



Bristol: State of the City

2010

Contact: Dave Clarke, Policy Officer,
Bristol City Council,
Phone: 0117 922 4294,
e-mail: daveclarke@bristol.gov.uk

Version Date: 20 May 2011

Table of Contents

Subject Area	Page Number
<u>State of the City: Executive Summary</u>	2
<u>Introduction</u>	4
<u>Bristol: A City of Contrasts</u>	4
<u>Demographic Change</u>	6
<u>Local Economy</u>	7
<u>Creating a Sense of Place</u>	8
<u>Creative Industries</u>	9
<u>Employment and Recession</u>	10
<u>Health</u>	12
<u>Older People</u>	15
<u>Children, Young People and Families</u>	17
<u>Quality of Life (QOL) in the City</u>	21
<u>Crime and Crime Reduction</u>	21
<u>Housing</u>	23
<u>Transport</u>	24
<u>Sustainability, CO₂ & Climate Change</u>	26
<u>Digital Connectivity</u>	28
<u>A Thriving Third Sector</u>	28
List of Figures and Tables	
<u>Map 1: Index of Multiple Deprivation in Bristol</u>	5
<u>Table 1: Population projections in Bristol by age group</u>	7
<u>Figure 1: JSA claimants by sought occupation 2007 – 2010</u>	11
<u>Figure 2: All age cancer mortality rate in Bristol and the most deprived quintile 2002-2008</u>	14
<u>Figure 3: Alcohol attributable admission rate (per 100,000) by deprivation quintile 2005/06 to 2008/09</u>	14
<u>Map 2: Attendance Rates (under 16) for unintentional injuries</u>	20
<u>Figure 4: Number of emergency admissions for fall-related injuries in 50+ and 65+ age groups</u>	
<u>Figure 5: Cycling Index growth rate, before and after Cycling City</u>	26
<u>Figure 6: Bristol's ICT carbon footprint</u>	27
<u>Map 3: MOSAIC Public Sector Segmentation 2009</u>	30

State of the City – Executive Summary

- Bristol has a current population of 433,100. The total population is projected to reach 585,800 people by 2033. Since 2001 there has been a significant increase in the number of international migrants coming to live in Bristol, particularly Somali communities and Polish residents coming to work in Bristol following the expansion of the EU.
- In 2008, Bristol generated some £11.5 billion of wealth (measured by gross value added, GVA); almost 12% of the wealth generated in the whole of the South West. The largest single contributor to GVA in Bristol is the banking and insurance sector, but the real feature of the local economy is diversity – Bristol is not overly dependent to any one sector for output employment, making it resistant to ‘shocks’ and well placed to foster growth.
- Creative industries account for 12% of all businesses and 5% of all employment in Bristol. The creative sector contributed £727million to the economy in 2008, accounting for 6% of the Bristol economy. The sector has some close synergies with other sectors such as Environmental Technology and ICT that could give it a competitive edge when promoting the sector to emerging markets such as China.
- The International Labour Organisation (ILO) unemployment rate for Bristol is currently 7.9%, slightly higher than the national rate (7.7%), and greater than the South West average rate of 6.2%. The number of Job Seeker Allowance (JSA) claimants for Bristol more than doubled between July 2008 and July 2009 but has remained significantly lower than that of the recession of the early 1990s. However, in the last three months (August to October 2010) when normal seasonal variations indicate a decrease of about 6% (historical average) the claimant count for Bristol increased by about 2%.
- As of October 2010 the number of JSA claimants seeking work as Managers & Senior Officials, Professionals and Associate Professionals & Technicians was 1,890, over twice the number (825) in October 2007.
- With respect to health inequalities, there are no examples where the inequalities gap is consistently rising and overall outcomes for many indicators are improving for the population as a whole. In terms of Quality of Life (QOL) indicators, many neighbourhoods show improving trends, particularly in the south of the city. Of concern is the drop in the level of exercise, an increase in drunk and rowdy behaviour in some parts of the city and a general decline in the satisfaction with local jobs, although the latter may reflect the impact of the recession.
- The over 65 population of Bristol is projected to increase over the next 10 years (2008-2018) by some 5,300 (9.7%) and the population aged 85 by some 1,400 (16.9%). Over the next 20 years the numbers of very elderly Bristol residents is projected to increase significantly, which means the cost pressures on health and social care services will also rise considerably. However, the increase in the numbers of elderly residents will be accompanied by a parallel rise in the working age population (16-64 M/16-59 F) within the city.
- Educational attainment is rising steadily in Bristol. In summer 2010, Early Years Foundation stage results overall were up to 7.2% from 2009 and the gap had narrowed between the lowest attaining 20% of children and the average by 3.5% - putting Bristol in the top 25 areas nationally for ‘narrowing the gap’. Key Stage 2 results improved in all measures including English and Maths and by a larger rate than the national average. In Key Stage 4, the percentage of young people attaining 5 good GCSEs (including English and Maths) rose by 6% on 2009, making a 16 percentage point rise over the past five years.

- In total, in 2008, it was estimated that around 21,900 (or 27%) children live in poverty in Bristol, 19,700 of these were aged under 16. These figures are not evenly distributed across Bristol. Wards like Stoke Bishop and Henleaze have incidences of child poverty below 4%, whereas Lawrence Hill has almost 60% of its children living in poverty, putting it in the bottom percentile of all wards nationally. Almost 2,300 children in Lawrence Hill live in poverty.
- The latest figures estimate that 11.9% of Bristol's working age population don't have any qualifications, compared with 12.4% nationally. There remains a significant gap between the proportion of Bristol's working age population who are qualified to NVQ level 2 (17.0%) and the national average (21.2%). This will have implications for Bristol's residents, as many employers have a minimum requirement of NVQ level 2 for their employees.
- Total recorded crime in Bristol has reduced from 2008/09 levels. A total of 53,915 crimes were recorded in 2009/10, a decrease of 9% from the previous year. Bristol now comes sixth out of eight when compared to the other Core Cities. A further reduction of 34% on current figures would be required for Bristol to be the safest core city.
- Local house prices in Bristol have significantly increased in recent years. In 1997, the ratio between lowest quartile incomes and lowest quartile house prices was 3.31. By 2009, this had risen to 6.35, though the highpoint was several years earlier, in 2007, when the ratio was 7.91. Bristol is one of the most difficult cities in Europe to afford to buy a flat or house. The EU's Urban Audit places Bristol in the most unaffordable fifth of major European cities for buying a flat or house.
- It has been estimated that by 2016 traffic congestion could cost the local economy some £600 million a year. The Joint Local Transport Plan (JLTP) set 21 targets to be met by 2011 and the latest progress report indicates that 17 of them are on track to be achieved. Air quality remains a problem and there are concerns about the condition of principal (mainly 'A') and non-principal ('B' and 'C') roads. The decline in accessibility to health facilities is also an issue that needs to be addressed. Nevertheless overall progress during 2009/10 has been encouraging.
- A recent Carbon Trust study calculated that businesses' use of ICT costs Bristol approximately £11 million per year in energy costs and produces 67,258 tonnes of CO₂, which is 7% of industry and commercial emissions. It is the public sector, with 38%, that generates the largest proportion of Bristol's ICT carbon footprint. Distribution, hotels and restaurants, and other services both account for 14% of Bristol's emissions.
- Investment in Bristol City Council's 'B-Net' (a network of ducting deploying high capacity fibre optic cables across the city to support Council business applications such as CCTV, Transport Operations and Traffic Signals) could create a shared Next Generation Access network for Bristol's public sector services, and act as a catalyst to attract major commercial investment by high-tech and data driven industries.
- Bristol has a vibrant third sector that makes a huge contribution to the democratic life of the city and the quality of life of citizens. However, only 18% of Bristol respondents to the 2008 Office of the Third Sector (OTS) national survey received funding from the council, 3% from local NHS and 1% from police or fire. Some 65% did not receive funding from any of these sources. Some 41% said the main areas where they carry out their activities are either internationally, nationally or regionally - so the main focus is not Bristol. It will be important to find ways to engage with organisations located in Bristol that are not necessarily engaged locally and those that have no political or funding relationship to statutory partners.

Introduction

The following narrative provides a snapshot of some key data and evidence gathered as part of a number of service specific needs assessments undertaken during 2010, along with evidence drawn from a range of other sources, such as the Draft Local Economic Assessment (LEA), Joint Local Transport Plan and the Quality of Life in Bristol report 2009.

It is intended as a strategic summary to highlight issues and evidence across all areas of policy and service delivery to assist decision makers in establishing a holistic view of the city. It is presented as a contextual document, rather than in support of a specific initiative. Greater detail on individual subject areas can be found in the documents/evidence footnoted throughout the document.

Bristol: A City of Contrasts

In economic terms, Bristol is a prosperous city nationally and internationally¹. Bristol's prosperity is built on a wide and varied industrial base, including high tech industries, business services, banking and finance, distribution and retail and the creative industries. It is a beautiful city with an international reputation as a good place to live and do business, a thriving arts scene and a modern city centre. Long-term regeneration of the Harbour side and city centre is well advanced. It is a well-connected city by road, rail, sea and air.

Yet, Bristol still faces a number of significant challenges. It is a city of contrasts: its relative prosperity throws these contrasts into sharp relief. For example, the city has two very successful and popular universities and a highly educated and skilled workforce, with some 35.1% of the working age population educated to degree level (NVQ4 and above)². At the same time, however, while a great deal of progress has been made with regard to educational attainment in recent years, there is still a need for further improvement. Bristol's economic success has also brought with it problems and challenges, such as congestion, environmental pollution and high house prices (relative to income) causing major problems for key workers and younger people looking for affordable housing.

Furthermore, Bristol's prosperity is not shared by all its citizens: many areas of the city suffer from multiple deprivation. Some of the most prosperous areas in the UK sit side by side with some of the most deprived. The statistical evidence for this is provided by the Government's English Indices of Deprivation which measures deprivation in 7 categories – income deprivation, employment deprivation, health deprivation and disability, education, skills and training deprivation, barriers to housing and services, crime and living environment deprivation. These categories are then combined in order to identify areas suffering from multiple deprivation. In Bristol there are a total of 252 lower layer super output areas (LSOA's)³. The latest version of the deprivation index (2010) shows that there are 32 LSOA's in Bristol which are amongst the 10% most deprived in the country (compared to 39 in 2007 and 35 in 2004). Of these 32 LSOAs, 14 are in the bottom 5% and one (Hareclive, Whitchurch Park) in the bottom 1%. The number of people living in the 32 most deprived areas of Bristol is approximately 60,655, constituting 14% of all Bristol residents.

