

A One City

Economic Recovery and Renewal Strategy



BRISTOL
ONE CITY

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Foreword

At the beginning of 2020, there were two contrasting aspects to the health of Bristol's economy. We were a diverse, thriving and dynamic city with a young, growing population and internationally recognised strengths in innovative and high value industries, including advanced engineering, the low carbon sector, professional and financial services, and the digital and creative industries. Our hospitality and tourism sector, night time economy and cultural offer attracted people from all over the world, as did our universities, who helped create one of the highest skilled workforces of any city in the UK.

It was also true that our city was being constrained by historic deficiencies in public transport capacity, a housing crisis that risked shutting out many of our essential workers, and pernicious inequalities that left 15% of our residents living in some of the most deprived areas in England. Our air quality had been much too poor for many years, three out of the four worst performing areas in the country for young people going on to higher education were in South Bristol alone, and Bristol's Black and Minority Ethnic communities faced among the country's worst inequalities at work and in education.

These contrasts were evident at the start of the year, and were identified in the One City Plan. The Economy Board was formed in 2019 to help address key priorities, build on our strengths and address our challenges, with goals for the year including implementing Bristol's plan for Making a Living Wage City, using the Ways to Work network to create an inclusive and sustainable plan to help employees under-represented in green jobs transition from high carbon industries, and raising Bristol's profile internationally through digital knowledge exchanges with major world cities.

Since then, the emergence of the COVID-19 pandemic has had a profound impact on our city, as it has on communities across the globe. The pandemic has led to a loss of life, a loss of liberty, and a loss of livelihoods for many people. It has worsened inequalities, with a disproportionate impact on some of our already disadvantaged communities, and it is not over yet. Many of our citizens are worried about their health, the wellbeing of their friends and family, and their jobs and their businesses.



This will not be turned around overnight, and this strategy will not alleviate all those worries. What it does do is present in October 2020 a detailed and comprehensive examination of the impact of the pandemic on three key pillars of our economy – namely; our people and labour market, our business and investment, and our places. It also sets out some emerging priorities for action and collaboration, and starts to identify areas for investment and some mechanisms for delivery.

The strategy does not aim simply to help steer our economy back to where it was at the start of the year, recreating the existing challenges. Instead, it aims to help point and take us towards a renewed economy, which is more sustainable, carbon neutral and is ecologically positive. It aims to build a fair, inclusive, successful and competitive economy that supports growth across our communities. The priorities are closely aligned with the goals of our partners across the West of England, and are measurable against the UN Sustainable Development Goals. The strategy has been informed by an extensive programme of sector and community engagement involving many hundreds of contributors, and we are very grateful to all of them.

The next step is to now develop an Action Plan, setting out how together we will meet these priorities, how much it will cost, when it will be achieved by, and who will need to be involved. Answering these questions will help make this more than just a document, and help further bring the One City Approach to life, but it will take a concerted effort from many different city partners working together. We are convinced that together, the city's economy can be renewed.

James Durie and Craig Cheney
Co-Chairs, Bristol One City Economy Board

Now, more than ever, everything depends on the links we can build between our people, our communities, our businesses and our institutions. This strategy has been enabled by the commitment of One City partners to place-based policy making, civic engagement and city governance.

When crisis hits, there can be a temptation to retreat into silos, for institutions to focus only on their core business – but the route to recovery and renewal mapped out in this Strategy requires every sector to play a part. We will continue to work hard to make it a reality. We know we can't do it alone, and we know we won't have to.

Andrea Dell,
Head of the City Office

It has been a remarkable experience working with the One City Economy Board through the past seven months to understand the shock waves the pandemic has sent through the city, its people and its economy.

The One City framework has enabled us all to work together and to develop a coherent, inclusive, sustainable and innovative approach to recovery and renewal. Bristol can and will be a better place for that work.

Professor Guy Orpen,
Deputy Vice-Chancellor (New Campus Development), University of Bristol

Through this plan, Bristol is setting an ambitious goal to lead on creating a more equitable and just economy for all.

It highlights priorities that will help us emerge as a city with quality jobs, investment in social infrastructure and resilience in environmental sustainability. This pandemic has highlighted inequalities and shone a light on the industries and people whom we rely on in crisis. The strategy is an opportunity for us all to work together and make things right.

Zara Nanu,
CEO, Gapsquare

2020 has been a year which has delivered unprecedented challenges, but it has also been the impetus for enormous change and a catalyst for us to work better as a community to create the type of place we can all be proud of.

The One City Approach has been a great way for us, as representatives of the tech sector, to feed into a strategy designed to build a better, more inclusive, city in the future. The digital economy has an enormous amount to offer and Bristol is already recognised across Europe for its tech community. This work will be the next step in ensuring we lever this strength and offer opportunities to people and businesses across the city.

Ben Shorrock,
Managing Director, Techspark

This Economic Recovery Strategy places inclusive economic development at its core by catalysing inclusion to implement a shared agenda that expands opportunity.

Recovery must include the voices of those too often left out of the design of initiatives developed to help them. To truly build community resilience, reduce income inequality and ultimately achieve any Sustainable Development Goals, community voice must be at the centre of any meaningful recovery strategy to enable these lived experiences to move beyond just being a powerful story, but actually affect real change.

Sado Jirde, Director,
Black South West Network

This year COVID-19 has further exposed social and economic challenges and their unequal distribution across Bristol. It has also created new pressures, even reaching into spaces that were thriving, and questioned our resilience. The economic crisis we have experienced in 2020 is not over yet, and we must acknowledge the damage that has been caused, and prepare for the loss that is still to come. But we hope that this also contains an opportunity for Bristol to build back better together.

This strategy sets us on the path not just to a recovery, but to a values led economic renewal that focusses the city's collective energy on tackling inequality; building a fair, healthy and sustainable city. A city of hope and aspiration, where everyone can share in its success.

Our work over the last few years setting up the One City Approach has meant we now have a governance structure and a culture of leadership in our key institutions, to enable us to make the most out of our strengths. These new ways of working have been put to test during the pandemic, and proved invaluable. We have used these principles in designing and collaborating on this strategy, bringing together organisations to be involved and ambitious about the aims we share for our recovery.

We are well placed to make it through these challenges, and recover and renew our economy, thanks to Bristol's greatest assets – our people and their communities and values.



Marvin Rees,
Mayor of Bristol

Executive Summary

The impact of the COVID-19 pandemic on Bristol has seen major changes and upheaval, at an unprecedented speed, across every aspect of our lives. The impact has been far reaching, from health and family, education and skills, culture and society, our city's places and the environment, and our economy, across businesses, investment and jobs. We know that much of the impact has been unequally distributed across our communities, and many who have been most negatively impacted are those who have already been disadvantaged by the systemic inequality in our society.

