Chapter 2.9. Socio-economic Assessment
9. Socio-Economic Assessment

9.1. Introduction

Overview of Scheme

9.1.1. The proposed South Bristol Link (SBL) will provide a transport link between the A370 Long Ashton bypass within North Somerset and Hengrove Park within the Hartcliffe area of south Bristol. This will incorporate 4.5km of new and upgraded highway between the A370, the A38 and the Cater Road roundabout, including a continuous shared cycleway and footway along the route corridor.

9.1.2. The SBL is one of a package of transport schemes that together will create a rapid transit network across the sub-region, linking key employment, housing and leisure areas. The objective for the scheme is to facilitate regeneration and growth in South Bristol (whilst reducing congestion on surrounding roads), to improve accessibility from residential and employment areas in South Bristol to the city centre and to the strategic transport network, including Bristol Airport.

9.1.3. The project falls within the administrative boundaries of both North Somerset Council (NSC) and Bristol City Council (BCC). The Councils consulted widely on the principles of the scheme and options for the alignment of the route corridor, in 2008 and 2009. This process culminated in the submission of a Programme Entry Major Scheme Business Case (MSBC) to the Department for Transport (DfT) in March 2010. Following the Comprehensive Spending Review of Autumn 2010, the authorities presented a ‘Revised Central Case’, which was submitted in an Expression of Interest to the DfT in December 2010. The revised scheme was included in the Development Pool of Local Major Transport Schemes, announced by the Minister on 4th February 2011, and a Best and Final Funding Bid (BAFB) submitted to the DfT on the 9th September 2011. Funding for the scheme was confirmed by the Chancellor, George Osborne, on the 29th November 2011 in the Government Autumn Statement, with a successful Programme Entry announced by the DfT on 8th December 2011.

9.1.4. Regular consultation has been held with key statutory organisations (Environment Agency, English Heritage and Natural England), local interest groups and residents which has informed the development of the proposals. A pre-application public consultation exercise was held in May and June 2012, requesting comments on the draft route alignment, largely based on the BAFB scheme. The responses prompted a thorough design review process from July 2012 to March 2013, informed by ongoing stakeholder engagement, with further options appraised to determine the final proposed alignment and scheme design which form the basis of the current application.

Socio-economic Assessment

9.1.5. This chapter of the ES aims to assess the potential socio-economic impacts of SBL. It sets out the existing socio-economic policy context and the socio-economic profile of the area likely to be impacted by the implementation of the scheme, defined as the Local Impact Area (LIA). This analysis will consider and assess the impact of SBL on the local economy and will consider employment effects and wider socio-economic impacts including accessibility to employment and education opportunities, image and perception and contribution to regeneration aims. This section will also look at any disruption to local residents and businesses particularly during the construction phase, and any potential mitigation measures which will aim to avoid or minimise any adverse impacts.
9.1.6. The analysis in this section provides an independent assessment of the potential socio-economic impacts of SBL, both positive and negative, to comply with planning legislation. The Socio-economic chapter of the ES has been produced separately to a study conducted by Atkins which solely focuses on the economic impacts of the scheme. In 2013 Atkins produced an Economic Benefits Study that examined the potential likely economic benefits of SBL, particularly in terms of unlocking and facilitating economic growth through release of land for job creation. The Economic Benefits Study of SBL is one of the supporting statements for the application. The Study focuses on the potential number of jobs unlocked by the proposed scheme and the impacts on productivity in terms of reduced business costs, improved efficiency and ‘agglomeration’ effects through increased clustering and increased business output. The Economic Benefits Study focuses on the SBL scheme and associated area and also builds upon the findings in a sub-regional study (also produced by Atkins) that set out the potential GVA impacts of major transport schemes across the West of England sub-region. Evidence presented in both the scheme level and sub-regional study has been considered as part of this assessment. A summary of the relevant findings of these studies is included in section 9.5 of this chapter.

9.2. Policy Context

9.2.1. The following provides an overview of relevant policy documents on a national, sub-regional and local level. At the local level the review looks at policy within both the local authority of Bristol City and North Somerset. This allows an assessment of the potential contribution of the proposed scheme to national, regional and local level socio-economic priorities and objectives.

National Policy

National Planning Policy Framework, 2012

9.2.2. The new national policy framework for planning sets out the Government’s policies and guidance on how they should be applied to both plan-making and decision-making. Sustainable Development is central to the Framework, with the presumption in favour of development unless adverse impacts will outweigh benefits. A total of twelve principles underpin the plan and decision-making process, the most relevant to this proposal being:

- Proactive in promoting sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places; and,
- Actively managing patterns of growth to make the fullest possible use of public transport, walking and cycling.

9.2.3. A total of 13 factors are identified in the Framework as a means to “delivering sustainable development”, of particular relevance to this project are:

- **Building a strong, competitive economy**: a clear commitment to securing economic growth in order to create jobs and prosperity. There is also a focus on provision of a low carbon future. The Framework outlines that planning policies should “seek to address potential barriers to investment, including a poor environment or any lack of infrastructure, services or housing”. Areas should have clear economic vision to encourage sustainable economic growth.

- **Supporting a prosperous rural economy**: Planning policies should support economic growth in rural areas in order to create jobs and prosperity by taking a positive approach to sustainable new development.

- **Promoting sustainable transport**: Critically the Framework outlines that solutions providing reductions in greenhouse gas emissions and reductions in congestion should be promoted. Adjoining local authorities should “work together to develop strategies for the provision of viable infrastructure necessary to support sustainable development”.
Sub-Regional Policy

9.2.4. In March 2012 the regional development agencies, responsible for economic development across regions were abolished. Local Enterprise Partnerships (partnership between local authorities and businesses) were established in 2011 with a view to determining local economic priorities and lead economic growth and job creation within a defined economic geography.

9.2.5. The two council areas of Bristol and North Somerset form part of the West of England Local Enterprise Partnership (LEP) area, which also includes Bath & North East Somerset and South Gloucestershire. The West of England LEP is responsible for the promotion of economic growth and prosperity in the West of England area.

West of England Local Enterprise Partnership – Business Plan, 2011-13

9.2.6. In late 2011 the West of England LEP agreed a Business Plan which included six areas of economic activity. The Plan sets out a vision for the area up to 2026 and within the vision the following two elements have particular significance to this proposal. The Plan states the West of England area will have:

- One of Europe’s fastest growing and most prosperous sub regions which has closed the gap between disadvantaged and other communities – driven by major developments in employment and government backed infrastructure improvements in South Bristol and North Somerset; and,
- Easier local, national and international travel, thanks to transport solutions that link communities to employment opportunities and local services, control and reduce congestion and improve strategic connections by road, rail and through Bristol Airport and seaport.

9.2.7. The Plan sets out the economic context that the LEP is working within, the priorities and agenda for the short to medium term and identifies resources and key relationships to the achievement of aims. The Plan provides a reference point against which the LEP can measure progress and review priorities. Six areas for Action are identified in the Plan, these being:

- **Action 1 – Improving Transport Infrastructure** - The West of England needs enhanced transport infrastructure and services to deliver the LEP’s key economic objectives, improve access to jobs, reduce congestion and carbon emissions, attract new business and maintain the strong performance of existing business. Key to this is the delivery of the five major transport schemes: Ashton Vale to Bristol Temple Meads rapid transit, South Bristol Link, North Fringe to Hengrove Package, Bath Transportation Package and the Weston Package. These will be instrumental to the future viability and delivery of the Temple Quarter Enterprise Zone, five Enterprise Areas and priority growth locations.
- Action 2 – Tackling Skill mismatches and/or gaps in the workforce
- Action 3 - Putting the West of England on the map: Inward Investment
- Action 4 - Create a clear case for investment from the LEP to national government
- Action 5 - Growing the green economy
- Action 6 - Creating a successful Enterprise Zone/Enterprise Areas

West of England Local Economic Assessment, 2011

9.2.8. The West of England Local Economic Assessment (LEA) provides a comprehensive assessment and analysis of key issues of the economy across the area, taking account of strategic issues identified in the local authorities. The LEA for the West of England seeks to ensure that:

- Policy making at all levels is based on a shared understanding of local economic challenges and economic geography; and,
- The economic interventions of different partners are aligned and complementary.

9.2.9. The LEA recognises that The West of England is a prosperous area with an excellent quality of life but that rapid growth and the changing current economic situation means that the area faces pressure on its infrastructure (such as roads, rail, green infrastructure etc).
9.2.10. In late 2010 the West of England Partnership submitted plans for investment in major transport schemes to the Department for Transport. The five schemes would help to ensure that the economic potential of the area is realised, and that growth is supported with the provision of necessary infrastructure. The South Bristol Link road was one of the five schemes identified.