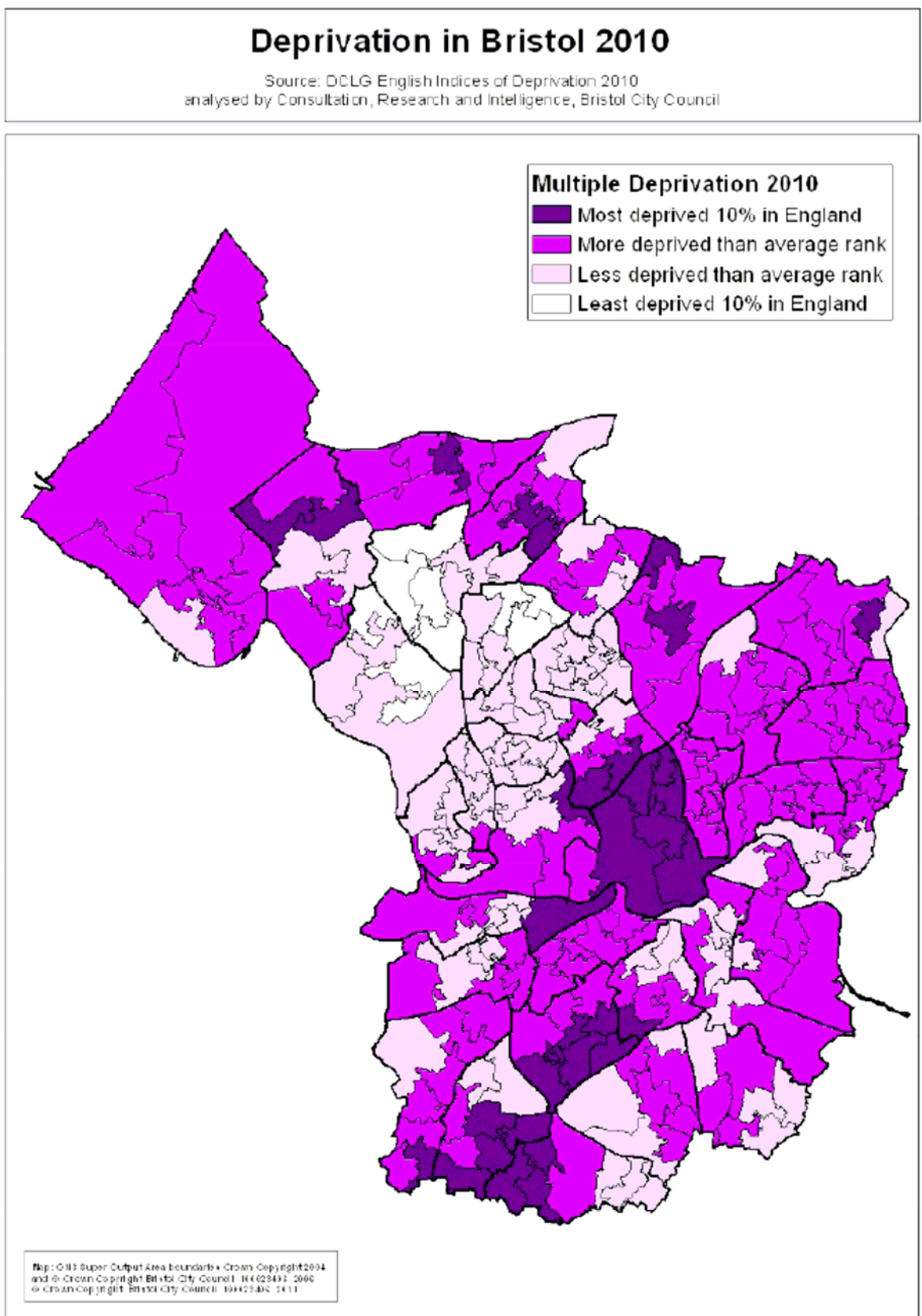
In the past, the levels of deprivation in parts of Bristol have been sufficiently severe for the city to receive special government funding through the Neighbourhood Renewal Fund, Single Regeneration Budget, New Deal for Communities and various European Union funding streams. However, despite continuing high levels of deprivation, these funding sources have now come to an end.

¹ See section on local economy below.

² Source: <http://www.nomisweb.co.uk/reports/Imp/la/2038431894/report.aspx?town=bristol>, (Qualifications)

³ Lower Layer Super Output Areas (LSOAs) are relatively small areas, each with an average population of 1,500 residents, which make the comparison of like sized areas across the country possible. This level of geography enables the identification of pockets of deprivation that are a feature of urban areas - pockets that can be overlooked if only looking at data at ward level.

Map 1: Index of Multiple Deprivation in Bristol



Demographic Change

With a current population of 433,100 people⁴, Bristol is the largest city in the South West and one of the eight 'Core Cities' in England (excluding London). Following a period of population decline in the post war years, the population stabilised in the 1990s and, if recent trends continue, Bristol's population is projected to increase by an additional 159,600 people by the year 2033, representing a 37.5% increase in the population⁵. The total population is projected to reach 585,800 people by 2033.

Local intelligence suggests that since 2001 there has been a significant increase in the number of international migrants coming to live in Bristol, particularly Somali communities and Polish residents coming to work in Bristol following the expansion of the EU. However, national and local data sources on international migration are limited and there is no comprehensive count of migrant numbers nationally or locally and definitively quantifying both the total numbers and movements of these migrants has not been possible.

The most recent data available on household composition estimates that almost half of all households in Bristol are couple households, a third are one person households, 10% lone parent households and the remaining 10% other multi-person households. Future projections indicate that the number of couple households is likely to fall, whilst the number of one person households is likely to increase⁶.

Overall the population of Bristol has increased by 11.0% since 2001, however this disguises both increases and decreases in population for different age groups. Since 2001 there has been a small decrease in the number of children - down by an estimated 1,800 children (2.4%) - and also a decrease in the number of people aged 65 and over – down by an estimated 2,800 people (4.8%). The population aged 16-64 has risen by 48,000 people, an increase of 18.4%.

Looking at the change in numbers of children in Bristol in more detail, between 2001 and 2009 the population estimates show an increase in all age groups 0 to 5 and a decrease in the age groups 6 through to 16. This reflects the substantial increase in numbers of births in Bristol in more recent years.

ONS population projections are also available by age group and gender. Within Bristol, between 2008 and 2028 all age bands are projected to increase. The greatest growth however is projected to be in the 30-44 year old age groups, with a projected extra 50,400 people. Overall the working age population in Bristol is projected to grow at a much higher rate than anywhere else in the South West region.

There is also a relatively large increase in the number of children living in Bristol (+27,300 0-15 year olds), the greatest increase being in the under 10s. The growth in numbers of children in Bristol is in fact projected to be higher than anywhere else in the South West.

Looking at the growth in older people, the projections show an increase of 8,100 people aged 65-74 and 8,000 people aged 75 and over. In terms of the ageing society, the change in the percentage of the older people is lower than most other areas in the South West. Numbers of older people, however, are still growing considerably and will have consequences for health and housing support in the future.

⁴ Mid Year Population Estimates, ONS Crown Copyright Reserved [Nomis 2010]

⁵ Population projections are based on the trends of the previous five years and thus are subject to change. Recent high levels of international migration may not continue and so future population projections for the city may be lower.

⁶ CLG 2006-based household projections

Table 1: Population projections in Bristol by age group

	2008	2013	2018	2023	2028	change 2008-2028	
age 0-14	66,300	72,000	80,700	88,100	92,800	26,500	40.0%
age 15-24	76,900	81,600	78,300	78,400	85,300	8,400	10.9%
age 25-44	141,900	163,700	183,800	197,700	201,400	59,500	41.9%
age 45-64	86,200	91,500	97,500	101,900	109,200	23,000	26.7%
age 65-74	26,400	29,100	30,800	31,500	34,500	8,100	30.7%
age 75-84	20,000	19,000	19,500	22,300	23,900	3,900	19.5%
age 85+	8,300	9,000	9,700	10,800	12,400	4,100	49.4%
Total 65+	54,700	57,100	60,000	64,500	70,800	16,100	29.4%
Total all ages	426,100	465,800	500,300	530,600	559,600	133,500	31.3%

Source: 2008-based SNPP Sub-national Population Projections Unit, ONS: Crown Copyright 2010

Looking at the components of future population change, natural change will continue to significantly contribute to population change in Bristol. The ONS 2008-based population projections components of change suggest that annual natural change will increase by 70% over the next 20 years. In contrast change due to net migration will decrease significantly over the same time period.⁷

The projections for overall net migration do, however, conceal some very significant population movements. International migration is likely to remain a significant contributor to population change and increasing population diversity, with annual net increases of some 6,000-6,700 international migrants. The international net migration will be offset to a degree, however, by the fact that trends in net internal migration will continue with increasing numbers of people moving out of Bristol rather than moving in.

Department for Communities and Local Government household projections (which are also based on the assumption that recent population trends continue into the future) indicate a downward trend in average household size for Bristol over the next 20 years. One-person households are likely to account for some 40% of all households by 2028. Household numbers are projected to increase by some 63,000 over this period. It is projected that more than 50% of this increase will be comprised of one-person households.

Local Economy⁸

In 2008, Bristol generated some £11.5 billion of wealth (measured by gross value added, GVA). This was almost 12% of the wealth generated in the whole of the South West. The significance of this wealth generation comes not just from the scale of Bristol's output, but from the productivity of Bristol's workforce – measured by GVA per full-time worker, it is significantly higher than the regional or national averages. Bristol's skilled workforce and the presence of large numbers of knowledge intensive businesses drive this relatively high productivity. Moreover, Bristol's GVA is forecast to rise at a rate faster than the national average over the next ten years. Increases in GVA will benefit Bristol's wider economy, enhancing individual prosperity and quality of life. However, GVA growth is not forecast to be strong enough to return employment levels to a pre-recession state in the near future.

⁷ As noted, population projections are based on the trends of the previous five years and thus are subject to change. Recent high levels of international migration may not continue and so future population projections for the city may be lower.

⁸ Much of the following is summarised from the draft Local Economic Assessment (LEA).

The largest single contributor to GVA in Bristol is the banking and insurance sector, but the real feature of the local economy is diversity – Bristol is not overly dependent to any one sector for output employment, making it resistant to ‘shocks’ and well placed to foster growth. Bristol’s positive track record of private sector growth, innovation, inward investment and enterprise could position it well to resist the impact of public sector budget reductions.

Achieving sustainable economic growth is essential for both the health of the local economy and the well-being of residents. Going forward, green transport initiatives in Bristol will help reduce pollution and traffic congestion. However, further transport initiatives will also be needed, to bring the supply of transport provision closer to demand and ensure that Bristol remains competitive with other cities in the UK.

Key Opportunities

- Bristol’s skilled workforce and diversity of knowledge intensive businesses position it well for economic growth.
- Specific strengths in the green and digital economy could be crucial to both growth and environmental sustainability.
- A flourishing cultural sector is driving strong and developing creative industries, adding to innovation and enterprise.
- Bristol’s track record in generating private sector employment growth increases its resistance to the impact of public sector cut backs.
- Bristol’s geographic location, size, connectivity and quality of life continue to make it attractive to business relocation and migration.
- Increasing prosperity, driven by economic and employment growth will contribute to advances in overall health and wellbeing for Bristol residents.

Key Challenges

- Reducing carbon emissions and dependence upon oil resulting from economic activity to promote longer-term sustainability.
- Developing sufficient and appropriate skills provision to enable employer demand to be met by local supply and enable economic growth to tackle persistent worklessness in some communities.
- Identifying sufficient and appropriate industrial and commercial employment land to meet demand and retain local jobs.
- Increasing the supply of new homes and associated infrastructure in line with a rising population
- Enhancing the transport infrastructure, including increasing the supply of public transport to match demand
- Expanding Bristol’s digital connectivity to increase business competitiveness and productivity, whilst also addressing ‘digital exclusion’ amongst residents.
- Retaining ‘quality of life’ amidst physical development of the city, to preserve Bristol’s character and attractiveness to investors.
- Maintaining Bristol’s ‘geographic advantage’ by enhancing connectivity to London, the UK and worldwide, through, for example, high-speed rail links, developing the Port of Bristol and enlarging Bristol Airport.