The One City Economic Recovery and Renewal Strategy has been produced with input from a wide range of institutions, organisations and individuals in Bristol, and begins to set out our priorities for recovering and renewing the city's economy in the context of sustainable development. While its scope is economic, its aims are broad, and it contains a detailed analysis of the impact to-date on our people, our businesses and our places, as well as setting out priorities which

will later form a comprehensive action plan for the city.

Our overarching priorities, in line with the earlier Statement of Intent, are:

- to seek to reduce poverty and inequality;
- to increase the city's resilience and environmental sustainability; and
- to enhance the economic and social wellbeing of every community.

To meet these goals we must both reduce social inequalities to levels much lower than before the pandemic, and take significant action on the environment; so our goal is to renew the city's economy, not just to recover to the position we were in at the beginning of the year. We are not alone in this challenge, and we will build on the work of many others around the globe. The framework set out by the United Nations Sustainable Development Goals (or SDGs, and also known as the Global Goals) will help us to put the principles of social inclusion and environmental sustainability at the heart of recovery planning, and this strategy is aligned with, and will be measured against the SDGs.



The strategy is built around three pillars, with priority areas for response and recovery identified within each pillar. A detailed analysis of the evidence and context for each pillar is also set out. Inclusion and sustainability are at the heart of all three pillars.

People and labour markets

Priorities include:

- protecting employment levels
- building skills and improving pathways to work for young people and groups disadvantaged in the labour market
- creating opportunities for better employment, particularly in green industries.



Business and investment

Priorities include:

- supporting businesses to recover from the crisis
- promoting digital innovation
- investment in low carbon technology and practices
- attracting the location of new and established businesses into the region.



Bristol's places

Priorities include:

- enabling development to ensure provision for future homes, jobs and quality places
- improving connectivity and the protection and enhancement of green space
- protecting and enhancing the viability of high streets and local centres
- targeting place based intervention on areas with communities experiencing long term deprivation



What the Strategy Is and Is Not

The strategy is...

- The first phase of an iterative process
- Based on the most recent evidence and data available
- An attempt to set emerging strategic priorities for action and collaboration
- A tool to identify areas for investment and some mechanisms for delivery
- The result of a One City Approach

The strategy is not...

- Set in stone
- Able to predict the course of the pandemic or its future impact
- A fully comprehensive and costed delivery plan
- Intended to take us back to where we were before
- Meant to override existing recovery work among our businesses, organisations and communities

Introduction

Bristol has created one of the most vibrant and successful economies in the UK. Nationally, among the Core Cities, Bristol has experienced sustained growth in both population and economic scale and has the highest productivity levels per capita, employment and qualification rates of the major cities. Within the West of England, Bristol is the primary economic centre with nearly half of all the jobs (44.8%) and enterprises (40.1%). But more than this, it is a creative and educational powerhouse with a vital, diverse and proudly Bristolian population.

The economic impact of COVID-19 has been an unprecedented shock for Bristol, as for all cities around the world. While the diverse and high skilled economy of the city has provided some protection for our key industries and employment, in common with other major cities in the UK, Bristol is working through the full implications for business and for residents. We have seen large scale closure of retail, cultural and hospitality sectors, major reductions in economic output and, as of the end of July 2020, Bristol has reacted quickly to the crisis of COVID-19, using our strong networks and partnerships to share intelligence and plan necessary interventions. The track record of co-ordinated action in the city has provided a firm foundation for collective action.



Our city's immediate response

Prior to COVID-19, One City partners and leaders were working together to make Bristol a fair, healthy and sustainable place. A city of hope and aspiration, where everyone can share in its success. This vision has never been more relevant. Working in partnership has underpinned the response to date as we sought to amplify and add to the support made available from central government.

The role of communications in a crisis and engaging with the people and businesses impacted by COVID-19 was an immediate priority and engagement across media was immediately utilised; frequent communications with citizens and businesses, business webinars, business surveys, social media, press releases, social Q&A's with city partners, local radio and press helped us to share critical information during lockdown.

This continued to be the case as businesses began to re-open and there was a need to communicate what Covid-secure meant. Direct access and engagement with critical

services such as public health and regulatory teams ensured businesses had access to guidance and support to re-open safely and build employee and customer confidence.

This engagement led to the creation of city specific communications around retail, leisure, hospitality and events guidance. This included the ability to request support to develop outdoor hospitality for venues such as Little French, which received national media coverage.

Bristol City Council also supported the city's central Business Improvement District and Destination Bristol with European Funding as they developed their '[Bristol Together](#)' campaign. This aimed to highlight the need for community cohesion and public health considerations, while also supporting a safe return to the high street. Recent data¹ has indicated that Bristol is the city with the least impacted footfall for city high streets. Businesses have further been supported by utilising central government support via Eat Out to Help Out, and some Bristol businesses will continue to promote their own incentives for customers.



1: <https://www.theguardian.com/business/2020/sep/04/government-must-do-more-to-get-public-back-into-shops-say-retailers>

Of course not everyone was able to return to work immediately, and part of the efforts in keeping Bristol safe were to communicate key developments of government support such as the Job Retention Scheme (with 69,500 jobs furloughed at the end of July 2020) and the Job Retention Bonus. By far the greatest effort in utilising government support, were the awards of the COVID-19 business grants. Almost 7,400 businesses were supported with over £93.8m from the core Small Business Grants and Retail, Leisure and Hospitality Grant.

Almost 1,200 organisations were also given over £4.7m of support via the Discretionary Grants Fund which was delivered in collaboration with local unitary authorities and Business West to maximise help across the region. Businesses supported were diverse and included restaurants, community groups and charitable shops.

A COVID-19 Emergency Business Resilience Support programme was developed to support micro business and delivered through YTKO. Over the course of April to August 2020 a website, dedicated helpline and email support were delivered by a team of expert

advisors who supported approximately 430 businesses. One out of three of these was from the culture and creative sector and other key sectors include health and social care, hospitality and retail/wholesale.

Recognising the disproportionate impact of COVID-19 on Black, Asian and Minority Ethnic communities and the high proportion of Black, Asian and Minority Ethnic led businesses in sectors hardest hit by the crisis, Black South West Network have launched a targeted support programme to help over 300 Black, Asian and Minority Ethnic led organisations.

There remains a lot to review and learn from the interventions during the first wave of COVID-19 and some of the initial analysis has directly informed the subsequent next stages of the city's strategic approach; such as guidance for the outdoor events sector and local outbreak management planning. However, it is without doubt that working in collaboration with businesses and partners across the city was, and will continue to be, a key strength and foundation of Bristol's long-term economic response and recovery.



Statement of Intent

In June 2020 we published an Economic Renewal Statement of Intent that set out the city's roadmap to recovery: addressing the emergency needs of our economy and setting out the principles of building back better.

