td>
</tr>
<tr>
<td>Bristol</td>
<td>14.0</td>
<td>13.4</td>
<td>14.8</td>
<td>57.7</td>
<td>99.9</td>
</tr>
</tbody>
</table>

Incorrect data in Fig. 29, total should equal 100\%

\textsuperscript{105} https://www.nomisweb.co.uk/reports/lmp/la/1946157348/report.aspx

\textsuperscript{106} https://www.nomisweb.co.uk/reports/lmp/la/1946157348/report.aspx

\textsuperscript{107} Source: ONS annual population survey, July 2016 to June 2017
Fig 30 appears to be using employee jobs rather than people in employment; needs clarification

Figure 30: Occupational Location Quotients for Bristol compared to England

<table>
<thead>
<tr>
<th>Occupational Location Quotients for Bristol compared to England (2016)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Programming &amp; broadcasting activities</td>
</tr>
<tr>
<td>Insurance, reinsurance &amp; pension funding</td>
</tr>
<tr>
<td>Activities auxiliary to financial services and insurance activities</td>
</tr>
<tr>
<td>Legal and accounting activities</td>
</tr>
<tr>
<td>Financial service activities, except insurance &amp; pension funding</td>
</tr>
<tr>
<td>Repair of computers &amp; personal or household goods</td>
</tr>
<tr>
<td>Advertising &amp; market research</td>
</tr>
<tr>
<td>Information service activities</td>
</tr>
<tr>
<td>Human health activities</td>
</tr>
<tr>
<td>Movie &amp; television production, sound recording &amp; music activities</td>
</tr>
<tr>
<td>Telecommunications</td>
</tr>
<tr>
<td>Services to buildings &amp; landscape activities</td>
</tr>
<tr>
<td>Construction of buildings</td>
</tr>
<tr>
<td>Activities of head offices; management consultancy activities</td>
</tr>
<tr>
<td>Scientific research &amp; development</td>
</tr>
</tbody>
</table>

Bristol has a high occupational location quotient for programming and broadcasting activities compared to the rest of England, indicating a particular specialism in that sector. The occupation where Bristol seems to be the least specialist by this measure, is scientific research and development.

There are around 1,400 third sector organisations in Bristol, who employ 12,000 people full time, and work with more than 100,000 volunteers. Voscur, the agency which supports the Voluntary, Community and Social Enterprise sectors in Bristol, estimated that in 2011/2012 the voluntary sector provided about £40 million in value to BCC.

In Bristol, 80% of males aged 16-64 are in employment, compared to 75% of females of working age. This is broadly similar to the percentages for the South West and Great Britain.

108 Source: ONS Business Register and Employment Survey 2016
110 https://www.nomisweb.co.uk/reports/Lmp/la/1946157348/report.aspx
What does Bristol’s low-skilled labour market look like?

**One in four of Bristol’s jobs are in low-skilled occupations.** This share is falling over time, with the city increasingly specialising in high-skilled work. Of these low-skilled jobs, almost a quarter are sales assistant and cashier roles, 13% are road transport drivers and 10% are in cleaning. The major employers of these workers are retail, transport, accommodation and food. Only 5% are employed in construction and 7% in manufacturing, as these industries mainly provide mid-skilled jobs.

**Low-skilled work is concentrated in central Bristol and Avonmouth.** But employment in the latter is more concentrated in process, plant and machine operatives (50% of low-skilled jobs) than the city centre which instead contains a concentration of retail and sales jobs (42% of low-skilled jobs).

**A Black or minority ethnic (BME) Bristol resident is more likely to be employed in a low-skilled job than a White resident.** Gender does not affect a resident’s chance of being in low-skilled work, but it does impact the type of low-skilled role they are most likely to do. 90% of process, plant and machine operatives are male, whereas 63% of sales and customer services roles are taken by women.

A third of those employed in low-skilled work have qualifications equivalent to good GCSEs or A-Levels and 13% have a higher education qualification. Only 40% of these workers have not achieved good GCSEs or equivalent. A quarter of mid-skilled jobs are done by workers with this lower level of qualifications.

**Bristol’s more deprived areas tend to have a high concentration of residents in low-skilled work.** In Filwood, Avonmouth and Whitchurch Park around 40% of residents are in these roles. In contrast, this share falls to around 10% in Henleaze, Clifton and Clifton East.

**But the pattern of mid- and high-skilled work in these areas varies a lot.** Wards in the south of the city are dominated by employment in skilled trades, while central areas have many high-skilled workers living alongside low-skilled workers. In Lawrence Hill 37% of residents are in high-skilled roles, compared with only 21% of residents in Hartcliffe.

**Low-skilled jobs are not always the lowest paid.** Some mid-skilled roles, such as care, leisure and administrative jobs, are lower paid than some lower-skilled jobs, such as plant and machine operatives.

**Accessing jobs can be difficult for residents of areas of deprivation due to the cost and availability of public transport.** In addition, lack of training provision means these roles are often long-term careers rather than a role which leads to progression to higher-skilled and better paid work.
How sustainable are these patterns of employment? How is low-skilled employment likely to change?

Many low-skilled jobs are likely to decline due to changes in the world of work such as automation, technology and globalisation. Roles such as elementary storage, retail cashiers, metal forming and printing trades are particularly vulnerable. On the other hand, some jobs are likely to grow in importance within the city’s labour market, such as teachers, health and social care managers, fitness professionals and artists.

This means that those in low-skilled employment are most vulnerable to potential job losses unless they can adapt, such as through retraining, to access the jobs which become more common in the future economy.

How can city policy respond to these coming changes?

The city will need to prepare for labour market changes by giving young people the skills they need to access the most resilient jobs. This will mean both raising skill and qualification levels and adapting teaching to meet evolving demands from employers.

In addition, the skills of the current workforce will need to adapt which will require provision of retraining and support. For some, adapting will be difficult or impossible and in these cases compensation will need to be provided to support them through job losses.

Certain communities will be most in-need of this support. Areas with high shares of residents in low-skilled work, such as Lawrence Hill and Hartcliffe, will be most vulnerable if employment opportunities in this part of the labour market decline.
Almost half of Bristol’s workforce is in high-skilled occupations – only 23% are in low-skilled:

- Low-skilled occupations account for just less than a quarter of Bristol’s workforce. A higher share is in both high-skilled occupations (46%) and mid-skilled occupations (30%)

Figure 31: Share of jobs in Bristol in each occupation skill level, Census 2011, workplace

[Diagram showing occupation skills distribution]

Breaking this down further shows that:

- 10% of Bristol’s workers are employed in elementary occupations
- 6% are in process, plant and machine operations
- And 8% are in sales and customer services roles

Figure 32: Share of jobs in Bristol in each small occupation group, Census 2011, workplace

[Diagram showing small occupation groups]

These are small shares of the workforce compared to some other occupations. 22% of Bristol’s workforce were in professional roles in 2011, and 15% were in associate professional and technical roles.

And looking just at low-skilled occupations, and breaking them down further, shows that:

- **38% are in elementary admin or service occupations** while only 4% are in elementary trade

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111 Census 2011 analysis by Centre for Cities; low skilled occupations defined as SOC 2010 7, 8 & 9
- 15% are transport and mobile machine drivers/operatives
- 27% are in sales, while a smaller 8% are in customer services

Figure 33: Share of low-skilled jobs in each single occupation, Census 2011, workplace

And finally, breaking this down even more gives you the patterns shown in Figure 34.