Creating a Sense of Place

Bristol has won many accolades, such as the best English city for quality of life and the UK’s highest performing city in the European Innovation Index. It was designated by DK Eyewitness as one of 10 ‘must-see’ cities in the world in 2009 and was the only UK city to be short listed in the race to become the first European Green Capital City. Its visitor economy has more than doubled in the last 15 years and its finance, high technology and

creative industries have grown considerably. But despite this success, Bristol is still striving to match the experience offered by its domestic and European competitors in many areas. Improvements are needed in the public realm, labour supply and skills, visitor management and traffic management. Investment in product development, infrastructure and marketing could also be improved through a more coordinated approach.

Destination Bristol and its strategic partners Bristol City Council, and GWE Business West, with the support of the South West Regional Development Agency and the local strategic partnership commissioned a Place Making and Marketing Strategy⁹, with the aim of delivering a more coherent image of the city and recommending priorities for action that reinforce and complement this image.

Bristol's future competitiveness and success depends on:

- Differentiating Bristol from its competitors and strengthening those areas that enhance Bristol's 'sense of place'. Communicating Bristol's characteristics to potential customers in its key sectors and market segments
- Forming strategic alliances that enable Bristol to punch above its weight in UK and world markets
- Delivering sustainable solutions to the transport problems in the "greater Bristol" travel-to-work area
- Providing opportunities for all citizens and communities to contribute to and benefit from Bristol's future success and prosperity
- Growing, attracting and retaining the creative talents and skills necessary to compete in the economy of the future and providing the means necessary to enable all people to fulfil their potential

Creative Industries

A key feature of Bristol's economy is its creative industries, perhaps the most famous example of which is Aardman Animations. There is no definitive description of what is meant by 'creative industries' as it is an ever-changing definition. Standard Industrial Classification (SIC) codes do not always capture more modern industries, which means most definitions of 'creative industries' take in a wide range of different industry groups. As a general guide, the SIC codes used by Department for Culture Media and Sport (DCMS) for the Cultural sector covers seven domains: Visual Art, Performance, Audio-Visual, Books and Press, Sport and Health, Heritage and Tourism.

Key Opportunities

- The sector is considered to be an important factor for innovation and growth out of a recession.
- The sector is very diverse and some sub-sectors are highly successful such as digital while other sectors have been in decline for some years, like publishing.
- There were 11,500 people employed in this sector in 2008
- Creative industries account for 12% of all businesses and 5% of all employment in Bristol
- Largest sub-sector of employment is in Audio / Visual category, followed by books and publishing,
- The creative sector contributed £727million to the economy in 2008, accounting for 6% of the Bristol economy.
- Bristol has a higher location quotient than any of the English Core cities except Manchester.

⁹ See <http://www.bristol.gov.uk/ccm/content/Business/Business-support-and-Advice/bristol-a-place-making-and-marketing-strategy.en>

- Small businesses and freelancers an important aspect of this sector which tend to focus on urban and cultural centres Bristol and Bath

Key Challenges

- There has been strong growth in this sector in recent years but it faces some barriers around skills in the moving image sectors (losing some key skills to graduates moving to London). So there is a need to attract talent from London and retain local graduates.
- A lack of suitable premises at the high end like Paintworks but there is also a need for more affordable space.
- Compared to other areas – there is a lack of public funding compared to other regions.
- Many creative practitioners do not see themselves as businesses and there is a lack of managerial and entrepreneurial skills. There is also reluctance to access existing business support services such as business link.
- This sector has some close synergies with other sectors such as Environmental Technology and ICT that could give it a competitive edge when promoting the sector to emerging markets such as China.
- Skills and training are required

Employment and Recession¹⁰

The recession has affected Bristol's residents and businesses in a number of ways. There has been the obvious and visible increase in unemployment, which has affected neighbourhoods and communities to varying extents. Similarly visible has been the impact on physical development, including housing, and on enterprise. Perhaps more hidden, but no less serious, has been the social impact - on health, crime, families and deprivation - generally resulting from increased unemployment and poverty.

The International Labour Organisation (ILO) unemployment rate is the proportion of the economically active population in an area who are unemployed. In the UK this definition includes those people who are aged over 16, but does not have an upper age limit¹¹. Using this definition the unemployment rate for Bristol is currently 7.9%¹², slightly higher than the national rate (7.7%), and greater than the South West average rate of 6.2%.

While not as comprehensive as the ILO measure of unemployment, it is also useful to look at changes in Jobseekers' Allowance (JSA) claimant numbers to get a clear understanding of the recession's impact. The claimant count is produced monthly, a month in arrears, and is a headcount of all claimants. The number of Job Seeker Allowance claimants for Bristol more than doubled between July 2008 and July 2009 but has remained significantly lower than that of the recession of the early 1990s (July 1993: 26,726). Since July 2009 the count has broadly reverted to the normal pattern of seasonal variations¹³ and in July 2010 stood at 10,164 about 1,500 below the July 2009 level. However in the last three months (August to October) when normal seasonal variations indicate a decrease of about 6% (historical average) the claimant count for Bristol has increased by about 2%.

¹⁰ Much of the following has been summarised from [The Bristol Economic Quarterly](#).

¹¹ The ILO definition refers to people without a job who were available to start work in the two weeks following their interview and who had either looked for work in the four weeks prior to the interview or were waiting to start a job they had already obtained.

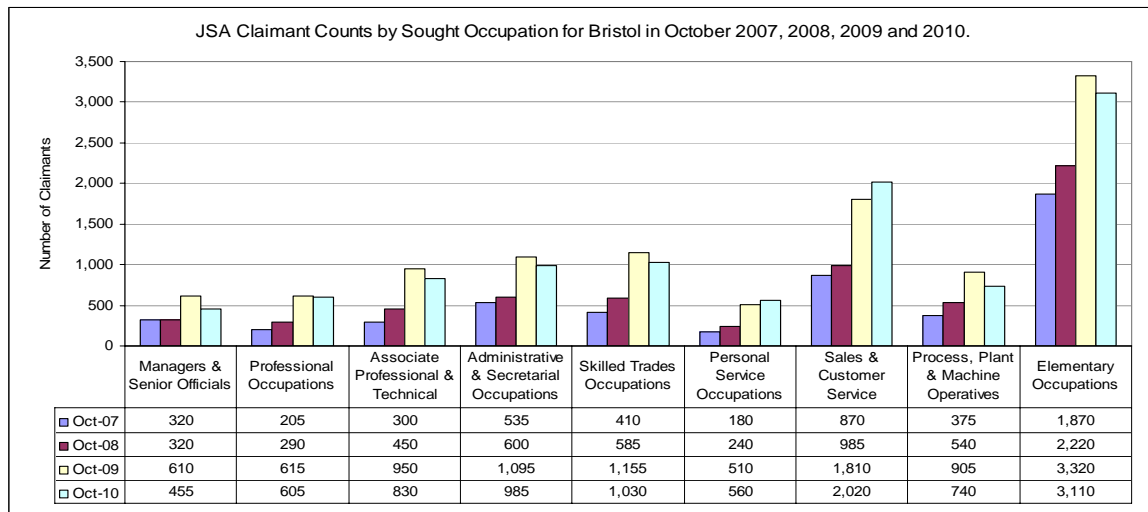
¹² Source: Nomisweb.co.uk. [Bristol Labour Market](#) (Unemployment rate: July 2009- June 2010)

¹³ The data indicates that claimant counts have broadly reverted to the normal seasonal variations throughout the UK.

Wealth inequalities, as measured by the proportion of residents claiming out-of-work benefits, exist in clear concentrations across the city. There are 30 LSOAs¹⁴ with more than 25% of the working age population claiming out-of-work benefits. These are clustered in the south (mainly Hartcliffe, Filwood and Whitchurch Park wards) and central east (Ashley and Lawrence Hill) of the city, together with a scattering across the northern periphery (individual neighbourhoods in Kingsweston, Southmead, Henbury and Lockleaze). There has been some movement in this group of 30 neighbourhoods over the last ten years, with the relative positions improving in the central east area of the city and deteriorating in the more peripheral areas, both north and south.

In October 2010 the numbers of JSA claimants for 6 of the nine major occupational groups remain at least twice those of October 2007. In absolute terms the individuals seeking work in the elementary occupations are still and will continue to be the largest group of claimants. However as of October 2010 the number of JSA claimants seeking work as Managers & Senior Officials, Professionals and Associate Professionals & Technicians was 1,890, over twice the number (825) in October 2007. Further it should be pointed out that the increase (830) in the number of people claiming JSA and seeking employment as Managers & Senior Officials, Professionals and Associate Professionals & Technicians between October 2008 and October 2010 matched more or less exactly the increase (890) in the number of those claiming JSA and seeking employment in Elementary Occupations.

Figure 1: JSA claimants by sought occupation 2007 - 2010



Source: [The Bristol Economic Quarterly](#) (December 2010) based on data from ONS (NOMIS) monthly count of unemployed claimants © Crown Copyright

There have been several high-profile closures on Bristol's high streets. Familiar names such as Woolworth's, Thresher's, MFI, Principles, Borders, The Pier and Zaavi have disappeared along with scores of independents. Combined with closures of estate agents, banks, building societies, cafés and pubs there has been a negative impact upon many retail centres.

The opening of Cabot Circus in September 2008 has helped to preserve the vitality of the city centre, although there has been a growing number of vacant units in Broadmead, especially within The Mall and the area around Union Street (Broadmead West). The owners of Cabot Circus and The Mall have each been initiating actions to reduce the number of vacant units, while the City Council has been promoting alternative uses for empty shops in the city's secondary retail centres.

¹⁴ Lower Layer Super Output Areas (LSOAs) are relatively small areas, each with an average population of 1,500 residents, which make the comparison of like sized areas across the country possible. This level of geography enables the identification of pockets of deprivation that are a feature of urban areas - pockets that can be overlooked if only looking at data at ward level.

A number of major development schemes in Bristol have been stalled or delayed by either a lack of credit, confidence or demand. This has affected both the commercial and domestic markets, which have also seen significant falls in value. Somewhat against this trend, public sector development has continued, with recognition of their value in providing employment and supporting local businesses.

Health

Health Inequality

Addressing inequalities in health remains a high priority for Bristol¹⁵. Following the structure of the Marmot report, *Fair Society, Healthy Lives*, six priority objectives have been identified to address health inequalities at all levels:

1. *'Give every child the best start in life'*

Data available for mothers smoking at the time of delivery, breastfeeding initiation, breastfeeding continuation and low birth weight show that the gap between the most deprived fifth of the population¹⁶ and the Bristol average or least deprived fifth has remained relatively unchanged. There has however been an overall reduction in those smoking at the time of delivery both in the most deprived fifth of the population and Bristol as a whole.

Early years attainment (as monitored by achievement on the Early Years Foundation Stage profile, including communication, language and literacy and personal social and emotional development) is improving in Bristol year on year and the gap between the lowest achieving 20% and the Bristol mean is decreasing steadily.

2. *'Enable all children, young people and adults to maximise their capabilities and have control over their lives'*

Assessments at Key stage 1 to 4 of children and young people in Bristol show wide variation in achievement in all subjects between those eligible for free school meals (a proxy for deprivation) and those who are ineligible. Where limited trended data is available for the achievement gap at GCSE (key stage 4 level) no reduction in the gap over time is apparent.

Overall however achievement at Key stages 2 and 4 is improving with key stage 2 data showing Bristol had reached similar levels to that of the other core cities and its statistical neighbours in 2009-2010. Key stage 4 results for five or more GCSEs at Grade A* – C (including English & Maths) still remains below that of its statistical neighbours in 2009/10, although the gap is narrowing.

Bristol is achieving well compared to the England average and its statistical neighbours in reducing its equality gap between those eligible for free school meals and those who were ineligible at aged 15 and their achievement of a level 2 or 3 qualification at aged 19. The percentage of young people not in education, employment or training (NEET) in March 2010 was also lower than it had been over the previous two years.