The statement of intent highlighted the key areas of risk for Bristol's businesses, residents and VCSE sector, to protect the long-term viability of our economy and the structures and networks distinct to our city. We also recognised the priority to gear our action toward the communities and places, Black, Asian and Minority Ethnic residents and businesses, young people and adults that will be disproportionately affected by the crisis and the recession that will inevitably follow. Our actions were for Bristol, but contributed to our wider commitments to making Bristol carbon neutral and climate resilient by 2030 and addressing the ecological emergency, equality of access and opportunity, and to the delivery of the UN Sustainable Development Goals:

- seek to reduce poverty and inequality;
- increase the city's resilience and environmental sustainability; and
- enhance the economic and social wellbeing of every community.

This strategy is the next step in developing our response to the pandemic: resetting our goals towards a healthy, open, productive, equal, resilient and sustainable city, growing back a regenerative not a destructive economy. It brings together available evidence on how COVID-19 has impacted Bristol's labour market, businesses and places and identifies a series of priority actions and interventions. These will need to be tested through open discussions with partners and the community, but are fully dependent on collective commitment and action to build a better Bristol.

As the primary economic centre of the region, Bristol contributes to and benefits from the success of the West of England.



For many of our priorities on skills, employment, sector development and infrastructure it makes sense to locate action within the wider context articulated in the Local Industrial Strategy, recognising the shared labour market, supply chains and transport and digital connections that run through Bristol into the region.

Alongside the West of England Combined Authority, Bristol is committed to action that prevents a widening of inequality in our region and works with businesses and the community to learn from the pandemic and rebuild resilience. COVID-19 has highlighted and accelerated longer term trends that have led to widening gaps in access to opportunity and reductions in the quality and returns from work.

Aligned with the West of England recovery priorities, Bristol is focused on:

- **People and labour markets** – protecting employment levels, building skills and improving pathways to work for young people and groups disadvantaged in the labour market, creating opportunities for better employment particularly in green industries;
- **Business and investment** – supporting businesses to recover from the crisis, while promoting digital innovation, investment in low carbon technology and practices and attracting the location of new and established businesses into the region; and
- **Place** – enabling development to ensure provision for future homes, jobs and quality places, improving connectivity and the protection of green spaces, focusing on areas with communities experiencing long term deprivation.



Strategy Development

This strategy has been steered by the Bristol One City Economy Board, and builds on the Statement of Intent published in June 2020. It features statistical analysis and survey data from a wide range of sources, and we will continue to refine the strategy through discussion with city partners and with the community and it will be translated into a delivery plan. Building on the action already underway, further investment will be made, drawing together both public and private sector resources, to delivering the aspirations and priorities set out in this strategy.

This strategy has benefited from our collaboration and partnership with the West of England Combined Authority (WECA), and is closely aligned to the goals identified in the WECA Recovery Plan of strengthening inclusion, getting residents back to work, rebuilding business, supporting green recovery, and renewing places. The city is also part of the Western Gateway strategic partnership, and Bristol will continue to work with partners across the wider region to progress opportunities for investment in sustainable and inclusive economic growth.

Looking forward the strategy will be refreshed over the next six months (aligned to the One City Plan refresh in March 2021) taking account of the ongoing economic impact of the pandemic on the city. This will include at a national level an update on the government's plans to protect jobs, further plans for devolution and place based economic recovery and preparing for Brexit.

The national policy context is changing rapidly, with for example the National Industrial Strategy likely to be refreshed, and the Action Plan for this strategy will help to identify opportunities for Bristol organisations to access economic stimulus and funding, and present a coordinated and Bristol-focused approach. At a city-wide level, new emerging priorities will also need to be reflected, including the VCSE strategy development and comprehensive citizen engagement underway through Your City Our Future, and issues around mental health and digital exclusion will need further exploration.

The Action Plan will also set out details outside the scope of this strategy, including prioritising actions and exploring funding requirements and resourcing opportunities, as well as looking to identify delivery timescales and project leads for each action.

Outcome Framework – UN SDGs

The Sustainable Development Goals (SDGs) are a collection of 17 global goals designed to be a "blueprint to achieve a better and more sustainable future for all". The 17 goals are broad and interdependent underpinned by a list of targets and measures.

Following an initial review, the following sections set out how the strategic priorities for action under each theme align to the sustainable development goals – both directly and indirectly.



1: People and Labour Market

Our Priorities for Response and Recovery

Our strategic priorities for people and the labour market in Bristol are focussed on protecting employment levels, building skills and improving pathways to work for young people and groups disadvantaged in the labour market, and creating opportunities for better employment.

The recommended Response and Recovery interventions and actions for the city are set out below, based on the evidence and context detailed in the next section, and informed by expertise from city partners and stakeholders. These actions are aimed at addressing one of the most visible effects of COVID-19 on the economy – the devastating impact on jobs and the wider labour market. There has been an unprecedented closure of a majority of retail, hospitality and cultural businesses across the country. All other sectors of employment have also been affected, with

particular impact on education providers, the construction sector, advanced engineering and business administration firms, as social distancing has made normal operations impossible or where demand for goods and services has reduced.

Analysis has been undertaken on the emerging impact on Bristol's labour market with particular regard to the differing impacts on young people, low skilled adults, older workers, low income families, women, Black, Asian and Minority Ethnic communities and disabled people, and includes an assessment of the longer term prospects for growth.

These priority actions seek to reduce poverty and inequality, increase the city's resilience and environmental sustainability, and to enhance the economic and social wellbeing of every community.



Priorities for response and recovery:

Respond to rising unemployment

- Improve job retention by supporting employers to bring workers back from furlough – provide assistance to micro businesses in high risk retail and hospitality sectors. **SDG: 8.3, 8.5**
- Work in partnership to develop and deliver regional redundancy programmes to maximise support for local residents, joining up local support and referral mechanisms. **SDG: 1.4, 17.7**
- Recognise the role of trade unions and Unionlearn in representing workers under threat of redundancy and in supporting their skill needs. **SDG: 8.5, 8.6**
- Develop a local 'One Front Door' and job matching service through Ways2Work in partnership with DWP and local providers to match unemployed people facing the greatest risks and challenges with work placements, apprenticeships and job vacancies in the city; and work to support higher access of Black, Asian and Minority Ethnic people to these programmes. **SDG: 8.5, 8.6**
- Retain jobs in the creative and culture sector through leveraging a range of government funding to provide business support and redesign business models and practices, including exploring the possibility of the new One City Culture Board leading a sector consortia to centralise and coordinate bids for funding. **SDG: 8.9, 11.4**
- Grow jobs in the green economy including low carbon sector such as renewables installation, sustainable architecture, buildings retrofitting, communications and engagement on sustainability, ecology and climate action. **SDG: 4.7, 7.1, 7.2, 7.3, 8.3, 8.4, 9.1, 9.4, 11.3, 11.6, 11.7, 12.6, 12.8, 13.2, 13.3, 15.9**