9.2.11. The LEA notes that cities are key drivers of the economy and thus returns on transport investment are greatest. The Infrastructure Investment Plan sets out opportunities that will address the following challenges:
- Tackling Deprivation;
- Promoting sustainable economic growth and a low carbon economy;
- Focusing on delivery;
- Infrastructure and scheme viability;
- Employment land;
- Housing growth;
- Up grading of town centres and public realm;
- Securing economic restructuring;
- Balancing economic growth; and,
- Creating sustainable communities.

West of England Joint Local Transport Plan 3, 2011 - 2026

9.2.12. In 2011 the four councils of Bath and North East Somerset, Bristol City, North Somerset and South Gloucestershire joined up to deliver transport improvements in the West of England, and produced a Joint Local Transport Plan (JLTP3). The Plan sets out a vision for ‘an affordable, low carbon, accessible, integrated, efficient and reliable transport network to achieve a more competitive economy and better connected, more active and healthy communities’. In order to deliver this vision, the JLTP3 sets out five key transport goals:
- Reduce carbon emissions
- Support economic growth
- Promote accessibility
- Contribute to better safety, security and health
- Improve quality of life and a healthy natural environment

9.2.13. -(Not used)

9.2.14. The Plan highlights that the West of England’s major transport scheme programme is key to supporting the JLTP3 and wider community strategy objectives. The schemes are identified as having an important role in supporting economic growth, regeneration and improving access to jobs and services.

9.2.15. As one of the proposed major transport schemes, the Plan outlines the objectives and potential benefits of SBL including reduced congestion in south Bristol and adjacent areas of North Somerset, facilitation of regeneration and growth in south Bristol, and improved accessibility from South Bristol to the city centre and strategic transport links including Bristol Airport.

Local Policy

Bristol City Core Strategy 2011

9.2.16. The Core Strategy for Bristol City (adopted June 2011) sets out a spatial portrait of the city now, ambitions for the future and delivery mechanisms for achieving the ambitions. The Spatial Vision up to 2026 states the aspiration for Bristol is “to be a leading European city for innovative industry, enterprise, culture, environmental quality, lifestyle and urban design, reinforcing its status as a European Science City and Green Capital.”

9.2.17. The vision of the Core Strategy leads to eleven strategic objectives for development, with each policy within the Core Strategy addressing one or more of the objectives and thus contributing to bringing the spatial vision into reality.
9.2.18. The following policies within the Core Strategy are of particular relevance to this proposal:

- **Policy BSC1 – South Bristol**: Advocates comprehensive regeneration as a priority. Provision of mixed uses including office, residential, industrial and warehousing in particular focused on Knowle West and Hengrove Park. Improvement of infrastructure in South Bristol and the city centre relating to cycling, walking and public transport. Within South Bristol the area of regeneration focus is just to the east of the South Bristol Link route.

- **Policy BSC2 – City Centre**: Promote and strengthen the regional role of the centre. Provision of new mixed-use developments including offices, residential, leisure, tourism, entertainment and culture. Expansion of the city centre boundary. Regeneration areas.

- **Policy BSC8 – Delivering Thriving Economy**: Strengthen economic performance through the provision of sufficient and flexible employment land supply, addressing barriers to employment and promoting the city for investment opportunities. Provision of new floorspace:
  - 150,000sqm city centre (office);
  - 60,000sqm South Bristol (office);
  - 10ha industrial/ warehousing land in South Bristol.

- **Policy BSC10 – Transport and Access Improvements**: Provision of an integrated transport system that improves accessibility and moves to meet the levels of new development. Includes rapid transit and the South Bristol Link along with other schemes such as park and ride facilities, rail and cycling/ pedestrian improvements.

**Bristol Local Economic Assessment 2011**

9.2.19. The LEA for Bristol is intended to contribute towards the delivery of sustainable economic growth for the city. Although not a strategy or policy document in its own right, it seeks to provide the comprehensive, shared understanding of the local economy to aid strategy and policy decisions.

9.2.20. The table below provides an overview of the key strengths, weaknesses, opportunities and threats faced by the economy of Bristol.
### Table 9.1: SWOT Analysis – Bristol Economy

<table>
<thead>
<tr>
<th>Strengths and Opportunities</th>
<th>Weaknesses and Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bristol’s economy functions well, producing levels of economic output greater than its physical size.</td>
<td>There is limited new land available for new employment use in Bristol, taking into account issues around developing Avonmouth/Severnside.</td>
</tr>
<tr>
<td>The workforce in Bristol has high levels of productivity, relative to other Core Cities and the national average. This labour productivity advantage is forecast to increase over the next ten years.</td>
<td>There are pockets of persistent worklessness in the City.</td>
</tr>
<tr>
<td>Bristol’s rate of private sector jobs growth (1998-2008) was 15.4%, significantly above other Core Cities and adding to Bristol’s resilience and growth prospects.</td>
<td>A large proportion of Bristol’s residents are employed in the public sector; while not as dependent upon the public sector as other cities, Bristol is still vulnerable to the impact of public expenditure cuts.</td>
</tr>
<tr>
<td>Bristol’s economy is diverse without an overdependence on any one sector.</td>
<td>Current internal transport infrastructure is inadequate to meet demand.</td>
</tr>
<tr>
<td>Bristol’s economy has a high proportion of knowledge intensive businesses, supporting creativity and innovation.</td>
<td>Housing supply may not keep pace with the rising population, exacerbating already high average house prices and issues around affordability.</td>
</tr>
<tr>
<td>Key sectors well represented in Bristol include environmental technologies, creative industries and business services. All are forecast to grow, in output and employment, over the next ten years.</td>
<td>The claimant count rate (JSA) in Bristol is relatively low when compared with other Core Cities. However, the Jobseekers Allowance claimant rate in Bristol is not forecast to return to pre recession levels before 2020.</td>
</tr>
<tr>
<td>A high proportion of Bristol’s residents are qualified to degree level or higher compared with other Core Cities and the national average.</td>
<td>There is a relatively high proportion of Bristol’s residents who have low qualification levels or no qualifications.</td>
</tr>
<tr>
<td>Bristol is well connected with easy access to London, the rest of the UK and worldwide.</td>
<td>Improvements in connectivity between other UK cities and London may reduce or remove this element of Bristol’s competitive advantage.</td>
</tr>
<tr>
<td>Bristol’s population, especially its working age population, is forecast to increase by 10% over the next ten years.</td>
<td></td>
</tr>
<tr>
<td>Bristol has an attractive environment, with a good quality of life including cultural vibrancy and diversity.</td>
<td></td>
</tr>
</tbody>
</table>

Source: Bristol Local Economic Assessment, Bristol City Council, 2011

9.2.21. The 2003 Air Transport White Paper recommended that airports in England and Wales with more than 1,000 passenger air transport movements a year should set up an Airport Transport Forum (ATF) with the aim of identifying targets for increasing the proportion of journeys made to airports by public transport. The requirement to establish ATFs and prepare Airport Surface Access Strategies (ASASs) originally formed part of the previous Government’s transport policy. The current Government published its Draft Aviation Policy Framework in July 2012 and recommended that airports continue to produce ASASs and included updated guidance on their suggested content of both ATFs and ASASs. This ASAS is aligned with the transport policies and strategy set out in the Joint Local Transport Plan 2011-2026 (JLTP3) published by the four unitary authorities comprising the West of England Partnership.

9.2.22. The purpose of this ASAS is “to deliver a low carbon, accessible, integrated, efficient and reliable transport network serving Bristol Airport to achieve a successful and growing airport serving the needs of the West of England and the wider communities within the Bristol Airport catchment area, delivering connectivity, jobs and economic growth”. The main aims and objectives of the ASAS are:
- To secure easy, reliable and efficient access to Bristol Airport for passengers and staff;
- To increase the use of public transport by passengers consistent with a target of 15% of passengers using public transport at 10 million passengers per annum;
- To improve access to Bristol Airport for passengers travelling to and from the West of England, the South West of England and South Wales;
- To reduce congestion and the carbon and air quality impacts of traffic travelling to and from Bristol Airport;
- To facilitate access to jobs for local communities through the implementation of the Staff Travel Plan; and
- To ensure that the surface access arrangements contribute to the growth of Bristol Airport and enable it to deliver its full potential in delivering air services to the local catchment supporting economic growth.

9.2.23. The strategy highlights the three proposed bus rapid transit routes including South Bristol Link, and states that “taken together, the rapid transit network has the potential to transform surface access to Bristol Airport”.

Bristol City Council Employment and Enterprise Strategy, 2013

9.2.24. This document highlights that there will be increasing investment in Bristol’s transport infrastructure in the coming years, much of which is directed at easing access to employment opportunities. It is acknowledged that the availability and affordability of public transport is an issue for many unemployed people, particularly young people.

9.2.25. The document refers to Bus Rapid Transit (BRT) which will provide residents of South Bristol with improved access to employment opportunities. The document recognises that investment in a city’s infrastructure, including transport, will produce both direct jobs in construction and service delivery and indirect jobs arising from enhanced development opportunities. It is important to note that this is still a draft document and does not yet have political sign-off.