Figure 34: Share of low-skilled workers in each sub-role, Census 2011, workplace

Some stand out figures from this are:

- Almost a quarter of low-skilled occupations are in Sales Assistants and Retail Cashiers roles
- 13% are road transport drivers
- 10% are in elementary cleaning occupations
In terms of changes over time, the figures show that:

- **The share of jobs in mid-skilled occupations has fallen from 28% to 24%**
- But the share in low-skilled occupations has also fallen, from 23% to 18%
- The share in high-skilled occupations has grown from 49% to 58%

This suggests that there has been a growth in high-skilled jobs and a corresponding decline in all lower skilled jobs (mid and low).

Figure 35: Share of workers in each occupational group, 2011 and 2017, APS, workplace

Figure 36 shows almost half of low-skilled (LS) occupations were within the ‘Distribution, hotels and restaurants’ industry group. This is equivalent to 25,300 workers, so it is a very significant employer of LS workers.

- 13% of LS occupations are in Transport and Communications
- 15% are in Finance, real estate and professional/admin
- 10% in Public admin, education and health

Figure 36: Share of workers in low-skilled occupations in each industry, Census 2011, workplace

These broad industry groups include

- G, I (Distribution, hotels and restaurants)
• Wholesale and retail trade
• Repair of motor vehicles and motorcycles
• Accommodation and food service activities

• H, J (Transport and communications)
  o Transport and storage
  o Information and communication

• K, L, M, N (Financial, Real Estate, Professional and Administrative activities)
  o Financial and insurance activities
  o Real estate activities
  o Professional, scientific and technical activities
  o Administrative and support service activities

On the surface it is interesting that such a large share is in the Finance/real estate category, but actually this is because this group includes administrative roles and other low-skilled roles such as cleaners.

Construction is often spoken about when discussing low-skilled workers, but this shows that this industry only accounts for 5% of low-skilled occupations. So it is less significant than thought. This is mostly because many of the construction workers perceived to be low-skilled are more accurately categorised as mid-skilled occupations because of their training.

Figure 37: Share of workers in mid-skilled occupations in each industry, Census 2011, workplace

• Now only 13% are employed in Distribution, hotels and restaurants, and instead the largest employer of mid-skilled workers is Public admin, education and health (37% of MS workers).
• Interestingly, 13% of MS workers are in construction – approx. 9,000 workers – as noted above
• 20% are in finance, real estate and admin

Mid-skilled occupations are defined as 4, 5 and 6 SOC 2010 codes, which includes:

4. Administrative and secretarial occupations
5. Skilled trades occupations
6. Caring, leisure and other service occupations
For high-skilled workers the patterns shift again. A third (31%) are employed in finance, real estate and admin, and 38% are employed in Public admin, education and health. 10% are in Distribution, hotels and restaurants.

Figure 38: Share of workers in high-skilled occupations in each industry, Census 2011, workplace

High-skilled occupations are defined as 1, 2, 3 SOC 2010 codes, which includes:

1. Managers, directors and senior officials
2. Professional occupations
3. Associate professional and technical occupations

Turning this around, this chart looks at the occupational make-up of each industry group.

Figure 39: Share of each industry’s jobs in each occupational level, Census 2011, workplace

It shows that the industry group with the highest share of LS workers is Distribution, hotels and restaurants, then transport and communications, then agriculture and then manufacturing. **Construction is predominantly made up of mid-skilled workers.**

Some interesting findings:

- We saw above that 15% of LS workers are employed in Finance industry group, but the Figure above shows that these LS workers only account for 10% of the
employees in this industry group. So, they are not significant to the industry. A similar pattern occurs with public administration.

- These two industry groups are very large employers overall in Bristol, and this is why they employ lots of LS workers, not because they predominantly made up of LS workers.

This second chart helps to explain this.

Figure 40: Share and number of jobs in each industry in each occupational level, Census 2011, workplace
This map shows the share of jobs in each MSOA are low-skilled occupations. It shows that the MSOAs most dominated by LS employment are near AvonMouth and a few other South and East locations.

Figure 41: Map showing share of jobs in each MSOA which are LS, Census 2011 workplace

The next figure is perhaps more useful in understanding spatial patterns of low-skilled employment. It shows the number of low-skilled occupations in each MSOA. Again, there is a concentration of low-skilled employment in Avonmouth, but there is also a concentration in Bristol city centre (both dark blue).

Figure 42: Map showing number of LS occupations in each MSOA, Census 2011 workplace
The bar chart at figure 43 shows the share of each type of occupation (low-skilled, mid or high-skilled) which are done by workers with each level of qualification. It shows:

- Almost half of LS occupations are done by those with low skills. Over half are done by those with higher skills.
- 34% have mid-levels, but 13% have high-skills
- On the other hand, 25% of mid-skilled jobs and 8% of high-skilled jobs are done by those with low-skills
This means that when thinking about ‘low-skilled jobs’, the workers brought to mind should be those with either low qualifications or mid qualifications – this means they have qualifications ranging from none to good GCSEs.

These skills levels are defined using the UK Government’s standardised qualification levels.¹¹²

- Low qualifications include 0 and 1: e.g. no qualifications, entry level qualifications, lower grade GCSEs
- Mid qualifications include 2 and 3: e.g. high grade GCSEs and A-Levels
- High qualifications include 4 and above: higher education certificates, degrees, PHDs

In absolute terms, the next chart shows that almost 23,000 workers with low skills are in LS occupations in Bristol and 19,000 mid-skilled workers are in LS occupations. A significant number of workers with low-skills are employed in MS occupations – 17,600 workers.

The next chart shows distance travelled to work for each level of occupation.
The patterns do not vary hugely across the different types of occupations but there is a broad trend that the lower skilled the occupation, the shorter the distance travelled into work.

- 53% of those in LS occupations travel less than 5km whereas this is only 41% for those in HS occupations.
- On the other hand only 12% of LS occupation workers travel 10-30km while 18% of HS occupation workers travel these longer distances.
- Interestingly, a higher share of HS occupations work from home than the lower level occupations.

Figure 45: Distance travelled to work by occupation, Census 2011 workplace

The chart below shows that the type of LS occupation determines what your commuting patterns look like.

- Those in sales and customer services and elementary occupations travel less far to work than those in process, plant and machine operation.
- Only 36% of those in machine operation travel less than 5km. Instead, 19% travel 10-30km and 14% have no fixed place of work.
- Only the other hand only 10% of sales jobs are 10-30 km commute and only 3% don’t have a fixed place

Figure 46: Distance travelled to work for each occupation, %, Census 2011 workplace
Figure 47: Distance travelled to work for each occupation, numbers, Census 2011 workplace

Resident-based data is used to show where workers live rather than where they work. This means that we exclude from this analysis anyone who works in Bristol (LA) but lives outside, and instead concentrate on understanding the characteristics of Bristol LA residents.

Figure 22 below shows the share of working residents in each ward who are in low-skilled occupations. There is huge amount of variation.

- In Clifton and Stoke Bishop between 10% and 16% of residents are in LS occupations.
- In Southmead, Hartcliffe and Kingweston this share rises to 35% to 43% of residents.

Figure 48: Share of working residents which are in LS occupations, 2011 Census resident
As a comparison, Figure 49 shows the same thing but for mid-skilled occupations.

A different pattern is shown, with the wards with concentration of MS workers in the south predominantly. There is a much smaller share in MS in Lawrence Hill, but a much higher share in Bishopsworth and Stockwood.
Comparing Lawrence Hill, Hartcliffe, Redland and the Bristol average

Lawrence Hill and Hartcliffe have been shown on the maps above to have a high share of their working residents in low-skilled occupations. This is played out in the pie charts shown below.