- Boost access to welfare advice and debt advice through the One Front Door approach. **SDG: 11.4, 16.6**
- Ensure adequate and affordable childcare provision to ensure both men and women can stay in work. **SDG: 5.4, 8.5**

**Increase access to employment support services**

- Develop place focused initiatives through community hubs, concentrating engagement in deprived areas with existing poor transition routes. **SDG: 1.2, 8.5, 10.2, 10.3, 16.6**
- Build on targeted community engagement, working with key partners through existing Black, Asian and Minority Ethnic network groups and building capacity within the VCSE sector to ensure that groups facing the most complex barriers can get the support they need to improve their employment and skills. **SDG: 1.2, 4.4, 8.5, 10.2, 10.3, 17.17**
- Embed service delivery models which are dynamic and flexible to respond to emerging needs as the socio-economic impact of COVID-19 evolves. **SDG: 16.6**



Priorities for response and recovery:

Boost support for young people

- As part of the regional Careers Hub through Bristol Works, boost experience of work and careers Information, advice and guidance for young people most at risk of disengaging from education, training and employment as a result of lockdown measures. **SDG: 4.1, 4.4, 5.4, 8.6**
- Tackle the emerging education gap through the Realising Talent Pre-NEET programme with a focus on disadvantaged young people. **SDG: 4.1, 4.5, 8.6**
- Deliver a responsive and targeted post 16 offer which addresses the increase in young people NEET through a collaborative planning approach with providers. **SDG: 4.3, 8.6**
- Maximise youth employment opportunities through local co-ordination and support for paid work experience – tailoring the recently announced Kickstart and traineeship scheme. **SDG: 4.3, 8.6**
- Work with partners to monitor such schemes to ensure they meet expectations and offer good quality outcomes for young people. **SDG: 8.6, 10.2, 10.3**
- Ensure there is specialist employment and training support available for those young people facing more complex barriers e.g. careleavers; young people with SEND; young parents; and that consideration is given to fairness and skills gaps across demographic groups. **SDG: 4.3, 4.5, 8.5, 8.6, 10.2, 10.3**
- Engage young people in volunteering across a range of sectors including low carbon and the environment, to extend the reach of VCSE organisations and build on the level of community engagement and mutual aid groups established since COVID-19, by supporting the growth of existing community organisations the establishment of new mutual aid groups. **SDG: 17.7**

Investment to address the digital divide

- Improve digital connectivity in deprived areas to enable access to skills, employment and local services – including free broadband hotspots and distribution of digital hardware. **SDG: 9.1, 10.2, 10.3**
- Increase local provision of digital skills training and support including upskilling for employees in sectors where technological changes are impacting on skills requirements. **SDG: 4.4**
- Work with Unionlearn to support trade union initiatives to encourage and support employees and their access to digital learning opportunities. **SDG: 4.4**
- Develop local learning hubs which can be supported through multiple delivery partners. **SDG: 1.4, 17.17**
- Ensure there are strong links and digital skills pathways for local learners to access opportunities available through regional programmes such as DETI (Digital Engineering Technology and Innovation) and WIDJET (Women into Digital Jobs, Education and Training). **SDG: 4.4, 5**
- Support the joining up of provision, at all levels of education and for all ages and backgrounds, for transferring expertise and experience in increasingly digitalised post-COVID-19 workplaces. **SDG: 4.4**



Priorities for response and recovery:

Work with employers to support inclusive growth and improve the quality of work

- Address in-work poverty in priority sectors through the city's Living Wage Initiative, engaging businesses and promoting Living Wage Accreditation through campaigns and providing support through peer networks, including employers who receive Living Wage Accreditation. **SDG: 1.2, 8.5, 10.1**
- Work with partners and WECA to develop good employer standards, challenge exploitation and highlight best practice, and support take-up of the City's Charters for employers, including in the key sectors of health and care. **SDG: 8.5, 17.17**
- Work with trade unions and employers to improve terms, pay and training opportunities for care sector workers. **SDG: 4.4, 8.5**
- Work with employers to support women into jobs and career development through high quality part time roles and embedding flexible working practice. **SDG: 5.5**
- Develop a city wide approach to increasing provision of affordable community and workplace based childcare provision and improve pay and conditions in the childcare sector. **SDG 5.4**
- Work with key industry sectors and business leaders to address under-representation of Black, Asian and Minority Ethnic employees and disabled people through inclusive recruitment practice and monitoring workforce data, and funding greater involvement of representatives of these communities in key policy areas such as environmental sustainability interventions. **SDG: 8.5, 10.2, 10.3**

Improve the apprenticeship offer

- Develop a range of pre-apprenticeship programmes for Black, Asian and Minority Ethnic and other young people and adults who are under-represented in key sectors. **SDG: 4.4, 8.6**
- Develop a One City Apprenticeship scheme that can support diverse recruitment across public, private and SME employers. **SDG: 8.6, 10.2, 17.7**
- Expand apprenticeships in the construction sector through a Building Bristol partnership, with improved co-ordination across capital programmes and green projects developed to support carbon neutrality and biodiversity net gain goals. **SDG: 8.6, 9.4, 12.2, 13.2**
- Accelerate and promote levy sharing with SMEs and push for devolution of apprenticeship levy funding, working together with the Apprenticeship Hub at a regional level. **SDG: 4.4, 8.6**



Priorities for response and recovery:

Vocational training and skills pathways to sustainable careers

- Explore options to tailor delivery of the Adult Education Budget to at risk workers in retail and hospitality sectors.

SDG: 4.3

- Improve skills pathways into growing health and social care careers including in-work training.

SDG: 4.3, 4.4, 9.4, 13.2

- Support creative talent by breaking down barriers to entry to the creative economy for those from under-represented groups in the sector through partnerships with UWE, Rising Arts Agency, Accentuate and other partners.

SDG: 10.2, 10.3

- Use public procurement to increase employment and training provision in green infrastructure and natural solution schemes and support retraining in other green job sectors including training for gas central heating engineers to become renewable energy heating engineers.

SDG: 12.6, 12.7, 12.8

- Build on Bristol WORKS to expand experience of work opportunities for priority groups of young people and adults.

SDG: 4.4, 8.6

- Develop vocational and career pathways to increase the diversity and address skills gaps in childcare and education sectors.

SDG: 4.3, 4.4, 4.5

- Expand and co-design career related ESOL pathways with experience of work, vocational training and language support for residents with English as a second language.

SDG: 4.6, 10.2, 10.3

- Use public procurement to increase employment and training provision in green infrastructure schemes.

SDG: 12.6, 12.7, 12.8

- Establish a Bristol Strategic Employment and Skills Advisory Group, reporting to the One City Economy Board, to oversee local service planning and to address critical issues as they arise.