3. & 4. *'Create fair employment and good work for all' & 'Ensure a healthy standard of living for all'*

¹⁵ Much of the following has been extracted from the Joint Strategic Needs Assessment, 2010 (Version 5), the Draft Bristol Health Inequalities – Baseline report, September 2010, and the [Quality of Life Report 2009](#)

¹⁶ When analysing data associated with deprivation levels, the data is sometimes separated into quintiles (fifths). Quintiles in the following examples represent the average ward data of the 7 wards (ie. one fifth of total wards) assigned to that quintile, (e.g. the 7 most deprived wards would make up quintile 5 – the most deprived fifth).

Overall Bristol has the lowest ILO unemployment rate of the core cities¹⁷. Bristol also compares favourably to other core cities with regard to rates of worklessness (the proportion of the working age population claiming out of work benefits). As noted, the number of Job Seeker Allowance claimants for Bristol more than doubled between July 2008 and July 2009 but has remained significantly lower than that of the recession of the early 1990s (July 1993: 26,726). Since July 2009 the count has broadly reverted to the normal pattern of seasonal variations and in July 2010 stood at 10,164 about 1,500 below the July 2009 level. However in the last three months (August to October) when normal seasonal variations indicate a decrease of about 6% (historical average) the claimant count for Bristol has increased by about 2%.

5. *'Create and develop healthy and sustainable places and communities'*

Availability of green space, use of active modes of transport, proportions of people exercising at least 5 times a week, and walking time to a park or open space appear similar across the deprivation gradient. However, in more deprived areas, there appears to be less concern with climate change, more road traffic accidents, less use of green space and less consumption of fresh fruit and vegetables.

Air quality and traffic pollution, and noise from traffic are reported fairly evenly. Social isolation as determined by the percentage of people who never or rarely see or talk to extended family or friends is highest in the least deprived fifth of the population.

6. *'Strengthen the role and impact of ill health prevention'*

There continues to be a gap between the most deprived fifth of the population and Bristol as a whole in all age all cause mortality and premature all cause mortality, with the gap changing little over time. Life expectancy at birth continues to rise but the difference in years between the Bristol average and the most deprived quintile stands at 1.8 years, with a much wider differential between the most and least deprived wards (8.8 years).

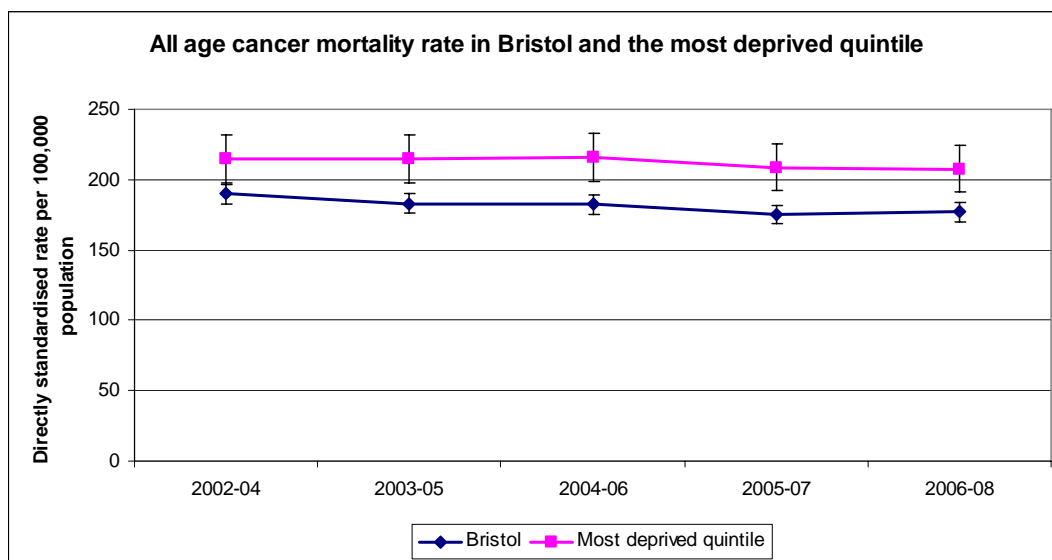
All-age cancer mortality (see Figure 2 below) and premature cancer mortality data show a persistent gap between the Bristol average and the most deprived fifth of the population. Similar measures for cardiovascular diseases, (all age and premature mortality) suggests that overall mortality rates are generally decreasing, with a lessening of the inequalities gap in both groups. Emergency admissions for stroke show marked differences between deprivation quintiles with those in the most deprived fifth having approximately twice the rate of admission compared to those in the least deprived fifth.

Smoking, alcohol admissions and childhood obesity also follow steep inequality gradients with rates rising across the deprivation quintiles. The rise in alcohol admission rates over the past few years in all deprivation quintiles is of particular concern (see Figure 3 below).

Overall, there are few areas where the data available shows a clear reduction in the inequalities gap. Exceptions to this would be in cardiovascular disease mortality and achievement of level 2 and level 3 qualifications by the age of 19. On a positive note however, there are no examples where the inequalities gap is consistently rising and overall outcomes for many indicators are improving for the population as a whole.

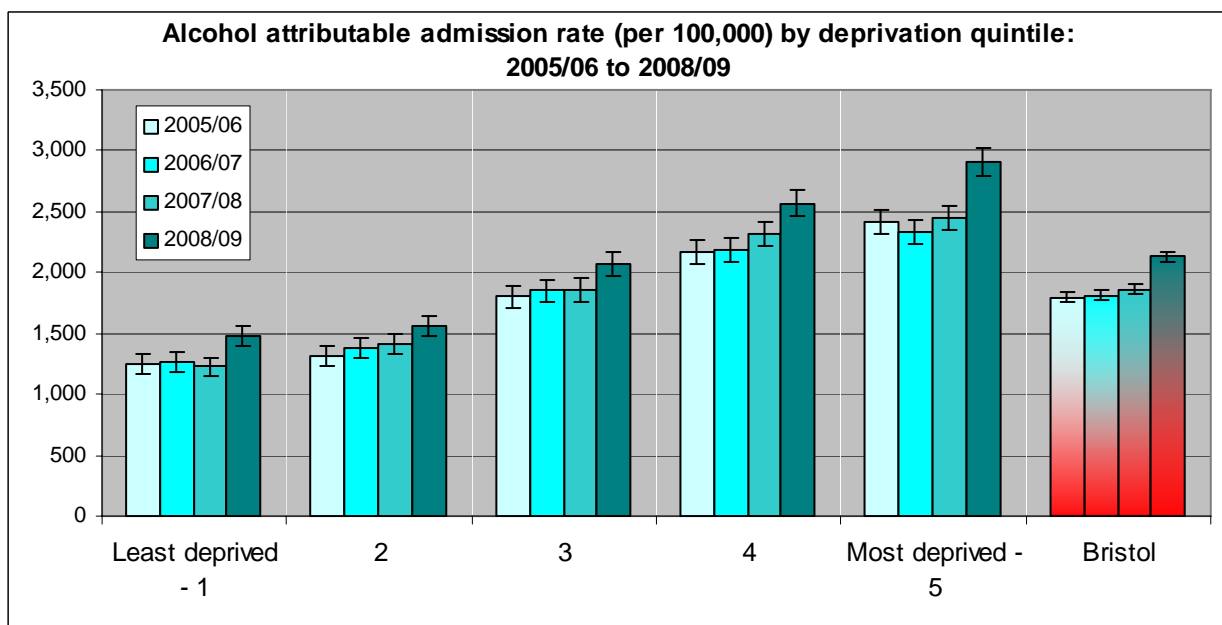
¹⁷ The core cities are Birmingham, Bristol, Leeds, Liverpool, Manchester, Newcastle, Nottingham and Sheffield.

Figure 2: All age cancer mortality rate in Bristol and the most deprived quintile 2002-2008



Source: Deaths data from ONS Annual Deaths file. Populations from GP registration, using Bristol residents view by deprivation quintile

Figure 3: Alcohol attributable admission rate (per 100,000) by deprivation quintile 2005/06 to 2008/09



Source: Alcohol-attributable admissions data extracted from local hospital activity datasets (Xiom data warehouse)

Teenage Pregnancy

Babies born to teenage mothers have a 60% higher infant mortality rate and a 63% increased risk of being born into poverty compared to babies born to older mothers. Tackling the risk factors for teenage pregnancy can have an impact on a range of other local priorities.

Latest available performance data show there were 357 under 18 conceptions in 2007. This represents a 7.3% increase from the 1998 baseline. In 2004-6 14 wards had rates among the highest 20% in England¹⁸. The 10 wards consistently in the 20% highest among England were: Lawrence Hill, Filwood, Easton, Avonmouth, Whitchurch Park, Southmead, Hartcliffe, Ashley, Bishopsworth, Henbury. Lawrence Hill has consistently had the highest rate in Bristol. Avonmouth has consistently been among the 5 highest wards in Bristol. Rates in Ashley, Henbury, Lockleaze and Bedminster rates have fallen over each 3-year period (although the numbers are too small to affect the overall picture)¹⁹.

*Physical Activity in Bristol*²⁰

According to the 2009 Quality of Life Survey, a third of respondents said that they took moderate exercise at least 5 times a week. Moderate exercise can include brisk walking, a sport or leisure activity, heavy gardening, heavy housework or DIY. The residents of Redland reported the highest levels of exercise. Ward trends over the last four years indicate that levels of exercise have significantly declined in Windmill Hill, Whitchurch Park, Lawrence Hill and Cotham. When compared to the population as a whole, significantly less exercise was taken by black and minority ethnic groups (25%). Disabled people also report lower levels of exercise. Exercise levels for women are lower than for men.

Some four out of ten residents said they participated in active sport at least once a week in 2009. Active sport includes activities that have no cost, for example, jogging, football, community sport, as well as attendance at local sports and leisure centres. Residents in Clifton East, Redland, Bishopston and Ashley participate in more active sport than the rest of the city. Residents in the south of the city report lower levels of participation, particularly in Bedminster and Hartcliffe. Disabled people and older people do less sporting activity.

In a 2009 Bristol survey of more than 5,000 children and young people, aged between 8 and 15, nearly nine out of ten reported finding it 'very easy' to be as physically active as they like at playtimes. In 2009-10, more than 1.5 million children and young people attended leisure centres and swimming pools. Visits to parks were also well above target. Ofsted's TellUs survey reports that Bristol children and young people's satisfaction with parks and play areas is well above target.

Project Opal²¹ is investigating activity levels among people aged over 70. Some of this work is being carried out in Bristol. To date, University of Bristol researchers have observed very low levels of activity amongst most people over 70. More than 70% of the people involved with the research take fewer than 5,000 steps a day. Women are more likely to be less active than men and have lower levels of physical function.

Overall, according to the Bristol Health Profile 2010, Bristol has the second highest physical activity rates for adults compared to seven other major cities in England. For children, Bristol comes out fifth.

Older People

¹⁸ As ward conception numbers are relatively small (even when aggregated over three years) rates may vary markedly from year to year and should be interpreted with some caution.