- In Lawrence Hill 36% of residents are in LS occupations, compared with 37% in Hartcliffe. In comparison, for Bristol as a whole 26% are in LS occupations and for Redland this falls to 12%.
- Interestingly, Lawrence Hill and Hartcliffe have very different patterns in terms of residents in mid-skilled jobs. In Lawrence Hill 27% of residents are in MS occupations, but in Hartcliffe this is a much higher share at 42%. As a result, not many Hartcliffe residents are in HS occupations (21%) but quite a few in Lawrence Hill are (37%).
- In Redland, as a comparator, the majority of residents are in HS occupations. For Bristol as a whole, the share in MS occupations is 29% - similar to Lawrence Hill – and the share in HS occupations is 45% - much higher than both Lawrence Hill and Hartcliffe but lower than Redland.
Breaking these low-skilled occupations down further (Figure 25), shows that:

- Lawrence Hill and Hartcliffe have slightly different concentrations of LS occupation workers. Lawrence Hill has a slightly higher share (18%) of elementary occupations than Hartcliffe (15%). Instead, it has a smaller share of process, machine operatives (7% compared with 11% in Hartcliffe).
- The major difference between these two areas is whether or not the remaining workers (those not in LS occupations) are in high-skilled or mid-skilled occupations. In Hartcliffe they are in MS and in Lawrence Hill they are in HS.
- For example, Hartcliffe has a much higher share of residents in Skilled Trades (17%) than Lawrence Hill (7%). It has a much lower share or residents in Professional Occupations (7%, compared with 16% in Lawrence Hill).
Analysis of recruitment vacancies and the Employer Skills Survey in the Bristol city region, by the Centre for Progressive Policy, identifies skills shortages in Administrative roles, especially in the Financial Services sector. As shown in Fig. 52, skills shortages for administrative/clerical staff were significantly above average for other similar geographies (9th highest among LEPs), while other occupations had skill shortage rates well below average.

There was a rapid expansion in ‘general administrative occupations’ and ‘accountancy technician/analyst/advisors’ vacancies, from 12,000 in 2014/5 to 21,000 in 2016/7, as shown in Fig. . This period saw in fall in relevant skills achieved in Further Education, from 800 in 2014/5 to 420 in 2016/7, as shown in Fig 55.
Figure 52: Skills shortage rates by major occupation group, Bristol City Region (WoE LEP) vs UK, 2015\textsuperscript{113}

![Bar chart showing skills shortage rates by major occupation group for Bristol City Region (WoE LEP) vs UK in 2015. The occupations listed from the highest to the lowest shortage rates are: Skilled trades occupations, Administrative/ clerical, Machine operatives, Professionals, Elementary staff, Caring, leisure and other services staff, Associate professionals, Sales and customer services staff, and Managers.]

Figure 53: Skills shortage rates by sector, Bristol City Region, 2015\textsuperscript{114}

![Bar chart showing skills shortage rates by sector for Bristol City Region in 2015. The sectors listed from the highest to the lowest shortage rates are: Financial services, Manufacturing, Hotels and restaurants, Electricity, gas and water supply, Health and social work, Transport and storage, Construction, Real estate, renting and business activities, Wholesale and retail trade, Community, social and personal service activities, Information and communications, Education, and Public admin. and defence; compulsory social security.]

\textsuperscript{113} Centre for Progressive Policy analysis of UKCES Employer Skills Survey 2015

\textsuperscript{114} Centre for Progressive Policy analysis of UKCES Employer Skills Survey 2015
Figure 54: Number of job vacancies for selected secondary occupation groups, Bristol City Region, 2014/15-2016/17\(^{115}\)

![Graph showing job vacancies for selected secondary occupation groups](image)

Figure 55: The number of FE course completions and apprenticeship completions for selected secondary occupation groups, Bristol City Region, 2014/15-2016/17\(^{116}\)

![Graph showing FE course completions and apprenticeship completions](image)

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\(^{115}\) Centre for Progressive Policy analysis of Burning Glass job vacancy data

\(^{116}\) Centre for Progressive Policy analysis of the Localities Data Cube
5 Economic Inclusion

5.1 Income

The median weekly gross pay for a full-time employee in Bristol has risen from £438 in 2007 to £540 in 2017. In Great Britain the figure was £553 in 2017, while in the South West it was £527 per week.

Figure 31: Annual percentage change in (median) gross weekly pay 2012-2017

<table>
<thead>
<tr>
<th>Year</th>
<th>Bristol</th>
<th>South West</th>
<th>England</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>0.08</td>
<td>1.25</td>
<td>1.68</td>
</tr>
<tr>
<td>2013</td>
<td>2.40</td>
<td>1.61</td>
<td>1.44</td>
</tr>
<tr>
<td>2014</td>
<td>2.83</td>
<td>2.21</td>
<td>0.58</td>
</tr>
<tr>
<td>2015</td>
<td>-0.37</td>
<td>0.50</td>
<td>1.59</td>
</tr>
<tr>
<td>2016</td>
<td>3.50</td>
<td>3.03</td>
<td>2.41</td>
</tr>
<tr>
<td>2017</td>
<td>3.03</td>
<td>2.65</td>
<td>2.04</td>
</tr>
</tbody>
</table>
The chart below shows the time series for the difference between the 90\textsuperscript{th} and 10\textsuperscript{th} percentiles of the Total Weekly Gross earnings of Bristol residents\textsuperscript{13} for the period 2002 to 2017. Also shown are the trends lines for 1997-08 and 2013-17. Clearly growth has been slower since 2013. For Bristol, the gap between the 90\textsuperscript{th} and 10\textsuperscript{th} percentiles grew at an annual average (2002-17) of £14.90 per year which is the same as the national (British) rate. Trend analysis of the individual percentiles (10\textsuperscript{th}, 20\textsuperscript{th}, 25\textsuperscript{th}, 30\textsuperscript{th}, 40\textsuperscript{th}, 50\textsuperscript{th}, 60\textsuperscript{th}, 70\textsuperscript{th}, 80\textsuperscript{th} and 90\textsuperscript{th}) show clearly that absolute trend growth of earnings of people at or below each of the percentiles is ordered from lowest to highest percentile. Overall there are no significant differences between the trend growths of the various percentiles for Bristol and those for England.
The chart above shows trend growth for the period 2002 to 2017 with 95% confidence limits for each of the percentiles. The relative size of the 10\textsuperscript{th} percentile (about 18% of the 90\textsuperscript{th}) hasn't changed a great deal. However, as is also evidenced by the above discussion the 90\textsuperscript{th} percentile has grown a lot faster than the 10\textsuperscript{th}. In absolute terms the gap between the two has grown by 40.4% and as is the case nationally the gap will continue to grow unless the 10\textsuperscript{th} percentile grows significantly faster than the 90\textsuperscript{th}. People with earnings in the bottom 10% will continue to fall further and further behind people with earnings in the top 10%.

\footnotesize

111 Source for entire section: https://www.nomisweb.co.uk/reports/lmp/la/1946157348/report.aspx unless stated otherwise

112 Source: NOMIS Annual Survey of Hours and Earnings
In November 2017, there were just 5,025 people aged 16 or over claiming Job Seekers Allowance or Universal Credit (and required to seek work). Of these claimants, the majority, 2,865 (57%) were aged between 25 and 49, 915 (18%) were aged between 16 and 24, and 1,245 (25%) were aged over 50.

Figure 32: Main benefit claimants (not seasonally adjusted) as a percentage of the resident population aged 16 to 64 in Bristol, the South West and Great Britain.\textsuperscript{113}

In Bristol, the percentage of children under 16 in low-income families is 23%. This is the second of the Core Cities, after Leeds (21%) and well below that of Manchester (32%) and Nottingham (33%). In England as a whole, it is 19%.\textsuperscript{114}

From January 2016 to December 2016, there were 17,300 workless households in Bristol. In 2007, the number was 28,800.

Bristol has the lowest percentage of benefit claimants compared to core cities.