SDG: 17.7

- Work to build skills pathways into sustainable careers for all our communities, including helping to address gender and ethnicity pay gaps by tackling barriers that lead to occupational segregation.

SDG: 4.4, 4.5, 5.5, 8.5, 10.2, 10.3



Indirectly related SDG targets

SDG: 2.1

SDG: 3.3, 3.4

SDG: 4.1, 4.2, 4.5

SDG: 7.2, 7.3

SDG: 8.1, 8.2, 8.9

SDG: 10

SDG: 11.1

SDG: 12.2, 12.4, 12.5,

SDG: 13,

SDG: 14

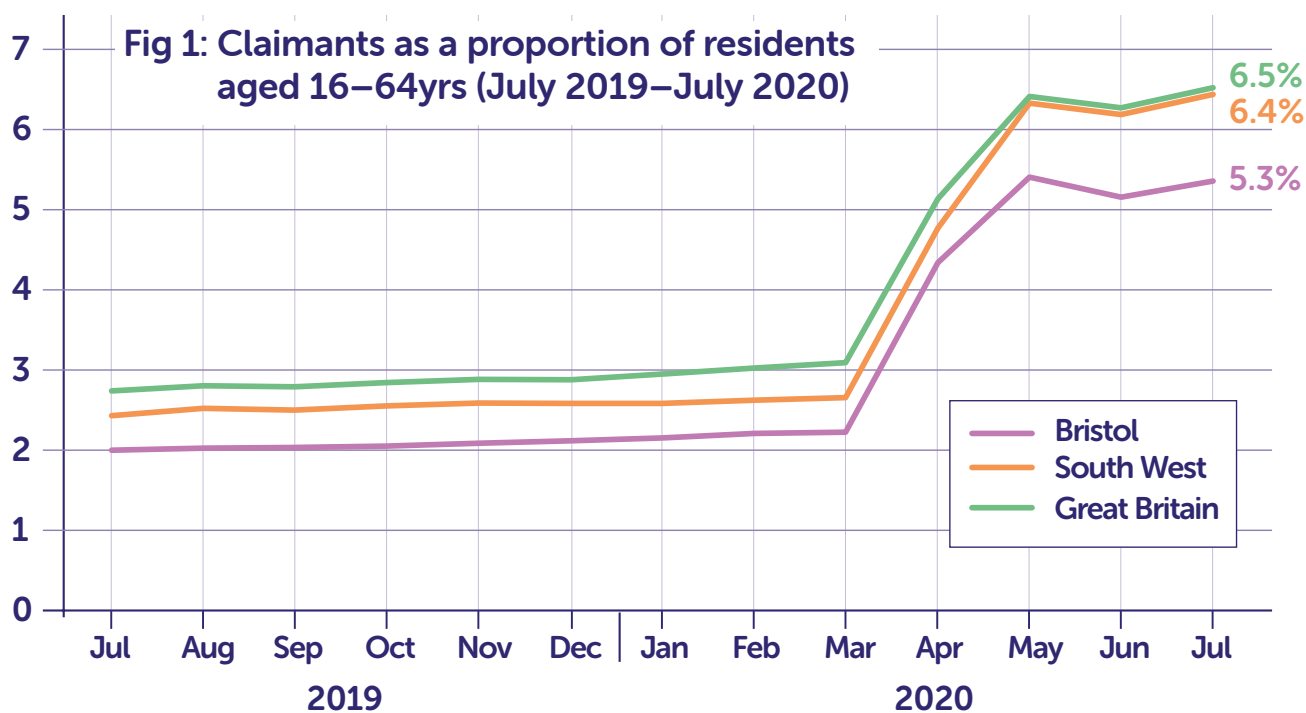
SDG: 15



Evidence and Context

On 12th August 2020, the UK officially entered a recession with a fall in GDP of 20.4% (the greatest fall on record) and the Bank of England forecasting national unemployment levels to reach 7.5% by the end of the year. Forecasts¹ suggest that Bristol will experience a severe recession in 2020, with the economy contracting and the loss of some 8,000 jobs, this impact will no doubt have a wider ripple effect across the South West as the city is the primary economic centre in the region.

The full impact is starting to emerge with announcements by major local employers including Airbus, John Lewis, Rolls Royce, Nisbets, GKN Aerospace and high street chains including Debenhams and M&Co². The cumulative effect of small business closures and reduction in headcount is also having an impact, particularly due to the economic structure of the city and high proportion of small and medium size businesses. This is evident in the steep rise in the unemployed claimant count, which has increased by 12,020 claimants (59%) over the period March to July 2020³.



However, with some 69,500 jobs furloughed (30% of eligible employment)⁴ at the end of July 2020, and a rise in furloughed employment of over 32% from the end of May, there is a high risk of a further large scale jump in unemployment, when government support programmes end. A Business West survey shows that 37% of firms are looking to reduce labour costs, even if they are accessing the national furlough scheme. 26% of businesses responding to a Bristol City

Council survey between April and May 2020 confirmed that they were adapting operations through the furlough of staff, qualitative responses indicating that the furlough scheme had significantly cushioned the impact of the pandemic⁵. Some business had both laid off staff and utilised the furlough scheme, with larger and medium-sized firms taking advantage of scheme, however micro and small businesses indicating less success retaining staff.

1: Oxford Economics (2020) Coronavirus: Economic Impact Scenarios for Bristol. Oxford Economics

2: www.bristolpost.co.uk/news/jobs/major-employers-making-redundancies-2020-4288715

