

Bolton Local Economic Assessment




A report for

Bolton
Council

February 2015

new
economy 

 part of MGC

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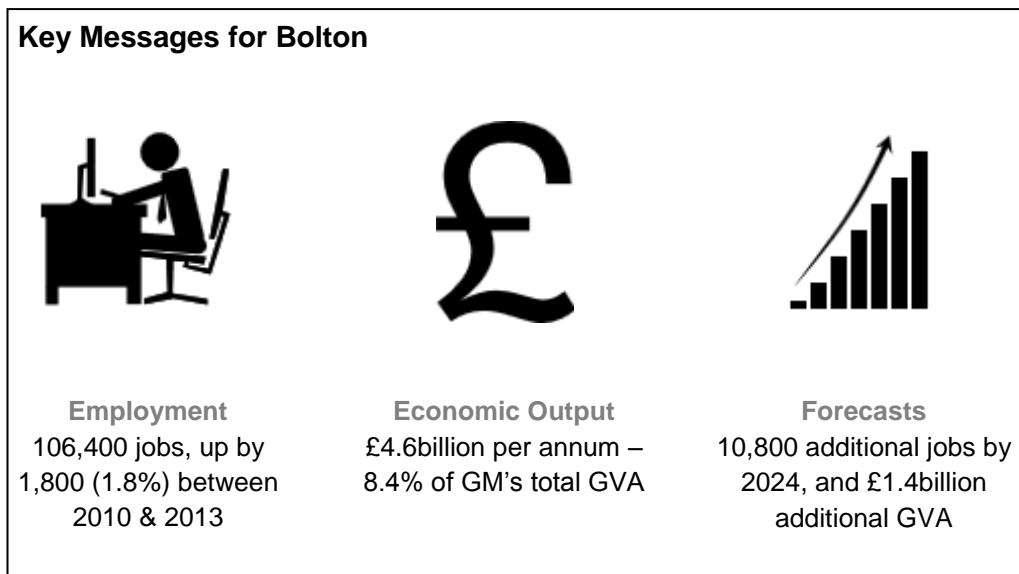
1 Introduction

- 1.1. This is the third Bolton Local Economic Assessment. The first was produced in 2011, followed by an update in 2013, both of which provide a detailed view on local socio-economic conditions. The economy has changed considerably since the first LEA and following the downturn, it is now firmly in the midst of recovery. This new LEA provides a detailed analysis of trends in Bolton, organised around the broad themes of business, people and place. The report also includes a separate section looking at the contribution that planned developments in the town centre and other major employment sites will make to the borough over the next 10-20 years. Where applicable, reference is made to the 2013 LEA in order to highlight trends that have either remained the same or have changed significantly over the last two years.
- 1.2. As highlighted in the previous LEAs, Bolton remains a place of economic scale and significance – being one of two town centres in Greater Manchester outside the conurbation core with economic critical mass and diversity, and is in the top ten largest employment centres in the North West¹. A number of points emerge in the latest LEA, including:
- **Economic recovery:** The economy and labour market is showing signs of recovery, and almost 11,000 jobs are forecast to be created in Bolton over the next decade according to the latest edition of the Greater Manchester Forecasting Model (GMFM). Significantly, GMFM also shows that employment in Bolton has now returned to pre-recession levels.
 - **Growth opportunities:** In line with trends across most of Greater Manchester (GM), future growth in Bolton is expected to be driven by sectors such as: business, financial & professional services; the cultural & creative industries; construction; and retail. It is important to note that while manufacturing will continue to see a decline in employment the sector is still expected to see a significant increase in economic activity. This indicates that while the sector will increasingly move away from being the mass employer that it once was, its productivity will continue to grow.
 - **Skills:** Educational attainment has improved in Bolton in recent years, in terms of GCSE results and also the number of people with degree level qualifications. A significant number of its resident working age population hold NVQ level 2 (5 GCSEs at grades A*-C) and/or NVQ level 3 (2+ A Levels) qualification and the challenge for Bolton is to ensure that these residents continue progressing with skills and move towards the higher end of the qualifications spectrum, thus increasing the proportion of people with higher level skills.

¹ Based on analysis of employment estimates for every North West district in the 2013 edition of the Business Register and Employment Survey.

- 1.3. As highlighted in the previous LEAs, Bolton looks to be well-placed to contribute to the growth and competitiveness of GM and not only as a supplier of skills and labour. In particular, developments at major employment sites such as Rivington Chase and Logistics North will help support Bolton's position as a key economic centre in north Manchester.
- 1.4. The remainder of the LEA is structured as follows:
- **Section 2** (Page 3) looks at the business base in Bolton, highlighting the number of firms in the borough and also the main employment sectors. It also summarises findings from the most recent edition of the GM Forecasting Model (GMFM) and looks at which sectors Bolton has specialisms in, relative to the national picture, in the form of sector snapshots.
 - **Section 3** (Page 25) analyses the demography of Bolton, covering population and skills. It also looks at unemployment trends in the borough, along with self-employment and part-time working.
 - **Section 4** (Page 42) outlines Bolton's connectivity with other parts of GM and the rest of the country, in addition to highlighting future developments that are likely to generate new employment opportunities and help in supporting the area's future economic development. It also looks at trends in Bolton's housing market.
 - **Section 5** (Page 51) looks at the impact of the future developments outlined in section 4, and the extent to which they will create additional employment in Bolton, over and above that expected by the GMFM.
 - **Section 6** (Page 54) provides concluding remarks on all the analysis.
- 1.5. A summary is provided at the end of sections two, three and four, highlighting the main messages from each section.

2 Business



Employment Base

- 2.1. According to the latest data from the Business Register and Employment Survey (BRES),² total employment in Bolton was around 106,400 in 2013. Bolton accounts for 7.0% of all jobs in Greater Manchester (GM, 1.21million). Since 2010, the district has gained 1,800 jobs – representing growth of 1.7% - and reflecting a more positive economic environment compared with the situation when the previous LEA was produced.
- 2.2. Figure 1 displays employment figures and changes for 2010-13, breaking the numbers down by sector. In 2013, the largest sector in Bolton was the public sector. Incorporating education, health and social care, and public administration it employs 27,700 people and accounts for 26.0% of total employment in the area. Following the economic downturn, jobs in the public sector in Bolton have declined by around 1,300 (4.5%) since 2010, driven predominantly by a sharp decline in public administration employment.
- 2.3. The second largest sector in Bolton is business, financial & professional services sector at 21,100 jobs. Within this sector, professional services saw a significant rise in employment of around 58.0% from 2010-13, equating to 3,700 additional jobs. The sector has a whole grow by 3,100 employees (17.2%) since 2010, with a decline in business services jobs of 900 offsetting the professional services rise to a degree.
- 2.4. The wholesale and retail sector is the third largest employer in Bolton with 20,300 jobs (which represents 10.1% of all jobs in the district). Looking at the sub-sector level, the wholesale and retail sector remains strong in Bolton mainly due to wholesale jobs. While motor trades and retail have lost jobs

² BRES data are subject to revision each year, however they remain useful in providing employment estimates for areas and for analysing change by sector.

(with jobs decreasing by 19.2% and 9.4%, respectively between 2010 and 2013), overall jobs have been driven up due to wholesale (with a net increase of 26.7% from 2010-13).

- 2.5. Other important sectors in Bolton include manufacturing (12,300 jobs in 2013) and the cultural & creative industries (11,200 jobs in 2013). Manufacturing actually saw a small increase in employment between 2010 and 2013 of around 500 (4.2%), reversing a long-term decline.

Figure 1: Employment in Bolton, 2010-13 (ordered by largest sectors, 2013)³

	Bolton				% change	
	2010	2013	Change (No.)	Change (%)	GM	GB
PUBLIC SECTOR	29,000	27,700	-1,300	-4.5%	-2.2%	0.3%
Health & Social Care	14,400	13,800	-600	-4.2%	0.7%	4.8%
Education	9,400	9,700	300	3.2%	3.8%	2.0%
Public Administration	5,200	4,300	-900	-17.3%	-18.6%	-13.0%
BUSINESS, FINANCIAL & PROFESSIONAL SERVICES	18,000	21,100	3,100	17.2%	9.9%	7.8%
Business services	6,500	5,600	-900	-13.8%	-3.9%	5.2%
Professional services	6,400	10,100	3,700	57.8%	21.5%	15.5%
Financial services	3,200	3,400	200	6.3%	1.5%	-0.3%
Employment activities	2,000	2,200	200	10.0%	23.5%	8.1%
WHOLESALE & RETAIL	20,900	20,300	-600	-2.9%	0.0%	-0.5%
Retail	13,900	12,600	-1,300	-9.4%	-2.1%	-0.8%
Wholesale	4,500	5,700	1,200	26.7%	9.7%	-0.8%
Motor trades	2,600	2,100	-500	-19.2%	-12.5%	1.3%
MANUFACTURING	11,800	12,300	500	4.2%	3.4%	1.4%
Other manufacturing	4,700	4,800	100	2.1%	-6.6%	0.0%
Advanced manufacturing	3,600	3,900	300	8.3%	6.5%	3.3%
Food & drink manufacturing	2,600	2,700	100	3.8%	0.0%	1.2%
Textiles manufacturing	900	1,000	100	11.1%	37.2%	-10.6%
CULTURAL & CREATIVE	10,800	11,200	400	3.7%	4.4%	5.9%
Tourism, Leisure & Culture	6,400	6,400	0	0.0%	4.0%	7.0%
Digital	1,600	1,600	0	0.0%	12.4%	7.4%
Sports	1,600	1,600	0	0.0%	-16.5%	4.3%
Creative Industries	1,200	1,600	400	33.3%	13.2%	2.0%
CONSTRUCTION	6,300	5,600	-700	-11.1%	-7.1%	-2.8%
TRANSPORT & STORAGE (INCLUDING POSTAL)	4,900	5,200	300	6.1%	5.9%	-0.1%
PERSONAL SERVICES	1,300	1,100	-200	-15.4%	-15.0%	-0.6%
PRIMARY INDUSTRIES	1,000	1,000	0	0.0%	19.2%	-2.6%
Utilities	900	900	0	0.0%	21.4%	3.9%
Agriculture, forestry & fishing	100	100	0	0.0%	-8.4%	-6.1%
Mining & quarrying	100	100	0	0.0%	-35.4%	3.2%
SCIENCE AND R&D	600	900	300	50.0%	16.7%	10.0%
Total	104,600	106,400	1,800	1.7%	2.4%	2.3%

Source: Office for National Statistics (ONS) Business Register & Employment Survey (BRES), 2013

	Decline
	Growth (below GM & GB)
	Growth (above GM & GB)
	No change

³ All figures rounded to the nearest hundred. Appendix 4 outlines how each sector is defined in terms of Standard Industrial Classification.

Business Base

- 2.6. Figure 2 shows the number of businesses in Bolton by sector, drawing on information from the Inter-Departmental Business Register (IDBR). As of 2014 there were 9,230 businesses in the borough, meaning Bolton accounts for approximately 10% of GM's business base (97,520). This is broadly in-line with Bolton's share of the GM employment base. The largest concentration of businesses in Bolton is in wholesale & retail with 2,185 companies – accounting for 23.5% of the business base. This is above the figures for GM and GB of 21.7% and 18.3% respectively). There are also large number of businesses in the business, financial & professional services sector (1,815 firms – 19.5% of the business base) and the public sector (1,095 businesses – 11.8%).
- 2.7. Compared with 2010 figures, the number of businesses in wholesale and retail has grown by about 3.0%, manufacturing has grown by 4.0% and construction by 9.0%. As well as having a larger proportion of wholesale and retail businesses relative to GM, there is a higher concentration of manufacturing businesses in Bolton (9.5% compared with GM's 8.6% average). Construction is also more concentrated in Bolton – accounting for 11.2% of all businesses, compared to 9.4% in GM.

Figure 2: Business numbers by Sector, 2014 (in absolute order)⁴

	No.	Percent of Total		
		Bolton	GM	GB
WHOLESALE AND RETAIL	2,185	23.5%	21.7%	18.3%
Retail	1,265	13.6%	12.7%	10.9%
Wholesale	550	5.9%	5.9%	4.6%
Motor trades	365	3.9%	3.1%	2.9%
BUSINESS, FINANCIAL AND PROFESSIONAL SERVICES	1,815	19.5%	23.5%	22.2%
Professional services	885	9.5%	12.5%	12.1%
Business services	610	6.5%	6.3%	6.7%
Financial services	250	2.7%	3.5%	2.4%
Employment Activities	65	0.7%	1.1%	1.0%
PUBLIC SECTOR	1,095	11.8%	9.8%	9.3%
Health and Social Care	665	7.1%	6.5%	5.8%
Education	260	2.8%	2.6%	2.5%
Public Administration	175	1.9%	0.7%	0.9%
CULTURAL AND CREATIVE	1,355	14.5%	17.8%	19.7%
Tourism, Leisure & Culture	580	6.2%	7.2%	7.4%
Digital	370	4.0%	5.0%	5.7%
Creative Industries	290	3.1%	4.5%	5.4%
Sports	115	1.2%	1.1%	1.2%
CONSTRUCTION	1,040	11.2%	9.4%	10.1%
MANUFACTURING	885	9.5%	8.6%	7.2%
Advanced manufacturing	465	5.0%	4.9%	4.2%
Other manufacturing	325	3.5%	2.7%	2.3%
Textiles manufacturing	55	0.6%	0.6%	0.3%
Food and drink manufacturing	35	0.4%	0.4%	0.4%
PERSONAL SERVICES	315	3.4%	2.8%	2.5%
TRANSPORT AND STORAGE (INCLUDING POSTAL)	305	3.3%	3.4%	3.3%
SCIENCE AND R&D	175	1.9%	1.7%	1.9%
PRIMARY INDUSTRIES	145	1.6%	1.3%	5.6%
Agriculture, forestry and fishing	85	0.9%	0.7%	5.0%
Utilities	55	0.6%	0.6%	0.5%
Mining and quarrying	0	0.0%	0.0%	0.1%
Total	9,320	-	-	-

Source: Inter Departmental Business Register (IDBR), 2014

- 2.8. In terms of the size of businesses operating in Bolton, the borough has a similar distribution when compared to GM and the UK, in line with findings outlined in the previous LEA. Figure 3 shows the breakdown of the business base according to number of employees. The majority (81.3%) of businesses are micro, with 0-9 employees. This is similar to GM (80.8%) and the UK more generally (82.9%). At the opposite end of the size scale, 0.5% of companies in Bolton have 250 or more employees, virtually in line with trends across GM and the UK.

⁴ All figures are rounded to the nearest 5.

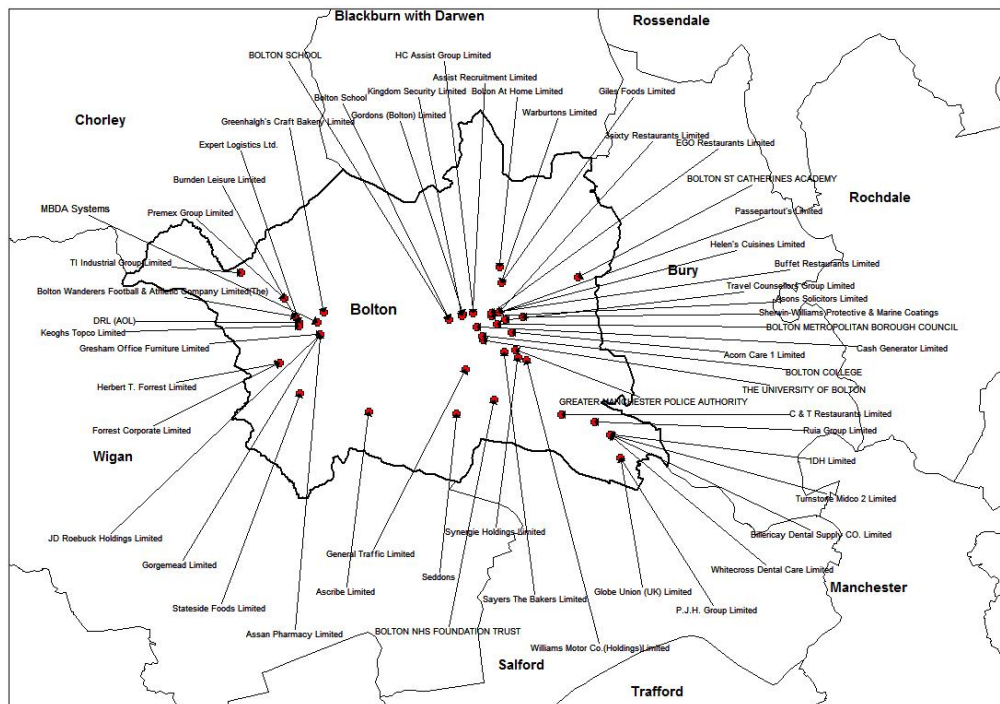
Figure 3: Business size, 2014

	0-9	10-49	50-249	250+	TOTAL
Bolton	81.3%	14.9%	3.4%	0.5%	9,320
GM	80.8%	15.3%	3.4%	0.6%	97,520
UK	82.9%	13.8%	2.8%	0.4%	2,721,240

Source: Inter Departmental Business Register (IDBR), 2014

- 2.9. There are several key private sector employers in Bolton, which are highlighted in Figure 4. The baker Warburtons is based in Bolton and as the third largest bread manufacturer in the UK, provides a major source of employment in the borough. With around 4,600 employees in its UK business, Warburtons is a family-run business that originated in Bolton. Stateside Foods is another food & drink manufacturer based in Bolton, with its head office at the Ates Industrial Estate plus a nearby production facility. A manufacturer of chilled and frozen pizzas, Stateside is one of the largest companies in its market.
- 2.10. Other key private sector employers emblematic of the growth of the financial & professional services sector include DRL (AOL), Asons and Keoghs whilst firms such as Leigh's Paints (part of Sherwin Williams) have become world-leaders in manufacturing with links to major projects such as the 2012 Olympics. MBDA Systems, a manufacturer of missiles and missile systems, is also a key company in Bolton. It currently has a factory in Lostock, and is due to move into new space being developed at the Logistics North site.
- 2.11. These companies and others that are driving economic growth, offer a wide range of careers to aspiring young people and the unemployed, including:
- Food Manufacturing, Drivers, Customer Services, Engineers, Finance, Packaging and Food Safety at **Warburtons**.
 - Sales, IT, Test Engineers, Business Analysts, Web Designers, Programmers and Software Developers at **AOL**.
 - A multi-award winning apprenticeship programme with professional and technical development for engineering with vocational qualifications leading to degree level and professional status at **MBDA**.
 - Legal interns, solicitors, fee earning pre-litigation roles; administration; IT Developers; Auditors at **Keoghs** and **Asons**.
- 2.12. Figure 4 also highlights some of the major public sector employers in Bolton (identified by upper case labels). This includes: Bolton NHS Foundation Trust; GM Police Authority; Bolton Council; Bolton College; and The University of Bolton.