\textsuperscript{113} Source: Department for Work and Pensions, benefit claimants - working age client group, November 2016
It is worth noting that, although Bristol has the lowest rate, it has more out-of-work benefit claimants (27,750) than Nottingham (27,070; Newcastle (19,930) and Cardiff (24,510).

5.2 Labour market exclusion

In November 2016, the number of people in Bristol aged 16-64 was 309,900 (the working age population). Of that, 255,400 were economically active, or 81%. This is greater than the GB average of 78%. 85% of working age males were employed, and 78% of working age females. This compares to 83% and 73% for GB. From July 2016 to June 2017, there were 58,200 people who were economically inactive. That is around 19% of the total working age population. The breakdown of this number is seen in Table 7.

Table 7: Economic Inactivity from July 2016 to June 2017, shown as a percentage of the total economically inactive population, which is a proportion of the working age population

<table>
<thead>
<tr>
<th>% of economically inactive population</th>
<th>City of Bristol</th>
<th>South West</th>
<th>Great Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student</td>
<td>38%</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Looking after family / home</td>
<td>21%</td>
<td>20%</td>
<td>25%</td>
</tr>
<tr>
<td>Temporary sickness</td>
<td>*</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Long-term sickness</td>
<td>22%</td>
<td>20%</td>
<td>22%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>------------------------</td>
<td>---------</td>
<td>-----</td>
<td>-----</td>
</tr>
<tr>
<td>Discouraged</td>
<td>*</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>Retired</td>
<td>8%</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>Other</td>
<td>11%</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>Wants a job</td>
<td>20%</td>
<td>27%</td>
<td>24%</td>
</tr>
<tr>
<td>Does not want a job</td>
<td>80%</td>
<td>74%</td>
<td>77%</td>
</tr>
</tbody>
</table>

* Estimate is not available since sample size is disclosed

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115 Source: NOMIS [https://www.nomisweb.co.uk/reports/lmp/la/1946157348/report.aspx](https://www.nomisweb.co.uk/reports/lmp/la/1946157348/report.aspx)

116 [https://www.nomisweb.co.uk/reports/lmp/la/1946157348/report.aspx](https://www.nomisweb.co.uk/reports/lmp/la/1946157348/report.aspx)

117 Source: ONS annual population survey
Table 8 shows the number of workless households in Bristol compared to the South West and Great Britain. Bristol has a lower percentage of workless households than the wider region, or Great Britain. The South West as a whole has a lower percentage of children in workless households at just 8%, compared with GB as 11%.

Table 8: Workless Households from January 2016 to December 2016 (Note these figures only includes those households that have at least one person aged 16 to 64, and children refers to all children aged under 16)\textsuperscript{118}

<table>
<thead>
<tr>
<th>Workless Households</th>
<th>City of Bristol</th>
<th>South West</th>
<th>Great Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Workless Households</td>
<td>17,300</td>
<td>220,900</td>
<td>3,043,300</td>
</tr>
<tr>
<td>Percentage of Households That Are Workless</td>
<td>12%</td>
<td>13%</td>
<td>15%</td>
</tr>
<tr>
<td>Number of Children in Workless Households</td>
<td>#</td>
<td>80,100</td>
<td>1,353,400</td>
</tr>
<tr>
<td>Percentage of Children Who Are in Households That Are Workless</td>
<td>#</td>
<td>8%</td>
<td>11%</td>
</tr>
</tbody>
</table>

\# Sample size too small for reliable estimate

5.3 \textbf{Deprivation}\textsuperscript{119}

The 2015 Index of Multiple Deprivation (IMD) indicated that 42 LSOAs in the city are in the most deprived 10% of England. That amounts to 16% of residents in Bristol, almost 70,000 people. This includes about 18,000 children, and 11,000 elderly people. 6 LSOAs in Bristol are in the most deprived 1% of England (See Table 9) and 26 are in the most deprived 5%.

\textsuperscript{118} ONS annual population survey - households by combined economic activity status

\textsuperscript{119} All sourced from https://www.bristol.gov.uk/documents/20182/32951/Deprivation+in+Bristol+2015/429b2004-eef5-4c5-8044-9e7dcd002f4f unless stated otherwise
Table 9: The ten poorest performing LSOAs in Bristol according to the 2015 Index of Multiple Deprivation

<table>
<thead>
<tr>
<th>LSOA</th>
<th>Ward</th>
<th>Rank (out of 32,844)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bishport Avenue</td>
<td>Whitchurch Park</td>
<td>65</td>
</tr>
<tr>
<td>Hareclive Road</td>
<td>Whitchurch Park</td>
<td>67</td>
</tr>
<tr>
<td>Fulford Road North</td>
<td>Hartcliffe</td>
<td>200</td>
</tr>
<tr>
<td>Bishport Avenue East</td>
<td>Whitchurch Park</td>
<td>232</td>
</tr>
<tr>
<td>Inns Court</td>
<td>Filwood</td>
<td>245</td>
</tr>
<tr>
<td>Easton Road</td>
<td>Lawrence Hill</td>
<td>251</td>
</tr>
<tr>
<td>Broadway</td>
<td>Filwood</td>
<td>340</td>
</tr>
<tr>
<td>Ilminster Avenue West</td>
<td>Filwood</td>
<td>367</td>
</tr>
<tr>
<td>Southmead Central</td>
<td>Southmead</td>
<td>368</td>
</tr>
<tr>
<td>Whitchurch Lane</td>
<td>Hartcliffe</td>
<td>518</td>
</tr>
</tbody>
</table>

Figure 35: Index of Multiple Deprivation 2015

Map legend

Deciles of deprivation

10% least deprived

10% most deprived

Source: DCLG, Indices of Deprivation Explorer
http://dclgapps.communities.gov.uk/imd/idmap.html
Of the English Core Cities, Bristol ranks lowest in terms of the proportion of LSOAs in the lowest decile (see Table 10).

Table 10: Proportion of LSOAs in each of the English Core Cities which are in the 10% most deprived nationally\textsuperscript{121}

<table>
<thead>
<tr>
<th>City</th>
<th>Proportion of LSOAs in the most deprived 10% nationally</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birmingham</td>
<td>40%</td>
</tr>
<tr>
<td>Bristol</td>
<td>16%</td>
</tr>
<tr>
<td>Leeds</td>
<td>22%</td>
</tr>
<tr>
<td>Liverpool</td>
<td>45%</td>
</tr>
<tr>
<td>Manchester</td>
<td>41%</td>
</tr>
<tr>
<td>Newcastle</td>
<td>22%</td>
</tr>
<tr>
<td>Nottingham</td>
<td>34%</td>
</tr>
<tr>
<td>Sheffield</td>
<td>23%</td>
</tr>
</tbody>
</table>

\textsuperscript{121} Source: BCC, Deprivation in Bristol, 2015
Bristol performs well compared to the other English Core Cities in terms of income deprivation, ranking 77 out of 326 English districts\(^{122}\) (see Fig. 37).\(^{124}\)

Figure 37: The English Core Cities, Income Deprivation rank of average score, 2015\(^ {125}\)

![Income Domain Rank of average score](chart.png)

A comprehensive analysis of the Indices of Deprivation 2015 related to the City of Bristol can be found at https://www.bristol.gov.uk/statistics-census-information/deprivation

### 5.4 Cost of Living

The housing affordability ratio\(^ {126}\) for Bristol was about 10.4 according to 2016 estimates, the highest of the Core Cities and about the national average of 9.8.\(^ {127}\) This means that housing in Bristol is less affordable than the rest of the country, relative to workplace-based earnings.

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\(^{124}\) Source: DCLG, Analysis Public Intelligence, via Manchester City Council

\(^{125}\) Ibid.