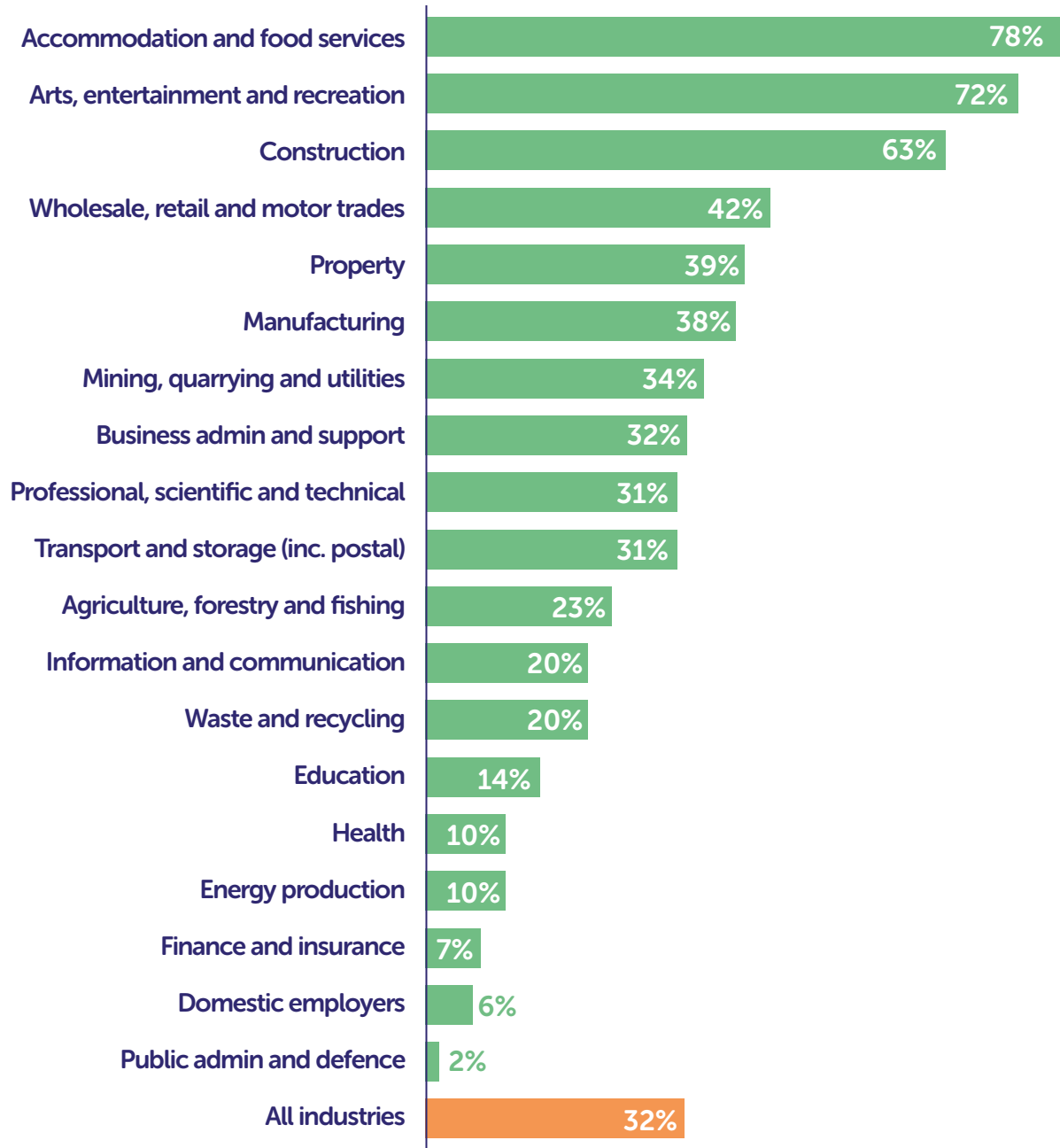
3: ONS Claimant Count, accessed 21 August 2020.

4: [ONS Coronavirus Job Retention Scheme statistics: July 2020](https://www.ons.gov.uk/economy/employmentandunemployment/articles/coronavirusjobretentionscheme/2020-07-01).

5: Bristol City Council Business Survey 9th April and 15th May 2020

**Fig 2: Percentage of South West workforce furloughed by industry
(31 July 2020)**

Data available for the South West indicates furlough levels are highest among the accommodation and food sector, arts, entertainment and recreation and construction¹.

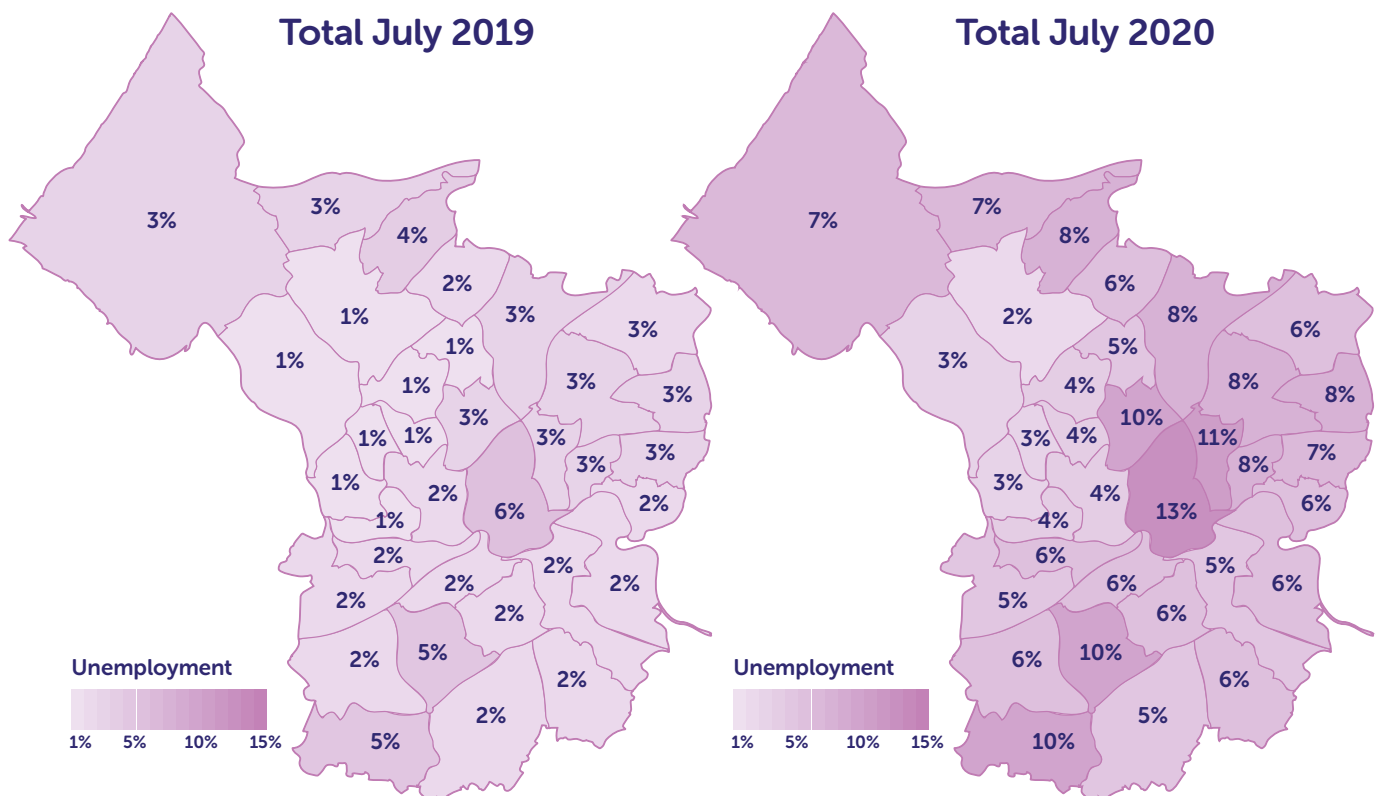


While the pandemic has had a significant impact on employment levels, the effects have been unevenly distributed across sectors and communities in Bristol. Many of the economic consequences of COVID-19 have amplified existing problems and exclusions affecting particular sections of the community.