Figure 4: Geographical location of largest employers in Bolton, 2014

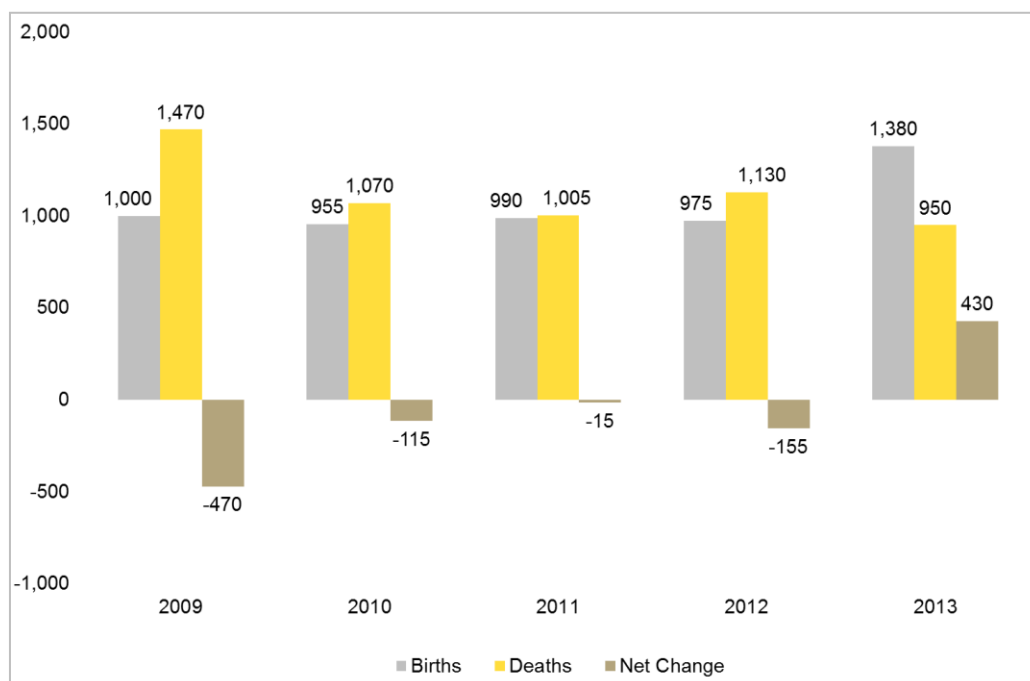


Source: FAME, Bureau van Dijk, 2014

Business Start-Up and Survival

- 2.13. Turning to business births and survivals, there were 1,380 new businesses started in Bolton in 2013, a substantial increase of 405 (41.5%) on the 975 business births in 2012, as shown in Figure 5. This was a far more positive trend than that highlighted in the previous LEA, when Bolton was still suffering from the effects of the downturn and business deaths were surpassing births. Business deaths declined by 15.9% (180) to 950 in 2013 compared to 2012. This shift in births and deaths saw an overall net increase in the number of businesses in Bolton of 430 in 2013, compared to a net decrease of 155 the previous year.
- 2.14. Bolton has a lower rate of business start-ups than the Greater Manchester and UK averages, as shown in Figure 6. However, it is important to note that the business start-up rate increased strongly between 2012 and 2013 (from 55.2 start-ups per 10,000 working age population to 78.4), indicating a continuing recovery from the effects of the economic downturn.

Figure 5: Business births & deaths in Bolton, 2009-13



Source: ONS – Business Demography, 2014

Figure 6: Business start-up rate per 10,000 working-age population

	2009	2010	2011	2012	2013
Bolton	57.1	54.2	55.8	55.2	78.4
Greater Manchester	54.9	53.3	60.2	61.8	83.8
UK	58.4	57.8	63.8	65.9	84.7

Source: ONS Business Demography and Mid-Year Population Estimates

Future Economic Trends in Bolton

Employment Forecasts

- 2.15. The latest edition of the GM Forecasting Model (GMFM, produced by Oxford Economics on behalf of AGMA) suggest that Bolton will see a 0.8% year-on-year increase in employment between 2014 and 2024 – equivalent to 10,800 additional jobs over the decade. This is in line with forecast GVA growth at a GM level. By 2024 employment in Bolton is forecast to be around 136,000. Moreover, the latest figures also indicate that employment in Bolton exceeded pre-recession levels in 2014 – the first time this has happened since the downturn. Compared with the previous LEA, the forecasts are far more positive about the future outlook and reflect the increasing confidence about economic prospects.
- 2.16. From a sector perspective, the main industries expected to experience increasing employment over the next ten years in Bolton are:
- Business, financial & professional services: 6,200 more jobs from 2014-24
 - Cultural & creative: 2,100 jobs
 - Construction: 1,800 jobs

- Wholesale & retail trade: 1,600 jobs
- 2.17. The increases in the sectors listed above are forecast to be offset by declines in other industries – in particular manufacturing (decline of 1,800 jobs from 2014-24) and the public sector (500 fewer roles).

Economic Output Forecasts

- 2.18. Gross value added (GVA) in Bolton is around £4.6billion, accounting for 8.4% of GM's GVA total of £54.7billion. This is the fifth highest share of economic output at a district level, the largest being Manchester (29.3% share, or £16.0billion).
- 2.19. Outputs from the GMFM estimate that Bolton will see a 2.8% year-on-year increase in GVA between 2014 and 2024. This is in line with forecast GVA growth at a GM level. By 2024 GVA in Bolton is estimated to be £6.0billion.
- 2.20. From a sector perspective, the main industries expected to experience increasing GVA over the next ten years in Bolton are:
- Business, financial & professional services: £0.62billion
 - Wholesale & retail trade: £0.24billion
 - Manufacturing: £0.17billion
 - Cultural & creative: £0.14billion
- 2.21. It is important to note that while GMFM indicates that manufacturing will continue to see a decline in employment in Bolton (and throughout GM), the sector is expected to see a significant increase in economic activity over the decade, with £0.17billion of extra GVA in the borough. This indicates that while the sector will increasingly move away from being the mass employer that it once was, its productivity will continue to rise.

Wages in Bolton

- 2.22. Looking at data for 2014 from the Annual Survey of Hours and Earnings, workplace-based wages in Bolton (£22,068) are virtually in line with resident-based (£22,819) (see Figure 7).
- 2.23. Annual residence-based earnings in Bolton fell by 2.5% (£600) between 2013 and 2014, while they remained broadly the same in GM. It should be noted here that local authority level data from the ASHE are subject to lower levels of confidence, meaning the size of the fall may not have been as high.
- 2.24. In line with the previous LEA, wages data continue to suggest that better equipping residents is still an important challenge for Bolton. Better skills mean that residents could access higher-value employment, either in Bolton or outside, expanding the opportunities available for residents. It also means that helping local businesses increase their productivity remains an opportunity for the borough, as local wages (£22,819) are still low compared with both GM (£24,945) and the UK (£27,195).

Figure 7: Resident and workplace earnings, full-time workers, median wages, 2013-14

	Resident-Based			Workplace-based		
	2013	2014	% change	2013	2014	% change
Bolton	£23,411	£22,819	-2.5%	£22,801	£22,068	-3.2%
GM	£25,000	£24,945	-0.2%	£25,292	£25,108	-0.7%
UK	£27,011	£27,195	0.7%	£27,011	£27,195	0.7%

Source: Annual Survey of Hours and Earnings

- 2.25. In addition to the annual wages data, figures from HMRC show the number of people claiming Working Tax Credit (WTC) and/or Child Tax Credit (CTC). WTC is for families with or without children who are in employment, while CTC is for parents with children under 16 (or under 20 in approved education or training) without a need to prove economic activity. There are around 14,200 families in Bolton in receipt of WTC and/or CTC (11,100 in receipt of both and 3,100 only in receipt of WTC). In Bolton, these families are in receipt of an average of around £9,200 annually (both WTC and CTC) and £2,380 (WTC only).

Sector Snapshots⁵

- 2.26. In addition to the broad industries outlined in the analysis above, it is possible to look at employment in more specific sectors in Bolton and GM. This includes: health & social care; education; financial & professional services; digital & creative; retail; construction; and manufacturing. Further information on these sectors is provided below – looking at employment numbers and areas of strength relative to national benchmarks. The latter is done by analysing the location quotient (LQ) of a particular sub-sector.
- 2.27. The LQ of an industry is an analytical statistic that measures an area's industrial specialisation relative to a benchmark (in this case Great Britain). LQs are calculated by comparing the industry's share of employment in GM with its share of GB employment. For example, if a sector accounts for 10% of all jobs in an area but only 5% of all GB jobs, the area's LQ for that sector is 2. This means it is 2 times more concentrated in that area than average.
- 2.28. The analysis below present LQs for Bolton and GM, both benchmarked against GB. This, for instance, highlights Bolton's specialisation in construction and manufacturing, which both have a higher LQ than GM's in the same sectors. Each sector snapshots provides a table of LQs in Bolton and GM, along with a map showing the concentration of employment in the sector in Bolton. The tables are ordered by LQ score in Bolton.

⁵ All figures in this section are rounded up to the nearest 100.

Health and social care

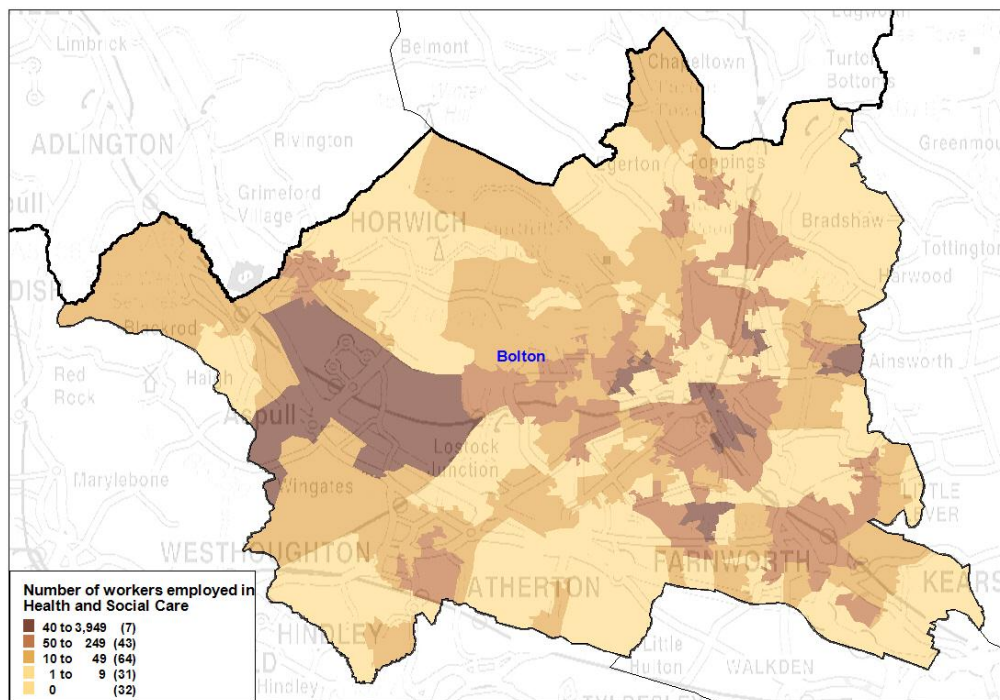
2.29. In terms of geographic concentration, Figure 8 shows that Bolton is in line with the rest of Great Britain. Although a slight concentration exists in human health activities employment (LQ of 1.08), the sector is as represented in Bolton as it is at the national level. As shown in Figure 9, there are concentrations of health and social care employment at the Royal Bolton Hospital, around Bolton town centre and in the west of the Borough.

Figure 8: Health and social care employment in Bolton, 2013

Health and Social Care Sub-Sectors	Bolton		
	Number	LQ	GM's LQ
Human health activities	8,700	1.08	1.06
Residential care activities	2,400	0.90	0.92
Social work activities without accommodation	2,800	0.82	0.88
Total Employment in the Sector	13,800	0.99	0.99

Source: Office for National Statistics (ONS) Business Register & Employment Survey (BRES), 2013

Figure 9: Employment concentration in health and social care



Source: BRES, 2013

Education

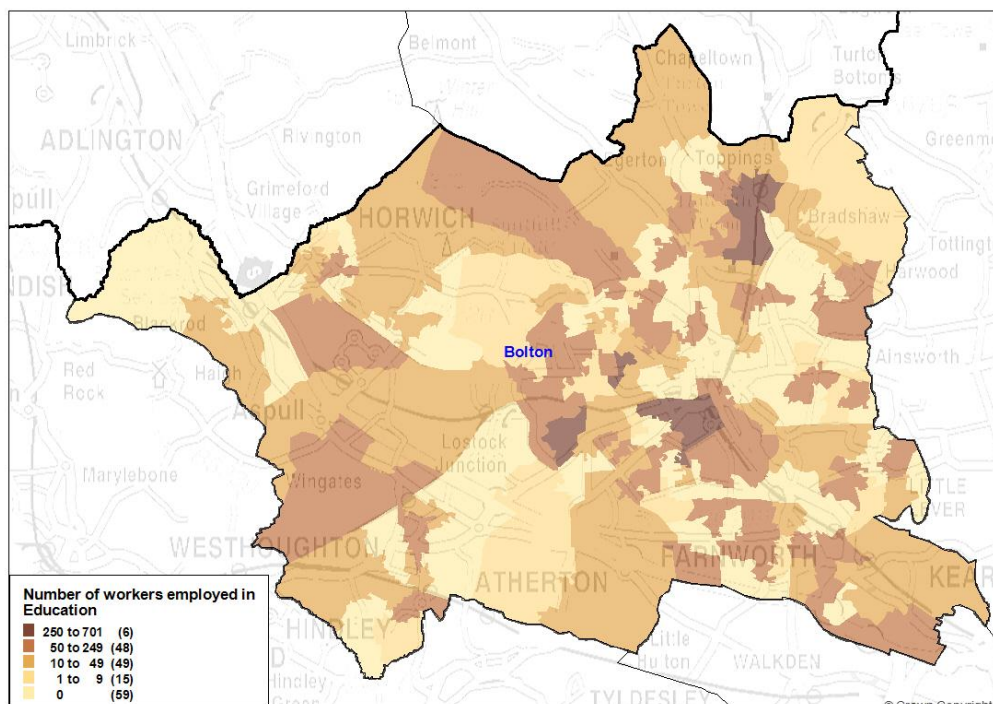
- 2.30. Bolton is in line with the national picture in terms of the jobs in the education sector (see Figure 10). The highest concentrations of employment in education are found in the north of the borough and towards the centre (see Figure 11).

Figure 10: Education employment in Bolton, 2013

	Bolton		
	Number	LQ	GM's LQ
Education	9,700	0.99	0.98

Source: Office for National Statistics (ONS) Business Register & Employment Survey (BRES), 2013

Figure 11: Employment concentration in Education



Source: BRES, 2013

Financial & professional services

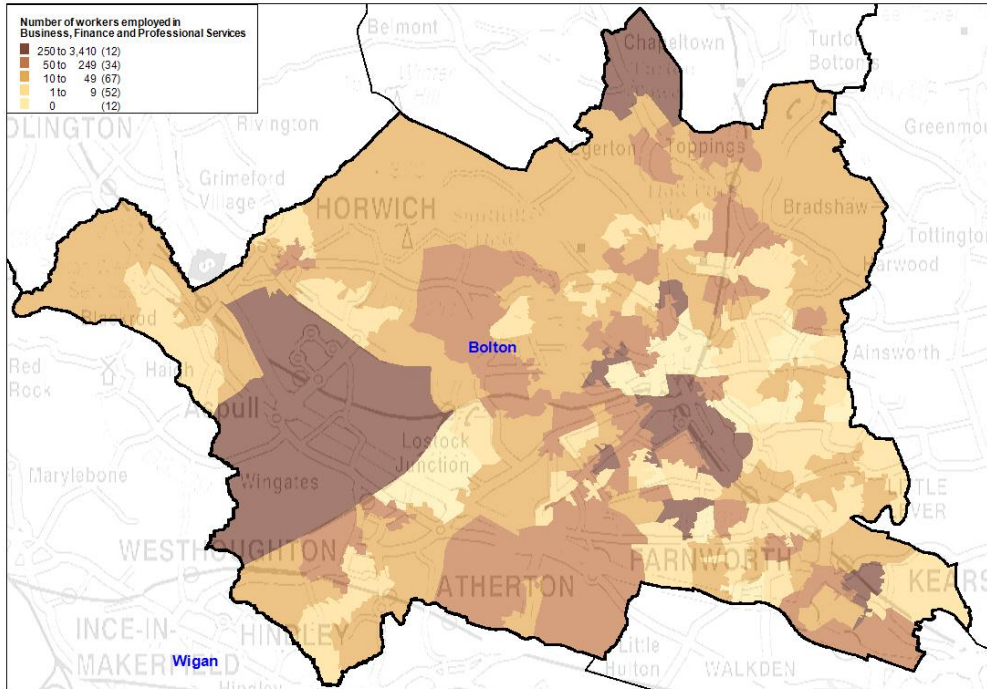
- 2.31. Financial & professional services account for 10% of all employment in Bolton with 21,100 people working in the sector. The borough has a degree of concentration in this sector, with an overall LQ of 1.14 (see Figure 12). This is driven by a high concentration jobs in real estate activities, legal and accounting activities, office administrations and activities of head offices and management consultancy activities.
- 2.32. In terms of location, these sub-sectors are highly concentrated towards the centre of Bolton, Middlebrook, parts of Farnworth and in some areas in the north of the district (see Figure 13).

Figure 12: Business, Financial & Professional Services employment in Bolton, 2013

Business, Financial & Professional Services Sub-Sectors	Bolton		GM's LQ
	Number	LQ	
Office administrative, office support and other business support activities	2,700	1.86	1.31
Legal and accounting activities	3,700	1.51	1.47
Activities of head offices; management consultancy activities	3,700	1.48	1.11
Real estate activities	2,800	1.42	1.28
Insurance, reinsurance and pension funding, except compulsory social security	500	1.26	1.32
Activities of membership organisations	900	0.99	1.01
Financial service activities, except insurance and pension funding	1,800	0.93	1.03
Activities auxiliary to financial services and insurance activities	1,100	0.71	1.12
Employment Activities	2,200	0.69	1.26
Security and investigation activities	500	0.63	1.45
Rental and leasing activities	400	0.63	1.04
Services to buildings and landscape activities	1,300	0.51	0.88
Translation and interpretation activities	100	0.49	1.53
Total Employment in the Sector	21,100	1.14	1.18

Source: Office for National Statistics (ONS) Business Register & Employment Survey (BRES), 2013

Figure 13: Employment concentration in Business, Financial & professional services



Source: BRES, 2013

Digital and creative

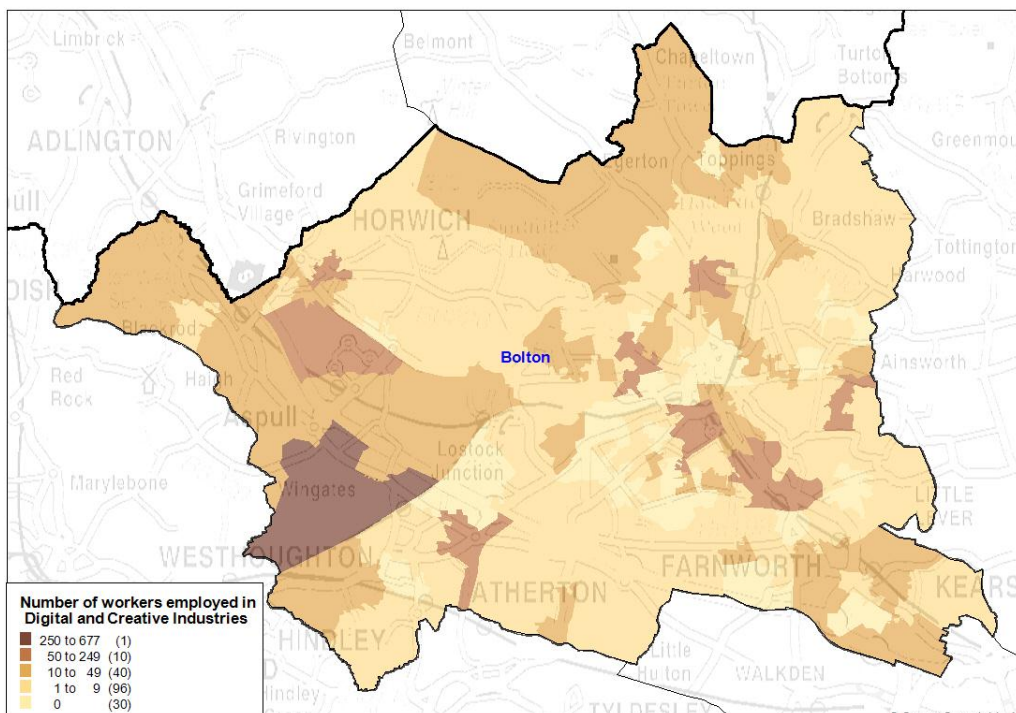
2.33. The digital and creative industries, as shown in Figure 14, are under-represented in Bolton in comparison to Great Britain. Most sub-sectors have an LQ below 1, with advertising and market research, for instance or programming and broadcasting activities significantly underrepresented. However, Bolton does have a high local presence of printing and reproduction of recorded media businesses. As indicated by Figure 15, employment in this sub-sector is highly concentrated, mainly in the west of the Borough and to the south of Bolton town centre.