¹⁹ Health and Well Being Fact Sheet, Teenage Pregnancy, January 2010

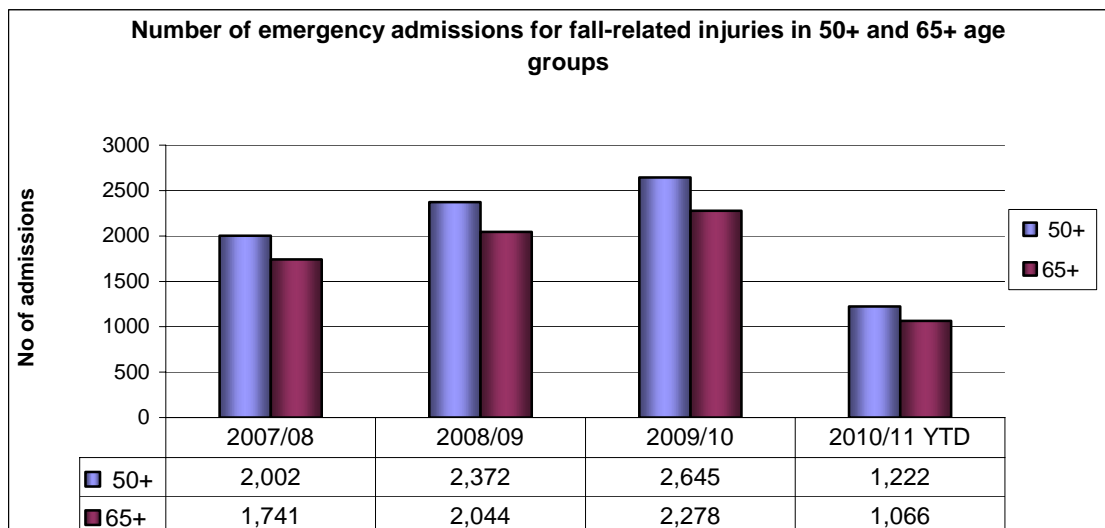
²⁰ Much of the following has been summarised from 'Active Bristol: a framework for change, 2010-15, Draft v4', November 2010 and the Quality of Life In Bristol Survey 2009: <http://www.bristol.gov.uk/qualityoflife>

²¹ See <http://www.bristol.ac.uk/enhs/opal>

The over 65 population of Bristol is projected to increase over the next 10 years (2008-2018) by some 5,300 (9.7%) and the population aged 85 by some 1,400 (16.9%). Over the next 20 years the numbers of very elderly Bristol residents is projected to increase significantly, which means the cost pressures on health and social care services will also rise considerably. However, the increase in the numbers of elderly residents will be accompanied by a parallel rise in the working age population (16-64 M/16-59 F) within the city. The 2008 figure of 291,500 working age population is projected to increase by 54,700 (18.8%) in 2018 and by 87,900 (30.2%) in 2028.

Falls represent the most frequent and serious type of accident in people aged 65 and over. Furthermore, falls are the main cause of disability and the leading cause of death from injury among people aged over 75 in the UK²². On average, every day, just over six (6.2) Bristol residents aged over 65 are admitted in an emergency to a hospital bed following a fall. In addition, the rate of admission for falls among Bristol's 50+ and 65+ population has increased at approximately 10% per year over for the last three years (see Figure 4 below).

Figure 4: Number of emergency admissions for fall-related injuries in 50+ and 65+ age groups



In 2008, 3.3% of Bristol's over 65 population were admitted to a hospital bed in an emergency following a fall. It is estimated that some 35% will have been treated in emergency departments and approximately 1.3% will have sustained a hip fracture. The costs of falls and aftercare in the over 65 population of Bristol is estimated to cost health and social care providers £28.5 million every year, not including the costs of GP consultations or outpatient rehabilitation.

Yet, falls are not an inevitable part of aging and falls risks are well understood. It is essential that the authority and partners help people maintain independence as they age, through keeping active, maintaining a healthy diet and undertaking strength and weight bearing activity amongst other effective interventions.

Dementia is increasing along with the ageing population. In the UK one in five people over 85 has dementia and one in 14 over 65 has a form of dementia. It is estimated 13% of people with dementia live alone at home. In addition, a lot of people with mild dementia may not be diagnosed. It has been estimated that in Bristol in 2010 there are 4222 people aged 65 and over with dementia, which is approximately 7.6% of the 65+ population. By 2030 this figure is predicted to rise to 5832 people aged 65 or over – an increase of 39%. Total costs relating to dementia, which includes costs relating to health, social care, informal care and personal funding costs, are difficult to calculate but it

²² See *Stop Falling: Start Saving Lives and Money*, Age Concern/Age UK (November 2010).

is estimated that in Bristol in 2010 these costs are between £120 million - £141 million. Moreover, these costs are projected to rise to between £135 million to £159 million, the biggest elements of which are likely to be care homes and informal care costs.

Bristol currently makes a high number of residential and nursing placements. In the future we will need less residential care as more people are helped to live at home with personalised care services. Under self directed support, a supported self assessment, service users with eligible assessed needs will be allocated a personal budget, which will enable them to meet those assessed eligible needs in new ways.

Social care is changing across the country and social care is likely to look very different in Bristol in 2011 as more personalised care is introduced. Personalised care is a new way of supporting people by telling them how much money there is available to support them and then giving them the choice of how that is spent to meet their needs. This means that they can either have a direct payment for them to spend on support, or they may choose to ask us to provide a service for them, or a mixture of the two.

The main changes are likely to be:

- giving people more choice and control over how they receive support
- telling people how much money can be spent on their care – their personal budget
- letting people directly control and spend their personal budget through direct payments
- giving help earlier to reduce the need for crisis services
- work together with the health service so we only have to assess people's care needs once and give people the chance to assess their own care needs – self-assessment
- social workers spending more time helping people to find the care they want and less on paper work

Children, Young People and Families²³

There are 93,800 children and young people aged 0 to 19 living in Bristol, equating to 21.7% of the city's total population. Projections of the child population indicate that, if current trends continue, the population of the city could increase by a third in the coming 25 years.

The Institute of Community Cohesion Report (iCoCo) report of 2009²⁴ highlighted that Bristol's 0-19 population is becoming more diverse at a much faster rate than the Bristol population as a whole. It notes, for example, that 22.5% of children and young people are from BME backgrounds compared with an estimated 10.7% of the population as a whole. Sixty-six different ethnic groups now make up the school population in the city; the two fastest growing ethnic groups are White Eastern European children (125% increase since 2007) and Black Somali children (64% increase since 2007).

A range of factors, including improved survival rates for premature babies, has also contributed to an increased number of disabled children and children with complex health needs. It has been estimated, following a GP pilot, that approximately 7.5% of children and young people are likely to have a disability or chronic illness in Bristol. In short, there is a need to understand how Bristol's population will grow and diversify in the coming years and to assess the shifting demand for services so that resources can be best used.

²³ Much of the following has been summarised from the Draft Children and Young People's Plan 2011-14 and the results of the CYPS needs assessment. See <http://bristolchildren.wordpress.com/>

²⁴ See <http://www.bristol.gov.uk/ccm/content/Leisure-Culture/Local-History-Heritage/legacy-commission-fsis/-institute-of-community-cohesion-report-icoco.en>

Educational attainment is rising steadily in Bristol. In summer 2010, Early Years Foundation stage results overall were up to 7.2% from 2009 and the gap had narrowed between the lowest attaining 20% of children and the average by 3.5% - putting Bristol in the top 25 areas nationally for 'narrowing the gap'.

Key Stage 2 results improved in all measures including English and Maths and by a larger rate than the national average. In Key Stage 4, the percentage of young people attaining 5 good GCSEs (including English and Maths) rose by 6% on 2009, making a 16 percentage point rise over the past five years (double the national improvement rate).

The percentage of 16-18 year olds in learning has shown a steady pattern of improvement in Bristol and compares favourably to that of other areas, as does the achievement of Level 2 qualifications by age 19. There has been an increased number of placements through the Young Apprenticeship Programme.

Other improvements include:

- There is now a single provider partnership (North Bristol NHS Trust with Barnados) for all child health services. Access to care has been improved and waiting times for contact with Child and Adolescent Mental Health Services have reduced.
- The health of children in care has steadily improved, with improved health assessment and dental check rates
- In a joint inspection by Ofsted and the Care Quality Commission, Bristol has been the first major city judged 'good' for its services and for its capacity to improve both for Safeguarding and for services for Children in Care. Bristol's Adoptions service has been judged to be 'outstanding'.
- By 2013, Bristol will be England's first area to have rebuilt, or significantly refurbished, all of its secondary schools, including leading edge co-location opportunities for inclusion of children with special educational needs
- National funding is to be released for 'My Place' – a city centre venue developed jointly by young people and VCS partners, and a successful Play Pathfinder bid means significant capital investment in facilities

However, there still remain a number of challenges:

In total, in 2008, it was estimated that around 21,900 (or 27%) children live in poverty in Bristol, 19,700 of these were aged under 16. These figures are significantly higher than the regional (15.8%) and national (20.9%) averages²⁵. As an overall proportion of all children living in poverty in England, almost 1% live in Bristol (0.94%). These figures are not evenly distributed across Bristol. Wards like Stoke Bishop and Henleaze have incidences of child poverty below 4%, whereas Lawrence Hill has almost 60% of its children living in poverty, putting it in the bottom percentile of all wards nationally. Almost 2,300 children in Lawrence Hill live in poverty.

Three quarters of Bristol's impoverished children live in lone-parent households: around 16,500. This proportion is greater than the average across our statistical neighbours or the core cities. Also, over half of children in poverty live in households where the youngest child is under the age of five. Again, Bristol has relatively more children in this category than any of its comparators, and may suggest that poverty will be harder to eradicate here than elsewhere.

As economic conditions worsen, so too will the numbers of children living in poverty. The use of free school meals (FSM) is often used as a proxy indicator for deprivation. Across Bristol the granting of FSM status has increased from 21.5% in 2008 to 22.9% in 2010. Furthermore, the geographical

²⁵ Source: http://data.gov.uk/dataset/ni_116_proportion_of_children_in_poverty

pattern of this increase suggests that child poverty is spreading outwards from core areas and enveloping more of the city. It is expected that both the absolute numbers of FSM claimants and the spread outwards in to the centre and north of the city will continue to increase over the next few years.

In Bristol each year, 13,500 children under 16 (around 38 every day) are treated for injuries in Bristol's emergency Departments. When a patient attends an Emergency Department, items of information including 'presenting complaint', 'diagnosis' and postcode of residence are recorded. The postcode information has been mapped and compared to the population of under 16's resident in each Lower Layer Super Output Area to calculate the rates of attendance in each area. It shows that each year between 2007 and 2009 nearly half of all children in parts of Southmead and Lockleaze attended an Emergency Department as a result of injury.

Poor housing, social isolation, poverty and a single parent family can increase the risk of childhood injury. Map 2 (below) indicates that the rate of injury does seem to be higher in the north, south and central areas of the city, all of which score higher than average for multiple deprivation. However, the rate in the North of Bristol is surprisingly high, so other factors may be affecting the pattern. Further work is being undertaken to examine the significance of proximity to services (easy access to services at Southmead and Frenchay), cultural and social differences (different perceptions of what constitutes a serious injury, differences in alcohol and drug use by parents and guardians etc) and accessibility of services (the availability of alternative treatment options).

Other notable points with regard to child safety issues include:

- Numbers of Looked after Children have been remarkably constant; children with CP plans have been reasonably constant; Children in Need have climbed to a plateau and remained steady for 1½ years.
- Increasing use of independent foster carers, which are much more expensive.
- Under-reporting of asylum-seeking children, leading to loss of Government funding.
- An increase in Domestic Violence as a reason for Child Protection Conferences.
- Evidence from drug and alcohol treatment services that the transition for 18 - 25 year olds from children's services to adults' is not satisfactory.