1: HMRC Coronavirus Job Retention Scheme statistics: August 2020

**Fig 3: Unemployment benefit claimant count at ward level
(percentage working age population)¹**

Claimant count data at ward level shows the increase across all wards in July 20 compared to July 19. There is a clear correlation between wards with highest claimant counts and wards with pockets of highest deprivation in the city – Lawrence Hill in the centre, Filwood, Hartcliffe and Withywood to the south.



In shaping the response to the current crisis, it will be vital to take account of the need to protect employment in the short-term while addressing skills deficits and improving access to jobs and the overall quality of work in the city.

Of particular importance is meeting the needs of the most vulnerable –families already living in persistent poverty and sections of the community with complex barriers to employment including care leavers, disabled people, refugees and asylum seekers who are already disadvantaged in the labour market. Investment in more tailored and intensive support developed through co-design with communities is critical to our success. Work through the council on citizen engagement will support priority groups to have a clearer

voice, defining their needs and supporting the design of services. The city's voluntary and community sector should have a pivotal role in both engagement and delivery, through existing links and services supporting hard to reach groups at a local level.

A key principle of delivering economic recovery in Bristol is to build back better. For jobs and skills this means improving the quality of work through the city's commitment to a living wage, reducing the number of workers earning below the living wage (baseline of 15.2% in 2019)²; and reducing the proportion of residents reliant on insecure work (6.8% in 2019)³ and increased investment in workplace training (just 39.5% of West of England firms have a dedicated training budget).⁴

1: www.nomisweb.co.uk Accessed 11 August 20

2: One City Living Wage application

3: ONS Annual Population Survey 2019 Accessed 15 July 2020

4: [Business West Skills \(2018\) Business Skills and Training Survey.](#)

The real Living Wage movement is built on a platform of shared values, seeking to address in-work poverty whilst benefiting businesses through higher staff retention and productivity. Bristol Living Wage City initiative achieved national recognition in December 2019, with an ambitious three year sector-based programme to engage and support businesses to become Living Wage employers. Following a strong start at the beginning of 2020 with five employers newly accredited by the end of March, the rate slowed over the next few months as a result of lockdown measures and the significant challenges experienced by businesses.

The initiative has now regained momentum and by August the Living Wage Foundation reported 11 newly accredited employers in Bristol, employing over 3,500 staff who will join the growing network of Living Wage employers in the city. Over the next two years Bristol Living Wage City will build on this success, galvanising support from both public and private partners who will bring expertise to address in work poverty.

The recession and expected job losses as a result of COVID-19 are also of great concern from a public health perspective, particularly with regard to those communities already disproportionately affected by the virus. There is a strong association between areas of economic deprivation and lower life expectancy; in Bristol, the gap in life expectancy between the most deprived and least deprived groups is currently 9.6 years for men and 7.1 years for women. This gap has not shown any clear signs of reducing over recent years.¹

Employment is a key determinant of health; unemployment is associated with an increased risk of long term conditions, cardiovascular disease, poor mental health and suicide, and unhealthy behaviours. For those in employment, there is evidence showing that good working conditions have a positive impact on health, and in turn on productivity. A workforce with healthy employees is three times more productive than those in poor health. Conversely, the costs of sickness absence, lost productivity through worklessness and health-related productivity losses in England are huge, estimated to be over £100bn annually.²

For work to support health it should pay fairly, ensure good working conditions, enable a good work life balance, and provide training and opportunities.

A central part of building back better is to secure the maximum benefits from a transition to a green economy. With accelerated investment in energy efficiency initiatives, environmental improvements, low emission vehicles and growing global markets for renewable energy and waste reduction, green skills and employment are an important foundation for skilled jobs. Working with employers and shaping public procurement provides an important opportunity to both build momentum for recovery and create the jobs for a sustainable future. Research for Bristol City Council estimates that investment in decarbonisation of our buildings and travel would generate approximately 10,000 jobs for the next decade.

The following sections draw together available data of COVID-19 on sections of the community disproportionately affected or at heightened risk of exclusion, highlighting both immediate consequences and longer-term challenges.

1: [Bristol City Council \(2019\) JSNA Life Expectancy.](#)

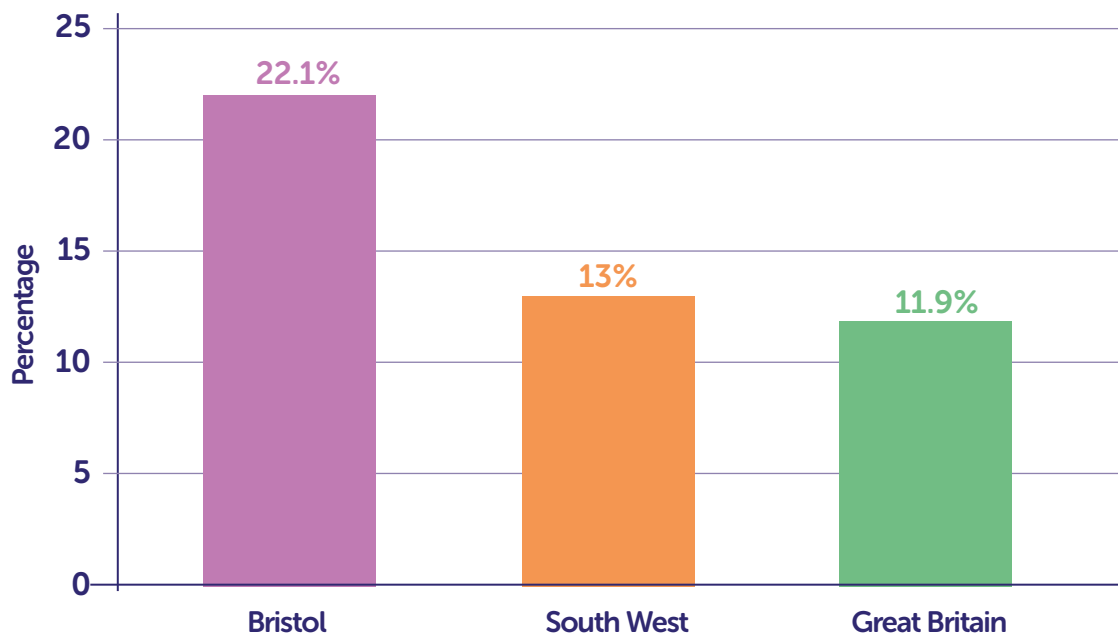
2: [Local Government Association and Public Health England \(2016\) Health, work and health related worklessness.](#)

3: www.bristolonecity.com/wp-content/uploads/2020/02/Bristol-net-zero-for-direct-emissions.pdf

1.1 Young People

Bristol's population of young people is a major asset for the city. Adding vibrancy and strengthening the labour pool, the high proportion of young people reflects the attractiveness of the city as a place to study, to live and work. Over one third (34.2%) of the population is aged under 24 years and over one in five (22.1%) are aged between 20 and 29 – nearly double the rate of the national average (figure 4)¹.