Figure 14: Digital and Creative Industries employment in Bolton, 2013

Digital and Creative Industries Sub-Sectors	Bolton		GM's LQ
	Number	LQ	
Printing and reproduction of recorded media	500	1.15	1.00
Creative, arts and entertainment activities	300	0.71	0.88
Specialised design activities	200	0.69	0.97
Publishing activities	400	0.64	0.33
Photographic activities	100	0.53	0.96
Motion picture, video and television programme production, sound recording and music publishing activities	200	0.40	0.61
Architectural activities	200	0.39	0.85
Advertising and market research	200	0.21	0.77
Programming and broadcasting activities	100	0.01	1.63
Total Employment in the Sector	2,200	0.54	0.78

Source: Office for National Statistics (ONS) Business Register & Employment Survey (BRES), 2013

Figure 15: Employment concentration in Digital and Creative Industries



Source: BRES, 2013

Retail

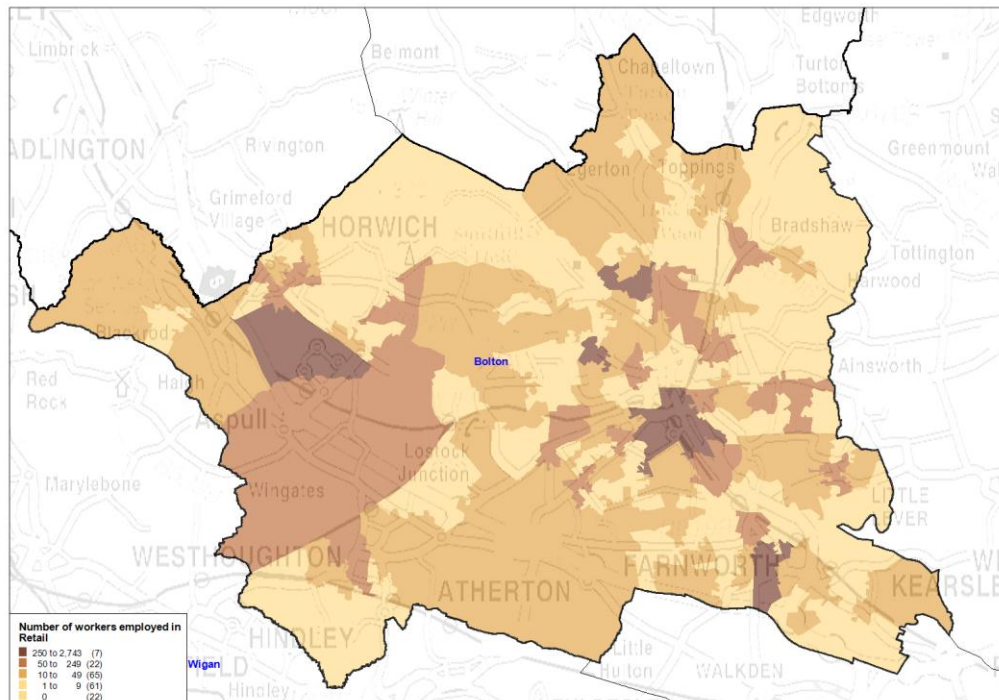
2.34. Retail is slightly more concentrated in Bolton than Great Britain, with an LQ of 1.17 (see Figure 16). Employment is mainly in Bolton town centre, Middlebrook and Farnworth (see Figure 17).

Figure 16: Retail employment in Bolton, 2013

	Bolton		
	Number	LQ	GM's LQ
Retail	12,422	1.17	1.01

Source: Office for National Statistics (ONS) Business Register & Employment Survey (BRES), 2013

Figure 17: Employment concentration in Retail



Source: BRES, 2013

Construction

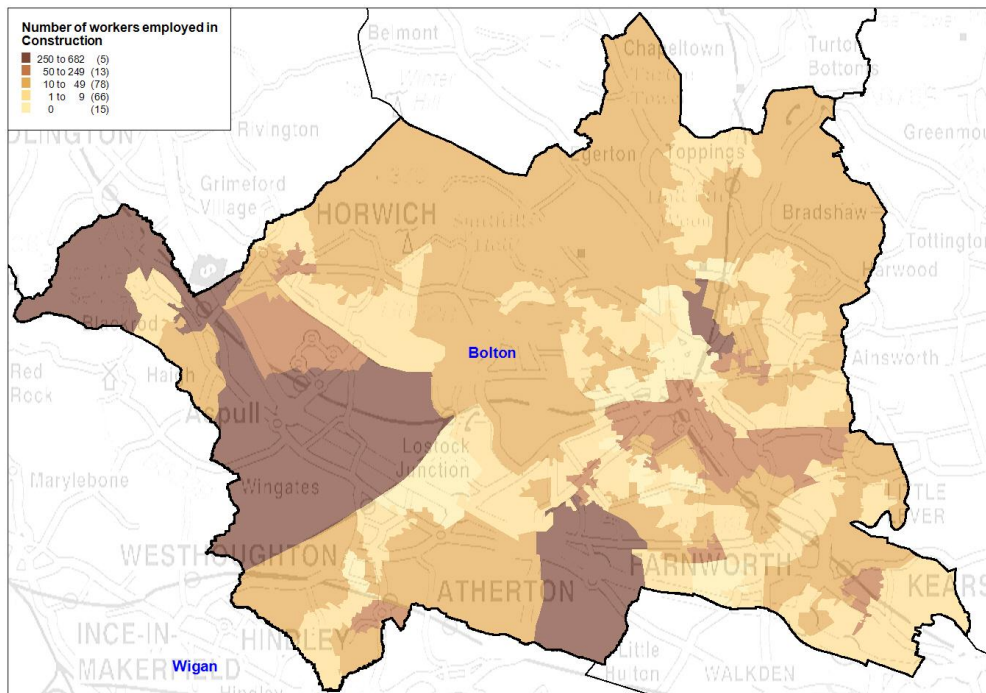
2.35. With an LQ of 1.15, Bolton has a higher concentration of construction employment than Great Britain. This is especially the case with activities relating to the construction of buildings (LQ of 1.38) and civil engineering (LQ of 1.30). Bolton does not have a geographic concentration of specialised construction activities, but it is not underrepresented either and it is in-line with national levels of geographic distribution (see Figure 18). Construction employment in Bolton is located mostly in Bolton's inner areas and in the west and south of the district (see Figure 19).

Figure 18: Construction employment in Bolton, 2013

Construction Sub-Sectors	Bolton		
	Number	LQ	GM's LQ
Construction of buildings	1,900	1.38	1.09
Civil engineering	1,000	1.30	1.05
Specialised construction activities	2,800	1.00	0.90
Total Employment in Sector	5,700	1.15	0.98

Source: Office for National Statistics (ONS) Business Register & Employment Survey (BRES), 2013

Figure 19: Employment concentration in Construction

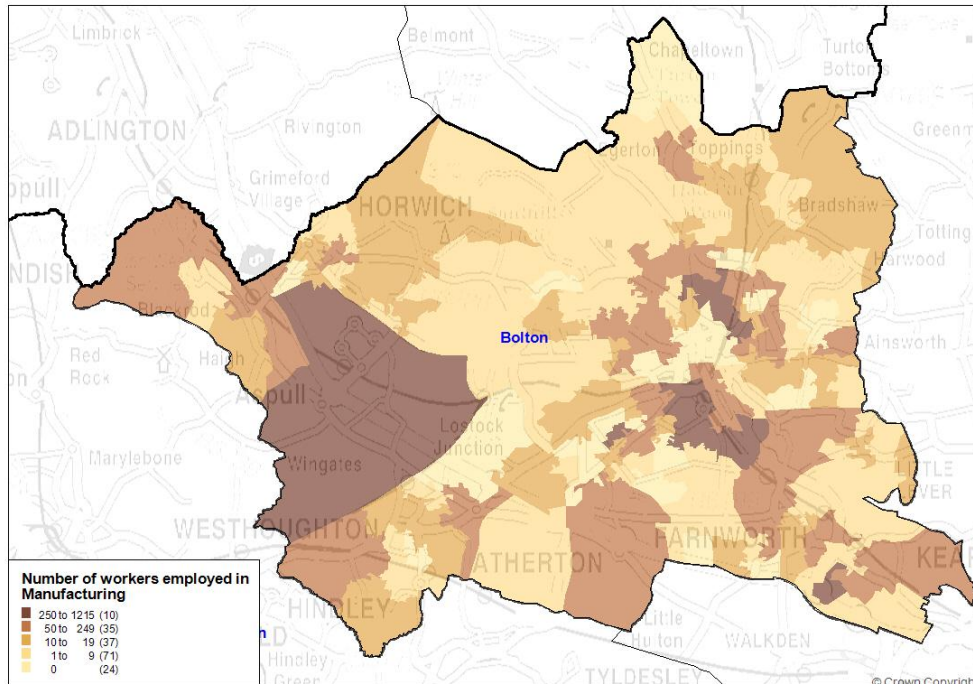


Source: BRES, 2013

Manufacturing

- 2.36. West Bolton has a high concentration of employment in manufacturing, and there are also areas of high concentration in the centre and around the south of the district (see Figure 20).

Figure 20: Employment concentration in Manufacturing



Source: BRES, 2013

- 2.37. Compared with the geographical distribution of the industry across Great Britain, Bolton has a concentration of manufacturing employment. The borough displays specialisation in the manufacture of furniture, textiles, rubber, medical products, wearing and apparel, paper, food and chemical products. Other sub-sectors are also highly represented in Bolton, as Figure 21 shows. This reflects a more traditional employment base (as opposed to higher-value jobs such as information technologies or financial services) in Bolton.

Figure 21: Manufacturing employment in Bolton, 2013

Manufacturing Sub-Sectors	Bolton		
	Number	LQ	GM's LQ
Manufacture of textiles	700	3.50	2.79
Manufacture of furniture	1,000	3.30	1.26
Manufacture of rubber and plastic products	1,300	2.21	1.42
Manufacture of medical and dental instruments and supplies	300	2.18	1.14
Manufacture of wearing apparel	300	2.13	2.94
Manufacture of food products	2,700	2.07	1.30
Manufacture of paper and paper products	400	1.96	1.13
Manufacture of chemicals and chemical products	700	1.75	2.08
Other manufacturing	200	1.60	1.37
Manufacture of fabricated metal products, except machinery and equipment	1,600	1.46	0.76
Manufacture of leather and related products	100	1.22	3.02
Manufacture of motor vehicles, trailers and semi-trailers	700	1.17	0.49
Manufacture of machinery and equipment n.e.c.	800	1.10	1.09
Manufacture of basic pharmaceutical products and pharmaceutical preparations	200	0.98	0.47
Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	300	0.97	1.14
Manufacture of electrical equipment	300	0.68	0.80
Engineering activities and related technical consultancy	800	0.60	0.99
Repair and installation of machinery and equipment	300	0.53	0.97
Manufacture of other non-metallic mineral products	200	0.47	0.64
Manufacture of computer, electronic and optical products	300	0.43	0.82
Manufacture of basic metals	100	0.39	0.51
Manufacture of games and toys	100	0.28	0.97
Manufacture of other transport equipment	100	0.15	0.19
Manufacture of beverages	100	0.12	0.58
Manufacture of tobacco products	0	0.00	0.00
Manufacture of coke and refined petroleum products	0	0.00	0.28
Manufacture of jewellery, bijouterie and related articles	0	0.00	0.39
Manufacture of musical instruments	0	0.00	0.90
Manufacture of sports goods	0	0.00	0.84
Total Employment in Sector	13,600	1.27	1.04

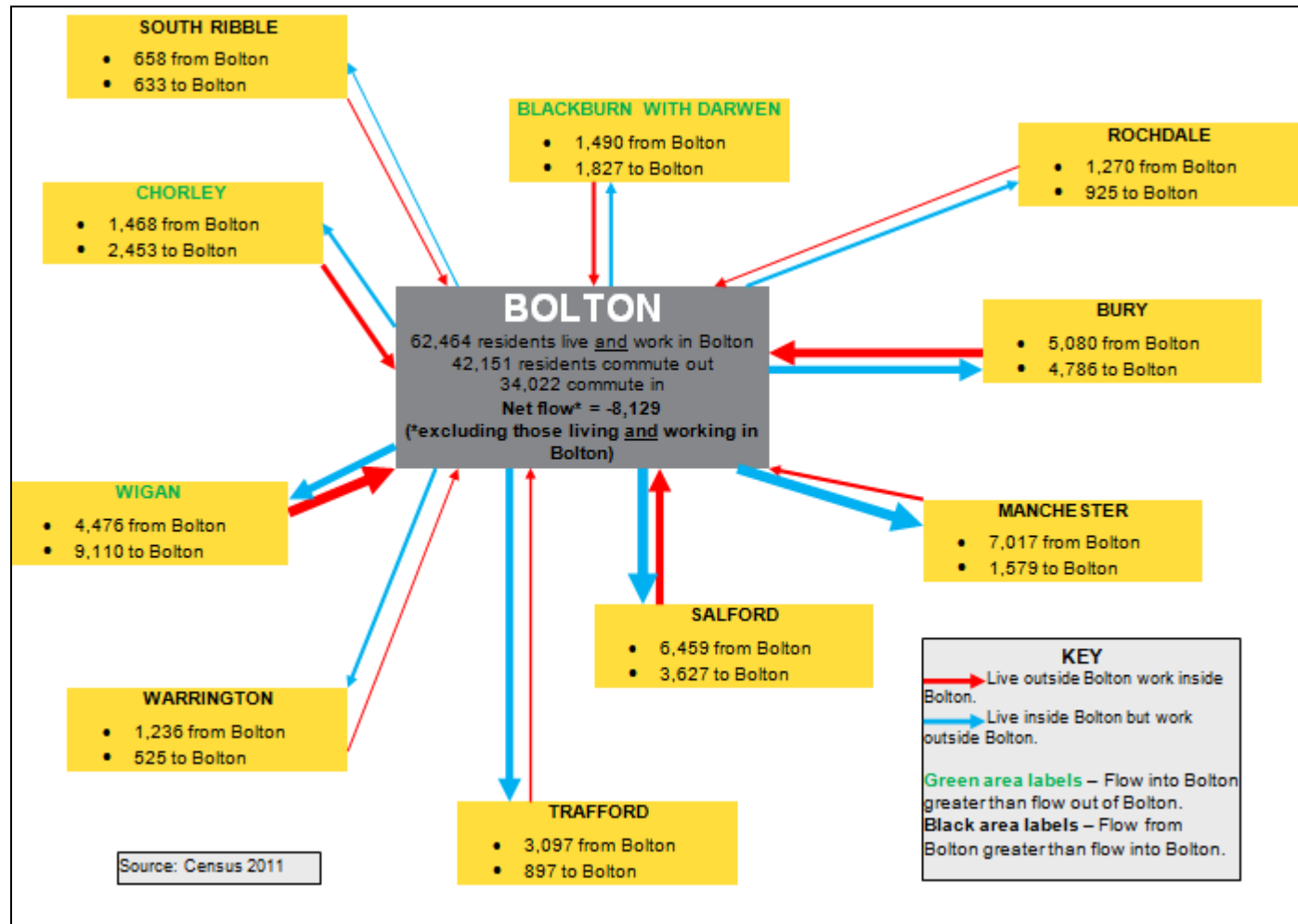
Source: Office for National Statistics (ONS) Business Register & Employment Survey (BRES), 2013

Travel-to-Work

- 2.38.** As shown in Figure 22, Bolton's travel-to-work flows from the 2011 Census indicate that it has a relatively self-contained labour market. 62,464 people live and work in Bolton. 42,151 of residents commute out of the borough and 34,022 people commute in. Excluding those who both live and work there, Bolton has a net outflow of commuters of just over 8,000. This trend remains consistent with analysis produced for the previous edition of the LEA.
- 2.39.** A large number of Bolton's commuters work in the conurbation core, with 18,556 residents commuting to Manchester, Bury and Salford.
- 2.40.** The main inflows of workers come from Wigan (9,110), Bury (4,786) and Salford (3,627), indicating Bolton's importance as a source of employment for other local authorities in the north of the conurbation and other neighbouring areas.

Figure 22: Largest travel to work flows in and out of Bolton to/from the rest of the UK, 2011⁶

Note: Thickness of arrows broadly represents absolute number of commuter flows.



⁶At the current time, data on commuting flows by occupation type and/or skill level are not available from the 2011 Census. Only broad level data are available for analysis, as shown in Figure 22.

Business Summary

- Bolton accounts for 7.0% of employment in GM, with just over 106,000 jobs in the borough. Since 2010 it has gained 1,800 jobs, reflecting the ongoing recovery from the economic downturn.
- The public sector remains the largest sector in Bolton, employing just under 28,000 people and having seen a decline in jobs of 1,300 between 2010 and 2013. This reflects the ongoing cuts in the public sector, a trend which is expected to continue over the coming years and will add further pressure on the private sector to generate new employment opportunities.
- Business, financial, and professional services is the largest private sector employer in Bolton, with around 21,000 jobs and accounting for 20.0% of total employment in the area – a key finding given the importance of this sector is expected to play in driving future economic growth. Wholesale and retail is the third largest sector in Bolton with 20,300 jobs (which represents 10.1% of all jobs in the district). Many of the key private sector employers in the borough are manufacturing businesses, with Warburtons bakers and Stateside Food providing significant employment for Bolton's residents.
- Other important sectors in Bolton include manufacturing (12,300 jobs in 2013) and the cultural & creative industries (11,200 jobs in 2013). Manufacturing actually saw a small increase in employment between 2010 and 2013 of around 500 (4.2%), reversing a long-term decline.
- Bolton is forecast to see a 0.8% year-on-year increase in employment between 2014 and 2024 – equivalent to 10,800 additional jobs over the decade. Business, financial & professional services (6,200) is expected to be the largest contributor, while declines in manufacturing and the public sector are forecast to offset some of the increases.
- The latest business demography data reveal that Bolton is recovering from the recession, with business births (1,380) surpassing business deaths (950) in 2013. This followed a net decline (deaths surpassing births) for all years from 2009-12.
- Both average workplace (£22,068 pa) and resident (£22,819 pa) wages in Bolton are below those of GM (£25,108 and £24,945 respectively). This suggests that better equipping residents is still an important challenge for Bolton. Better skills mean that residents could access higher-value employment, either in Bolton or outside, expanding the opportunities available for residents.
- Bolton's travel-to-work flows from the 2011 Census indicate that it has a relatively self-contained labour market. A large number of Bolton's commuters work in the conurbation core. The main inflows of workers come from Wigan, Bury and Salford, indicating Bolton's importance as a source of employment for other local authorities in the north of the conurbation and other neighbouring areas such as Blackburn with Darwen and Chorley.