\(^{126}\) The average cost of a house compared to the average wages paid to a worker in a year

\(^{127}\) [http://www.centreforcities.org/data-tool/#/graph=map&city=show-all&indicator=housing-](http://www.centreforcities.org/data-tool/#/graph=map&city=show-all&indicator=housing-
Figure 38: Housing Affordability Ratio for the Core Cities, actual change 2011-2016

Source: Centre for Cities
Figure 39: Average monthly salary (after tax) compared to the cost of living per city

<table>
<thead>
<tr>
<th>City</th>
<th>Estimated number of households</th>
<th>Estimated number of fuel poor households</th>
<th>Proportion of fuel poor households</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birmingham</td>
<td>418,199</td>
<td>65,117</td>
<td>16%</td>
</tr>
<tr>
<td>Bristol</td>
<td>191,219</td>
<td>24,574</td>
<td>13%</td>
</tr>
<tr>
<td>Leeds</td>
<td>324,995</td>
<td>43,871</td>
<td>14%</td>
</tr>
<tr>
<td>Liverpool</td>
<td>210,601</td>
<td>30,210</td>
<td>14%</td>
</tr>
<tr>
<td>Manchester</td>
<td>208,928</td>
<td>31,939</td>
<td>15%</td>
</tr>
<tr>
<td>Newcastle upon Tyne</td>
<td>118,817</td>
<td>17,604</td>
<td>15%</td>
</tr>
<tr>
<td>Nottingham</td>
<td>129,446</td>
<td>20,493</td>
<td>16%</td>
</tr>
<tr>
<td>Sheffield</td>
<td>233,110</td>
<td>28,708</td>
<td>12%</td>
</tr>
</tbody>
</table>

129 Source: Office for National Statistics, via Capgemini
130 A household is said to be fuel poor if it needs to spend more than 10 percent of its income on fuel to maintain an adequate standard of warmth.
132 Source: Department for Business, Energy and Industrial Strategy, 2015
6 Residential and Commercial property

6.1 Residential property

A smaller proportion of Bristol’s population owns its housing and a larger proportion privately rents and socially rents its housing in comparison to the average for the whole of South West and all of England. (see Figure 41).

Figure 40: Rent/Ownership rates Bristol and England 2001,2011

Bristol experienced a strong increase of private rented properties over the past 10 years with the share of private renting rising from 12% to 24%, which is line with the national trend as the average of private rented properties in England increased from 9% to 17%.

.opendata.bristol.gov.uk,

Bristol Core Strategy (2011)
Local authority housing is mainly focused in inner city areas and on the outlying housing estates such as Hartcliffe, Withywood, Knowle West, Southmead, Lockleaze, Lawrence Weston and Henbury. Private renting is concentrated in the central and central west wards of Clifton, Clifton East, Cabot, Cotham and Redland.\(^{135}\)

Figure 41: Rent/Ownership rates Bristol 2011\(^{136}\)

\(^{135}\) Source: Bristol Core Strategy (2011)

\(^{136}\) Source: opendata.bristol.gov.uk, 2011
The Bristol Core Strategy (2011) set the delivery of 26,400 homes between 2006 and 2026 as the minimum target for housing in the City.\textsuperscript{139} The Bristol Housing Strategy envisions 7,100 new homes between 2014- and 2019.\textsuperscript{140}

Housing trajectory requires an average completion rate of 1,300-1,400 homes per annum.

\textsuperscript{137} Ibid.
\textsuperscript{138} Ibid.
\textsuperscript{139} Source: Bristol Core Strategy, 2011
\textsuperscript{140} https://www.bristol.gov.uk/documents/20182/361915/Bristol+Housing+Strategy+2016/8612fc26-53db-4061-b5e7-182083e3dbce6
Recent dwelling completions are low at only 750 per annum, although 2008-2012 shows capacity to deliver up to 2,000 dwelling a year.

26,400 – minimum number of homes to deliver in 10 years to 20261 = 1,300-1,400 per annum
29,100 new affordable homes needed in Wider Bristol by 2036 141

Figure 44: Bristol Housing delivery trajectory142

141 Source: Bristol Core Strategy (2011)
142 Source: Bristol Core Strategy, 2011
Bristol median house prices are the fifth highest in the UK. According to Centre for Cities inequality is less acute in Bristol in comparison to cities such as London, Cambridge and Brighton.\textsuperscript{144}

\textsuperscript{143} Source: DCLG
\textsuperscript{144} Source: Centre for Cities
Table 12: Average house prices (median) 2017\textsuperscript{145}

<table>
<thead>
<tr>
<th>City</th>
<th>Current price</th>
<th>%yoy Sep-17</th>
<th>%yoy Sep-16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edinburgh</td>
<td>£219,500</td>
<td>6.7%</td>
<td>3.8%</td>
</tr>
<tr>
<td>Manchester</td>
<td>£156,800</td>
<td>6.5%</td>
<td>6.6%</td>
</tr>
<tr>
<td>Birmingham</td>
<td>£153,200</td>
<td>5.9%</td>
<td>6.6%</td>
</tr>
<tr>
<td>Bournemouth</td>
<td>£285,100</td>
<td>5.4%</td>
<td>6.4%</td>
</tr>
<tr>
<td>Leicester</td>
<td>£163,300</td>
<td>5.4%</td>
<td>5.5%</td>
</tr>
<tr>
<td>Glasgow</td>
<td>£120,300</td>
<td>3.3%</td>
<td>1.8%</td>
</tr>
<tr>
<td>Bristol</td>
<td>£276,900</td>
<td>5.1%</td>
<td>11.8%</td>
</tr>
<tr>
<td>Portsmouth</td>
<td>£230,900</td>
<td>5.1%</td>
<td>8.1%</td>
</tr>
<tr>
<td>Nottingham</td>
<td>£144,200</td>
<td>5.0%</td>
<td>5.5%</td>
</tr>
<tr>
<td>Southampton</td>
<td>£222,600</td>
<td>4.4%</td>
<td>7.4%</td>
</tr>
<tr>
<td>Leeds</td>
<td>£161,100</td>
<td>4.3%</td>
<td>4.9%</td>
</tr>
<tr>
<td>Sheffield</td>
<td>£135,100</td>
<td>4.2%</td>
<td>3.7%</td>
</tr>
<tr>
<td>Liverpool</td>
<td>£114,800</td>
<td>3.2%</td>
<td>2.2%</td>
</tr>
<tr>
<td>Belfast</td>
<td>£129,100</td>
<td>3.1%</td>
<td>2.9%</td>
</tr>
<tr>
<td>Newcastle</td>
<td>£125,900</td>
<td>3.0%</td>
<td>1.5%</td>
</tr>
<tr>
<td>Cardiff</td>
<td>£198,000</td>
<td>2.4%</td>
<td>6.4%</td>
</tr>
<tr>
<td>London</td>
<td>£493,800</td>
<td>2.3%</td>
<td>8.9%</td>
</tr>
<tr>
<td>Oxford</td>
<td>£427,100</td>
<td>2.3%</td>
<td>7.8%</td>
</tr>
<tr>
<td>Cambridge</td>
<td>£433,600</td>
<td>1.7%</td>
<td>5.1%</td>
</tr>
<tr>
<td>Aberdeen</td>
<td>£173,900</td>
<td>-1.8%</td>
<td>-10.6%</td>
</tr>
<tr>
<td>20 city index</td>
<td>£251,600</td>
<td>4.9%</td>
<td>6.0%</td>
</tr>
<tr>
<td>UK</td>
<td>£211,200</td>
<td>3.6%</td>
<td>6.0%</td>
</tr>
</tbody>
</table>

Growth in house prices in Bristol since 2012 has outstripped the UK and South West. In 2016, Hometrack data showed Bristol at the top of the league table for house price growth in the 20 major cities of the UK. However, this has since slowed, with Bristol currently sitting 7th in the city level summary - at 5.1% growth since September 2016, which is still well above the UK average of 3.6\textsuperscript{146}.