North Somerset Core Strategy 2012

9.2.26. The North Somerset Core Strategy was adopted by the Council in April 2012. The Core Strategy sets out the broad long-term vision, objectives and strategic planning policies for North Somerset up to 2026. The Strategy incorporates creation of sustainable communities and issues such as health and education.

9.2.27. The Strategy sets out a total of seven separate visions created for various elements of the Core Strategy focus, one of the visions relates to North Somerset as a whole and states, “By 2026 North Somerset will be a more prosperous district, with reduced inequalities throughout. Its coastal and rural setting, underpinned by a rich heritage will strongly influence new development.”
Development will respond to the challenge of climate change, the move to more sustainable energy use and be characterised by high quality design that contributes to creating successful, thriving place."

9.2.28. The following policies within the Core Strategy are of particular relevance to this proposal:

- Policy CS6 – North Somerset Green Belt: Designate area to remain the same;
- Policy CS10 – Transport and Movement: Focus on improved and integrated transport networks with a wide choice of mode providing access to jobs, homes, services and facilities.
- Policy CS20 – Supporting a Successful Economy: Provision of at least 10,100 additional employment opportunities over the Strategy period. Provision of land for employment needs to counter high levels of out-commuting. Economic development as a key priority.
- Policy CS32 – Service Villages: Includes Long Ashton. Provision of small scale development to support the role of the village as a hub for community, facilities and services.

9.2.29. Although formally adopted, the Core Strategy was subject to a legal challenge by Bristol University, a judgement on which was made on the 14th February 2013 with an addendum dated 7th March 2013. Policy CS13 (Scale of New Housing) was found to be unlawful by reason of the Core Strategy Inspector’s failure to give ‘adequate or intelligible reasons for his conclusion that the figure made sufficient allowance for latent demand i.e. demand unrelated to the creation of new jobs’. This matter is remitted back to the Planning Inspectorate for re-examination.

9.2.30. The Core Strategy remains an adopted development plan document and most policies are unaffected. However, given the conclusion in respect of Policy CS13, the Judge indicated that if the housing requirement was amended then it could have a knock on effect on other policies. As a consequence, some other policies have been remitted back to the Planning Inspectorate for re-examination, including policy CS6 ‘Green Belt’ and CS32 ‘Service Villages’.

9.2.31. The Judgment is clear that while it is only Policy CS13 which was found to be unlawful, because the re-examination of the total housing figure may result in consequential alterations for other policies, then these policies are also remitted. However, “the policies can still be accorded appropriate weight in any decision making and housing can be brought forward through the development control process.”

9.2.32. Therefore policies CS6 and CS32 currently have the status of emerging policy (albeit with significant weight) and are consequently a material planning consideration but not part of the adopted development plan. Until such time that the policies are adopted the equivalent Local Plan policies form part of the development Plan and should be considered.

North Somerset Local Economy Plan 2013

9.2.33. There are four ‘Key Ambitions’ that underpin the North Somerset Local Economy Plan:

- Significantly increase the number of local jobs;
- Develop a workforce with the skills that businesses need;
- Increase the employment opportunities for the long term unemployed; and
- Improve infrastructure provision.

9.2.34. A separate action plan has been developed through a programme of consultation events to deliver these ambitions. In relation to improving infrastructure provision, the plan highlights the following priorities:

- Development of key transport infrastructure improvements across the area to support delivery of jobs, including development of the South Bristol Link proposal.
- Develop creative transport solutions to strengthen accessibility of employment sites to the labour market (including less well connected areas/ communities).
9.3. Assessment Methodology

9.3.1. To enable the assessment of socio-economic impacts of the proposed scheme there is a need to understand the local socio-economic character and context of the area. Analysis of the socio-economic conditions and associated policy context will identify the study area’s social and economic objectives and priorities; ensuring the proposed scheme is strategically aligned.

Assessment of Effects

9.3.2. The socio-economic effects of the proposed scheme will be assessed during both the construction and operational phases. The assessment will cover the impacts on jobs (considering the net additionality of jobs created or lost), accessibility to employment and education opportunities, image and perception and inward investment.

9.3.3. The criterion used to assess the significance of the potential impacts of the scheme is detailed in the table below. Assumptions will be made based on the evidence gathered and professional judgement.

<table>
<thead>
<tr>
<th>Significance</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beneficial</td>
<td>Positive effect on economic or social activity at the LIA level</td>
</tr>
<tr>
<td>Minor beneficial</td>
<td>Slightly positive effect on economic or social activity at the LIA level</td>
</tr>
<tr>
<td>Negligible/ Neutral</td>
<td>Little or no effect on economic or social activity at the LIA level</td>
</tr>
<tr>
<td>Minor adverse</td>
<td>Slightly negative effect on economic or social activity at the LIA level</td>
</tr>
<tr>
<td>Adverse</td>
<td>Negative effect on economic or social activity at the LIA level</td>
</tr>
</tbody>
</table>

Limitations, Constraints and Assumptions

If any adverse residual effects are identified mitigation measures will be considered together with complementary measures that will maximise the proposed scheme’s socio-economic benefits.

Equality Impact Assessment (EqIA)

An Equality Impact Assessment (EqIA) has also been produced in relation to the proposed scheme; this is a separate assessment to the socio-economic assessment presented in this chapter. The purpose of an EqIA is to ensure that a scheme, strategy or policy does not discriminate against any individual or community and where possible promotes equality for all. The EqIA has been developed to ensure that equalities issues are thoroughly considered within construction and operation of SBL. This initial EqIA is being prepared to support the planning application for the scheme. The full assessment is featured in Volume 3, Appendix 9.2.
9.4. **Existing Conditions**

**Introduction**

9.4.1. This section analyses the socio-economic profile of the areas that are likely to be affected by the implementation of the proposed scheme. These areas cover the route that the scheme is expected to follow which includes areas of Bristol City and North Somerset.

9.4.2. The Local Impact Area (LIA) for this assessment is defined as the Bristol wards of Bedminster, Bishopsworth, Filwood, Hartcliffe, Whitchurch Park and Hengrove and the North Somerset wards of Winford and Wraxall and Long Ashton. Figure 1 below displays the proposed route and the wards which have been used to define the LIA. It is important to highlight that the North Somerset Council wards SBL will pass through are relatively rural in nature, contrasting with the built up nature of the Bristol City wards.

9.4.3. The socio-economic effects of the scheme are likely to extend beyond its route corridor, to include the wider areas of the Bristol City, North Somerset and West of England LEP area. These areas are also considered as part of the baseline analysis.

Figure 9.1: SBL proposed route and Local Impact Area
Population

9.4.4. In the 2001 Census the population of the LIA was approximately 76,610. The latest 2011 Census shows that the population in the LIA has increased by approximately 5.9% since 2001, to 81,102.

9.4.5. In 2011, the Bristol City wards within the LIA accounted for approximately 16.4% of the total population of Bristol, whilst the North Somerset wards accounted for approximately 5.3% of the total population of North Somerset.

9.4.6. Table 9.3 below compares the 2011 age breakdown of the population across the benchmark areas. The LIA had the greatest proportion of the population aged 15 years and under across all benchmark areas at 20.6%. In terms of the proportion of the population that was of working age – aged 16-64 – the LIA (alongside North Somerset) had the smallest proportion across all areas at 62.5%. The proportion of the population aged over 65 was smaller in the LIA (16.8%) compared with the South West region (19.6%), but slightly greater than the proportion across England (16.3%).

<table>
<thead>
<tr>
<th>Age Band</th>
<th>LIA</th>
<th>Bristol</th>
<th>North Somerset</th>
<th>West of England LEP</th>
<th>South West</th>
<th>England</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-15</td>
<td>20.6</td>
<td>18.4</td>
<td>18.1</td>
<td>18.2</td>
<td>17.6</td>
<td>18.9</td>
</tr>
<tr>
<td>16-64</td>
<td>62.5</td>
<td>68.6</td>
<td>60.9</td>
<td>65.5</td>
<td>62.8</td>
<td>64.8</td>
</tr>
<tr>
<td>65 +</td>
<td>16.8</td>
<td>13.0</td>
<td>21.0</td>
<td>16.3</td>
<td>19.6</td>
<td>16.3</td>
</tr>
</tbody>
</table>

Source: Census, ONS, 2011

9.4.7. Using Census data, Table 9.4 analyses the proportion of the total population that was of working age in 2001 and 2011 across all areas, and provides the average annual rate of change.

9.4.8. The LIA and North Somerset had the smallest proportions of those of working age across all areas in 2001 and 2011. Between 2001 and 2011, the LIA experienced an average annual percentage change of 0.8%, which was the same as the regional average.