3 People

Key Messages for Bolton



Population
280,000 people live in Bolton, with projected growth of 16,600 over the next decade

57.3%

GCSE Results
Students in Bolton achieving 5+ GCSEs grades A*–C (incl. mathematics and English)



Resident Skills
¼ of residents have an NVQ4+ qualification (HND/HNC/degree), below GM (31.8%)

Population

- 3.1. Just over 280,100 people live in Bolton and it is the fourth largest district in GM (see Figure 23). This large resident population provides the borough with a key economic asset that has driven growth. During the last decade (2003–2013), Bolton’s population has grown by 6.2% (16,200). This is slightly below the 6.9% growth in GM as a whole, but higher than growth in the North West (4.2%).

Figure 23: Population Change, 2003–13

	Population		Change	
	2003	2013	No.	%
England & Wales	52,863,200	56,948,200	4,085,000	7.7%
North West	6,814,700	7,103,300	288,600	4.2%
Greater Manchester	2,538,600	2,714,900	176,300	6.9%
Bolton	263,800	280,100	16,300	6.2%
Bury	181,400	186,500	5,100	2.8%
Manchester	436,700	514,400	77,700	17.8%
Oldham	218,500	227,300	8,800	4.0%
Rochdale	207,500	212,100	4,600	2.2%
Salford	217,300	239,000	21,700	10.0%
Stockport	282,900	285,000	2,100	0.7%
Tameside	213,500	220,600	7,100	3.3%
Trafford	213,000	230,200	17,200	8.1%
Wigan	303,800	319,700	15,900	5.2%

Source: ONS Mid-Year Population Estimates

- 3.2. The largest age group in Bolton in 2013, as shown in Figure 24, was the 45–49 age range, representing 7.3% of the total population. The smallest group was children under 1 year old, representing 1.4% of the total population.

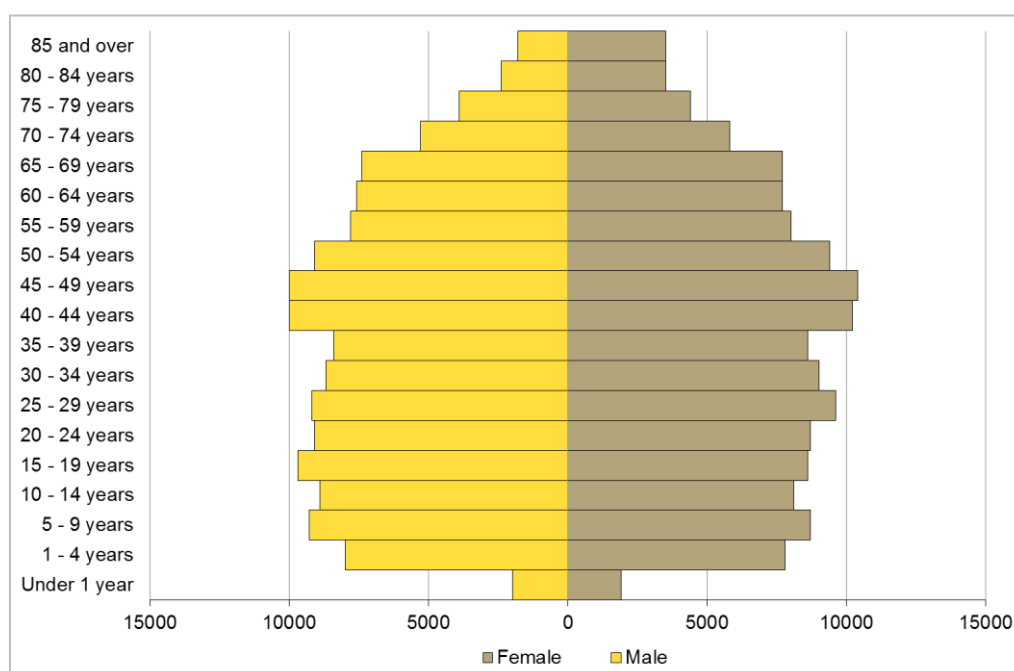
- 3.3. In 2013, there was a higher proportion of older people living in Bolton than in 1993 (for instance, in 1993 19.8% of the population were over the age of 60, whereas in 2013, this had increased to 21.9%).

Figure 24: Population breakdown for Bolton by age, 1993 and 2013

Age	1993		2013	
	Number	%	Number	%
Aged under 1 year	3,600	1.4	3,900	1.4
Aged 1–4 years	15,300	5.8	15,700	5.6
Aged 5–9 years	18,400	7.0	18,000	6.4
Aged 10–14 years	17,200	6.6	17,000	6.1
Aged 15–19 years	16,000	6.1	18,200	6.5
Aged 20–24 years	19,000	7.3	17,800	6.4
Aged 25–29 years	20,600	7.9	18,800	6.7
Aged 30–34 years	19,600	7.5	17,700	6.3
Aged 35–39 years	17,200	6.6	16,900	6.0
Aged 40–44 years	17,500	6.7	20,200	7.2
Aged 45–49 years	18,400	7.0	20,500	7.3
Aged 50–54 years	14,800	5.6	18,500	6.6
Aged 55–59 years	12,800	4.9	15,800	5.7
Aged 60–64 years	12,000	4.6	15,300	5.5
Aged 65–69 years	11,900	4.5	15,100	5.4
Aged 70–74 years	11,100	4.3	11,100	4.0
Aged 75–79 years	7,300	2.8	8,300	3.0
Aged 80–84 years	5,500	2.1	5,900	2.1
Aged 85 and over	3,900	1.5	5,300	1.9
Total	261,900	100.0	280,100	100.0

Source: ONS Mid-Year Population Estimates

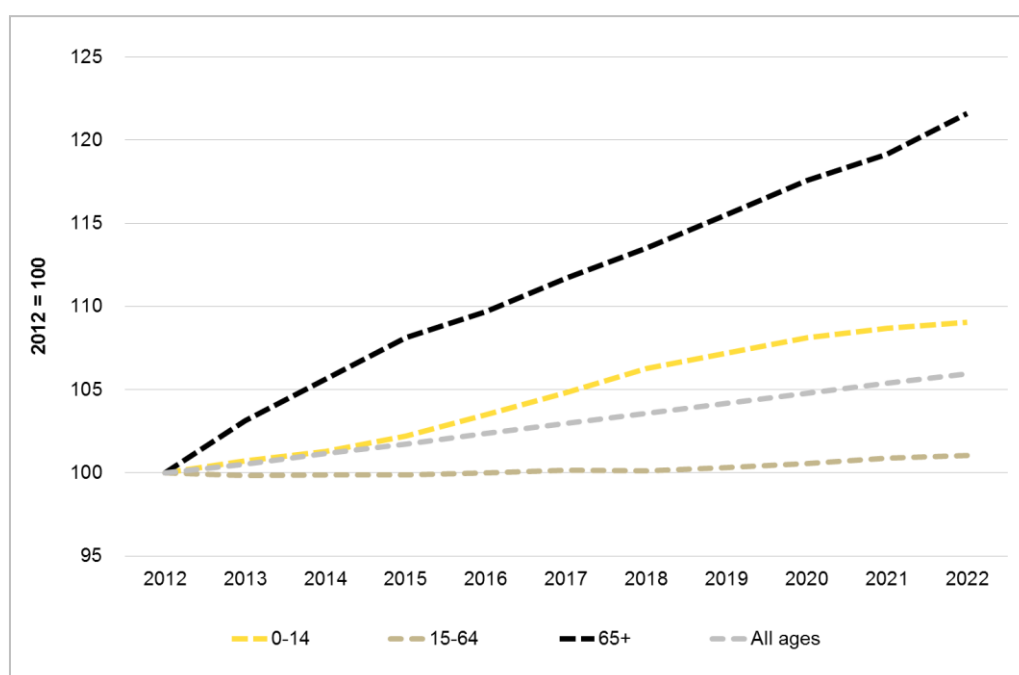
Figure 25: Population Pyramid for Bolton, 2013



Source: ONS Mid-Year Population Estimates

- 3.4. Bolton's population is expected to grow by 6% between 2012 and 2022, according to the latest projections from the Office of National Statistics (ONS). This amounts to an additional 16,600 people in 10 years. In terms of age groups, estimates suggest the over 65 age group will account for most of the growth, rising by 22.0% (or almost 10,000 people). The 0-14 age group is projected to increase by 9.0% (5,000 people). The 15-64 age group is projected to see an increase of about 1.0%, adding some 2,000 people (see Figure 26). This means that while Bolton's population is expected to grow over the next decade, it is mostly due to an increase in the dependent age groups.

Figure 26: Population projections by age group in Bolton, 2012-22



Source: ONS 2012-based Sub-national Population Projections for Local Authorities in England

Skills

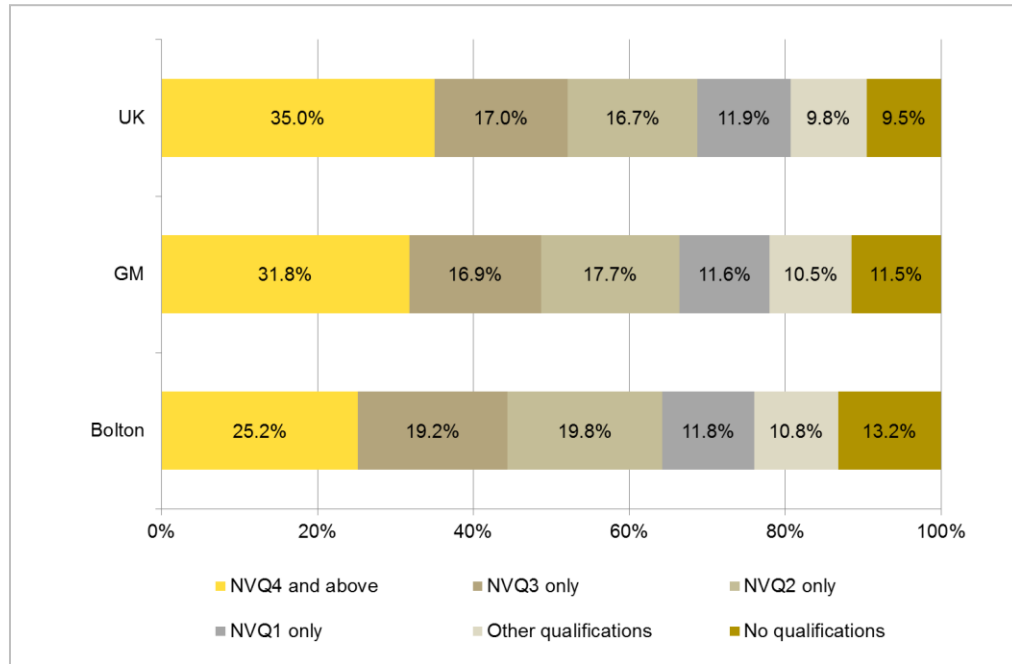
Resident Qualifications

- 3.5. In 2013, 25.2% of the population aged 16+ in Bolton held an NVQ4 qualification or above (equivalent to an HND/HNC/degree or higher). As Figure 27 shows, this is below both GM's and the national average (31.8% and 35.0%, respectively). While this still poses a challenge and is an issue that was highlighted in the previous LEA, Bolton's economy has been moving in the right direction. The proportion of people aged 16+ holding an NVQ4+ qualification has grown from 21.0% in 2008 to 25.2% in 2013.
- 3.6. Figure 27 also shows that Bolton has a higher proportion of residents with NVQ 2 or NVQ 3 qualifications compared to GM and the UK. The challenge for Bolton is to ensure that these residents continue progressing with a greater number moving towards the higher end of the qualifications and skills spectrum, thus increasing the proportion of people with NVQ 4+ skills. To help achieve this, multi-agency partners in Bolton are implementing Bolton's Skills Strategy which aims to engage employers and support high education

attainment and the right level and mix of skills that are essential for access to work and to support a competitive and innovative growth economy.

- 3.7. Also of note is the concentration of people with no qualifications. While the UK and GM averages were 9.5% and 11.5% respectively in 2013, Bolton's economy has 13.2% of its age 16+ population with no qualification. While a challenge for Bolton, the borough has made headway compared to 2008, when 15.0% of the age 16+ population held no qualifications.

Figure 27: Qualification levels for people aged 16+, 2013



Source: Annual Population Survey

- 3.8. Figure 8 shows qualifications by age in Bolton, revealing clear differences when the area is compared to GM and the rest of the UK. In particular, the proportion of people in Bolton aged 25-49 with NVQ4+ qualifications is 29.7% – substantially below the GM (39.3%) and UK (42.4%) averages.

Figure 28: Qualification levels for people in 3 age groups, 2013

Qualification Level (by Age Group)	Bolton	GM	UK
16-24 Age Group			
NVQ4+	14.0%	16.2%	16.9%
NVQ3 only	30.4%	27.7%	29.7%
NVQ2 only	31.2%	27.1%	26.8%
NVQ1 only	9.6%	13.1%	13.0%
Other qualifications	5.3%	6.0%	5.2%
No qualifications	8.9%	9.9%	8.4%
25-49 Age Group			
NVQ4+	29.7%	39.3%	42.4%
NVQ3 only	18.2%	14.9%	14.9%
NVQ2 only	17.1%	16.1%	15.1%
NVQ1 only	12.1%	10.5%	11.3%
Other qualifications	11.6%	9.9%	9.2%
No qualifications	11.3%	9.2%	7.1%

50-64 Age Group			
NVQ4+	25.8%	27.9%	32.5%
NVQ3 only	11.6%	12.7%	13.0%
NVQ2 only	15.6%	13.9%	13.4%
NVQ1 only	13.1%	12.6%	12.3%
Other qualifications	13.5%	15.4%	13.9%
No qualifications	20.4%	17.5%	14.9%

Source: Annual Population Survey.

NEET Trends in Bolton

- 3.9. Of the GM boroughs, Bolton has seen a considerable decline in 16 to 18 year olds who are not in employment, education, or training (NEET). Between June 2011 and 2014 NEETs fell by 3 percentage points in Bolton, a higher fall than in GM as a whole (see Figure 29).

Figure 29: % NEET, 2011-14

	June, 2011	June, 2012	June, 2013	June, 2014	2011-2014 (% point)
Trafford	6.1%	5.2%	4.5%	3.8%	-2.3
Bolton	7.9%	6.3%	5.0%	4.9%	-3.0
Rochdale	9.1%	8.4%	5.9%	5.0%	-4.1
Tameside	9.0%	7.9%	8.1%	5.0%	-4.0
Oldham	8.5%	7.4%	5.5%	5.0%	-3.5
ENGLAND	6.5%	5.9%	6.0%	5.5%	-1.0
GM	8.1%	7.4%	6.4%	5.6%	-2.5
Stockport	7.4%	7.7%	6.1%	5.6%	-1.8
NORTH WEST	7.9%	7.3%	6.6%	5.8%	-2.1
Wigan	8.4%	7.2%	7.2%	6.1%	-2.3
Bury	7.6%	6.8%	6.1%	6.1%	-1.5
Manchester	9.7%	9.5%	7.2%	6.6%	-3.1
Salford	7.2%	7.1%	8.5%	7.8%	0.6

Source: NCCIS

GCSEs

- 3.10. Bolton has the fourth-highest proportion of pupils achieving 5 or more GCSEs at grades A*–C (57.3%) in the conurbation, based on the 2013/14 figures. It is also above the North West and England averages of 55.8% and 53.4% respectively. Figure 30 shows the data for all districts in GM. It also provides previous data for 2009/10, although it should be noted that the figures are not directly comparable because of reforms implemented in 2014 that affected the way GCSE performance is calculated.

Figure 30: Pupils achieving 5+ GCSEs grades A*–C (incl. mathematics and English), 2009/10 & 2013/14

	2009/10	2013/14
England	49.8%	53.4%
North West	49.0%	55.8%
Bolton	46.2%	57.3%
Bury	58.8%	56.9%
Manchester	38.6%	51.4%

	2009/10	2013/14
Oldham	46.8%	52.4%
Rochdale	47.8%	54.0%
Salford	45.8%	47.3%
Stockport	55.3%	58.3%
Tameside	45.5%	53.7%
Trafford	63.3%	72.2%
Wigan	48.7%	58.0%

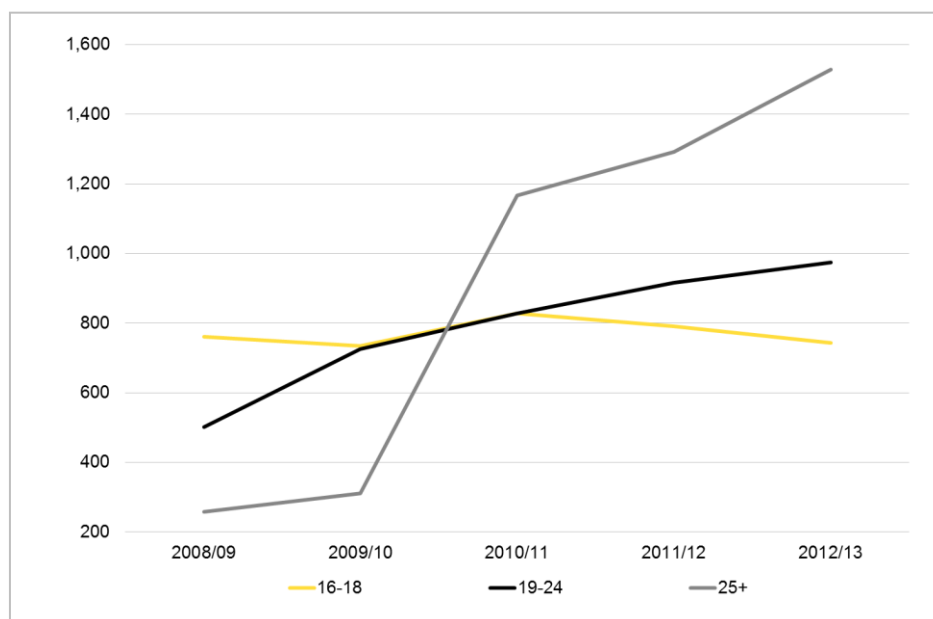
Source: Department for Education and Skills (DfES)

Apprenticeships

3.11. Information sourced from the Skills Funding Agency Data Cube can be used to analyse trends in apprenticeship starts in Bolton over recent years. Figure 31 shows the trend by age group and the main points from the analysis of the Data Cube information can be summarised as follow.

- The number of apprenticeship starts in Bolton by 16-18 year olds in 2012/13 was 744, which represented 22.9% of all apprenticeships in the area (3,246). The absolute number peaked in 2010/11 at 828, but numbers have been falling since. The 2012/13 number was down on the 2008/09 figure of 760.
- The number of apprenticeship starts in Bolton by 19-24 year olds in 2012/13 was 947, accounting for around 30.0% of all apprenticeships. The absolute number was up on the 2008/9 figure of 501, and now amounts to almost twice the number.
- The highest proportion of apprenticeship starts in Bolton is seen in the over 25 age group, which accounted for 47.0% (1,528) of the total in 2012/13. This is almost 6 times higher than the 2008/09 number of 258, as can be seen in Figure 31.