According to Bristol's *Action Plan to Reduce Inequalities in Education Achievement for Black and Minority Ethnic (BME) Children and Young People* at all stages non BME pupils outperform those from BME communities. Furthermore, more specifically, black pupils are consistently the worst achieving. The underachievement by black students is far worse for boys. For example, in 2010, 23.5% of black boys achieved the five or more GCSEs at grade A* – C whereas the corresponding figure for black girls was 36.5%. Moreover the most recent data indicates that the gap in performance between black/black British and white pupils is widening again following a period when it narrowed in 2008/9.

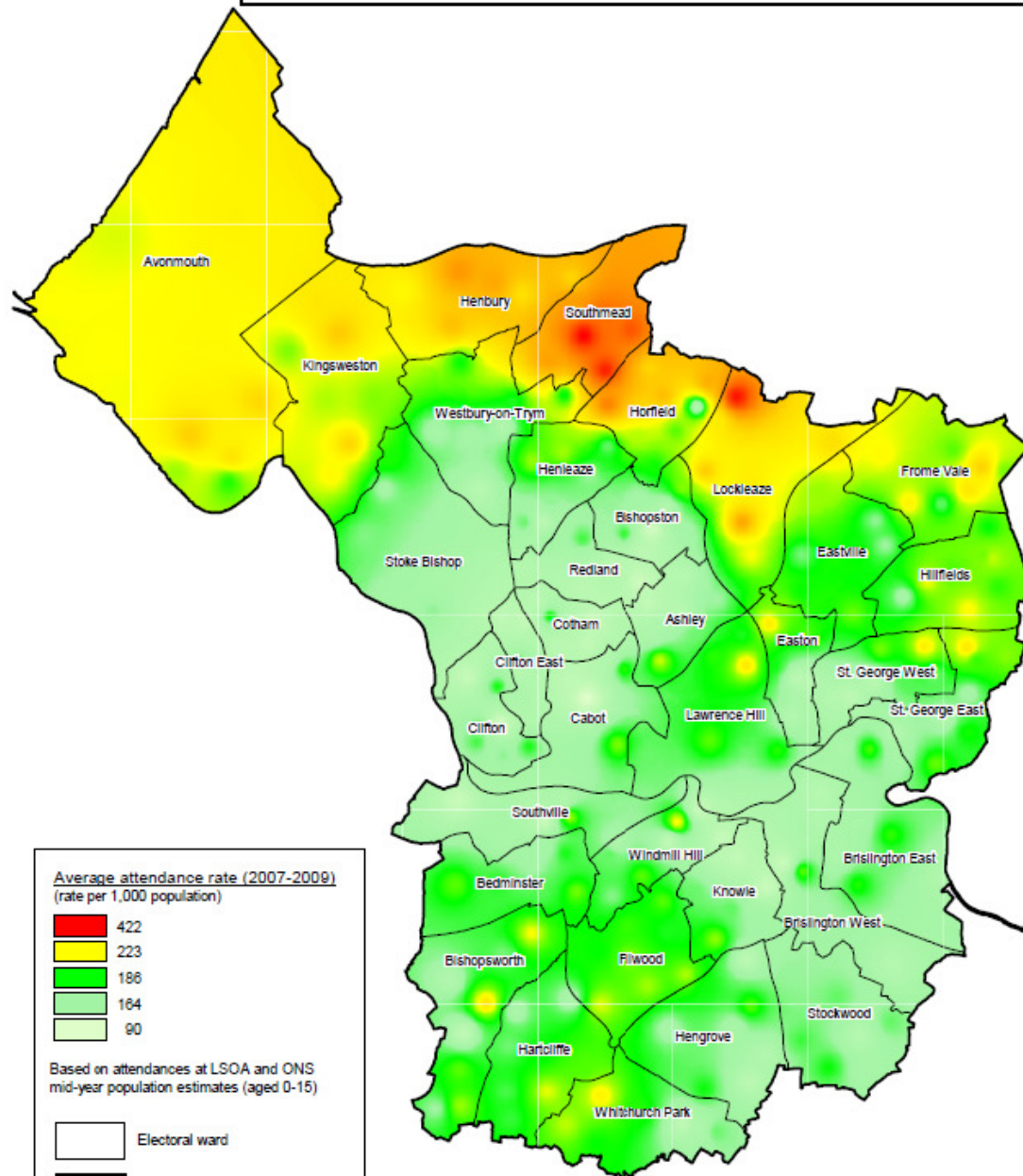
Reasons for the underachievement within the BME population are many. The Institute of Community Cohesion Report (iCoCo) report of 2009 indicated that the key issue is the low numbers of BME teachers, governors, Council staff and Members. Only 4.4% of teachers were BME in March 2008, up slightly from 3.7% in the previous year. Just 1.79% of teachers were Black or Black British with just one Somali. The number of BME governors is also low but improving, up from 94 in 2006/07 to 147 in 2007/08 and 158 in the first quarter of 2008/09. The Council has set an Local Area Agreement (LAA) target for increasing the proportion of BME governors.

In 2006 only 5.2% of pupils with Special Educational Needs (SEN) provision passed five or more GCSEs, including Maths and English; this figure improved drastically to 16.8% in 2010. However, they still lag behind those without any SEN provision by a considerable margin; in 2006 39% of those without SEN provision passed five or more GCSEs, including Maths and English, whereas

52.3% achieved the milestone in 2010. Moreover, within the SEN cohort, there are significant disparities between BME and non BME pupils, with SEN white pupils' pass rates being some three times higher than their SEN Asian or Asian British, or Black or Black British counterparts.

Map 2: Attendance Rates (under 16) for unintentional injuries

NHS Bristol: Attendance rates (under 16) for unintentional injuries at Bristol Childrens Hospital, Frenchay Emergency Department and Southmead Minor Injury Unit - (2007-2009)



Average attendance rate (2007-2009)
(rate per 1,000 population)

Based on attendances at LSOA and ONS mid-year population estimates (aged 0-15)

Electoral ward

PCT boundary

Unintentional Injuries include:-

- Road traffic casualties
- Accidental poisoning
- Falls
- Burns and scalds
- Cuts and lacerations
- Animal bites

Avon IM&T Consortium **NHS**

Kathryn Wright - 18 August 2010
 Contains Ordnance Survey data ©Crown copyright and database right 2010. Contains Royal Mail data © Royal Mail copyright and database right 2010

X:\PCT\Bristol\Injury Prevention\0708\BCH&NBTAHE_Area_2007-09\Bristol_Are_rates_200709.wor

The latest figures estimate that 11.9% of Bristol's working age population don't have any qualifications, compared with 12.4% nationally. There remains a significant gap between the proportion of Bristol's working age population who are qualified to NVQ level 2 (17.0%) and the

national average (21.2%). This will have implications for Bristol's residents, as many employers have a minimum requirement of NVQ level 2 for their employees.

Quality of Life (QOL) in the City²⁶

Generally, QOL indicators measured in the annual resident behavioural and perception survey reflect a number of the positive changes noted in this report, with the majority indicating Bristol has a good quality of life that is improving. Many Neighbourhoods show improving trends, particularly in the south of the city. Of concern is the drop in the level of exercise noted under *Physical Activity* above, an increase in drunk and rowdy behaviour in some parts of the city and a general decline in the satisfaction with local jobs, although the latter may reflect the impact of the recession.

Crime and Crime Reduction²⁷

Total recorded crime in Bristol has reduced from 2008/09 levels. A total of 53,915 crimes were recorded in 2009/10, a decrease of 9% from the previous year, along with nearly 35,000 reported incidents of anti-social behaviour (down 11% on 2007/8)

Acquisitive Crime

There were 11,486 Serious Acquisitive Crimes (NI16)²⁸ in Bristol during 2009/10 – a decline of 16% on the previous year. However, Bristol performs relatively poorly for most acquisitive crime types against the Core Cities; ranking fifth out of eight for serious acquisitive crime (NI16) with a rate of offending of 22.18 crimes per 1000 population (5% higher than the Core City average). In order to move from the third quartile to the second there would only need to be a 0.03% reduction, however to become the safest Core City, there would need to be a 42% reduction.

In relation to specific types of acquisitive crime, it can be noted that:

- Dwelling burglary levels continue to reduce across the city. In 2009/10 there were 4400 recorded, a decrease of nearly 7% from 2008/9. Bristol now ranks fifth out of eight against the Core Cities, a significant improvement since Dec 2009 when it was ranked worst. A 9% reduction on current levels would be required to move from the third quartile to the second and a 54% reduction to become the safest Core City.
- Levels of robbery are at the lowest they have been in the past three years. Some 1290 were recorded in 2009/10, a decrease of 16% from 2008/09. Bristol comes fifth out of eight compared to the Core Cities, one rank higher than December 2009. A 10% reduction would be needed to move from the third quartile to the second and a reduction of around 52% in current offence levels would be required to be the safest Core City. Existing dwelling burglary hotspots are still being targeted through the Burglary Target Hardening Zones in Redland, Cotham, Bishopston and Montpelier.
- Vehicle Crime (Theft of Motor Vehicle and Theft from Motor Vehicle) has reduced significantly over the past three years. TOMV has decreased from approximately 3200 in 2006/07 to 1604 in 2009/10. TFMV too has seen considerable reductions since 2006/07, reducing by over 50%. However, Bristol is still positioned seventh out of eight Core Cities. Nevertheless, Bristol would only need a 0.5% reduction to move from the fourth quartile to the third. A 31% reduction would be required to make Bristol the Safest Core City, assuming other Core Cities remained the same.

²⁶ As the Annual Quality of Life report touches on many aspects of this narrative, its main findings have been included under individual sections. The full QOL report can be found here: <http://www.bristol.gov.uk/qualityoflife>

²⁷ Much of the following is summarised from the Safer Bristol Partnership, *Crime and Disorder Strategic Assessment* (December 2010).

²⁸ Essentially Burglary, Robbery, Theft of Motor Vehicle (TOMV) or Theft from Motor Vehicle (TFMV).

- As with shoplifting generally across the UK, there was a steep increase of approximately 40% between 2007/08 and 2008/09 in Bristol (attributed anecdotally to the recession). Conversely, between 2008/09 and 2009/10 levels have remained stable. Bristol is placed eighth out of eight among Core Cities and would require a 15% reduction in current offence levels to move from the fourth quartile to third and an almost 56% reduction to become the safest Core City.
- Theft Other levels have decreased by 22% since 2006/7 however since 2009/10 there has been a 6.6% increase. Theft Other alone is not recorded against Core Cities, however for Theft (other than vehicle) and Handling Stolen Goods, Bristol is ranked seventh out of eight and has a rate 24% above the average Core City rate. A reduction of nearly 7% would be needed to move from the bottom quartile to the third and a 52% reduction to be the safest of the Core Cities.

While crime has fallen in Bristol (down 8.7%) between 08/9-09/10, levels of Anti Social Behaviour (ASB)²⁹ have remained fairly stable at around 74,000 (up 1%) over the same period. An analysis of all ASB in Bristol identified several priority hotspots, which will be tackled within each of the seven neighbourhood delivery teams.

Violent Crime

There were some 12,361 violent and sexual offences recorded in 2009/10, making up around a quarter of all recorded crime in Bristol. While Bristol performs poorly against Core Cities for assault with less serious injury, sexual offences and racially or religiously aggravated offences, instances of serious violence, gun crime and knife crime are comparatively low.