<table>
<thead>
<tr>
<th></th>
<th>2001</th>
<th>% of Total</th>
<th>2011</th>
<th>% of Total</th>
<th>Average Annual % Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>LIA</td>
<td>46,972</td>
<td>61.3</td>
<td>50,729</td>
<td>62.5</td>
<td>0.8</td>
</tr>
<tr>
<td>Bristol</td>
<td>251,138</td>
<td>66.0</td>
<td>293,781</td>
<td>68.6</td>
<td>1.6</td>
</tr>
<tr>
<td>North Somerset</td>
<td>116,381</td>
<td>61.7</td>
<td>123,281</td>
<td>60.9</td>
<td>0.6</td>
</tr>
<tr>
<td>West of England LEP</td>
<td>634,862</td>
<td>64.5</td>
<td>700,112</td>
<td>65.5</td>
<td>1.0</td>
</tr>
<tr>
<td>South West</td>
<td>3,070,749</td>
<td>62.3</td>
<td>3,323,813</td>
<td>62.8</td>
<td>0.8</td>
</tr>
<tr>
<td>England</td>
<td>31,429,250</td>
<td>64.0</td>
<td>34,329,091</td>
<td>64.8</td>
<td>0.9</td>
</tr>
</tbody>
</table>

Source: Census, ONS, 2001/2011
**Economic Activity**

9.4.9. The level of economic activity, often referred to as the available workforce, is the sum of the population aged between 16 and 74 who are either employed, actively seeking employment, or full-time students. In contrast, economic inactivity refers to those who are not engaged in the labour market including those who are retired, caring for dependants, permanently sick or disabled, or students.

9.4.10. In 2011, the LIA, alongside England, had the smallest level of economic activity (69.9%) and the greatest rate of economic inactivity (30.1%) across all areas.

Figure 9.2: Economic activity and inactivity, 2011

Source: Census, ONS, 2011

9.4.11. Table 9.5 below provides the latest Census data setting out economic activity and inactivity by type across all areas. In terms of economic activity, the LIA experienced the greatest proportion of those in employment (77.9%) across all areas. However, the proportion of those that were unemployed was also the greatest at 6.7%.

9.4.12. In terms of economic inactivity, the LIA had the greatest proportions of those that were looking after the home or family (17.5%), or registered as long-term sick or disabled (18.7%), across all areas.
Table 9.5: Economic activity and inactivity by type (% of total), 2011

<table>
<thead>
<tr>
<th>Age Band</th>
<th>LIA</th>
<th>Bristol</th>
<th>North Somerset</th>
<th>West of England LEP</th>
<th>South West</th>
<th>England</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Economically Active</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employed</td>
<td>77.9</td>
<td>75.2</td>
<td>76.7</td>
<td>76.2</td>
<td>74.8</td>
<td>74.9</td>
</tr>
<tr>
<td>Self Employed</td>
<td>11.5</td>
<td>11.9</td>
<td>15.0</td>
<td>13.1</td>
<td>16.0</td>
<td>14.0</td>
</tr>
<tr>
<td>Unemployed</td>
<td>6.7</td>
<td>6.1</td>
<td>4.2</td>
<td>4.8</td>
<td>4.7</td>
<td>6.3</td>
</tr>
<tr>
<td>Full Time Student</td>
<td>3.9</td>
<td>6.8</td>
<td>4.0</td>
<td>5.9</td>
<td>4.6</td>
<td>4.9</td>
</tr>
<tr>
<td><strong>Economically Inactive</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retired</td>
<td>44.6</td>
<td>33.4</td>
<td>59.3</td>
<td>45.0</td>
<td>53.3</td>
<td>45.5</td>
</tr>
<tr>
<td>Student (including full-time students)</td>
<td>11.4</td>
<td>30.7</td>
<td>10.7</td>
<td>24.0</td>
<td>16.5</td>
<td>19.3</td>
</tr>
<tr>
<td>Looking after home or family</td>
<td>17.5</td>
<td>13.3</td>
<td>11.9</td>
<td>12.4</td>
<td>12.5</td>
<td>14.5</td>
</tr>
<tr>
<td>Long-term sick or disabled</td>
<td>18.7</td>
<td>14.8</td>
<td>13.1</td>
<td>12.4</td>
<td>12.1</td>
<td>13.5</td>
</tr>
<tr>
<td>Other</td>
<td>7.8</td>
<td>7.8</td>
<td>4.9</td>
<td>6.2</td>
<td>5.6</td>
<td>7.3</td>
</tr>
</tbody>
</table>

Source: Census, ONS, 2011

**Unemployment**

9.4.13. Figure 3 below shows the claimant count rate between 2003 and 2013. The claimant count rate shows the proportion of the resident working age population claiming unemployment benefits and is, therefore, used as a proxy for the level of unemployment. Figures for the LIA are only available from 2004 onwards.

9.4.14. Over the past decade the claimant count rates across the LIA and Bristol have been higher than the sub-regional and regional averages. Since 2011 they have also been higher than the national average. The impact of the recession on all areas is clear, highlighted by the sharp increase in those claiming unemployment benefits between 2008 and 2009. All areas experienced a slight decline in the proportion of residents claiming unemployment benefits between 2012 and 2013.
Skills and occupational profile

Skills

9.4.15. Figure 4 shows the skills profile of those aged 16 and over in all areas using the latest Census 2011 data. In 2011, the LIA had the greatest proportion of the population aged 16 and over with no qualifications across all areas at 30.5%, which was 9.8 and 8 percentage points greater than the regional (20.7%) and national (22.5%) averages. Similarly, the LIA experienced the smallest proportion of those with the highest qualifications across all areas. Approximately 18.9% had gained Level 4 qualifications and above, compared with Bristol (32.8%), North Somerset (28.4%), the West of England LEP area (30.6%) and the South West region and England (27.4%).
Occupational profile

9.4.16. Table 9.6 below analyses the occupational profile of the LIA and its benchmark areas in 2011. The LIA had the greatest proportion of those with the lowest skilled occupations - that is process, plant and machine operatives and elementary occupations – compared with the other areas, at 8.1% and 12.9% respectively. Bristol and the West of England LEP area had a comparatively large proportion of those employed in highly skilled professional occupations at 22.6% and 20.2% respectively, compared with 13.3% in the LIA.

1 Level 1 qualifications: 1-4 O Levels/CSE/GCSEs (any grades), Entry Level, Foundation Diploma, NVQ level 1, Foundation GNVQ, Basic/Essential Skills.
Level 2 qualifications: 5+ O Level (Passes)/CSEs (Grade 1)/GCSEs (Grades A*-C), School Certificate, 1 A Level/ 2-3 AS Levels/VCEs, Intermediate/Higher Diploma, Welsh Baccalaureate Intermediate Diploma, NVQ level 2, Intermediate GNVQ, City and Guilds Craft, BTEC First/General Diploma, RSA Diploma.
Level 3 qualifications: 2+ A Levels/VCEs, 4+ AS Levels, Higher School Certificate, Progression/Advanced Diploma, Welsh Baccalaureate Advanced Diploma, NVQ level 3; Advanced GNVQ, City and Guilds Advanced Craft, ONC, OND, BTEC National, RSA Advanced Diploma.
Level 4+ qualifications: Degree (for example BA, BSc), Higher Degree (for example MA, PhD, PGCE), NVQ Level 4-5, HNC, HND, RSA Higher Diploma, BTEC Higher level, Foundation degree (NI), Professional qualifications (for example teaching, nursing, accountancy). Other qualifications: Vocational/Work-related Qualifications, Foreign Qualifications (Not stated/ level unknown).
Table 9.7: Occupational profile, % of those aged 16-74 in employment, 2011

<table>
<thead>
<tr>
<th></th>
<th>LIA</th>
<th>Bristol</th>
<th>North Somerset</th>
<th>West of England LEP</th>
<th>South West</th>
<th>England</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managers, directors and senior officials</td>
<td>8.2</td>
<td>8.6</td>
<td>12.2</td>
<td>10.2</td>
<td>11.1</td>
<td>10.9</td>
</tr>
<tr>
<td>Professional occupations</td>
<td>13.3</td>
<td>22.6</td>
<td>17.2</td>
<td>20.2</td>
<td>16.5</td>
<td>17.5</td>
</tr>
<tr>
<td>Associate professional and technical occupations</td>
<td>10.6</td>
<td>13.7</td>
<td>13.2</td>
<td>13.0</td>
<td>12.1</td>
<td>12.8</td>
</tr>
<tr>
<td>Administrative and secretarial occupations</td>
<td>13.0</td>
<td>11.1</td>
<td>11.6</td>
<td>11.9</td>
<td>11.0</td>
<td>11.5</td>
</tr>
<tr>
<td>Skilled trades occupations</td>
<td>14.2</td>
<td>9.6</td>
<td>11.3</td>
<td>10.8</td>
<td>13.4</td>
<td>11.4</td>
</tr>
<tr>
<td>Caring, leisure and other service occupations</td>
<td>9.7</td>
<td>8.5</td>
<td>9.8</td>
<td>8.8</td>
<td>9.8</td>
<td>9.3</td>
</tr>
<tr>
<td>Sales and customer service occupations</td>
<td>10.0</td>
<td>8.7</td>
<td>8.7</td>
<td>8.7</td>
<td>8.4</td>
<td>8.4</td>
</tr>
<tr>
<td>Process, plant and machine operatives</td>
<td>8.1</td>
<td>5.8</td>
<td>6.3</td>
<td>5.9</td>
<td>6.7</td>
<td>7.2</td>
</tr>
<tr>
<td>Elementary occupations</td>
<td>12.9</td>
<td>11.4</td>
<td>9.6</td>
<td>10.5</td>
<td>11.0</td>
<td>11.1</td>
</tr>
</tbody>
</table>

Source: Census, ONS, 2011

Employment and economic structure

9.4.17. In 2011 there were 25,534 people employed in the LIA which accounted for approximately 8.4% of all employees in the Bristol and North Somerset areas. All areas experienced a decline in employment between 2008 and 2011 apart from the West of England LEP area which experienced a slight increase of 0.3%. The LIA experienced the greatest decline in employment at -4.8%.