Figure 31: Apprenticeship starts in Bolton by age, 2008-13

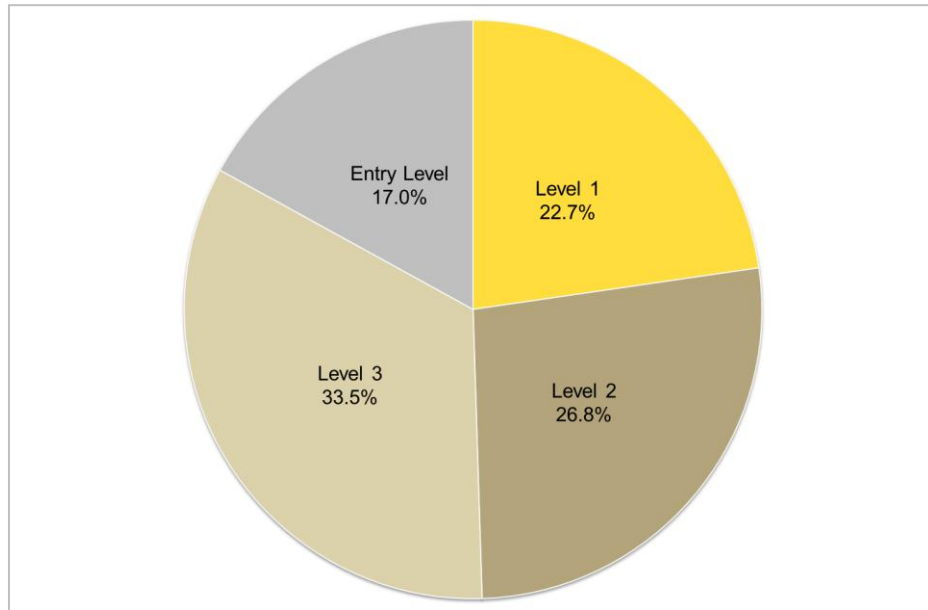


Source: Skills Funding Agency Data Cube

Bolton College

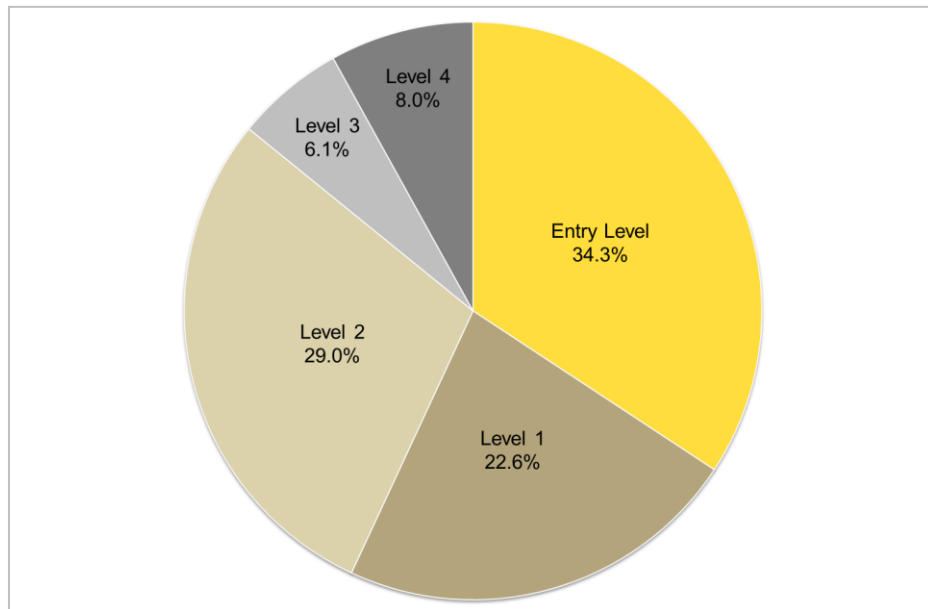
3.12. As of January 2015, there are currently 2,152 students aged 16-18 at the college, including 300 apprentices. The total student number at Bolton College in 2015 is just over 350 more than the number reported in the 2013 LEA of 1,775. Figure 32 shows 16-18 students by level of study, including all learners. Additional charts show the breakdown of Apprentices and Classroom Learners separately by level. Figure 33 shows the breakdown of adult learners by level.

Figure 32: 16-18 Students at Bolton College 14/15



Source: Bolton College, January 2015

Figure 33: Adult Students at Bolton College 14/15

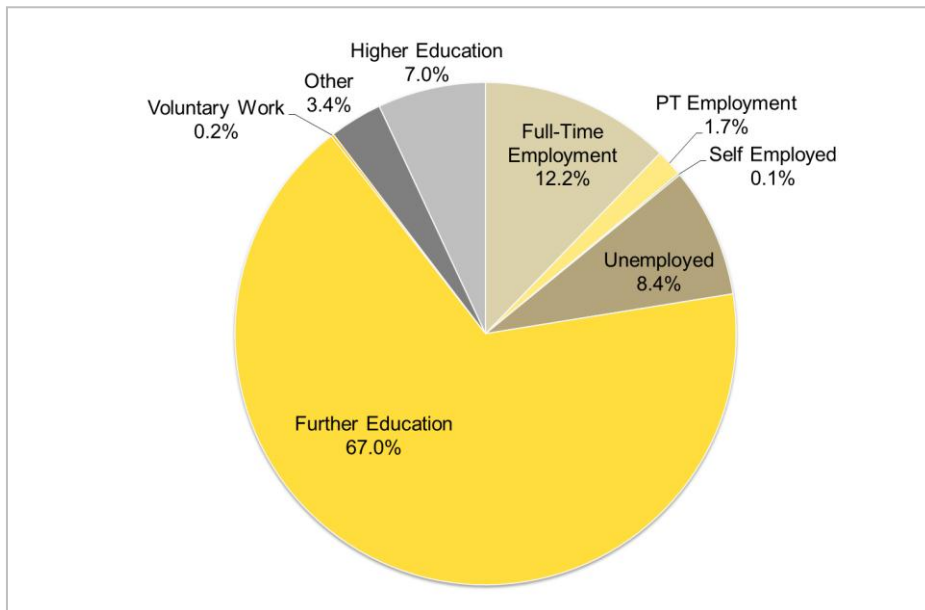


Source: Bolton College, January 2015

3.13. Figure 34 shows the destinations of 16-18 year old students at Bolton College in the year 2013/14. Of the students who completed their course of study, the

majority (67%) returned to Further Education, a similar trend to that reported in the 2013 LEA which looked at destinations of 2010/11 leavers. A further 12% moved into full-time employment and 7% to Higher Education.

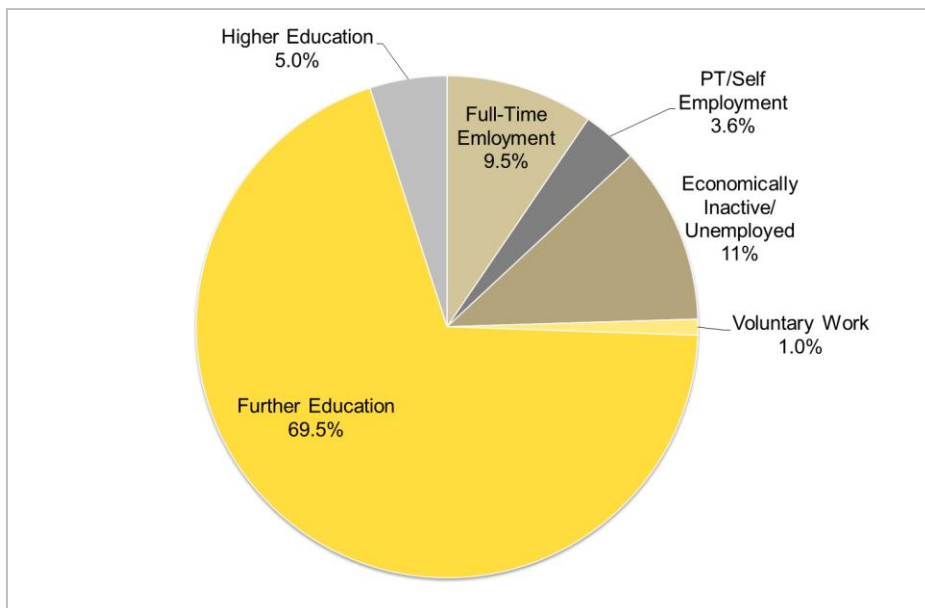
Figure 34: Bolton College learner destinations: 16-18 year olds 13/14



Source: Bolton College, 2013/14

3.14. Figure 35 shows learner end of course destinations for 19-year olds in the 2013/14 year. The most popular destination was further education, with 69% students planning to return to further education. This was up on the figure of 55.1% reported in the 2013 LEA for 2010/11 leavers. Full-time employment, part-time employment and self-employment made up a further 14% and 5% of 19+ learners went to Higher Education.

Figure 35: Bolton College learner destinations: 19-year olds 13/14



Source: Bolton College, January 2015

- 3.15. Bolton College also provides apprenticeships, which are a crucial part of the skills agenda for the borough. Among 16-18 year olds completing apprenticeships in the 2013/14 year, the vast majority 111 (96.5%) went into full time employment, with only 4 (1%) becoming unemployed. Among 19-year olds, out of 761 students, 350 (97.5%), went into full-time employment, while only 9 (2.5%) became unemployed. The success of Bolton's apprentices illustrates the importance of this qualification in creating employment and increasing the life chances of Bolton's residents.
- 3.16. Bolton College also provides courses across Bolton through Community Learning funding from the Local Authority. In 2013/14 826 courses ran across 95 different locations within the borough engaging with over 5500 individual people.

Higher Education

- 3.17. There are around 100,000 students studying at higher education institutions in GM, of which around 7,000 are based at The University of Bolton, according to data from the Higher Education Statistics Agency (HESA) for 2013/14.
- 3.18. The Research Excellence Framework (REF), published in December 2014, concluded that the University's research over the last five years in psychology, engineering, english and creative writing, the built environment, education and communications & media included work of a world-leading standard (4*).
- 3.19. Figure 36 shows the breakdown of UoB students according to their location of employment and provides comparison data for the University of Manchester, Manchester Metropolitan University, and the University of Salford. UoB students have a higher tendency of staying within GM upon graduation (with 53.0% staying). In comparison, 28.0% of the students who graduated from the University of Manchester remained in GM when they got a job.

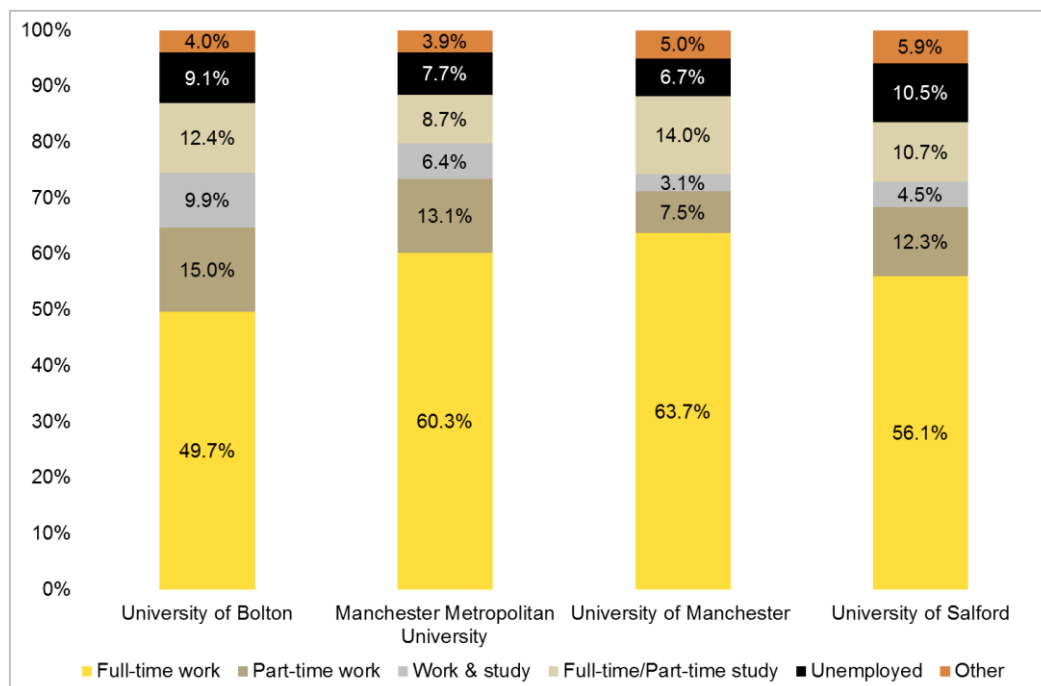
Figure 36: Location of employment for graduates in 2012/13

Location of employment	University of Bolton	Manchester Metropolitan	University of Manchester	University of Salford
Greater Manchester	53.0%	39.7%	28.0%	45.2%
England (Unknown)	0.4%	0.0%	0.0%	1.9%
Other UK	20.3%	38.1%	41.5%	24.6%
UK (Unknown)	0.1%	0.1%	0.1%	0.0%
Non-UK	1.2%	2.1%	4.3%	2.4%
Unknown or N/A	25.0%	19.9%	26.1%	26.0%
Total	100.0%	100.0%	100.0%	100.0%

Source: Higher Education Statistics Agency

- 3.20. In terms of type of activities, around 50.0% of 2012/13 graduates from UoB went into full-time employment (see Figure 37). This was lower than other universities in GM, although a higher proportion of UoB graduates did go into part-time employment.

Figure 37: Type of Activities for Graduating Students in 2012/13



Source: Higher Education Statistics Agency

Occupational Structure

- 3.21.** Based on results from the September 2014 edition of the Annual Population Survey (APS), the highest concentration of occupations in Bolton is in professional roles (15.7%), although this is lower than the GM average of 18.9% and the UK figure of 19.9% (see Figure 38). This is a similar trend to that seen in the APS for the same time period in 2013.
- 3.22.** Bolton does have a higher proportion of residents working as managers, directors and senior officials (9.3% in 2014, up from 8.5% in 2013), compared to 8.8% in the conurbation. Bolton also has a higher concentration of residents employed in caring, leisure & other service occupations, with 11.8% in 2014 compared with 9.5% in GM and 9.1% nationally.

Figure 38: Occupational structure of those in employment, September 2014

	Bolton	GM	UK
Managers, directors and senior officials	9.3%	8.8%	10.2%
Professional occupations	15.7%	18.9%	19.9%
Associate prof & tech occupations	11.8%	13.2%	14.0%
Administrative and secretarial occupations	11.0%	11.0%	10.7%
Skilled trades occupations	11.4%	10.3%	10.8%
Caring, leisure and other service occupations	11.8%	9.5%	9.1%
Sales and customer service occupations	9.0%	9.6%	7.8%
Process, plant and machine operatives	6.8%	5.9%	6.2%
Elementary occupations	12.1%	11.7%	10.7%

Source: Annual Population Survey

- 3.23.** In addition to looking at employment by occupation type, it is possible to look at vacancies using the same classification system as in Figure 38 – using an

online tool called Labour Insight⁷. This reveals that for the year ending December 2014 there were around 11,500 vacancies in Bolton, of which the top three occupation types were:

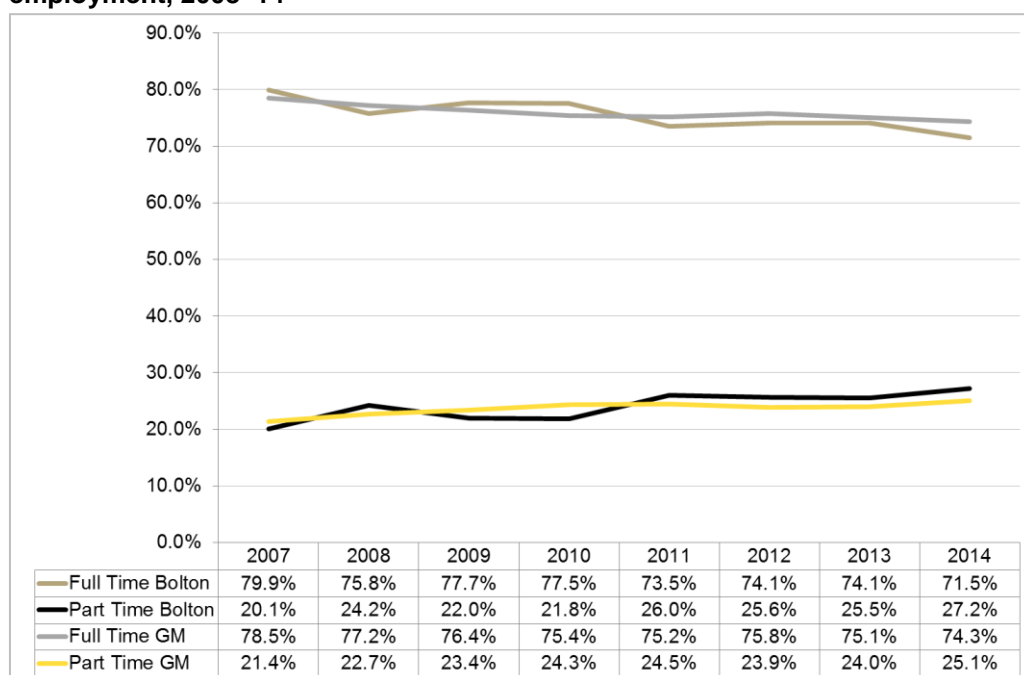
- Professional: 3,200 vacancies (27.8% of total)
- Associate professional & technical: 2,600 (22.4%)
- Administrative and secretarial: 1,400 (11.8%)

3.24. The three occupations listed above also accounted for the highest number of vacancies at a GM level for the year ending December 2014, meaning Bolton is in line with conurbation trends. If this trend continues and residents of Bolton are able to access the higher value professional/associate technical roles, it would help move the borough more in line with GM and UK in terms of the shares of employment outlined in Figure 38.

Part-Time Working and Self-Employment

3.25. One of the characteristics of the recession and its recovery was the rise in people either working part-time or becoming self-employed, often seen to be reflecting weakness in the labour market with a lack of full-time permanent employment available. As can be seen in Figure 39, changes in part-time employment in Bolton have broadly mirrored those in Greater Manchester, having risen in recent years, and are higher than before the recession, though Bolton's proportion of part-time employees (27.2%) is now higher than the average for Greater Manchester (25.1%).

Figure 39: Resident full & part-time workers (16-64) as proportion of total employment, 2008–14



Source: Annual Population Survey

⁷ New Economy holds access to Labour Insight, an online database of jobs posting across England, on behalf of AGMA

- 3.26. Figure 40 shows that the number of people self-employed in Bolton has risen since 2008, up from 9.5% to reach 11.9% in 2014. Self-employment in Bolton is lower than GM as a whole (13.0%) and the UK (13.7%). The conurbation saw a substantial rise in self-employment between 2013 and 2014.

Figure 40: Percentage of people aged 16-64 who are self-employed

	2008	2009	2010	2011	2012	2013	2014
Bolton	9.5	9.4	8.4	11.9	10.2	11.6	11.9
GM	10.5	10.7	11.5	11.1	11.6	11.3	13
UK	12.6	12.4	12.8	13	13.6	13.4	13.7

Source: Annual Population Survey

- 3.27. Figure 41 shows the employment rate within the 50+ cohort. Of those aged 50 and above in Bolton, 38.0% are in employment. This is above the GM average of 36.6%, but below the national figure of 39.8%. The employment rate of people aged 50+ in Bolton fell to a low of 34.0% in 2012, however it has been recovering significantly since then.