Estate Agents Knight Frank, in their Bristol Market Insight 2016, noted that a lack of available properties for sale has been the biggest driver of the market in Bristol during 2016.\textsuperscript{147}

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\textsuperscript{145} Source: Hometrack House Price Indices
\textsuperscript{146} Ibid.
\textsuperscript{147} http://content.knightfrank.com/research/787/documents/en/q1-2016-3469.pdf
Housing affordability in Bristol is on average lower than for the whole of England – with Bristol having lower than the national gross weekly earnings, but higher than the national rent during the time period between 2013 and 2016 (see Figure 49).

Figure 46: House Price Growth 1998-2016 Bristol, London and UK average

![House Price Growth 1998-2016 Bristol, London and UK average](image)

Figure 47: GINI coefficient 2013

![GINI coefficient 2013](image)

Source: Hometrack House Price Indices
Source: Centre for Cities
Figure 48: Gross weekly earnings and Private rental (£) 2013-2016\textsuperscript{150}

Table 13: Household Affordability for the Core Cities 2016\textsuperscript{151}

<table>
<thead>
<tr>
<th>Rank</th>
<th>City</th>
<th>Affordability ratio</th>
<th>Average house price, 2016 (£)</th>
<th>Yearly wages, 2016 (£)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Oxford</td>
<td>16.7</td>
<td>491,900</td>
<td>29,400</td>
</tr>
<tr>
<td>2</td>
<td>London</td>
<td>16.7</td>
<td>561,400</td>
<td>33,700</td>
</tr>
<tr>
<td>3</td>
<td>Cambridge</td>
<td>15.8</td>
<td>475,800</td>
<td>30,100</td>
</tr>
<tr>
<td>4</td>
<td>Brighton</td>
<td>13.7</td>
<td>367,600</td>
<td>26,800</td>
</tr>
<tr>
<td>5</td>
<td>Bournemouth</td>
<td>12.5</td>
<td>309,500</td>
<td>24,700</td>
</tr>
<tr>
<td>6</td>
<td>Aldershot</td>
<td>11.6</td>
<td>360,400</td>
<td>31,200</td>
</tr>
<tr>
<td>7</td>
<td>Reading</td>
<td>11.3</td>
<td>375,200</td>
<td>33,200</td>
</tr>
<tr>
<td>8</td>
<td>Worthing</td>
<td>10.7</td>
<td>279,100</td>
<td>26,100</td>
</tr>
<tr>
<td>9</td>
<td>Exeter</td>
<td>10.5</td>
<td>253,500</td>
<td>24,100</td>
</tr>
<tr>
<td>10</td>
<td>Bristol</td>
<td>10.4</td>
<td>275,900</td>
<td>26,600</td>
</tr>
</tbody>
</table>

\textsuperscript{150} Bristol Core Strategy, 2011

\textsuperscript{151} Source: Centre for Cities
The SHMA (Strategic Housing Market Assessment) has identified a substantial need for affordable housing: a total of 29,100 dwellings across the Wider Bristol HMA over the 20-year Plan period 2016-36, equivalent to an average of 1,455 dwellings per year. The report foresees market-led housing development as a key means to deliver the identified level of affordable housing. Enhancing the economic viability of affordable housing will crucial in enabling schemes to deliver the required level of development.

6.2 Commercial property

Bristol experienced greater than 10% job growth in 2013-16, recording higher levels of net absorption (as a percentage of existing stock) than any other major UK city. High demand and low new supply and office conversions, have brought down vacancies to the lowest recorded level in 20 years (the lowest of}

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152 Centre for Cities
153 Wider Bristol HMA Strategic Housing Market Assessment, 2015
154 Centre for Cities
155 Source: BNP Paribas Real Estate / Property data; Bristol Market report 2016/17
any major regional city in the UK). The rate of net absorption is expected to
decrease in the near-term due to the decrease in existing supply.

Bristol has the highest average rents of the ‘Big Six’ cities. Many of the office
buildings taken out of the supply chain over the last three years have been
converted to residential. Continued strong demand remains strong for offices
across Bristol City Centre and Clifton and the shortage in the supply of good
quality office stock has resulted in the significant rent increases (in some cases
doubling) seen in recent years. Investment volumes have fallen since peaking in
2015, and increased uncertainty due to Brexit have the potential to result in further
yield decompression in the short term.

Figure 50: Bristol Rent Growth 2011-2021

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156 Big Six Cities refer to the six largest office markets and include: Birmingham, Bristol,
Edinburgh, Glasgow, Leeds, and Manchester. Source: https://www.mandg.be/-
/media/Literature/UK/Institutional/MG-Real-Estate-Perspective-London-Big-Six.pdf
157 Burston Cook, 2017
158 Costar, 2017
159 Costar, 2017
By the third quarter of 2017, total availability of office floorspace fell 5% since the start of the year, amounting to 855,000 sq ft. Availability of Grade A space has continued to fall in Bristol City Centre and currently stands at 115,000 sq ft, a 23% decrease since 2015. St Catherine's Court currently provides 12,000 sq ft of available Grade A space.\(^{161}\)

The 2011 Bristol Core Strategy identified approximately 290,000 m\(^2\) net additional office floorspace at the start of its 20-year plan period. A further 236,000m\(^2\) net additional floorspace is proposed in order to deliver the 524,000 m\(^2\) total potential requirement recommended by the Employment Land Study. The City Centre is planned as the main locational focus for this new floorspace to enhance its position as the primary location for high-density employment. The added floorspace will serve to expand some of the key economic sectors including professional services, finance and banking, information and communications technology and public administration. To support its regeneration, about 60,000m\(^2\) of the net additional floorspace requirement is focused on South Bristol. The remaining 26,000m\(^2\) is focused on Town, District and Local Centres in the rest of Bristol.\(^{162}\)

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\(^{160}\) Source: BNP Paribas Real Estate / Property data; Bristol Market report 2016/17

\(^{161}\) Savills.co.uk

\(^{162}\) Source: Bristol Core Strategy 2011
Investment volumes reached £412m in 2016, the highest level seen since 2006, far surpassing the 5-year average (up 86% on 2011-15), illustrating investor appetite for Grade A development opportunities in core locations.\footnote{http://pdf.savills.com/documents/Savills_Bristol_Office_Market_Watch_August_2016.pdf\,Source: Savills.co.uk\footnote{Savills, 2017. https://www.savills.co.uk/research_articles/229130/213749-0\footnote{https://www.realestate.bnpparibas.co.uk/upload/docs/application/pdf/2017-03/bristol_offices_march_2017.pdf?id=p_1563033\,Source: Savills.co.uk}}
Much lower investment in the out of town submarket (c.20% of total investment activity).