Table 9.8: Total employment and % change, 2008/11

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2011</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>LIA</td>
<td>26,828</td>
<td>25,534</td>
<td>-4.8</td>
</tr>
<tr>
<td>Bristol</td>
<td>234,693</td>
<td>230,905</td>
<td>-1.6</td>
</tr>
<tr>
<td>North Somerset</td>
<td>75,117</td>
<td>73,622</td>
<td>-2.0</td>
</tr>
<tr>
<td>West of England LEP</td>
<td>528,685</td>
<td>530,040</td>
<td>0.3</td>
</tr>
<tr>
<td>South West</td>
<td>2,265,485</td>
<td>2,243,351</td>
<td>-1.0</td>
</tr>
<tr>
<td>England</td>
<td>23,331,259</td>
<td>23,058,930</td>
<td>-1.2</td>
</tr>
</tbody>
</table>

Source: Business Register and Employment Survey, NOMIS, 2008/11
9.4.18. Figure 5 below shows the proportional distribution of employment in the LIA by sector in 2011. Employment in the LIA was dominated by the education (11.4%), health (11.2%) and business administration & support services (11.1%) sectors.

9.4.19. In comparison with the other areas, the LIA had greatest higher proportion of people employed in the education and business administration & support services sectors, but smallest lower proportion of people employed in the health sector. The LIA had a comparatively high proportion of people employed in the construction sector at 8.1%, which was almost double the regional and national averages (4.5%). The proportion of people employed in the professional, scientific & technical sector in the LIA (2.7%) was lower than all benchmark areas, and was particularly low compared with Bristol (9.1%) and the West of England LEP area (8.5%).

Figure 9.4: Employment by broad sector (% of total employment), LIA, 2011/12

![Bar chart showing employment by sector in 2011/12]

Source: Business Register and Employment Survey, NOMIS, 2011

9.4.20. The latest business unit data available is 2008 Annual Business Inquiry (ABI) workplace data. In 2008, there were approximately 2,100 business units in the LIA. In 2008, workplace units in the LIA were dominated by the construction sector (22.2%). The professional, scientific & technical and retail sectors also accounted for a fairly large proportion of workplace units at 9.7% and 9.4% respectively.

9.4.21. Workplace units in 2008 across all areas were dominated by the professional, scientific & technical, retail and construction sectors. However, the LIA had the smallest proportion of business units in the professional, scientific & technical sector across all areas (9.7%), which was particularly small compared with Bristol (15.2%) and the West of England LEP area (15%). The LIA had the greatest proportion of units in the construction sector at 22.2%, with Bristol experiencing the smallest proportion (10.3%).

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2 Sectors that account for less than 4.0% of total employment have not been included in this chart.
Enterprise levels

9.4.22. The rate of VAT registrations in an area can be used as a proxy measure of the level of entrepreneurship within the economy. VAT registration data is not available at ward level; however analysis of VAT registrations in Bristol and North Somerset can be used as a proxy measure for the LIA. It is worth noting that the true level of entrepreneurship may be slightly underestimated by VAT Registration data where some businesses fall naturally below the registration threshold.

9.4.23. Figure 6 below shows that between 1997 and 2007 all areas experienced similar trends in the level of enterprise. The latest data for 2007 shows that Bristol City and England had the greatest levels of enterprise with North Somerset and the South West region experiencing the lowest. On average, England and Bristol City experienced the greatest levels of enterprise across all areas over the ten year period.

Figure 9.5: VAT registrations per 10,000 resident population (aged over 16 years), 1997/2007


Housing market analysis

Average house prices

9.4.24. Figure 7 below sets out the average house prices between April 2002 and April 2012. Data is not available at ward level, therefore house prices for Bristol and North Somerset will be used as a proxy measure for the LIA. Data is presented for England & Wales collectively.

9.4.25. England and Wales and Bristol have shared similar house prices between 2002 and 2012, which have been the lowest across all areas over the ten year period. The West of England LEP area has experienced the highest house prices compared with the benchmark areas. North Somerset and the South West region have shared similar average house prices, with North Somerset having slightly higher prices. The effect of the recession on the housing market is clear, highlighted by the sharp decrease in average house prices between 2008 and 2009.
Deprivation

9.4.26. The Index of Multiple Deprivation 2010 combines a number of indicators, chosen to cover a range of economic, social and housing issues, into a single deprivation score for each small area in England. This allows each area to be ranked relative to one another according to their level of deprivation. The Indices of Deprivation have been produced at Lower Super Output Area (LSOA) level, of which there are 32,482 in the country.

9.4.27. Deprivation levels are higher across Bristol compared with North Somerset. Bristol has 32 LSOAs (12.7% of the total number of LSOAs within Bristol) in the most deprived 10% in England for multiple deprivation. Of these 32 LSOAs, there are 14 in the most deprived 5% and 1 in the most deprived 1% in England. North Somerset has 9 LSOAs (7.3% of the total number of LSOAs within North Somerset) that are within the most deprived 10% of areas nationally.

9.4.28. Of the six Bristol wards within the LIA, four of the wards contain LSOAs within the most deprived 10% of LSOAs nationally. The two North Somerset wards within the LIA contain LSOAs within the least deprived 40% nationally.

Travel to work

9.4.29. Census 2001 provides travel to work patterns from and to the area, more up-to-date data is not available. Travel to work patterns are an important indicator of an economy as they help to establish the level of in/out commuting and the resulting implication for employment opportunities in an area. The table below summarises the travel to work patterns in to and out of the LIA, Bristol City and North Somerset, based on 2001 Census data.
9.4.30. The LIA has a net export of labour, with 7,306 more trips made out of the LIA than inwards. The LIA has a relatively low labour containment rate whereby only around 35% of the people both live and work in the LIA. Conversely, and as would be expected, there is a net import of labour in to Bristol with 37,442 more trips to work made into Bristol City from surrounding areas. Bristol City area has a relatively large containment rate of around 75.2%, with 132,008 trips made to work in the Bristol City area by people who also reside in this area. North Somerset has a net export of labour, with 15,739 more trips made out of the district than inwards. The labour containment rate is relatively high, whereby 64.3% of people both live and work in the district. Similarly, the LIA is a net exporter of labour with 7,306 more trips made out the area for work, than inwards.

Table 9.9: Summary of travel to work journeys

<table>
<thead>
<tr>
<th></th>
<th>LIA</th>
<th>BCC Area</th>
<th>North Somerset Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live/ Work in Area</td>
<td>11,660</td>
<td>132,008</td>
<td>56,662</td>
</tr>
<tr>
<td>Number Travel In</td>
<td>26,265</td>
<td>213,072</td>
<td>72,345</td>
</tr>
<tr>
<td>Number Travel Out</td>
<td>33,571</td>
<td>175,630</td>
<td>88,084</td>
</tr>
<tr>
<td>Net Commute</td>
<td>-7,306</td>
<td>37,442</td>
<td>-15,739</td>
</tr>
<tr>
<td>Containment Rate</td>
<td>34.7%</td>
<td>75.2%</td>
<td>64.3%</td>
</tr>
</tbody>
</table>

Source: Census 2001

9.4.31. Tables 9.9 and 9.10 analyse journeys to work to and from the LIA, from and to surrounding districts. As expected, journeys to work to and from the LIA are predominantly made from and to Bristol City. The remainder of journeys to work to and from the LIA are mainly made from and to North Somerset, South Gloucestershire and Bath and North East Somerset.