Figure 41: Employment rate (%) of people aged 50+

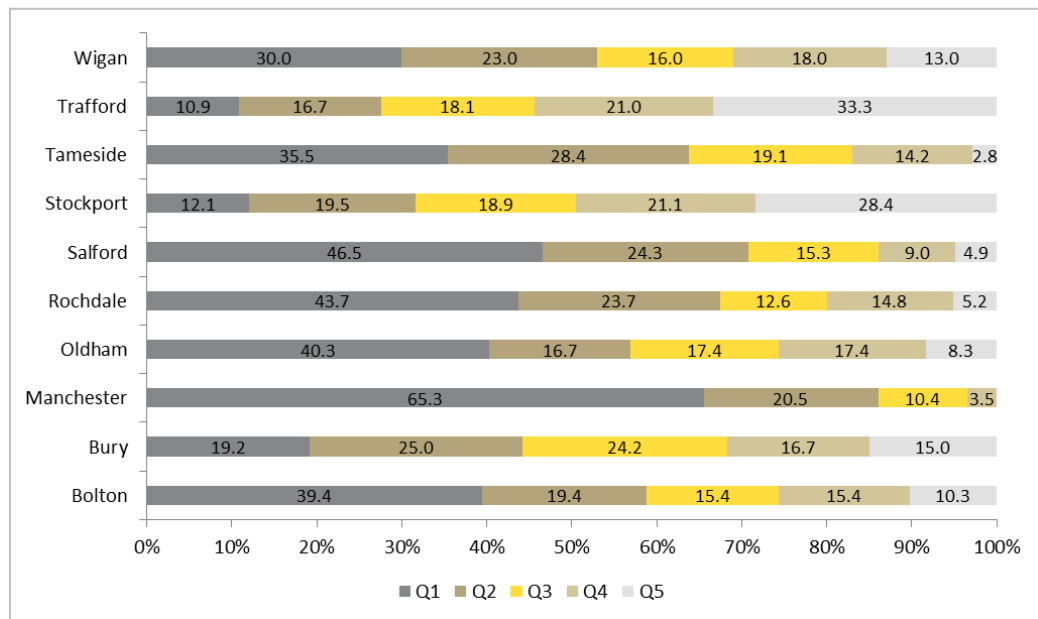
	2008	2009	2010	2011	2012	2013	2014
Bolton	37.7	35.2	34.6	34.1	34.0	37.3	38.0
GM	35.7	35.5	35.9	35.4	35.3	36.1	36.6
UK	38.3	38.2	38.2	38.3	38.3	39.0	39.8

Source: Annual Population Survey

Deprivation

- 3.28. Deprivation data, which is based on a high level of disaggregation is only available for 2010. Figure 42 shows deprivation numbers for Greater Manchester according to quintiles (Q1 being the most deprived). In 2010, Bolton had 39.4% of people in the bottom quintile, marginally lower than Oldham, and a little higher than Tameside. Manchester, in comparison, has much higher levels of the population in the lowest quintile with 65.3% of residents, and Salford has 46.5%. The Index of Multiple Deprivation (IMD) highlights that more than half of the population are in the two lower quintiles (39.4% in Q1 and 19.4% in Q2), while only 10.3% of the population is the top quintile.
- 3.29. When looking at lower super output areas (LSOAs) across Bolton, the borough is ranked 4th in GM and 36th in the UK in terms of deprivation. One in five (39 in total) LSOAs in Bolton is in the top 10% of most deprived LSOAs in the UK. Salford, in comparison, has 47 LSOAs in the top 10% of most deprived LSOAs in the UK (which amounts to around 1 in 3).

Figure 42: Deprivation in Greater Manchester, 2010



Source: Index of Multiple Deprivation (IMD)

Unemployment

Jobseeker's Allowance Claimants

- 3.30. Figure 43 shows the percentage of Jobseeker's Allowance (JSA) claimants from 2008-14. Although the percentage of claimants in Bolton (as well as in GM and nationally) dropped sharply in the 2014 figures, this is increasingly affected by the introduction of Universal Credit (UC), which folds six different benefits and credits into one payment, covering both in-work and out-of-work people. While UC began in October 2013, it did so only in pilot areas. This included parts of GM but not Bolton, where it has only just started. For example, as of December 2014 there were 1,410 people in Bolton claiming UC, of which 930 of these were not in employment⁸. In the absence of UC, these people are likely to have previously claimed JSA. Over the coming months, JSA and UC figures will therefore need to be assessed together to gain a full picture on the state of the borough's labour market.
- 3.31. Looking at 2014 figures, they are more positive than those reported in the 2013 LEA, however Bolton's labour market still has higher levels of JSA claimants (2.7%) compared with GM and national averages (2.4% and 2.2%, respectively). While still high in comparison, the claimant rate in Bolton has dropped from its peak of around 5.0% (in 2009 and 2012) and remains on a downward trend.

⁸ Figures sourced from DWP.

Figure 43: JSA claimant rate (% of working resident population), 2008–14

	2008	2009	2010	2011	2012	2013	2014
Bolton	3.0%	4.8%	4.0%	4.7%	4.8%	4.3%	2.7%
GM	2.0%	4.7%	4.2%	4.7%	4.8%	3.9%	2.4%
UK	2.4%	3.9%	3.5%	3.8%	3.8%	3.1%	2.2%

Source: ONS claimant count

- 3.32. In terms of young people (aged 16-24), their share of JSA claimants in Bolton has declined significantly since 2008. In 2014, the share of young people claiming JSA was 20.0% in Bolton, lower than both GM figure of 21.4% and the national average of 24.2% (see Figure 44).

Figure 44: Percentage of JSA claimants aged 16-24, 2008–14

	2008	2009	2010	2011	2012	2013	2014
Bolton	34.7%	33.1%	32.1%	34.0%	28.2%	25.7%	20.0%
GM	34.2%	34.2%	31.6%	33.0%	29.1%	25.9%	21.4%
UK	31.8%	30.8%	29.5%	30.9%	28.4%	26.3%	24.2%

Source: ONS claimant count

- 3.33. While young people account for a smaller share of claimants, the share of long-term claimants has risen substantially since 2008. In 2014, people claiming JSA for more than 12 months accounted for 35.0% of all JSA claimants in Bolton, compared with only 8.9% in 2008. Most of the rise happened in 2012 (from 15.5% in 2011 to 25.6% in 2012), but also during the last year with the figure growing from 29.0% (in 2013) to its current 35.0% share. Bolton is now above both the GM and national averages (of around 30.0%), and while both GM and the UK has witnessed growth in long-term claimants, Bolton's share is growing faster (see Figure 45).

Figure 45: Long-term (12+ months) JSA claimants as percentage of all JSA claimants, 2008–14

	2008	2009	2010	2011	2012	2013	2014
Bolton	8.9%	11.4%	15.6%	15.5%	25.6%	29.0%	35.0%
GM	8.8%	11.4%	18.6%	17.3%	26.3%	29.8%	29.9%
UK	10.4%	11.6%	17.9%	17.0%	27.8%	31.2%	30.0%

Source: ONS claimant count

Out-of-work Benefits Claimants

- 3.34. The overall out-of-work benefits picture seems to be relatively stable in Bolton, with 13.6% of the working resident population claiming one form of benefit (this amounts to around 24,000 people). Key out-of-work benefits consist of the groups: job seekers, Employment and Support Allowance (ESA) and incapacity benefits (IB), lone parents and others on income-related benefits.
- 3.35. While down on its peak of 16.2% in 2009, this figure is still larger than GM (13.0%) and the national average (10.2%). A steady downward trend can be seen since 2010, which continues in 2014 for Bolton (see Figure 46).

Figure 46: Percent of out-of-work benefits claimants (% of working resident population), 2008-14

	2008	2009	2010	2011	2012	2013	2014
Bolton	14.3%	16.2%	15.6%	15.5%	15.4%	14.9%	13.6%
GM	14.3%	16.2%	15.7%	15.3%	15.3%	14.5%	13.0%
UK	11.0%	12.6%	12.2%	11.9%	11.9%	11.2%	10.2%

Source: DWP

3.36. As of May 2014, the absolute number of people claiming out-of-work benefits in Bolton was:

- Job seekers: 6,140⁹
- ESA and IB: 14,510 (of which 3,360 are ESA Work-Related Activity Group (WRAG) claimants)¹⁰
- Lone parent: 2,580
- Others on income-related benefits: 780

ILO Unemployment

3.37. An alternative way of analyzing trends in unemployment is to use the International Labour Organisation (ILO) measure. It records the rate of people, who currently do not have a job, amongst those who are 16 or older and who are economically active¹¹. Unlike the JSA claimant rate, it includes those of the unemployed not claiming benefits.

3.38. The ILO unemployment rate in Bolton remains higher than in both GM and the UK. In 2014, the percentage of people aged 16 and above who were unemployed was 9.3%, compared with 8.7% and 6.8% for GM and nationally, respectively. While unemployment rates in Bolton are lower today than their 2012 peak of 10.1%, they are still much higher than in 2008, when only 5.4% of people 16+ were unemployed (see Figure 47).

Figure 47: Percentage of people aged 16+ who are unemployed, 2008-14

	2008	2009	2010	2011	2012	2013	2014
Bolton	5.4	7.5	10.3	7.3	10.1	9.1	9.3
GM	6.7	8.5	9.6	9.0	10.1	9.4	8.7
UK	5.2	6.8	7.7	7.7	8.1	7.8	6.8

Source: Annual Population Survey

Ethnicity

3.39. The Rumworth ward has the largest population within Bolton of residents who are not White, with 69.5% of the population belonging to an ethnic minority

⁹ This figure is taken from the quarterly DWP benefits data, which only cover the period up to May 2014. More recent data on JSA claimants in Bolton is available on a monthly basis, from a separate dataset, which indicates that there were just over 4,200 JSA claimants in the district in January 2015. The figure of 6,140 is reported in the main body of the text in order to be consistent with the other out-of-work benefits information presented.

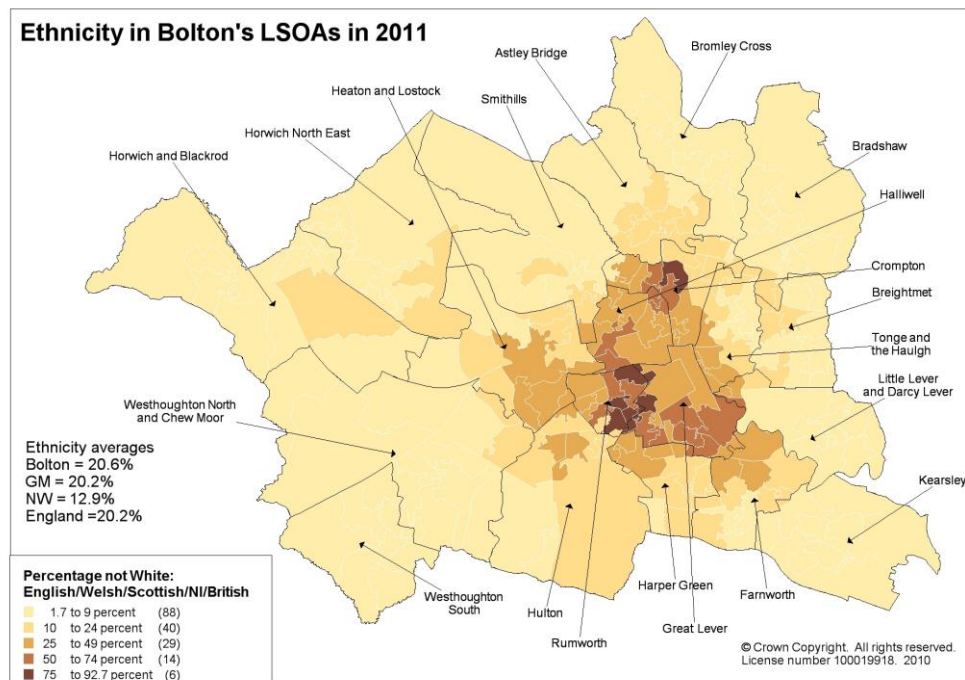
¹⁰ WRAG data sourced from DWP. Claimants in this group are those where work is feasible in the short to medium term.

¹¹ Economically active are those between 16-64 year olds who are *able* and *available* to work and who are either in employment or have sought work in the past four weeks.

group. This ward has the fifth highest actual number (11,293) of ethnic residents at ward level across GM. The second highest rate in Bolton is in the neighbouring Great Lever ward, where the rate is 56.3%. There are also large concentrations of ethnic minorities in Halliwell (44.9%), Crompton (43.4%) and Harper Green (27.3%)

3.40. Bolton's Indian population is mainly resident near Bolton town centre, with almost 60% of the Indian community resident in just three wards: Rumworth (29.3% of the Indian community), Crompton (18.8%) and Greater Lever (11.6%). Eight of the ten largest ward populations of Indians across Greater Manchester are resident in Bolton's wards. Rumworth (6,360), Crompton (4,073), and Great Lever (2,523) have the largest concentrations of this ethnic group in the borough. In total the Indian community represent 7.8% of Bolton's total population. There is also a sizable Pakistani population across the district. Wards with more than 5% of the population classed as Pakistani are Great Lever (21.4%), Halliwell (15.9%), Rumworth (10.0%), Harper Green (8.3%) and Farnworth (5.6%).

Figure 48: Ethnicity in Bolton, 2011



Source: Census 2011

People Summary

- Just over 280,100 people live in Bolton and it is the fourth largest district in GM. This large resident population provides the borough with a key economic asset that has driven growth. During the last decade (2003-2013), Bolton's population has grown by 6.2% (16,200). This is slightly below the 6.9% growth in GM as a whole, but higher than growth in the North West (4.2%).
- Around one quarter of the population aged 16+ in Bolton hold an NVQ4 qualification or above. While this is below both GM's and the national average, Bolton's economy has been moving in the right direction. The proportion of people aged 16+ holding an NVQ4+ qualification has grown from 21.0% in 2008 to 25.2% in 2013. The latest vacancies data for Bolton (and the wider GM conurbation) highlight the availability of higher value vacancies on the jobs market (professional, managerial roles etc.) If this trend continues and residents of Bolton are able to access these, it will help an increased proportion of the local population to work in higher level roles.
- While the UK and GM averages were 9.5% and 11.5% respectively in 2013, Bolton's economy has 13.2% of its age 16+ population with no qualifications. While a challenge for Bolton, the borough has made headway compared to 2008, when 15.0% of the age 16+ population held no qualifications.
- Of the GM boroughs, Bolton has seen a considerable decline in 16 to 18 year olds who are not in employment, education, or training (NEET). Between June 2011 and 2014 NEETs fell by 3 percentage points in Bolton to 4.9%, a higher fall than in GM as a whole.
- Bolton has seen increases in educational attainment in line with overall trends across GM and is also in line with national averages. The proportion of pupils achieving five or more GCSEs at grades A*–C (including Maths and English) increased by 14 percentage points from 46.2% in 2009-10 to 60.2% in 2012-13.
- A major asset for the district is The University of Bolton, which has more than 7,000 students and was identified as undertaking world-leading research in psychology, engineering, english and creative writing, the built environment, education and communications & media by the 2014 Research Excellence Framework.
- The unemployment rate in Bolton remains higher than in both GM and the UK. In 2014, the percentage of people aged 16 and above who were unemployed was 9.3%, compared with 8.7% and 6.8% for GM and nationally, respectively. While unemployment rates in Bolton are lower today than their 2012 peak of 10.1%, they are still much higher than 2008, when only 5.4% of people 16+ were unemployed.
- Bolton is ranked 4th in GM and 36th in the UK in terms of deprivation. One in five (39 in total) lower super output areas (LSOAs) in Bolton is in the top 10% of most deprived LSOAs in the UK. Salford, in comparison, has 47 LSOAs in the top percent of most deprived LSOAs in the UK.

4 Place

Key Messages for Bolton

**20
Million**

Drive time population
People living within a 2
hour drive of Bolton



House prices
Average property costs
£90,000 in Bolton,
compared to £108,000 in
GM

**£227
Million**

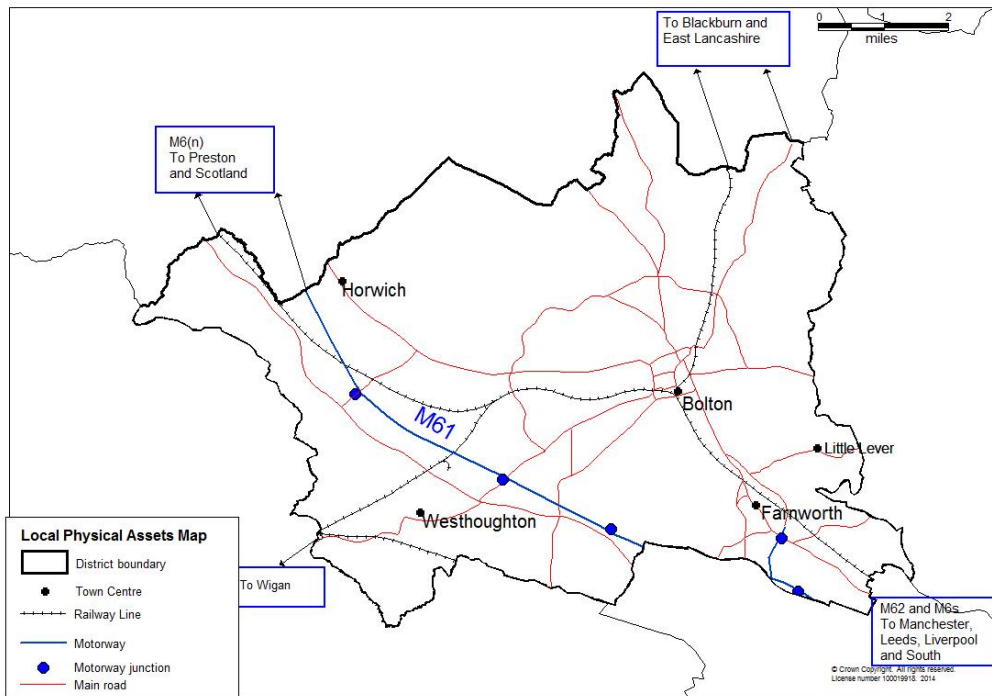
Town centre investment
In schemes such as the
Innovation Zone, transport
interchange & Academic
Village

Connectivity & Strategic Links

- 4.1. An important part of Bolton's appeal is its key strategic links both into the conurbation core and beyond Greater Manchester to the rest of the country.
- 4.2. Bolton lies at the heart of the region's motorway network with 20 million consumers and 60% of UK businesses within a two hour drive. Locational advantages include four junctions of the M61 linking Bolton to wider markets in Preston, Lancashire and Scotland via the M6 and towards the conurbation core and Midlands via the M60. The M62 is three miles away, providing easy access to key ports in Liverpool and Hull, a key factor in the location of Logistics North. Trains link direct to all major stations in Manchester city centre and through to Southport, Blackburn, Preston and the North providing a larger labour market and easy access for commuters to jobs inside and out of Bolton.
- 4.3. Close to 1.1 million people live within a 45 minute peak time Journey-To-Work Area (JTWA) of Bolton town centre (illustrated in Figure 50). This is a large scale catchment similar in size to Liverpool's 35 minute JTWA (1,033,650 people) and 17% larger than the catchment for Birmingham International Airport (915,800 people). The working age population accounts for 62.9% of all people¹², closely matching the regional profile. Overall, this area provides a total labour pool of over half a million people in work or seeking it.