Bristol experienced fastest increase in rental values compared to six largest cities outside London. However, the city is still more affordable than others.
- Year on year growth rate of 7.1% and 4.1% in 2015 and 2016, driven by top quality refurbished Grade B
- New Grade A offices anticipated to drive future growth as well\textsuperscript{166}

Figure 54: Average office rent per sft in Core Cities (2016/17)\textsuperscript{167}

<table>
<thead>
<tr>
<th>City</th>
<th>Rent per sft</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sheffield</td>
<td>£15.00</td>
</tr>
<tr>
<td>Liverpool</td>
<td>£18.00</td>
</tr>
<tr>
<td>Nottingham</td>
<td>£19.50</td>
</tr>
<tr>
<td>Newcastle</td>
<td>£20.00</td>
</tr>
<tr>
<td>Cardiff</td>
<td>£21.00</td>
</tr>
<tr>
<td>Bristol</td>
<td>£21.00</td>
</tr>
<tr>
<td>Leeds</td>
<td>£27.00</td>
</tr>
<tr>
<td>Glasgow (City Centre)</td>
<td>£27.50</td>
</tr>
<tr>
<td>Edinburgh (City Centre)</td>
<td>£27.50</td>
</tr>
<tr>
<td>Manchester</td>
<td>£28.00</td>
</tr>
<tr>
<td>Birmingham</td>
<td>£28.00</td>
</tr>
</tbody>
</table>

\textsuperscript{166} Source: http://officespace.co.uk/html/rents/southwest.html
\textsuperscript{167} Source: http://officespace.co.uk/html/rents/southwest.html
The focus of office growth is planned in Bristol City Centre and the regeneration of South Bank and demand for highly accessible core locations from a diverse occupation base (see Figure 56).

Figure 56: Office take-up per sector, 2016\textsuperscript{169}

\textsuperscript{168} Source: Colliers International
\textsuperscript{169} Source: BNP Paribas Real Estate / Property data; Bristol Market report 2016/17
However, of the 500k m² additional office space that is required between 2011-2031, the vast majority is located in the City Centre.

Figure 57: Planned location of net additional floorspace in Bristol

The office take-up experiences growth and demand based on a highly diversified economic occupier base.

The demand for small new office space in the City Centre of Bristol outstrips supply, leaving some smaller businesses to locate in Grade B/C offices. Savills predicts a growth in the serviced office provision from 2018 to help meet the needs of fast-growing companies.

Figure 58: Office space take-up by size of lease in Bristol City Centre

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170 Source: Bristol Core Strategy 2011
171 Source. Savills. http://www.savills.co.uk/research_articles/229130/227846-0
172 Source: Colliers International
Commercial Space – Market confidence and trends evidence:

BNP Paribas (2017)
- Legal & General Property agreed in Q4 2016 to forward fund the development of 3 Glass Wharf to the tune of £76m, reflecting a headline yield of 4%. The office element of the scheme, pre-let to HMRC for a 25 year term, will produce rental income of £2.94m pa.
- Bridgewater House scheme, Existing Grade A stock, was sold earlier in the year to a private overseas investor, shortly after EDF’s substantial letting (81,202 sq ft) took the building to full occupancy.
- In H1 2016, Palmer Capital in a joint venture with CBRE Global Investors agreed a £40 million speculative forward funding deal at the Aurora scheme (95,000 sq ft, completion due Q4 2017).

Southwest Business / Colliers (2018)
- In Q1 2018: James Preece, national offices director at commercial real estate company Colliers International, predicts prime rents in the city centre will continue to rise beyond the £32.50 per sq ft recently achieved for One Cathedral Square on College Green. He said: “With supply now at an historically low level it seems inevitable the upward trajectory will continue and even higher figures will be achieved in 2018. “I would not be surprised to see top rents in the city centre head closer to £34 or even £35 per sq ft as more deals are done at Aurora, the 95,000 sq ft scheme at Finzels Reach, which is the only speculative office development in Bristol.” Pre-lettings at Aurora are being agreed at such a pace that although it will bring more supply to the market when it completes in mid-2018, it will do little to address the problem of lack of space in Bristol.”

Savills (2018)
- Grade A supply in the city centre now stands at only 119,000 sq ft, enough for only around nine months of Grade A take-up at average levels.
- Bristol's office based investment reached £425 million in 2017, 82% above the long term average and the strongest year since 2006.

Knight Frank (2018)
- The ongoing supply shortage in Bristol served as a restraining factor for leasing activity in 2017. Nevertheless, overall takeup reached 614,000 sq ft, 12% above the 10-year average for the city and the third highest annual total of the past decade.
- Professional Services continue to be the mainstay of activity in Bristol. The pre-lettings of 13,000 sq ft to intellectual property specialists, Mewburn Ellis, and of 27,000 sq ft to law firm, Simmons and Simmons, within Aurora at Finzels Reach proved to be the flagship deals of the year. In all, the sector accounted for 24% of take-up.

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173 Source: BNP Paribas Real Estate / Property data; Bristol Market report 2016/17
175 Source: Savills 2018. https://www.savills.co.uk/research_articles/229130/227844-0
Figure 59: Key property developments Bristol2016/17

Source: BNP Paribas Real Estate / Property data; Bristol Market report 2016/17
7 Business environment

7.1 Economic growth

Bristol is highly productive and has a higher GVA per capita than the England or South West average. Productivity has recovered since the recession and has showed strength in the region. But, total economic growth in Bristol is lower than in England or South West, with the compound annual growth rate at 3.5 percent per year, compared to 4.3 and 4.2 percent respectively.

Figure 60: GVA per head by local authority 1997-2015

The proportion of private sector employment in Bristol is on par with the West of England and English averages, at 83 percent. This means that the private sector is healthy and the area is not particularly vulnerable to public sector budget cuts.

In 2016, GVA per worker in Bristol was £54,000, compared to £49,600 in Leeds or £47,700 in Manchester.  

7.2 Company size and structure

Bristol has a higher business churn rate than the national average (see Figure 61).

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178 Source: ONS
179 Calculated using Regional GVA (balanced) by local authority in the UK, ONS data and total employment data from BRES, NOMIS 2016 to reach total GVA per worker.
High churn is often good, as it signals that new businesses are starting up, demonstrating innovation and a healthy economic environment.

Figure 61: Business Churn Rate 2010-2015 Bristol and national average

Source: Centre for cities
Figure 62: Business Churn Rate Core Cities 2010-2015

7.3 Sectors

Sector change and growth trends can be seen in Figure 63.

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181 Source: Centre for Cities
Bristol has had a higher proportion of highly-skilled occupations than Great Britain.

Since 2004, there has been a noticeable decline in low- and middle-skilled jobs.

- Importance of up-skilling existing workers and local residents
- Attracting highly-skilled workers
- Supporting low and medium-skilled workers and employers

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182 ONS Annual Business Inquiry employee analysis
183 https://www.nomisweb.co.uk/reports/lmp/la/1946157348/subreports/empocc_time_series/report.aspx?
Bristol also experienced strong growth rates with respect to start-ups and newly founded businesses. Between 2014 and 2016, more than 2,800 businesses have been created in the city each year on average, and 44% survive to their fifth year (on par with the UK average). 184

7.5 Patents

In 2016, the West of England generates almost 41 patents per 100,000 population, much higher than the UK average of 17 patents per 100,000. 185

Bristol is also known for innovation, ranking first out of the Core Cities for number of patent applications per capita. 186

8 Place and amenities

8.1 Cultural amenities

The Bristol Quality of Life Survey (2016) has revealed “location, leisure facilities and parks” as the best thing about living in Bristol, with most people feeling that in terms of location, history and culture, Bristol is better off than other major cities. As well as outstanding strengths there are gaps and weaknesses in local cultural provision. The same survey, for example, lists the absence of quality arts and sports facilities as a key weakness. 187

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185 http://www.centreforcities.org/west-of-england/
186 Source: Centre for Cities from PATSTAT; Intellectual Property Office, Patent published by postcode, 2015 data. Note that Centre for Cities analysis of Core Cities considers Primary Urban Areas (PUA). The PUA for Bristol is defined as the City of Bristol and South Gloucestershire.
187 Source: Bristol Quality of Life Survey
Bristol City Council  
Inclusive and Sustainable Economic Growth Strategy  
Evidence Baseline report  

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Figure 65: Bristol Quality of Life Survey Results\(^{188}\)

![Bar chart showing various satisfaction levels related to leisure activities and facilities in Bristol.]