Table 9.10: Journeys to work to the LIA from surrounding districts (in-commuting), 2001

<table>
<thead>
<tr>
<th>Area of Residence</th>
<th>Number of Journeys</th>
<th>% of Total in-commuting journeys</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bristol City</td>
<td>16,137</td>
<td>61.9</td>
</tr>
<tr>
<td>North Somerset</td>
<td>4,085</td>
<td>15.7</td>
</tr>
<tr>
<td>South Gloucestershire</td>
<td>2,021</td>
<td>7.8</td>
</tr>
<tr>
<td>Bath and North East Somerset</td>
<td>1,413</td>
<td>5.4</td>
</tr>
<tr>
<td>Sedgemoor</td>
<td>315</td>
<td>1.2</td>
</tr>
<tr>
<td>Mendip</td>
<td>276</td>
<td>1.1</td>
</tr>
<tr>
<td>Stroud</td>
<td>106</td>
<td>0.4</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>26,265</strong></td>
<td><strong>100.0</strong></td>
</tr>
</tbody>
</table>

Source: Census 2001
Table 9.11: Journeys to Work from the LIA to Surrounding Districts (Out-Commuting), 2001

<table>
<thead>
<tr>
<th>Area of Residence</th>
<th>Number of Journeys</th>
<th>% of Total in-commuting journeys</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bristol City</td>
<td>25,417</td>
<td>75.8</td>
</tr>
<tr>
<td>North Somerset</td>
<td>3,233</td>
<td>9.6</td>
</tr>
<tr>
<td>South Gloucestershire</td>
<td>2,856</td>
<td>8.5</td>
</tr>
<tr>
<td>Bath and North East Somerset</td>
<td>942</td>
<td>2.8</td>
</tr>
<tr>
<td>Swindon</td>
<td>96</td>
<td>0.3</td>
</tr>
<tr>
<td>Sedgemoor</td>
<td>78</td>
<td>0.2</td>
</tr>
<tr>
<td>Stroud</td>
<td>60</td>
<td>0.2</td>
</tr>
<tr>
<td>Mendip</td>
<td>57</td>
<td>0.2</td>
</tr>
<tr>
<td>Total</td>
<td>33,571</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Source: Census 2001

9.4.32. As with the LIA, journeys to work to and from Bristol City are predominantly made from and to Bristol City, reflected by the high containment rate. The remainder of journeys to work to and from Bristol are mainly made from and to North Somerset, South Gloucestershire and Bath and North East Somerset.

9.4.33. Journeys to work to and from North Somerset are predominantly made from and to North Somerset, also reflected by the high containment rate. The remainder of journeys to work to and from North Somerset are mainly made from and to Bristol City, Sedgemoor, South Gloucestershire, Bath and North East Somerset.

Summary

9.4.34. In summary, the key points of the socio-economic baseline are as follows:

- Census 2001 and 2011 data show that the LIA, alongside North Somerset, have the smallest working age populations across all areas. The latest data shows that the LIA suffers from low levels of economic activity and high levels of unemployment.
- Skill levels are particularly low in the LIA. In 2011 it experienced the greatest proportion of the population aged 16 and over with no qualifications across all areas. Similarly, the LIA has the greatest proportion of those employed in the lowest skilled occupations.
- The LIA experienced the greatest decline in employment between 2008 and 2011 across all areas. Employment in the LIA in 2011 was dominated by the Education, Health and Business Administration & Support Services sectors. The LIA had a comparatively large proportion of those employed in the Construction sector, but a comparatively small proportion of those employed in the Professional, scientific & technical sector compared with the benchmark areas.
- Deprivation levels are generally higher across Bristol compared with North Somerset. Of the six Bristol wards within the LIA, four of the wards contain LSOAs within the most deprived 10% of LSOAs nationally.
- The LIA has a net export of labour and a relatively low labour containment rate, which is estimated to be 35%. Conversely, there is a net import of labour in to Bristol, a City which has a relatively large containment rate of approximately 75.2%. North Somerset has a net export of labour but a relatively high containment rate at 64.3%.
Journeys to work to and from the LIA and Bristol are predominately made from and to Bristol City, with the remainder of journeys made from and to North Somerset, South Gloucestershire, Bath and North East Somerset. Journeys to work to and from North Somerset are predominantly made from and to North Somerset. The remainder of journeys are mainly made from and to Bristol City, Sedgemoor, South Gloucestershire, Bath and North East Somerset.

9.4.35. In conclusion, south Bristol faces multiple social and economic challenges, including high levels of unemployment, low skills levels and extensive and acute deprivation. This appears to be operating alongside relatively poor business performance, with a high dependence on public sector jobs and low value-added activity in retail and manufacturing. There is significant out-commuting from the area due to lower numbers of jobs than working residents. There is a major challenge in encouraging job creation, to both boost economic activity and improve social outcomes.

9.5. Evidence from Existing Studies

South Bristol Link Economic Benefits Study, and GVA Impacts of Major Transport Schemes across the West of England

Introduction

9.5.1. In 2013 Atkins produced a study examining the likely economic benefits of the proposed SBL scheme, especially in terms of unlocking and facilitating economic growth. This study built on the findings of various studies including the ‘GVA Impacts of Major Transport Schemes’ produced by Atkins in 2012 for the West of England Authorities, and the ‘South Bristol Link Transport Economic Report’ produced by Atkins in May 2013. This section provides a summary of the main findings from these studies.

Current Challenges and Issues

9.5.2. The Business Plan for the West of England Local Enterprise Partnership (LEP) proposes that a large proportion of growth across the West of England should be directed to the Regeneration Area in south Bristol. This means that failure to address transport constraints in this priority location will significantly constrain the growth potential of the West of England as a whole.

9.5.3. South Bristol faces particular challenges in unlocking regeneration and new employment to improve economic prospects and outcomes for local residents. South Bristol faces multiple social and economic challenges, including high levels of unemployment, low skills levels and acute deprivation. There is a high dependence on public sector jobs and low value-added activity, and significant out-commuting from the area due to a low level of employment opportunities.

9.5.4. The area has complex needs but transport issues are a particular challenge in unlocking the potential of the area. Several of those people consulted through this study made specific reference to the transport problems in south Bristol, highlighting the disadvantages compared with the north of the city. It was also highlighted that the accessibility challenges result in some businesses having limited interest in considering locating in the south of the city. This challenge will become progressively more serious as travel demand increases in the city and traffic conditions deteriorate with increased congestion.

9.5.5. Much of the area is not connected to the rail network; although there are stations at Bedminster and Parson Street, services are not frequent and access to Temple Meads is poor. The area is therefore dependent on bus services to meet the accessibility needs of people living and working in the area. However, increasing congestion in the area will directly impact on buses, meaning that much of the city centre (and its employment opportunities) will be at least 45 minutes journey time from much of south Bristol. Conversely this also means that employers will have limited accessibility to the labour market, with much of the north of the city located more than one hour from most of south Bristol.
9.5.6. Congestion will be a particular challenge, with significant constraints to highway accessibility in south Bristol. Model forecasts indicate that a large area can be reached to the south east (via the A37 Wells Road) within 20 minutes and Bristol Airport can be reached within 30 minutes (via the A38). However, access to other destinations is highly constrained. Access to the Cumberland Basin is poor, due to long delays in the Parson Street area, and Junction 18 of the M5 is more than 50 minutes from Hengrove. Given the importance of good quality access to the Strategic Road Network to existing and future businesses in south Bristol (as evidenced by recent consultation), this is likely to significantly impact on the attractiveness of this area for business.

Potential Economic Impacts

9.5.7. The potential economic outcomes of the proposed SBL scheme are identified as improved depth of labour market for businesses in south Bristol and better access to jobs elsewhere for residents in south Bristol. In addition, improved access to education & training, large reductions in business travel and goods movement costs, unlocked access to new geographic areas for business markets and improved business competitiveness of south Bristol. Overall, the scheme will help unlock capacity for growth and vital regeneration in south Bristol.

9.5.8. According to the latest Transport Economic Efficiency calculations (May 2013), the scheme will have a Present Value of Costs (PVC) of approximately £38 million and a Present Value of Benefits (PVB) of approximately £169 million. These figures are based on the latest SBL model, which has a base year of 2012 and includes scheme costs from May 2013. This results in a Benefit to Cost Ratio (BCR) of 4.44. This means that the scheme will return £4.44 for every £1 spent on it.

9.5.9. The BCR of the scheme improves further with the inclusion of reliability and wider impact benefits. Reliability benefits are expected to total a further £14 million for business users and £16 million for commuters and other users. The importance of improved reliability is significant as it adds to the benefits from reduced journey times and operating costs. The monetised value of the wider impacts of the scheme is estimated at approximately £25 million, which comprises the effects of agglomeration, output effects and Exchequer benefits of increased numbers of people working. The wider impacts of the scheme demonstrate the potential of SBL to unlock economic benefits that are significantly greater than those simply assessed through time and cost savings. The overall net present value of the scheme’s benefits is estimated to be £224 million while the net present value of the costs is estimated to be £38 million. This results in an overall benefit to cost ratio of 5.89 which means the scheme will return £5.89 for every £1 spent on it.