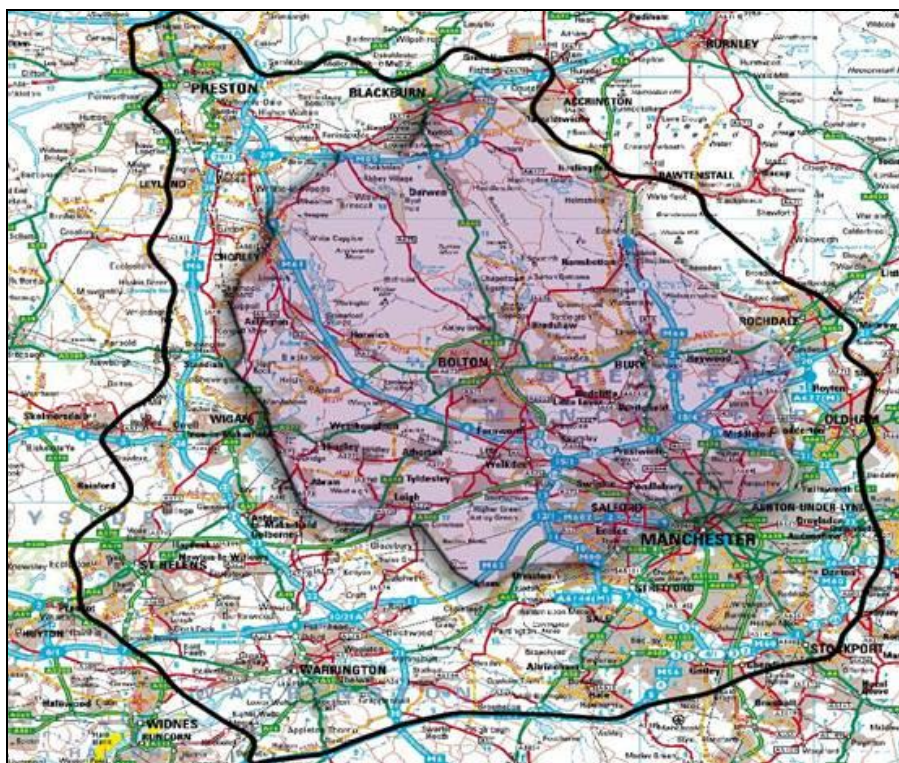
¹² Based on 2013 mid-year population estimates from the ONS.

Figure 49: Transport Infrastructure in Bolton



Source: Ordnance Survey 2010

Figure 50: 45 Minute Journey to Work Area (JTWA) at Peak Time



Source: MIDAS, 2008

Figure 51: Average Off Peak Travel Times from Bolton

Average Off Peak Travel Times	Road	Train
Birmingham	1 hr 45	2hrs
Cardiff	3hrs 40	3hrs 40
Edinburgh	3hrs 50	3hrs 15
Glasgow	3hrs 25	3hrs
Leeds	55 mins	1hr 15
Liverpool	40 mins	1hr 10
Central London	3hrs 50	2hrs 50
Manchester	25 mins	20 mins
Newcastle	2hrs 40	2hrs 50
Manchester Airport	30 mins	40 mins
Blackburn	20 mins	30 mins

Source: AA Route Planner (Road) & National Rail Enquiries (Train)

Future Developments in Bolton

- 4.4. Key sites for future development in Bolton include Rivington Chase (Horwich Loco Works) and Logistics North (Cutacre), both of which have the potential to generate significant employment opportunities for the borough. Job creation from both schemes is discussed in section 5 of the LEA. In addition, development is underway in Bolton Town Centre including a new transport interchange, which aims to act as a catalyst for the wider regeneration.

Town Centre

- 4.5. Bolton town centre has seen significant investment, with more than £227 million committed to projects that have either been completed or are scheduled for completion over the next few years. This has included the opening of the £90 million Innovation Zone Knowledge Campus (co-locating Bolton College, Bolton Sixth Form College and the University of Bolton), a £30 million investment in Bolton One Health Leisure and Research Centre and a £4.3m STEM Centre at Bolton College. Investment will continue in the future, including:

- A new, £48million **transport interchange**. This will co-locate the main bus station with Bolton train station and combine with new retail and commercial development, public spaces and extensive public realm works. It aims to deliver transformational change to one of the town centre gateways and is expected to be operational in spring 2016.
- A new £40million **Academic Village** accommodating up to 850 students in the heart of the Town Centre together with a **University Technical College** (UTC) for 14-19 year olds. UTCs are able to design their own curriculum and UTC Bolton will specialise in health sciences and engineering technologies. When fully enrolled in 2017 the UTC is expected to have 600 students, with 240 students at Years 10 and 12 (14 and 16) enrolling in September 2015.

- The **Market Place** is undergoing a £15 million refurbishment. Plans include the building of a nine screen cinema with a capacity for 1,200 seats and the development of 30,000 sq. ft. of new restaurant space, creating seven to eight restaurants by opening up the vaulted basement of the old market.

Logistics North

- 4.6. The former Cutacre Colliery site, now known as Logistics North, is located adjacent to Junction 4 of the M61. Planning permission was granted for the 250 acre scheme in December 2013 and works have started on site to deliver over 4 million sq. ft. of space. Once complete, Logistics North will be the largest distribution, logistics and employment site in GM. Aldi is one of the first occupiers to sign up to a new build 440,000 sq. ft. distribution centre on a 35 acre plot to support growing operations in the North of England. MBDA, one of the largest private employers in Bolton is scheduled to move to the site as well (See Box 1).

BOX 1 – Logistics North Bolton



Summary: The largest distribution, logistics and manufacturing site in Greater Manchester, comprising 400,000 sq. m. (4 million sq. ft.) with 600 acre country park and associated leisure uses.

Units: Design and build ranging in size from 20,000 sq. ft. to 1 million sq. ft.

Delivery: Phase 1 onsite 2014 including infrastructure (completes 2015).

Access: Immediate access to Junction 4 of the M61, with 20 million consumers and 60% of UK businesses within a 2hr drive.

Economic Growth: Adding £229million to Bolton's GVA (£339million GM).

Employment: 7,750 gross jobs on site, of which 4,000 net will be in Bolton (6,000 in GM) and over 110 construction jobs onsite each year.

Skills and Careers: Logistics North is supporting employment across a range of careers with opportunities from entry level to highly skilled positions. Occupiers are engaged with the Team Bolton Partnership to recruit jobs and apprenticeships, provide work experience and work with schools and the local community.

Typical jobs, apprenticeships and careers include construction trades; logistics; drivers (incl. HGV); warehouse; office; administration; engineering; manufacturing.

Occupiers: Aldi is amongst the first occupiers to sign up to a new build 600,000 sq. ft. state-of-the-art distribution centre to support their growing business in the North of England (Opens 2016: 600 jobs). MBDA are developing a new 125,000 sq.ft. facility which will combine high-quality manufacturing space with offices and also complete in 2016.

Developer: Harworth Estates www.logisticsnorth.com



Over 4000
Bolton
Jobs



Adding
£229m to
Bolton's
GVA

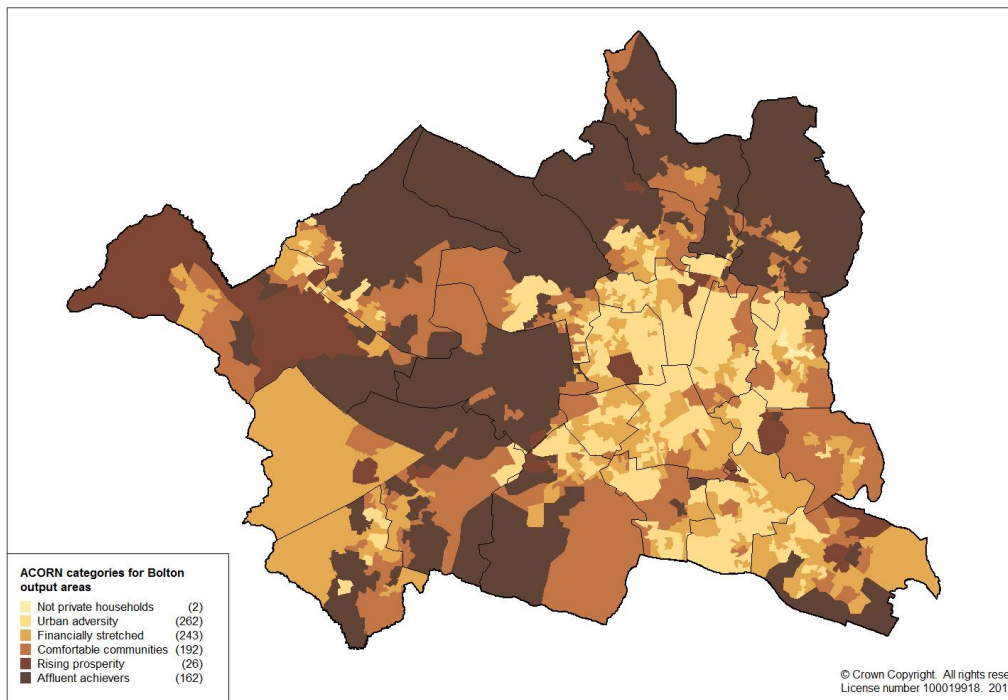
Rivington Chase

- 4.7. The mixed use redevelopment of the 180-acre former Horwich Loco Works site was given the go-ahead by Bolton Council in September 2014. The Horwich Vision scheme represents an investment of more than £260million and will deliver a mix of uses including up to 1,700 new homes, employment uses, new local facilities including shops, community and health facilities and major areas of public open space and supporting infrastructure.

ACORN Profile

- 4.8. Figure 52 shows Bolton's output areas according to ACORN categories. The top category, 'affluent achievers', is concentrated mainly in the north and west of the district. These are some of the most 'successful' and 'affluent' people in the UK. They live in wealthy, high status rural, semi-rural and suburban areas of the country. By contrast, the town of Bolton and its urban environs are characterised by large numbers of 'financially stretched' residents, experiencing high levels of economic and social deprivation. This category contains the poorest areas of the UK, where unemployment is well above the national average, levels of qualifications are low, and those in work are likely to be employed in unskilled occupations.

Figure 52: Bolton residents by ACORN classification



Source: CACI (2014) ACORN

Housing Market

- 4.9. In September 2014, the average house price in Bolton was £89,683, about 4 times the gross median annual wage (£22,819). While wages are lower in Bolton in comparison to GM, houses in the district are more affordable than

the GM average. The wages to house price ratio in Bolton was 3.9 in September 2014, compared to 4.3 in GM (see Figure 53).

Figure 53: Housing Affordability, 2014

Area	Gross Median Annual Wage, 2014	Average House Price, September 2014	Affordability Ratio
Bolton	£22,819	£89,683	3.9
GM	£24,945	£108,002	4.3

Source: Housing Price Index based on ASHE and Land Registry data

- 4.10. Figure 54 shows average rental prices for houses, and the number of available properties for July 2014. It is a snapshot of activity in the housing market which shows that Bolton is more affordable than GM as a whole in terms of rental prices. While the average rent across Greater Manchester is £506 per calendar month (pcm) for a two bed property, renting a two bed property in Bolton costs around £405pcm. A three bed property in Bolton can be rented for £559pcm, and a four bed property for £804pcm. All these figures are lower than the GM average.
- 4.11. While rent prices have not changed much for two bed and three bed properties, four bed properties have gone up in price by 11.2% in Bolton on an annual basis.

Figure 54: Rental Prices for houses, July 2014

	Rent (pcm)		Available properties	
	£	Annual change (%)	No.	Annual change (%)
2 Bed				
Bolton	£405	-0.5%	194	-12.6%
GM	£506	2.0%	1,722	-14.2%
3 Bed				
Bolton	£559	0.4%	120	-28.1%
GM	£668	-1.4%	1,642	-19.3%
4 Bed				
Bolton	£840	11.2%	34	9.7%
GM	£1,037	-3.0%	644	-26.8%

Source: GM Estate Agents

- 4.12. In terms of flats/apartments in Bolton, a studio flat can be rented for an average of £307pcm, a one bed flat for £375pcm, a two bed for £491pcm, and a three bed for £565pcm (see Figure 55). All of these prices are lower than GM averages. While the price of a studio or a one bed flat dropped in Bolton, the prices for larger flats have risen on an annual basis.

Figure 55: Rental prices for flats/apartments, July 2014

	Rent (pcm)		Available properties	
	£	Annual change (%)	No.	Annual change (%)
Studios				
Bolton	£307	-10.0%	5	-16.7%
GM	£479	13.7%	134	42.6%
1 Bed				
Bolton	£375	-5.7%	60	-14.3%
GM	£529	6.5%	1,554	23.4%
2 Bed				
Bolton	£491	1.7%	157	-12.3%
GM	£690	8.1%	3,085	32.2%
3 Bed				
Bolton	£565	7.4%	5	-28.6%
GM	£1,054	4.4%	357	15.2%

Source: GM Estate Agents

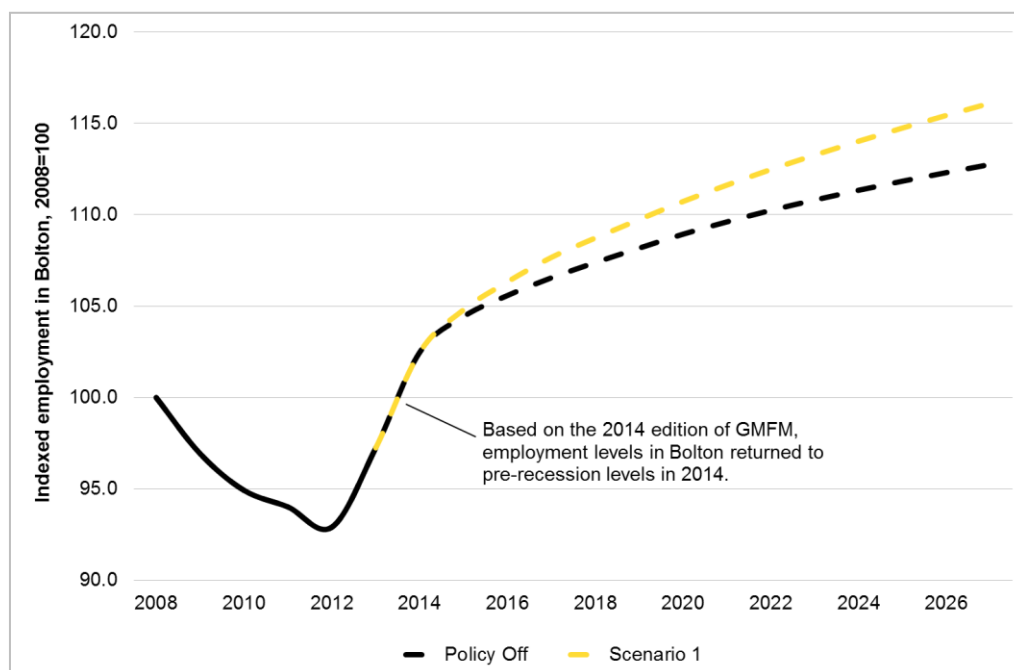
Place Summary

- Bolton's key locational advantages include the M61 – linking the borough to wider markets towards the conurbation core and across the UK. Direct train links to Manchester city centre, Southport, Preston and Blackburn also provide a wider labour market and easy access for commuters to jobs inside and out of Bolton.
- One of Bolton's key strengths as a location is its affordable housing, with the average price of £89,683 significantly below the Greater Manchester (£108,002) and England & Wales (£177,299) averages. The wages to house price ratio in Bolton was 3.9 in September 2014, compared to 4.3 in GM.
- The rental market in Bolton is also more affordable than elsewhere in GM. While the average rent across Greater Manchester is £506 per calendar month (pcm) for a two bed house, renting a two bed property in Bolton costs around £405pcm, for example. In terms of flats/apartments in Bolton, a studio flat can be rented for an average of £307pcm, a one bed flat for £375pcm, a two bed for £491pcm, and a three bed for £565pcm. All of these prices are lower than GM averages.
- Bolton is also able to provide an attractive lifestyle offer, with areas of significant natural beauty. This is reflected in the number of 'wealthy achievers' (as classified by ACORN ratings) residing in the borough particularly to the north and west, in the more rural parts of Bolton. By contrast, the town of Bolton and its urban environs are characterised by large numbers of 'hard pressed' residents, experiencing the high levels of economic and social deprivation.
- Key sites for future development in Bolton include Rivington Chase and Logistics North, both of which have the potential to generate significant employment opportunities for the borough. Development of the former Horwich Loco Works site will see the £260million scheme deliver a mix of uses including up to 1,700 new homes and employment uses. The former Cutacre Colliery site, now known as Logistics North will be the largest distribution, logistics and employment site in GM. Aldi is one of the first occupiers to sign up to a new build 440,000 sq. ft. distribution centre on a 35 acre plot to support growing operations in the North of England.
- Development is also underway on a new transport interchange in Bolton, which aims to act as a catalyst for the wider regeneration of the town centre area. Due to open in spring 2016, the £48million scheme will co-locate the main bus station with Bolton train station, combined with new retail and commercial development, public spaces and extensive public realm works.

5 Forecasting Scenarios

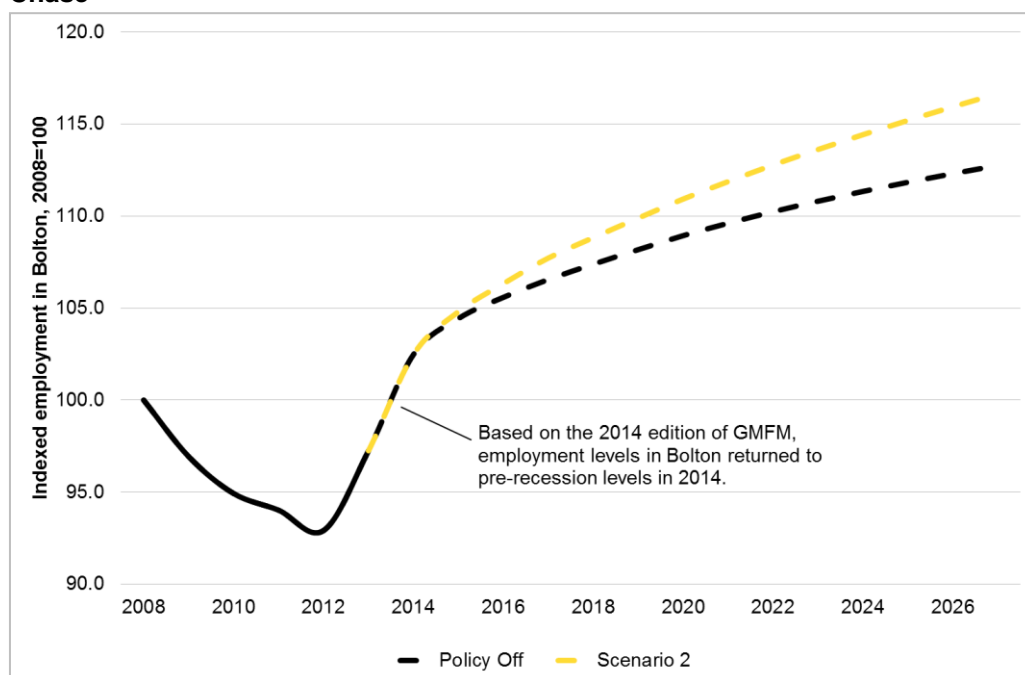
- 5.1. The GMFM results discussed in section 2 provide baseline forecasts, meaning the estimates do not take into account further interventions from local government. With the economy now recovering from the downturn, the forecasts are more optimistic than those reported in the last Bolton LEA. In particular, the latest estimates indicate that employment in the borough returned to pre-recession levels by 2014. The forecasts indicate that growth will continue, however there are a number of major projects in Bolton that could influence future trends even further and these are discussed in this section.
- 5.2. The following projects have been identified as those which could have an impact on future trends: Logistics North; Bolton Town Centre; Rivington Chase (Horwich Loco Works); and The Bolton Skills Strategy. Three scenarios have been modelled using these developments in order to show the increase in employment and GVA that will be provided by the actions of Bolton Council and its partners. These are:
- **Scenario 1:** Logistics North
 - **Scenario 2:** Logistics North + Rivington Chase
 - **Scenario 3:** Logistics North + Rivington Chase + Bolton Town Centre + Bolton Skills Strategy
- 5.3. As shown in Figure 56, Scenario 1 would have a significant impact on employment compared to the policy off baseline, creating an extra 4,100 jobs between 2013 and 2027. The development would also create an extra £229.4 million in GVA.