In relation to specific types of violent crime, it can be noted that:

- Levels of serious violent crime have reduced this year by 25%, from 450 incidents in 2008/09 to 337 incidents in 2009/10. Bristol compares favourably with Core Cities in this respect, being ranked first out of eight.
- Assaults with less serious injury are still mainly stable across the City with 4120 offences occurring in 2009/10 compared to the 4205 offences in 2008/09. Cabot and Trinity are still the focus for offending
- Previous analysis of knife crime found that although Knife Crime in Bristol accounts for a very small percentage (1.5%) of the total crime in Bristol, it remains a threat because of the impact of knife crime.
- Recording practices for gun crime have changed in recent years, making identifying trends difficult. However, Bristol is still well placed compared to Core Cities, with regard to gun crime, being second only to Newcastle and well below the average.
- The number of serious sexual assaults reported to Police in Bristol has been rising in recent years³⁰: offence levels rose by 8% between 2008/09 and 2009/10.
- Almost 1,300 hate crimes were reported to the Police in 2009/10. Offending is focused in the city centre and some of the city's more deprived communities.
- There were 7524 reported domestic violence incidents (crime and non-crime) reported to Police in Bristol during 2009/10. This represents nearly a 14% increase from 6640 in the previous year. Currently, domestic incidents comprise around 15% of all violent offences recorded by Police in Bristol. Safer Bristol is committed to tackling this issue.

The headline priorities for the Safer Bristol Partnership are:

²⁹ Covers all stormlogs (Police), Criminal Damage and Public Order (Police), deliberate false alarms (Avon Fire & Rescue), complaints for fly-tipping, fly posting and graffiti (BCC Street Scene), ASB related Noise complaints (BCC Noise), BCC Housing Complaints and BCC parks.

³⁰ It is unclear if the rise in reported offences is a genuine rise or is due to increased confidence in reporting such offences.

- Reduce Re-offending
- Making Bristol the Safest City by accelerating acquisitive crime reductions
- Addressing Anti-Social Behaviour across the City
- Improving the levels of Public Protection
- Tackling Crime and Disorder in Trinity Neighbourhood
- Cross-cutting Issues – Organised Crime Groups and Drugs

Housing

As of April 2010, there were some 186,262 dwellings in Bristol, of which 146,953 are owner occupied or privately rented and 39,309 are social rented (including 28,435 Council houses).³¹

It is yet another consequence of Bristol's considerable economic success that local house prices have significantly increased in recent years. Statistics show that the affordability of home ownership has decreased in Bristol over the last 10 years. In 1997, the ratio between lowest quartile incomes and lowest quartile house prices was 3.31. By 2009, this had risen to 6.35, though the highpoint was several years earlier, in 2007, when the ratio was 7.91.³² The south-west is the least affordable region outside London and whilst Bristol is not quite so badly placed as the wider region, the total numbers of households unable to afford to buy is larger than some whole counties in the south-west. But whilst house prices have fallen a little from their peak since the recession lenders are requiring first time buyers to fund a 25% deposit before agreeing a mortgage.

Bristol is one of the most difficult cities in Europe to afford to buy a flat or house. The EU's Urban Audit places Bristol in the most unaffordable fifth of major European cities for buying a flat or house.³³ Private renting is currently more affordable than buying with twice as many younger working families able to afford the former. The average house or flat takes about three years to build from start to completion this means the effect of the recession is staggered. In recent years new home starts (market and affordable) peaked at just under 3000 homes in 2007/08 and have now halved to under 1500 in 2009/10. A significant recovery appears unlikely until post recession confidence returns (that homebuilders will be able to sell their products) and new proposed planning rules 'bed in'.

Between 2004 and 2007 there were on average 12,122 applicants (i.e. not including transfers) on the Bristol housing register. In April 2010, the figure was 10,420. Approximately 3,000 social rented homes from all social landlords (new build and relets) become available each year, though the credit crunch has significantly reduced the number of relets coming available, as fewer households are moving. A Housing Needs and Affordability Assessment for the West of England in 2005 identified a need for an additional 935 affordable homes each year. The Strategic Housing Market Assessment of 2009 indicated that the annual net need had increased to approximately 1,526 new affordable homes. Bristol has a particular shortage of 2, 3 and 4+ bed affordable homes. Yet delivery over the same period averaged around 400 homes each year, around a quarter of the number needed. In 2009/10, 607 additional affordable homes were built. This higher rate was largely due to opportunities to purchase stalled properties originally intended for the market housing sector. Sales of former Council property under the right to buy scheme have significantly reduced the amount of social housing in the city but these sales have dropped significantly since the recession and the increase in house prices. In 2008/09 the number of sales was 48 and in 2009/10 41, compared to an average of some 270 per annum a few years previously.

The way homelessness (the most extreme form of housing need) is being tackled has changed dramatically. The use of Bed & Breakfast style accommodation has ceased and the council and it

³¹ Source: Housing Flows Reconciliation Return, 2010.

³² Source: Communities and Local Government website, [Housing Market Figures](#) (Table 576)

³³ Source: <http://www.urbanaudit.org/CityProfiles.aspx>

partners now use bespoke hostels and assistance to access the private rented sector. In the majority of cases the council's need to exercise its homelessness duty is prevented by dealing with potential homelessness before it becomes a crisis. 1000 households were helped into private tenancies in 2009/10 under this prevention approach.

Overall the condition of the private housing stock (private rented and owner occupied accommodation) has improved significantly over the last ten years with the growth in owner occupation and the private rented sectors. However, the housing stock within the City is generally old with over 40% of the stock being built before 1919. As a result of the age of the stock, the condition and energy efficiency of private housing remain a concern with 24% of the stock being in non decent condition in 2007 and the energy efficiency (SAP) rating being 59 (currently 92% decent and SAP 61 in the affordable housing stock)³⁴

Transport

With Bristol's economic success come a number of related issues to be addressed. One such key issue is traffic congestion. It has been estimated that by 2016 this could cost the local economy some £600 million a year³⁵. Moreover, vehicle speeds are slow. The Bristol Development Framework outlines a suite of planning documents to guide development decisions in the city for the next 20 years, including future house building. Continuing housing development will undoubtedly have an impact on future traffic use.

The Joint Local Transport Plan (JLTP) set 21 targets to be met by 2011 and the latest progress report indicates that 17 of them are on track to be achieved³⁶. Air quality remains a problem, although this is an issue for all urban areas in the UK, and there are concerns about the condition of principal (mainly 'A') and non-principal ('B' and 'C') roads. The decline in accessibility to health facilities is also an issue that needs to be addressed. Nevertheless overall progress during 2009/10 has been encouraging.

The main headlines of the Joint Progress Report 2010³⁷ are as follows:

- Targets for tackling traffic growth, peak hour flows into Bristol and congestion are all well on track.
- Bus patronage remains above the trajectory for 2009/10 despite a slight fall during the year, not unexpected given the current economic downturn and the extreme winter conditions; bus punctuality has also continued to improve.
- Rail patronage has increased by a further 8% over 2008/9 levels, with significant increases at Filton Abbey Wood and in the Severn Beach line.
- The level of cycling, further advanced through the Cycling City project, continues to grow significantly.
- Access by public transport to key employment sites is significantly better than the JLTP trajectory, access to health facilities is not as good as it was in 2008/9 due to changes in bus timetabling, although this is likely to have been offset by growth in community transport which is excluded from this indicator.
- Road safety continues to improve substantially; Killed and Seriously Injured (KSI) casualties fell by 18% in 2009 compared with the previous year and Child KSIs fell by 28%, and road safety is now a major success story for the sub-region.
- There has been a welcome reduction in nitrogen dioxide (NO₂) concentrations in Bristol's Air Quality Management Area (AQMA) with this target now being on-track for the first time.

³⁴ Private House Condition Survey, Bristol City Council, 2007.

³⁵ See <http://travelplus.org.uk/our-vision/joint-local-transport-plan-3/read-the-final-jltp3-strategy>, p. 14.

³⁶ See <http://www.westofengland.org/media/190904/progress%20report%202010.pdf>

³⁷ See <http://www.westofengland.org/transport/joint-local-transport-plan/joint-progress-report-2010>

- Records show a slight deterioration in the condition in the condition of 'A' and 'B' roads in 2009/10.
- The quality of life (QOL) survey shows a promising trend with more residents satisfied with the bus service recently (57% in 2009 compared with 48% in 2008)

The new Joint Local Transport Plan (JLTP3) covers the period from 2011-2026³⁸. The four councils of Bath and North East Somerset, Bristol City, North Somerset and South Gloucestershire have joined up to deliver transport improvements in the West of England. The three parts of the JLTP3 are based around five key goals of:

- Reduce carbon emissions.
- Support economic growth.
- Promote equality of opportunity.
- Contribute to better safety, security and health.
- Improve quality of life and a healthy natural environment.

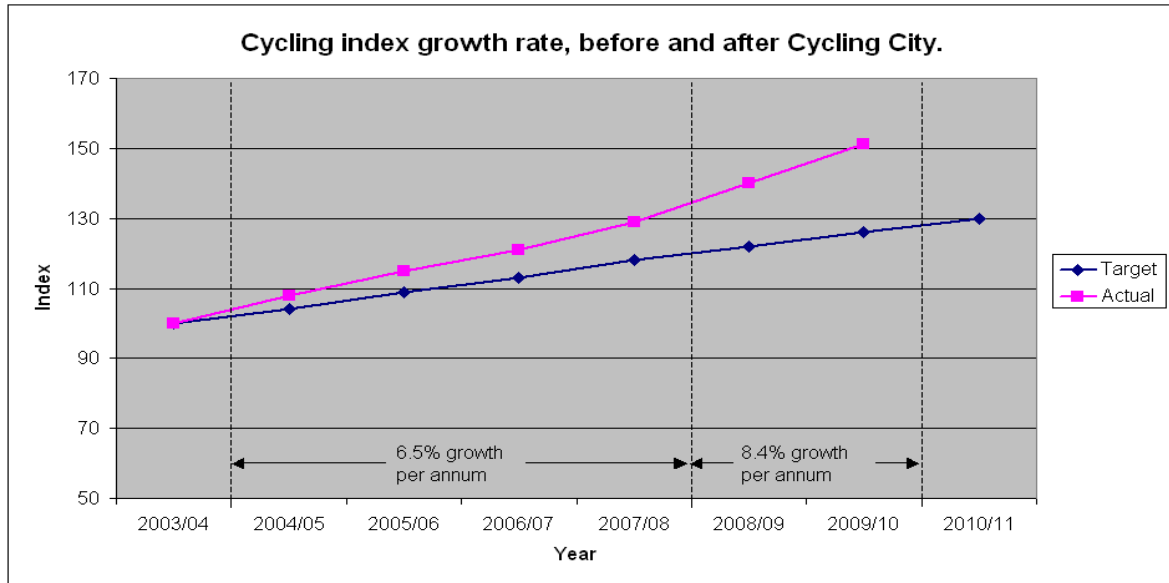
Some 45,000 people use their cars for journeys to work of less than 5km (3 miles) on a daily basis. Many of these short journeys could be cycled or walked (or undertaken in combination with public transport). The city regions that will prosper in the 21st century will be those that successfully adapt their approach to travel and transport. Within densely populated areas the normal choice will be safe, reliable, comfortable and affordable public transport combined with walking and cycling. This must be carefully planned to link with the transport networks in the surrounding rural areas, where the car will continue to play a major part alongside improved public transport, walking and cycling.