9.5.10. At the sub-regional level, the net number of jobs potentially unlocked by the proposed SBL scheme by 2030 is estimated at 3,100. Using the estimated net employment unlocked by the scheme, estimated net additional GVA in 2030 has been calculated at £199 million (Atkins, 2012). The estimated GVA return on expenditure is 5.2 (increase in GVA/PVC).

South Bristol Business Survey

9.5.11. This section presents a summary of the findings from a telephone survey conducted with a cross-section of businesses in the south Bristol area in October 2012. The survey was designed to inform the assessment of potential socio-economic impacts of the proposed transport measures, in particular by gaining an insight into current issues of businesses relating to transport and accessibility and their importance to business operation and future potential.

9.5.12. An independent survey company conducted the telephone interviews on behalf of Atkins. Overall, 165 businesses were contacted. In total, a hundred businesses were consulted, which accounts for approximately 8% of the total number of businesses across the south Bristol area.

9.5.13. A set of semi-structured questions was devised prior to the commencement of the telephone interviews. The questions covered a range of topics including an overview of the overall operation of the business, travel to work patterns of employees, overview of the performance and growth plans of organisations, transport and connectivity issues and details relating to the proposed South Bristol Link scheme.
9.5.14. A summary of the survey findings is presented below, with the full set of results presented in Volume 3, Appendix 9.1. The discussions and comments set out in this section are intended to be non-attributable and have been gathered on the basis of confidential engagement with businesses. It should be noted that the section sets out the views and opinions that were raised by the consultees only, and the summary section draws out the key themes based on the information given by the consultees.

- Transport and connectivity across the south Bristol area is highly important for the businesses interviewed, considering the majority of their employees and customers live within south Bristol and Bristol City, and a fairly large proportion of their suppliers are based in Bristol City. Of those consulted, 64% said that road transport and connectivity is ‘very important’ to their business operation in south Bristol.

- The importance placed on transport and connectivity by businesses is evident from the survey findings. When questioned about the most important factors for business performance the majority of respondents (67%) listed ‘transport links to customers’, with ‘transport links to suppliers’ listed by the third greatest proportion of respondents (36%).

- However, the majority of respondents at 56% believe current transport connections and infrastructure in south Bristol are ‘average’, while 31% considers them to be ‘poor’. Approximately 54% of businesses said that congestion in the area affects the operation of their business, and 51% are ‘definitely’ concerned about congestion on the roads increasing in the future.

- Travel to work patterns highlight the dominant use of cars and the small proportion of employees using public transport when travelling to work. Alongside discount bus or train tickets, improved bus/ train service reliability, direct bus routes and more frequent bus services were listed by the majority of businesses as factors that would encourage use of more sustainable forms of transport.

- The majority of businesses said that more frequent and reliable public transport is the main improvement to the transport network that would most benefit their business.

- In terms of the proposed South Bristol Link scheme, 62% of businesses said it would benefit their business, listing improved journey speed and accessibility to customers as the main benefits.

- Transport and connectivity is highly important for the potential growth and retention of businesses in the south Bristol area. When questioned about factors that may enable growth in the future, and factors that are important for re-location decisions, the majority of businesses listed improved transport links.

Summary

9.5.15. These studies demonstrate that transport is a major barrier to economic growth in south Bristol, and that investment in the proposed scheme will play a key role in unlocking new growth. The primary economic benefit of the scheme will be helping to unlock the latent economic potential of south Bristol. This includes helping to unlock thousands of jobs that would not be delivered without major transport investment and unlocking some £199 million of additional GVA by 2030.

9.6. Effects of Proposed Development

9.6.1. The construction and subsequent operation of the proposed scheme is expected to create a small number of short and long-term employment opportunities in the area. As with any physical development there will be demand for skilled construction workers and engineers during the construction phase. It will be important for local businesses to have the opportunity to bid for procurement contracts and contractors to employ local people. After the proposed scheme becomes operational, there will be some additional permanent job opportunities for drivers and other support staff.

9.6.2. Additional effects relate to wider impacts such as improvements to accessibility – particularly to employment but also education/ training, leisure and recreation that will be available in Bristol city centre and south Bristol.
9.6.3. Evidence from other Rapid Transit Systems (e.g. Ipswich, Luton, York) suggest that the proposed scheme could lead to improved image and perception of the area along the route and offer the chance for further redevelopment opportunities if the locations are seen as attractive to commercial and residential developers.

Construction Phase

Disruption

9.6.4. Construction of new transport routes such as link roads/rapid transport systems can be disruptive to businesses, residents and those commuting/travelling through the affected area. Businesses situated along the route and those heavily dependent on car access may be affected during the construction phase. As we do not yet have any details relating to construction practices/periods etc. the level of disruption is difficult to quantify. However, ensuring widespread consultation and notification of construction periods etc. will help to minimise the level of disruption related to implementing the scheme.

Job Creation

9.6.5. Construction jobs, by their nature are only temporary and will not form a central part of the rationale for this scheme; however they are captured here due to the short-term outputs they will produce as a result of implementing the scheme. Given the difficulty in estimating construction jobs the figure stated should be seen an indicative figure only. Following further work to identify construction processes for the scheme a more substantive calculation of construction jobs could be made.

9.6.6. Calculating the number of construction jobs created by a project is often difficult given the lack of agreed convention for converting construction employee years to equivalent full time jobs. The estimation of construction jobs is normally completed on the basis of the number of permanent “full-time equivalent” (FTE) jobs, where a permanent FTE is an employment opportunity for at least 10 years.

9.6.7. The construction cost of the scheme is set at £24.7m. The average construction sector revenue per employee is approximately £201,000 (based on the average turnover per employee that appears in the company reports of a sample of 40 of the UK’s top construction firms, 2011 data). This project would therefore support 123 construction person years. Using the figure of 10 employment years equating to one full-time equivalent (FTE) job the construction phase of the scheme would generate approximately 12 direct FTE jobs. This is in-line with similar transport schemes.

9.6.8. In addition to the direct employment during construction it is likely that indirect jobs will also be supported in the locality and regionally as a result of supply-chain linkages and multiplier effects, including supply of equipment, materials and additional spending from construction staff.

9.6.9. It is expected that the implementation of the scheme would require a commitment to local employment from construction contractors. However, the level of local employment cannot be certain and therefore employment effects during construction phases should be seen as moderate.
**Operational Phase**

**Journey Times/ Congestion**

9.6.10. A key aspect of the scheme is to address the currently poor transport links and significant traffic congestion which result in poor journey time reliability. Thus a key benefit of the scheme is time savings as a result of faster and more efficient and reliable journeys and reduced congestion. According to the South Bristol Link Transport Assessment (Atkins, May 2013), the scheme will lead to a reduction in delays within south Bristol and areas of North Somerset near to the scheme. The reduction is estimated at between 2 and 3% in 2016 and between 6% and 11% in 2031. The scheme will therefore provide congestion relief across south Bristol and adjacent areas of North Somerset.

9.6.11. According to the latest Transport Economic Efficiency calculations (Atkins, May 2013), reliability benefits are expected to total £14 million for business users and £16 million for commuters and other users.

**Job Creation**

9.6.12. It is envisaged that a small number of new jobs will be created during the operational phases of the scheme. The calculation of jobs is based on the vehicle and driver hours resulting from the implementation of the scheme. Annual driver hours (peak and off-peak) of 11,688 would result in an additional 7 driver jobs, based on a 40 hour week for 46 weeks a year.

9.6.13. Job creation estimates assume that other operational aspects of the scheme (inspectors, maintenance, management etc.) would be undertaken by existing staff, with no significant requirement for additional staff.

9.6.14. Indirect job creation is anticipated in terms of the regeneration effects that the implementation of the scheme will contribute to and help facilitate. Major developments planned/underway in the south Bristol area include provision of new business parks, Bristol Airport expansion, Hartcliffe education campus, community hospital and leisure centre. In addition the scheme will make access to services, facilities and employment in Bristol City centre easier therefore generating additional potential due to increased sales in retail and leisure establishments.

**Wider Regeneration / Socio-Economic**

**Accessibility**

9.6.15. The area of south Bristol has been identified as suffering from social deprivation and has low levels of car ownership which result in reduced accessibility to employment, training and education as well as leisure activities. Analysis has shown high unemployment levels in Filwood, Whitchurch Park and Hartcliffe. Research undertaken for the SBL Major Scheme Business Case (MSBC) identified demand for light-industrial SME accommodation in south Bristol due to labour availability, if current accessibility issues are overcome.