Figure 56: Scenario 1, Employment impact of Logistics North



5.4. Figure 57 shows employment in Bolton from 2008 to 2027 with the effects of Scenario 2, including the impact of Logistics North and the Rivington Chase development. The addition of Rivington Chase to Scenario 2 adds an extra 670 jobs¹³ and £32.3 million in GVA to the impact of Scenario 1. This brings the total impact of Scenario 2 to around 4,800 jobs, with a GVA increase of £262.0 million from 2013-27.

Figure 57: Scenario 2, Employment impact of Logistics North and Rivington Chase

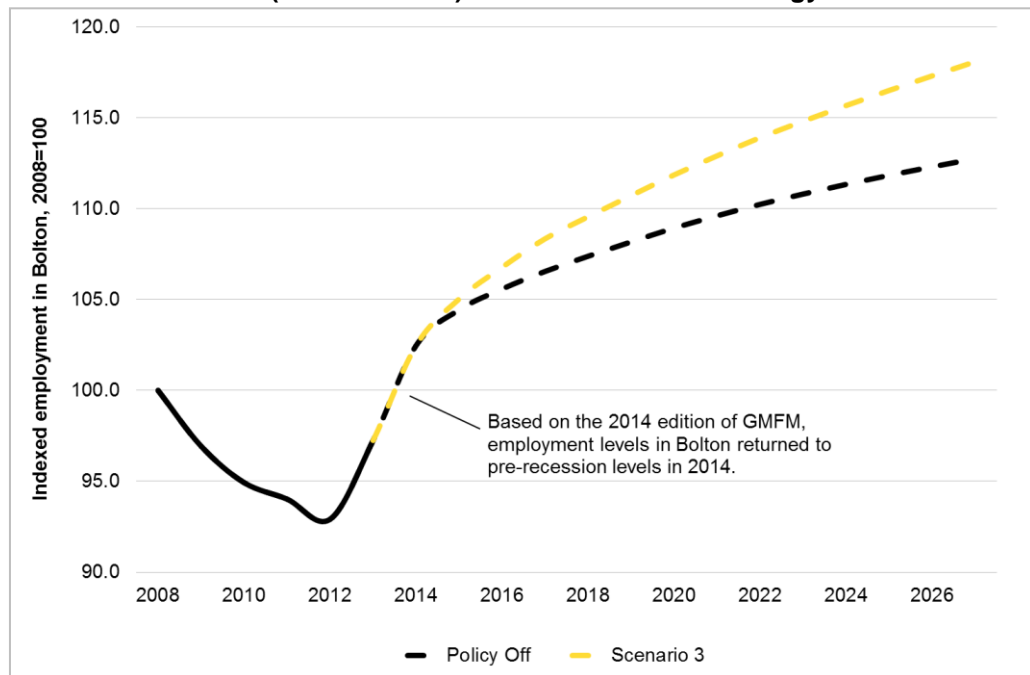


5.5. Figure 58 shows the impact of Scenario 3, which includes all the developments and the Bolton Skills Strategy. The addition of developments in Bolton town centre and the Bolton Skills Strategy add a further 1,700 jobs to the impact over the period, with an additional £88.8 million in GVA. The total impact of Scenario 3 over this period is an extra 6,500 jobs and £351.0 million in GVA.

5.6. Adding on the impact of Scenario 3 to the GMFM forecasts, the increase in jobs in Bolton over this period, with all developments and the skills strategy would be almost 25,500 jobs and GVA would rise by £2.5 billion.

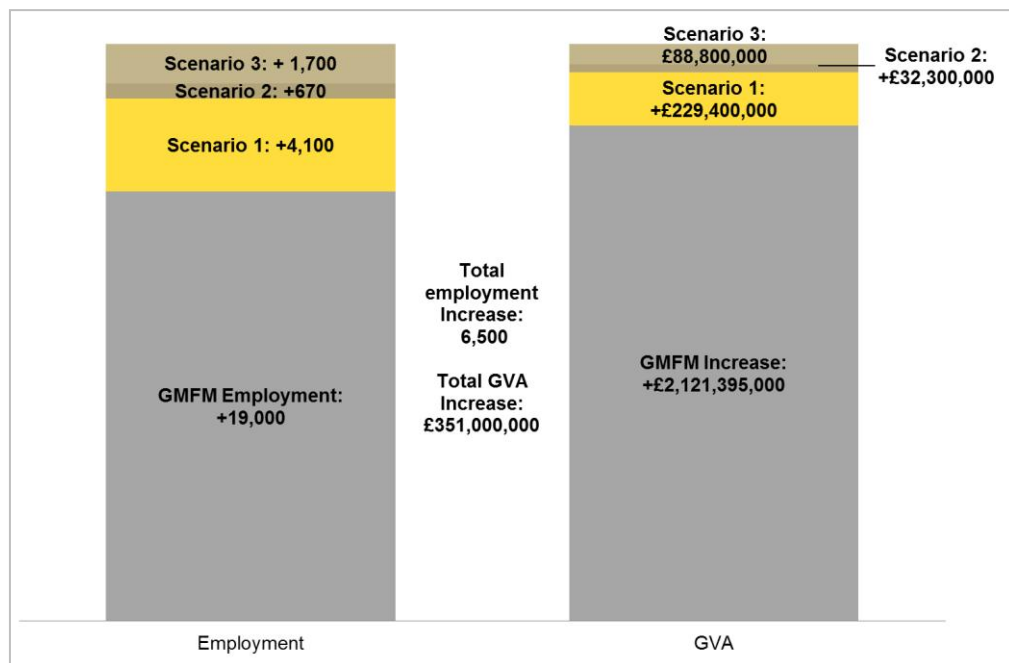
¹³ Figures quoted in relation to the planning application for Horwich Loco Works give job numbers in the region of 1,400-1,500. These are gross jobs, whereas the figure of 670 is net and accounts for additional factors (leakage, deadweight, displacement and multiplier effects).

Figure 58: Scenario 3, Employment impact of Logistics North, Rivington Chase, Bolton Town Centre (Church Wharf) & the Bolton Skills Strategy



5.7. Figure 59 shows the cumulative impact of the three different scenarios on employment and GVA in Bolton from 2013 to 2027, with the forecasts from the GMFM.

Figure 59: Employment and GVA impact of all of Scenarios 2013-27



5.8. Appendix 1 summarises the impacts of each of the developments and the Bolton Skills Strategy, while Appendix 2 outlines the methodology used to arrive at the impact estimates. Appendix 3 shows the impact of each scenario.

6 Conclusion

- 6.1. Bolton is a relatively independent area compared to other parts of Greater Manchester with lower levels of commuting into the conurbation core. However there are still strong economic linkages between the borough and the rest of Greater Manchester in a number of areas. With just over 106,000 people working in the borough, Bolton has gained 1,800 jobs since 2010 – reflecting its ongoing recovery from the economic downturn.
- 6.2. In another positive sign, estimates from the most recent GMFM indicate that Bolton has now returned to pre-recession levels of employment, and the borough has a number of significant strengths that provide key opportunities for growth in the future. The high-quality lifestyle offer in much of the borough makes it an attractive location to attract and retain skills, while good-quality transport links to employment sites both inside and outside of the borough provide strong connectivity for workers. The borough's economy is also complemented by strengths in manufacturing, construction and retail.
- 6.3. The public sector is the largest sector in Bolton and has seen a decline in job numbers in recent years. This reflects ongoing cuts in the sector, a trend which is expected to continue over the coming years and will add further pressure on the private sector to generate new employment opportunities in Bolton. It is also important that Bolton is able to grow its knowledge-intensive businesses, particularly in business & professional services over the coming years, as manufacturing will continue to decline in absolute employment terms even as the sector sees a resurgence, because increasing levels of productivity are essential in maintaining global competitiveness.
- 6.4. It remains important to address economic inequalities across the borough in order to enable more of Bolton's residents to share in the benefits arising from future growth. Despite improvements in recent years, the unemployment rate in Bolton remains higher than in both GM and the UK, while wages (residence and workplace-based) are below those for the conurbation and UK as a whole.
- 6.5. Skills are a critical issue, both for reducing deprivation and worklessness and for stimulating business growth. In order to maximise the advantage of the size of its economy and resident population, Bolton needs to increase the proportion of its residents attaining higher-level skills, supporting those with GCSEs/A Levels to move towards achieving degree level qualifications. The creation of higher-value employment opportunities in the borough will be important in order to ensure people want to live and work in the borough. Bolton's economy has already started moving in the right direction in this respect and developing sites such as Rivington Chase and Logistics North should help to create such opportunities over the next decade.

Appendix 1: Policy-off compared to development scenarios

Employment increases in Bolton 2013-27, by development

	Development Jobs	GMFM Increase	Development + Forecasted
POLICY OFF	0	18,958	18,958
CUTACRE	4,102	18,958	23,060
BOLTON TOWN CENTRE	1,254	18,958	20,212
LOCO WORKS	674	18,958	19,632
TOTAL PROJECTS	6,030	18,958	24,988
SKILLS STRATEGY	493	18,958	19,450
TOTAL 2027	6,523	18,958	25,481

Summary of Scenarios 1, 2 and 3

	Jobs		GVA	
	Scenario	Total Growth	Scenario	Total Growth
Scenario 1	4,102	23,060	£229,429,183	£2,350,824,183
Scenario 2	4,776	23,734	£261,734,681	£2,383,129,681
Scenario 3	6,523	25,481	£350,563,666	£2,471,958,666

GVA Impact of all projects

	GVA
CUTACRE	£229.4 million
BOLTON TOWN CENTRE	£62.5 million
LOCO WORKS	£32.3 million
TOTAL PROJECTS	£324 million
SKILLS STRATEGY	£26.3 million
TOTAL DEVELOPMENTS	£351 million
GMFM GVA INCREASE	£2.5 billion

Appendix 2: Methodology for development scenarios

- The employment impact is calculated by using standard employment densities from the Homes and Communities agencies for floor space types, providing a gross jobs number. Floorspace figures for each development and the impact of the Bolton Skills Strategy were provided by Bolton MBC.
- Net impacts were calculated to capture impacts not already included in GMFM forecasts, based on government guidelines. Net impacts are reached by subtracting leakage and displacement values for jobs and adding in multiplier effects. For the purposes of this modelling it was assumed that there was no deadweight – all the projects are unique and will not be replicated without funding.
- Standard leakage values were used to revise down the impact, taking into account jobs that go to non-Bolton residents. (50% leakage for office and industrial developments, 25% for all other developments).
- Standard government displacement values were also used for each development (12% for office, 17% for industrial and warehousing, 40% for cinema, 50% for restaurants).
- A multiplier effect of 10% was assumed for all projects based on official guidelines.
- With the Bolton Skills Strategy, the modelling assumes that the strategy will cut the leakage of all projects by 10%, providing extra jobs and GVA.
- GVA is based on employment forecasts from GMFM and the net jobs figures.
- GVA per employee for each sector is sourced from the Annual Business Survey GVA data and the Business Register and Employment Survey employment data at a North West level. GVA values are consistent with 2012 prices.
- Impact figures are consistent with EIA modelling provided earlier for Cutacre, but use a different methodology to the SAF model and thus are not comparable to the economic impact figures provided in SAF assessments.
- The job and GVA forecasts are calculated by adding in the modelled impacts to the forecasts produced by the GMFM. The impacts are split by year, with the yearly impact calculated using the development timescales provided by Bolton MBC.
- The total job and GVA impact of all elements of the modelling is broken down in Appendix 3.

Appendix 3: Development Scenarios Forecast Figures

Bolton Employment Growth in Bolton 2013-27

	CUTACRE	TOWN CENTRE	RIVINGTON CHASE	SKILLS STRATEGY	GMFM INCREASE	TOTAL
2013	-	-	-	-	-	-
2014	-	-	-	-	6,389	6,389
2015	456	173	-	53	2,391	3,127
2016	456	173	-	53	1,412	2,147
2017	456	173	61	53	1,182	1,918
2018	273	98	61	36	1,021	1,479
2019	273	98	61	36	964	1,422
2020	273	98	61	36	934	1,392
2021	273	98	61	36	824	1,282
2022	273	98	61	36	769	1,227
2023	273	49	61	31	694	1,099
2024	273	49	61	31	652	1,057
2025	273	49	61	31	610	1,015
2026	273	49	61	31	571	976
2027	273	49	61	31	546	951
Total	4,102	1,254	674	493	18,958	25,481

Bolton GVA Growth 2013-27

	CUTACRE	TOWN CENTRE	RIVINGTON CHASE	SKILLS STRATEGY	GMFM INCREASE	TOTAL
2013	-	-	-	-	-	-
2014	-	-	-	-	£205,449,000	£205,449,000
2015	£25,492,131	£8,516,274	-	£2,814,909	£153,500,000	£194,162,696
2016	£25,492,131	£8,516,274	-	£2,814,909	£131,784,000	£172,446,696
2017	£25,492,131	£8,516,274	£2,936,863	£2,814,909	£133,234,000	£173,896,696
2018	£15,295,279	£4,918,045	£2,936,863	£1,909,106	£132,508,000	£156,709,165
2019	£15,295,279	£4,918,045	£2,936,863	£1,909,106	£139,524,000	£163,725,165
2020	£15,295,279	£4,918,045	£2,936,863	£1,909,106	£144,507,000	£168,708,165
2021	£15,295,279	£4,918,045	£2,936,863	£1,909,106	£149,174,000	£173,375,165
2022	£15,295,279	£4,918,045	£2,936,863	£1,909,106	£151,624,000	£175,825,165
2023	£15,295,279	£2,471,671	£2,936,863	£1,668,265	£154,832,000	£176,345,950
2024	£15,295,279	£2,471,671	£2,936,863	£1,668,265	£158,959,000	£180,472,950
2025	£15,295,279	£2,471,671	£2,936,863	£1,668,265	£160,700,000	£182,213,950
2026	£15,295,279	£2,471,671	£2,936,863	£1,668,265	£155,171,000	£176,684,950
2027	£15,295,279	£2,471,671	£2,936,863	£1,668,265	£150,429,000	£171,942,950
Total	£229,429,183	£62,497,401	£32,305,497	£26,331,585	£2,121,395,000	£2,471,958,666

Appendix 4: Sector Breakdown by Standard Industrial Classification

PRIMARY INDUSTRIES

Agriculture, forestry and fishing

SIC Code(s)	Description
1	Crop and animal production, hunting and related service activities
2	Forestry and logging
3	Fishing and aquaculture

Mining and quarrying

SIC Code(s)	Description
5	Mining of coal and lignite
6	Extraction of crude petroleum and natural gas
7	Mining of metal ores
8	Other mining and quarrying
9	Mining support service activities

Utilities

SIC Code(s)	Description
35	Electricity, gas, steam and air conditioning supply
36	Water collection, treatment and supply
37	Sewerage
38	Waste collection, treatment and disposal activities; materials recovery
39	Remediation activities and other waste management services. This division includes the provision of remediation services, i.e. the clean-up of contaminated buildings and sites, soil, surface or ground water.

CONSTRUCTION

Construction (incl. Civil Engineering)

SIC Code(s)	Description
41	Construction of buildings
42	Civil engineering
43	Specialised construction activities

MANUFACTURING

Advanced manufacturing

SIC Code(s)	Description
20	Manufacture of chemicals and chemical products
21	Manufacture of basic pharmaceutical products and pharmaceutical preparations
26	Manufacture of computer, electronic and optical products
27	Manufacture of electrical equipment
28	Manufacture of machinery and equipment n.e.c.
29	Manufacture of motor vehicles, trailers and semi-trailers
30	Manufacture of other transport equipment
33	Repair and installation of machinery and equipment
325	Manufacture of medical and dental instruments and supplies
7112	Engineering activities and related technical consultancy

Food and drink manufacturing

SIC Code(s)	Description
10	Manufacture of food products
11	Manufacture of beverages
12	Manufacture of tobacco products

Textiles manufacturing

SIC Code(s)	Description
13	Manufacture of textiles
14	Manufacture of wearing apparel
15	Manufacture of leather and related products

Other manufacturing

SIC Code(s)	Description
16	Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials
17	Manufacture of paper and paper products
19	Manufacture of coke and refined petroleum products
22	Manufacture of rubber and plastic products
23	Manufacture of other non-metallic mineral products
24	Manufacture of basic metals
25	Manufacture of fabricated metal products, except machinery and equipment
31	Manufacture of furniture
321	Manufacture of jewellery, bijouterie and related articles
322	Manufacture of musical instruments
323	Manufacture of sports goods
324	Manufacture of games and toys
329	Other manufacturing

TRANSPORT AND STORAGE (INCLUDING POSTAL)

Transport and storage (including postal)

SIC Code(s)	Description
49	Land transport and transport via pipelines
50	Water transport
51	Air transport
52	Warehousing and support activities for transportation
53	Postal and courier activities

WHOLESALE AND RETAIL

Motor trades

SIC Code(s)	Description
45	Motor trades

Retail

SIC Code(s)	Description
47	Retail trade, except of motor vehicles and motorcycles

Wholesale

SIC Code(s)	Description
46	Wholesale trade, except of motor vehicles and motorcycles

PERSONAL SERVICES

SIC Code(s)	Description
95	Repair of computers and personal and household goods
96	Other personal service activities
97	Activities of households as employers of domestic personnel
98	Undifferentiated goods- and services-producing activities of private households for own use

BUSINESS, FINANCIAL AND PROFESSIONAL SERVICES

Business services

SIC Code(s)	Description
77	Rental and leasing activities
80	Security and investigation activities
81	Services to buildings and landscape activities
82	Office administrative, office support and other business support activities
94	Activities of membership organisations
99	Activities of extraterritorial organisations and bodies

Employment activities

SIC Code(s)	Description
78	Employment activities

Financial services

SIC Code(s)	Description
64	Financial service activities, except insurance and pension funding
65	Insurance, reinsurance and pension funding, except compulsory social security
66	Activities auxiliary to financial services and insurance activities

Professional services

SIC Code(s)	Description
68	Real estate activities
69	Legal and accounting activities
70	Activities of head offices; management consultancy activities
743	Translation and interpretation activities

CULTURAL AND CREATIVE

Creative industries

SIC Code(s)	Description
18	Printing and reproduction of recorded media
58	Publishing activities
59	Motion picture, video and television programme production, sound recording and music publishing activities
60	Programming and broadcasting activities
73	Advertising and market research
90	Creative, arts and entertainment activities
7111	Architectural activities
741	Specialised design activities
742	Photographic activities

Digital

SIC Code(s)	Description
61	Telecommunications
62	Computer programming, consultancy and related activities
63	Information service activities

Sport

SIC Code(s)	Description
93	Sports activities and amusement and recreation activities

Tourism, leisure and culture

SIC Code(s)	Description
55	Accommodation
56	Food and beverage service activities
79	Travel agency, tour operator and other reservation service and related activities
91	Libraries, archives, museums and other cultural activities
92	Gambling and betting activities

SCIENCE AND R&D (EXCLUDING MANUFACTURING)

Science and R&D

SIC Code(s)	Description
72	Scientific research and development
75	Veterinary activities
7120	Technical testing and analysis
749	Other professional, scientific and technical activities n.e.c.

PUBLIC SECTOR

Education

SIC Code(s)	Description
85	Education

Health and social care

SIC Code(s)	Description
86	Human health activities
87	Residential care activities
88	Social work activities without accommodation

Public administration

SIC Code(s)	Description
84	Public administration and defence; compulsory social security