Bristol is the first cycling city in the UK. The Cycling City programme (2008-11) aims to double the number of cycle trips across the greater Bristol area. Measures include new-friendly infrastructure and promotional work to encourage greater bicycle use such as among residents and through employers. Although cycling was on the increase prior to Cycling City, the number of cyclists has risen substantially since its introduction (see Figure 5 below). Transport policy and practice in the city is being supported by the placement of a public health and transport specialist within the transport division of the Council. New developments include 20mph speed limits for residential streets, a Danger Reduction project to help improve road safety interventions to enable more health promoting choices, support to the Cycling City team and contributing to the development of the Joint Local Transport Plan for 2011-26 (JLTP 3).

Bristol City Council also has a draft walking strategy. The purpose of this strategy is to ensure that a concerted and co-ordinated effort is made throughout the Council's services to enhance the pedestrian environment, so that, more people are able to get around the city by walking or wheeling.³⁹ With between 7 and 9 million visitors to Bristol each year walking can make a positive impact towards achieving and maintaining a thriving economy.

³⁸ See <http://travelplus.org.uk/our-vision/joint-local-transport-plan-3/read-the-final-jltp3-strategy>

³⁹ The term wheeling is used for people who use wheelchairs, prams and pushchairs and should not be interpreted as including scooters or skateboards.



Sustainability, CO₂ & Climate Change

Ensuring businesses become more carbon efficient, as well as supporting the development of more green technologies and services, will help to put Bristol on a path to developing a low carbon economy. We must also consider the environmental risks and opportunities for the local economy, including the impacts of climate change and peak oil, and how well placed local infrastructure and businesses are to meet these.

The Bristol Partnership 20:20 plan and the Bristol Development Framework Core Strategy⁴⁰ both identify climate change a priority for Bristol and recognise the key role the Partnership has to play in leading and enabling a rapid improvement in the energy efficiency and carbon emissions from the city's transport, homes and economy. These documents also commit the Partnership to lead the city's adaptation to the impacts of climate change.

Bristol has a target to reduce CO₂ emissions in the city by 40% by 2020, from a 2005 baseline. In February 2010 the City Council adopted a Climate Change and Energy Security Framework, which sets out how the authority will work with partners in the city to meet this target and achieve the opportunities presented by the transition to a low carbon and resilient city. Strategic initiatives developing in Bristol as part of the Framework include:

- Investment in new infrastructure and upgrading buildings (e.g. installing energy efficiency measures and smart metering in existing homes and office buildings);
- Planning for a low carbon and renewable energy supply system within the city;
- Development of sustainable transport systems; and
- Investing in new world class digital infrastructure, which will deliver carbon reductions through both technological and behavioural changes.

The Green Capital Momentum Group and Bristol City Council commissioned a study in 2009 called 'Building a positive future for Bristol after Peak Oil'. Peak oil describes the point at which the amount of oil produced globally in a single year reaches its absolute maximum. From this point onward the amount of oil produced will decline and prices will increase. Peak oil is currently often not considered as a risk factor for many organisations, yet its effects will cause substantial price volatility in raw materials and fuel. Bristol economic sectors with a direct vulnerability to oil shortages and

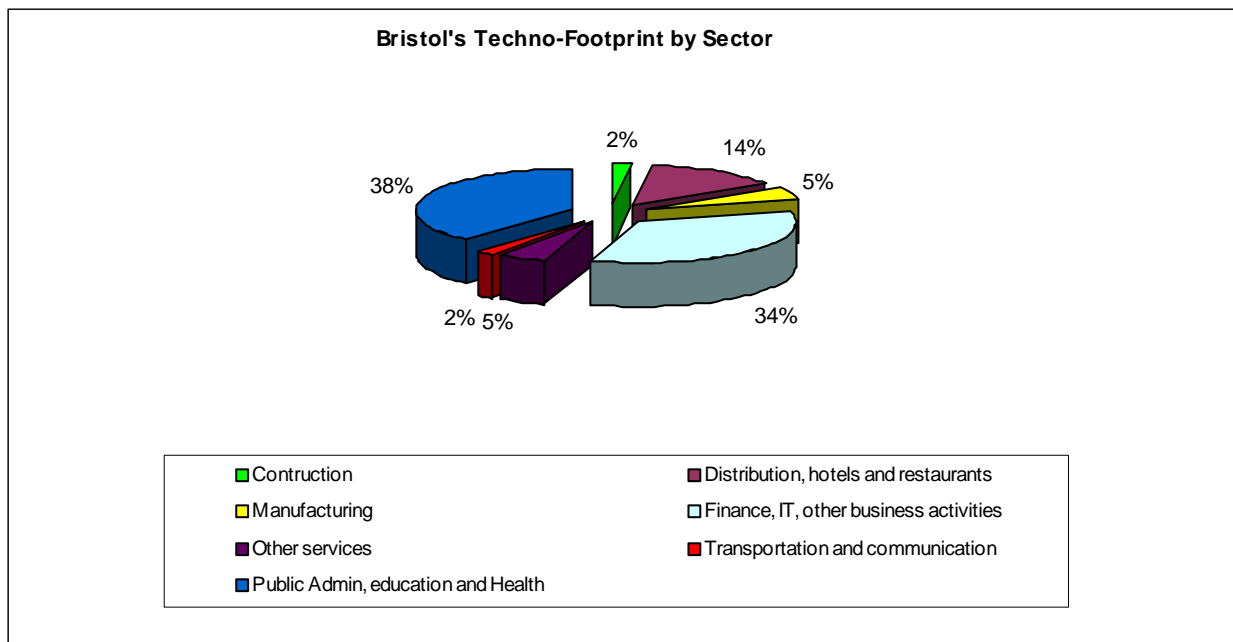
⁴⁰ See [Bristol Development Framework Core Strategy](#) and also the [Citywide Sustainable Energy Study](#) (2009)

price rises include distribution, retail, construction and aerospace. However, large service sectors such as banking, insurance and tourism will not be immune. Companies and organisations located nearer their staff or allowing home working will cope better during acute fuel supply shocks. Overall, high oil prices will favour a more localised economy for everyday goods and services.

Taking action on climate change will benefit Bristol's economy by stimulating innovation and new technologies, helping businesses to reduce their energy costs and providing employment in 'green industries'. The environmental technologies and services sector is an important driver of growth and innovation in the city. Assessing the risks of climate change and peak oil to Bristol's economy and putting in place adaptation measures will also save costs in the long-term and make organisations and businesses more resilient.

Bristol is the first city to have calculated its carbon footprint of ICT (see Figure 5 below). The study was funded by the Carbon Trust and calculated that businesses' use of ICT costs Bristol approximately £11 million per year in energy costs and produces 67,258 tonnes of CO₂, which is 7% of industry and commercial emissions. These emissions can be broken down into broad industry groups as shown in Figure 5. Bristol is a city known for its high proportion of financial and office based industries and this is reflected in the ICT footprint, with 34% of the emissions coming from this sector. However, it is the public sector, with 38%, that generates the largest proportion of Bristol's ICT carbon footprint. Distribution, hotels and restaurants, and other services both account for 14% of Bristol's emissions.

Figure 6: Bristol's ICT carbon footprint



Source: Bristol's ICT Carbon Footprint, 2009

Bristol recognises that it needs to green both its use of ICT as well as using ICT to reduce carbon emissions in other sectors such as smarter buildings, smart metering, and developing a smart grid and intelligent transport system. It also sees digital technologies as an enabler of behavioural change to reduce emissions and a critical enabler for sustainable growth.

Digital Connectivity

Bristol currently has one of the slowest average broadband provisions in the Country. Research published in October 2010 by Broadband comparison website Top10.com⁴¹, suggests that only Southampton, Southend-On-Sea, Stoke-On-Trent, Newcastle and Cardiff had lower ratings.

The Government has stated that Next Generation Broadband Access will have a major role to play in bringing the country out of recession. This recognition that the digital economy can drive broader recovery has been well received. In order to be at the vanguard of this many larger cities, such as Manchester, Nottingham and Birmingham, have developed their own strategies and investment plans to create locally owned and managed Next Generation networks to encourage and attract digital businesses.

More than eight years ago Bristol City Council took the bold step of purchasing a network of ducting from Rediffusion, the cable TV pioneer. Since then the Council has refurbished and extended this network (B-Net), deploying high capacity fibre optic cables across the city to support Council business applications such as CCTV, Transport Operations and Traffic Signals. This has put Bristol in a unique position to use this asset to attract investment, and work with partners from different sectors to be amongst those lead cities demonstrating ambition and “future-proofing” their digital infrastructure.

Investment in B-Net could create a shared Next Generation Access network for Bristol's public sector services, and act as a catalyst to attract major commercial investment by high-tech and data driven industries. Bristol already has significant cluster of both creative and microelectronics businesses who rely heavily on the ability to download, and upload, huge amounts of data. Easily available, super-fast, symmetrical connectivity, across the City would provide businesses with real competitive advantage and underpin the future delivery of better, more efficient public services.

However, there is also a need to ensure that all citizens can engage with, and contribute to, this digital future. Many people and communities who already experience economic, social and health inequalities also face digital exclusion. In Bristol, older people, disabled people, less well off families and social housing tenants are amongst the most likely to be digitally excluded. Ensuring universal access to affordable, high quality connectivity needs to be a priority if Bristol is to achieve its vision of being a leading, inclusive and connected City.

A Thriving Third Sector

Bristol has a vibrant third sector that makes a huge contribution to the democratic life of the city and the quality of life of citizens. The sector is well-established and longstanding and delivers many services that are essential to the wellbeing of Bristol citizens and to the economic success of Bristol. Bristol's draft Third Sector Strategy has been developed to set out clearly and positively how the public, private and third sectors will work together in Bristol to promote a thriving third sector for the benefit of Bristol's communities. The aim is to create a new relationship between the sectors based on common values and a shared commitment to delivering outcomes for Bristol's communities.

Key Challenges:

- Third sector organisations often feel that they are not seen as equal partners in policy and decision-making
- The third sector identifies that the way in which public bodies work can be a barrier to the third sector being able to thrive

⁴¹ See http://top10.com/company/press/north_south_divide_the_great_british_broadband_gap/

- The commissioning agenda presents the third sector with a significant change to the way in which they can access investment opportunities
- It is not clear what public sector partners are doing to create an environment for a thriving third sector
- The third sector faces difficulties in developing and sustaining products and services that generate income
- Supporting the third sector to access and secure capital assets including buildings and equipment
- The third sector faces challenges in recruiting, developing and retaining people especially when funding is insecure

One of the targets in the Local Area Agreement (LAA) was national indicator (NI 007) 'creating an environment for a thriving third sector'. The Office of the Third Sector (OTS) carried out a national survey in 2008 asking a sample of third sector organisations the question 'taking everything in to account, overall how do the statutory bodies in your area influence your organisation's success?' A total of 428 organisations responded in Bristol. Some 14.7% (against a national average of 16.2%) of Bristol respondents thought that statutory bodies in their area have a positive influence on their organisation's success. Prior to the abolition of the LAA the main target for 2011 was to raise Bristol's score to 19.1% through delivery of the NI 007 action plan. In light of the Coalition Government's emphasis on the 'Big Society' - ie. more services being delivered locally through voluntary and community sector organizations - this target is likely to remain an important one. Key to delivery of this target will be continued partnership working between Bristol Partnership partners from all sectors.

Only 18% of respondents in Bristol received funding from the council, 3% from local NHS and 1% from police or fire. 65% did not receive funding from any of these sources. Some 41% said the main areas where they carry out their activities are either internationally, nationally or regionally - so the main focus is not Bristol. This means there are limitations to the NI 007 measure. It is also important to find ways to engage with organisations located in Bristol that are not necessarily engaged locally and those that have no political or funding relationship to statutory partners.

Map 3: MOSAIC Public Sector Segmentation 2009