9.6.16. The scheme will improve accessibility from South Bristol to the city centre and to strategic transport links in the wider area. As detailed in the South Bristol Link Transport Assessment (Atkins, May 2013), the residential areas to the south of SBL will see an average decrease of 43 seconds when making a journey on the highway network to the city centre in the morning peak hour in 2016. By 2031 these journey time savings will have further improved to a saving of nearly 4 minutes as the highway network north of SBL is less congested with the introduction of SBL. Access to the airport will also be improved by the scheme, with journey times from the airport and city centre reducing by approximately two minutes in 2016. Forecast journey times to the strategic road network are also lower, with journey times between Cater Road and the M5 becoming between one and three minutes quicker in 2016 and between three and six minutes quicker in 2031.

9.6.17. The introduction of SBL will provide a combination of improved public transport infrastructure (bus lanes on SBL and select vehicle detection at signals), new services between Bristol (city centre) and south Bristol and the airport as well as a reduction in traffic on the highway network north of SBL enabling journey times for the buses to/from south Bristol to travel marginally quicker. The
The impact of this is that in the morning peak hour in 2016 there is forecast to be an average bus journey time reduction of 71 seconds between south Bristol and Bristol (city centre). Buses between the airport and city centre are forecast to see a much larger decrease in average journey times, with the morning peak hour bus journeys taking almost 6 minutes less than the 'without SBL' scenario. This is due to the reduction in traffic north of SBL, particularly along the A38, and the introduction of airport buses along the SBL.

Health, Safety and Environment

9.6.18. The Health Impact Assessment (HIA) produced by Atkins highlights health determinants that will experience positive changes in the operation phase including accessibility, active travel, access to green space, air quality, quality of life, personal safety & perception of crime, social inclusion and employment. Negative impacts are currently predicted for noise determinant due to change in facade noise level, predominantly along the reserved corridor, King Georges Road and Highridge Green, south of Sandburrows Road. For further details please refer to the HIA in Chapter 12.

Carbon Emissions

9.6.19. Quality of life improvements associated with improved air quality/ reduction in carbon emissions is a further wider impact of the scheme. The latest Transport Economic Efficiency calculations (Atkins, May 2013), estimates greenhouse gas emission savings equivalent to £1.056 million.

Economic Development/ Regeneration

9.6.20. The need for economic and social regeneration in south Bristol is clear with comprehensive regeneration in south Bristol set as a priority in the Bristol Core Strategy (including mix of uses and improved infrastructure). Employment and worklessness are key issues for the local area, with improved accessibility to the city centre and locality identified as a key element of reducing deprivation in the area.

9.6.21. A number of development sites have been identified as being both suitable and available for employment use and will benefit from the investment in the scheme to improve accessibility and journey time reliability. As previously mentioned there is seen to be potential for additional employment generation from market opportunities brought about by overcoming accessibility issues in the area and through improved access of the local population to facilities and services in the city centre.

9.6.22. The scheme is also identified as an important element in assisting Bristol Airport in plans to expand capacity to 10 million passengers a year. The scheme will allow a faster and more reliable journey time to the city centre, M5 and also increase the number of households within a 40 minute drive of the airport.

Mitigation

9.6.23. The construction and subsequent operation of the link road will provide an opportunity for additional benefits for those living and working in the south Bristol area. In order to maximise the opportunities provided a number of interventions and measures could be adopted during construction and operation of the new link road.

Construction Phase

9.6.24. Early and regular consultation with businesses, residents and other local stakeholders will be critical during the construction phase of the scheme. This will provide information on likely levels, frequency and duration of disruption to a range of users which in turn should help to reduce disruption.
9.6.25. Provision of clauses to ensure local supplier procurement and local employment will ensure benefits of the scheme during construction are maximised especially for the local community. Similarly provision of construction work training opportunities for locals would ensure that benefits of the scheme will be felt over a longer period as skills can be transferred to other jobs/ work.

**Operational Phase**

9.6.26. The assessment of potential impacts of the scheme has identified the potential demand for new employment units in the south Bristol area if issues of accessibility could be resolved. Clearly the scheme provides the potential for inward investment in the area by businesses, associated business growth of existing businesses and new start-ups.

9.6.27. Improved accessibility of the south Bristol area, to and from the area, as a result of the implementation of the scheme, is identified in policy as a key asset and element of comprehensive regeneration of the area. This aspect should be clearly followed to ensure maximum benefits are brought out from the scheme in regeneration terms.

**Residual Effects**

**Construction phase**

9.6.28. The construction phase may have an adverse residual impact on businesses and residents adjacent to the scheme route, as a result of construction taking place. The level of this impact can be reduced though early and on-going consultation as well as agreeing particular support measures (e.g. access, working hours etc.) where appropriate.

9.6.29. Positive residual impact from the 12 FTE construction jobs created.

**Operational phase**

9.6.30. The scheme is not anticipated to have any adverse residual impacts in socio-economic terms. Positive impacts will result including improved access to public transport, reduction in carbon emissions, support for and contribution to regeneration aims and improved accessibility to employment, services and facilities in the local area and in the city centre. The scheme is anticipated to have a positive residual impact from the 7 FTE driver jobs. Over a longer time frame the implementation of the project could assist in the generation of additional jobs due to the number of planned and existing developments in the area.

**Consideration of Likely Cumulative Effects**

9.6.31. The proposed SBL scheme forms part of the proposed Rapid Transit network, along with the North Fringe to Hengrove Package (NFH Package) and Ashton Vale to Temple Meads (AVTM) Rapid Transit scheme. Evidence from other Rapid Transit Systems (for example, Ipswich, Luton, York) suggest that the proposed SBL could lead to improved image and perception of the area along the route and offer the chance for a step change in development quantum and mix if the locations are seen as attractive to commercial and residential developers. The proposed SBL could lead to improved accessibility to public transport for residents in south Bristol and associated improved links to Bristol city centre. The proposed link into Brookgate will improve accessibility and connectivity for businesses to the airport, the port and the strategic road network.

9.6.32. As one of the three proposed rapid transit schemes, SBL has the potential to contribute towards very significant economic growth and development.
9.7. **Summary and Conclusions**

9.7.1. From a socio-economic perspective, the proposed SBL scheme is strategically aligned to local, sub-regional and national policies relating to sustainable economic development, regeneration and improving accessibility to employment and education opportunities.

9.7.2. The proposed scheme is expected to have an overall positive socio-economic impact. After the potential short-term disruption caused during the construction phase, the scheme will result in Bristol city centre and the employment, education, training, retail and leisure opportunities available there, more accessible to people living across the proposed scheme’s catchment area. In addition, the implementation of the scheme is anticipated to result in employment and business opportunities in the south Bristol area due to business growth and start-ups. The implementation of the scheme also has the potential to support a number of planned and existing development projects in the south Bristol area that would result in additional employment.

9.7.3. Recent studies on the proposed scheme produced by Atkins demonstrate that transport is a major barrier to economic growth in south Bristol, and that investment in the proposed scheme will play a key role in unlocking new growth. The primary economic benefit of the scheme will be helping to unlock the latent economic potential of south Bristol. This includes helping to unlock thousands of jobs that would not be delivered without major transport investment and unlocking some £199 million of additional GVA by 2030.

9.7.4. In terms of cumulative impacts, SBL has the potential to contribute towards very significant economic growth and development. As one of the three proposed rapid transit schemes, SBL could help attract inward investment and improve the image and perception of the area along the route.

9.7.5. The table below sets out a summary of the likely socio-economic impacts arising from the construction and operation of the proposed scheme. Assumptions have been made based on the evidence gathered and professional judgement using the significance criterion outlined in Table 9.2.

<table>
<thead>
<tr>
<th>Phase</th>
<th>Impact</th>
<th>Magnitude</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction</td>
<td>Temporary disruption to businesses and residents as a result of construction work.</td>
<td>Minor adverse</td>
</tr>
<tr>
<td>Construction</td>
<td>Temporary employment supported by the construction of the scheme.</td>
<td>Minor beneficial</td>
</tr>
<tr>
<td>Operational</td>
<td>Reduced journey times and less congestion for commuters and business traffic.</td>
<td>Beneficial</td>
</tr>
<tr>
<td>Operational</td>
<td>Permanent employment supported by the operational phase of the scheme.</td>
<td>Negligible</td>
</tr>
<tr>
<td>Operational</td>
<td>Improved accessibility to employment, training and education.</td>
<td>Beneficial</td>
</tr>
<tr>
<td>Operational</td>
<td>Improved quality of life as a result of reduction in carbon emissions.</td>
<td>Minor beneficial</td>
</tr>
<tr>
<td>Operational</td>
<td>Additional opportunities for economic development and regeneration in south Bristol.</td>
<td>Beneficial</td>
</tr>
<tr>
<td>Operational</td>
<td>Economic growth as a result of improved image and perception and better transport connections.</td>
<td>Beneficial</td>
</tr>
</tbody>
</table>