- % respondents satisfied with activities for children and young people (2015)
- % respondents satisfied with the range and quality of outdoor events in Bristol (2015)
- % respondents satisfied with museums and galleries (2015)
- % respondents satisfied with children’s playgrounds and play areas (2015)
- % respondents satisfied with museums and galleries (2015)
- % respondents satisfied with leisure facilities/services (2015)
- % library card holders satisfied with the library service (2015)

Figure 66: Bristol Quality of Life survey: % respondents satisfied with leisure facilities/services\(^{189}\)

![Map of Bristol showing different satisfaction levels across various locations.]

Bristol is the eighth most visited city in the UK, with 570,000 inbound visitors in 2016. Bristol’s tourism economy is worth more than £1.3bn and supports more than 27,000 jobs.\(^{190}\)

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\(^{188}\) Source: Bristol Quality of Life Survey  
\(^{189}\) Source: Bristol Quality of Life survey  
\(^{190}\) https://www.visitbritain.org/town-data
Bristol is known as the city of festivals and community gatherings. A new site permission structure for festivals will see a move from an ‘event-based’ price, to set site costs. Whilst site permission prices are benchmarked against other core cities across the country and the measure would support more money for BCC, it might also price out some festivals out of Bristol.

8.2 Open space

Bristol’s parks and green space strategy proposes that the minimum distance between place of residence and nearest green space should not exceed 400 metres.

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191 Source: Visit Britain
193 Source: BRES
According to the Bristol Green Space Database, the mean road distance to the nearest green space is 334.1 metres\textsuperscript{194}.

Figure 69: Green space provision in Bristol\textsuperscript{195}

The Bristol Quality of Life survey reveals that 81.6\% of respondents are satisfied with the quality of parks and open spaces in Bristol, compared to 83.1\% in 2014; 84.1\% in 2013; and 80.1\% in 2012. There are no apparent social inequalities in access to parks and green spaces.\textsuperscript{196}

\textsuperscript{194}Source: Bristol: Parks and Green Space Strategy
\textsuperscript{195}Source: Bristol: Parks and Green Space Strategy
\textsuperscript{196}Bristol Quality of Life Survey
8.3 Environment

The annual average levels of nitrogen dioxide are above government standards across central areas of Bristol. The main cause of air pollution in Bristol is traffic, especially diesel engines. 40% of Bristol’s nitrogen dioxide emissions are from Diesel cars. Buses and coaches cause 23% of emissions. Diesel LGV cause 22% and HGV cause 11%.  

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197 Source: Bristol Quality of Life Survey
198 Source: Claircity
Figure 71: Nitrogen dioxide (NO2) in Bristol

Figure 72: Share of population exposed to noise from roads

8.4

8.5 Digital Connectivity

In 2016, 85.93% of premises in Bristol were covered with ultrafast broadband (>100 Mbps). This is considerably higher than the national average of 51.36%. Bristol also has higher rates of ultrafast broadband connectivity than Manchester, Liverpool, Cardiff or London with rates of 65.62%, 80.87%, 76.40% and 77.40% respectively.  

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199 Source: Claircity
200 Source: Defra: https://uk-air.defra.gov.uk/index.php
201 Centre for Cities
# Accessibility

## Public transport Network

Bus service on 32 distinct routes operates within the City of Bristol today. Inter-city coach services also serve Bristol from a central bus station at Marlborough Street.

The Great Western Railway connects Bristol with the greater South West Region. Primary stations within Bristol are the Bristol Temple Meads Railway Station and Bristol Parkway Railway Station. The city’s major mainline railway station is Temple Meads supported by several suburban railway stations located on the main routes and on the Severn Beach line.

Ferry services provide connections across and along the Floating Harbour. Large numbers of taxis also operate in the city contributing to tourism and business as well as residents’ transport options.

Bristol Airport is located about 10 miles to the south of Bristol in North Somerset. It is the United Kingdom’s ninth busiest airport and provides scheduled and chartered services to domestic and international destinations.

## Mobility Trends

Although below the South West average (65%), the majority of employed people in Bristol (57%) travel to work by car. Traffic congestion and journey time unreliability make Bristol one of the most congested cities in Britain. There has been a significant increase in walking and cycling trips in Bristol in recent years and it is estimated that they now account for over 25% of all commuter journeys.

## Access to employment centres

Across the West of England 73% of the workforce lives within 40 minutes by public transport of a major employment site, whilst 31% is within 20 minutes.

There is a considerable number of deprived LSOAs with poor transport connectivity in South Bristol.
9.4 West of England Commuting patterns

In the west of England private car is the preferred transport mode of the region, concentrating over 64% of the trips.

Cycling, bus and rail passenger numbers have been growing steadily. The region has a higher cycling and walking proportion than equivalent city regions like Birmingham, Leeds and Manchester.

The West of England Joint Local Transport Plan expects to reduce car dependency and promote active modes in order to reduce traffic congestion and emissions, support economic growth, promote accessibility and improve quality of life and a healthy natural environment.
9.5 Bristol Commuting patterns

Traffic congestion and journey time unreliability make Bristol one of the most congested cities in Britain.\textsuperscript{210}

60\% of Bristol’s workforce reside in Bristol. Whilst car (48\%) is their preferred transport mode, a significant number of trips involve active modes (39\%). This may be related with the council’s Walking Strategy and major investments that have improved the pedestrian and cycling environment of the city.\textsuperscript{211}

\textsuperscript{208} Source: West of England Joint Local Transport Plan

\textsuperscript{209} Source: West of England Joint Local Transport Plan

\textsuperscript{210} Source: Bristol Core Strategy, 2011

\textsuperscript{211} ONS: WU03UK – Location of usual residence and place of work by method of travel to work
Among the employees commuting into Bristol, the proffered modes are car (77%), bus (8%) and rail (7%).

Figure 76: Bristol workforce travel mode\textsuperscript{212} (means of commuting for all workers in Bristol, resident and non-resident)

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{bristol_workforce_travel_mode}
\caption{Bristol workforce travel mode}
\end{figure}

\subsection{9.6 Cost of transport}

Whilst bus expenditure per person decreased to £5.36 in the South West, it’s still more expensive than the England average (£5.03).\textsuperscript{213}

\textsuperscript{212} ONS: WU03UK – Location of usual residence and place of work by method of travel to work Census 2011
South West of England and Bristol in particular has seen considerable cuts in regional funding and total number of bus service cuts.

Table 14: Regional Funding Cuts 2015-16 (source: Campaign for Better Transport (2016). Buses in Crisis: A report on bus funding across England and Wales 2010-2016)

Table 15: Funding cuts by councils 2015-16 (source: Campaign for Better Transport (2016))

Figure 78: Total number of bus service cuts, alterations and withdrawals by region

10 APPENDIX

10.1 APPENDIX A – Core Cities

The Core Cities group was formed in 1995 as a partnership of eight cities: Birmingham, Bristol, Leeds, Liverpool, Manchester, Newcastle, Nottingham and Sheffield. The Group is a self-selected, self-financed and functions as a collaborative advocacy group.

The Core Cities Group primary interests include transport and connectivity, innovation and business support, skills and employment, sustainable communities, culture and creative industries, climate change, finance and industry, and governance. 216

10.2 APPENDIX B – Happy City Index

Happy City’s Index measures and informs progress using local level indicators to support the wellbeing of all citizens. It is based on the three main indicators: Sustainability, local conditions, equality; and is designed to support decision-makers in local areas.

Figure 79: Framework Happy City Index 217

216 https://www.corecities.com/
217 http://www.happycity.org.uk/measurement-policy/happy-city-index/