Fig 4: Proportion of Residents aged 20–29, 2019



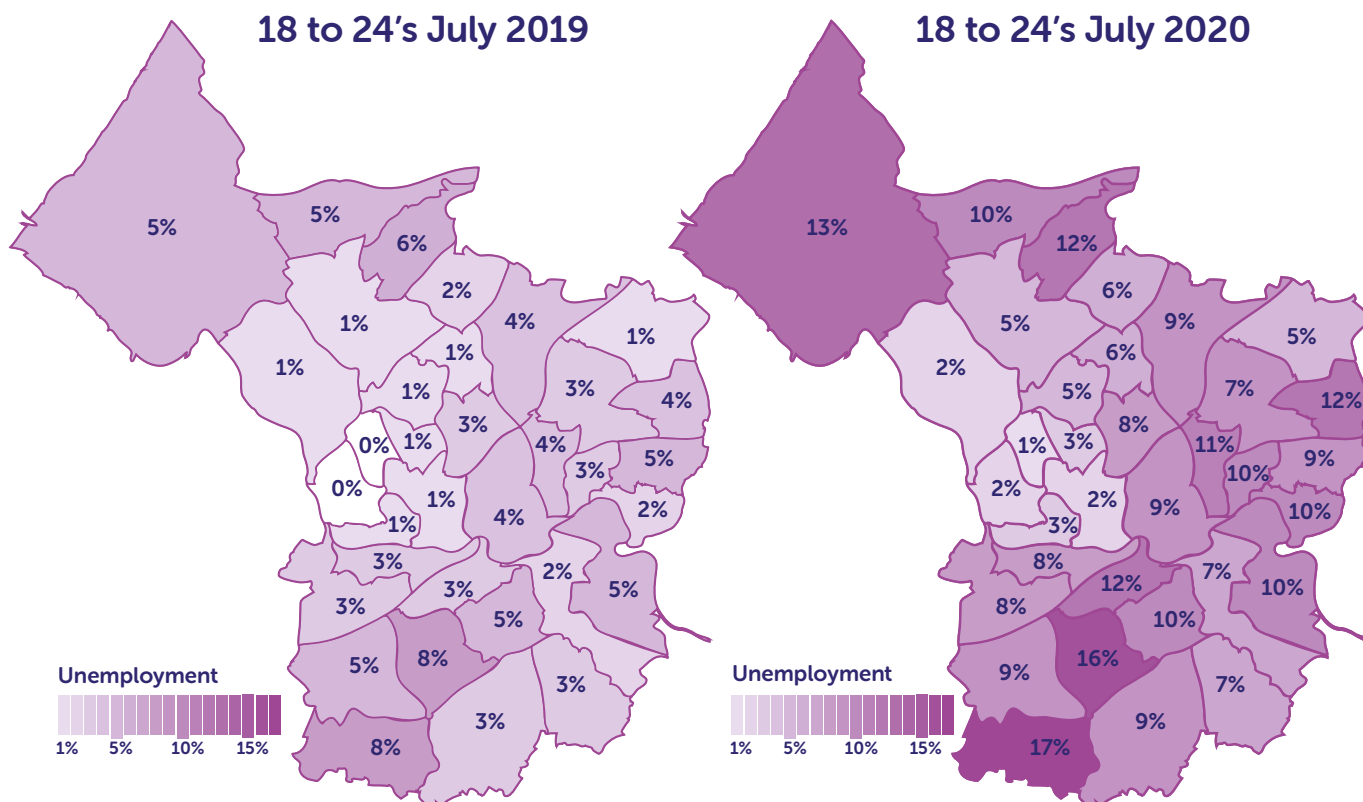
While the young population is a major benefit to Bristol's economy, young people aged 16–24, have been disproportionately affected by COVID-19. National data shows a significantly higher rate of furlough (44% of eligible employment) among 16–24 year olds than for all ages (31%).



1: www.nomisweb.co.uk Accessed 11 August 20

Fig 5: Unemployment benefit claimant count at ward level (% 18–24yrs)¹

Claimant count data at ward level shows the increase and distribution across the city of 18–24 year olds claiming unemployment benefits (as a % of 18–24yrs population).



Three issues have been particularly significant for young people.

- Disengagement from education, training and employment** – young people have experienced significant disruption in their education and training, including a loss of learning, career development and transition support – including into post 16 and post 19 opportunities. It is anticipated that Bristol will see a high increase in the level of NEET young people in the 2020/2021 academic year. It is also anticipated that there could be a widening of educational attainment for young people from the most disadvantaged communities.
- Sectors of employment** – young people are concentrated in retail, hospitality and food sector employment; areas of the economy most affected by the lockdown. In Bristol, around 40% of young people in employment work in these industries, double the rate for all ages². With large numbers of businesses reporting a loss of half of their turnover (37.3% of retail and wholesale and 61.5% of accommodation and food services)³, there is expected to be ongoing job loss. Estimates for the retail sector in Bristol suggest a loss of 1,600 jobs during 2020⁴.

1: www.nomisweb.co.uk Accessed 11 August 20

2: ONS Census of Population, 2011. Accessed 15 July 2020

3: ONS Business Impact of COVID-19 Survey – May 2020

4: Oxford Economics (2020) Coronavirus: Economic Impact Scenarios for Bristol. Oxford Economics

- **Insecurity of employment** – linked to sectors of employment, a high proportion of young people are working with casual, zero hours or temporary contracts. Within a longer-term pattern in Bristol showing an increase in insecure work from 5% of employment in 2010 to 6.8% in 2019¹, national research shows that 44% of workers in casual employment were aged 18–24². Young workers, during the pandemic, have lost their main job at three times the rate of workers of all ages³.

The immediate challenge is to target young workers to provide support and employment advice to those that have lost jobs or are at risk of unemployment. With falling levels of vacancies in Bristol and ongoing uncertainty in the retail, hospitality and food sectors, there will be elevated competition for jobs.

Assistance to retrain or access sectors of employment less affected by the pandemic will be important to prevent growing levels of youth unemployment. A key part of the response must be expanding the capacity of existing support services and tailoring national programmes to prevent a loss of pathways into skilled employment.

Working in partnership with businesses and employers across the city to create opportunities for young people through meaningful work experience, work placements, traineeships and apprenticeships will be vital to re-establishing transition pathways to work. Government support through the Kick Start Scheme and Apprenticeship Levy will be key mechanisms for achieving this.



1: ONS Annual Population Survey 2019. Accessed 15 July 2020

2: [TUC \(2018\) Living on the Edge.](#)

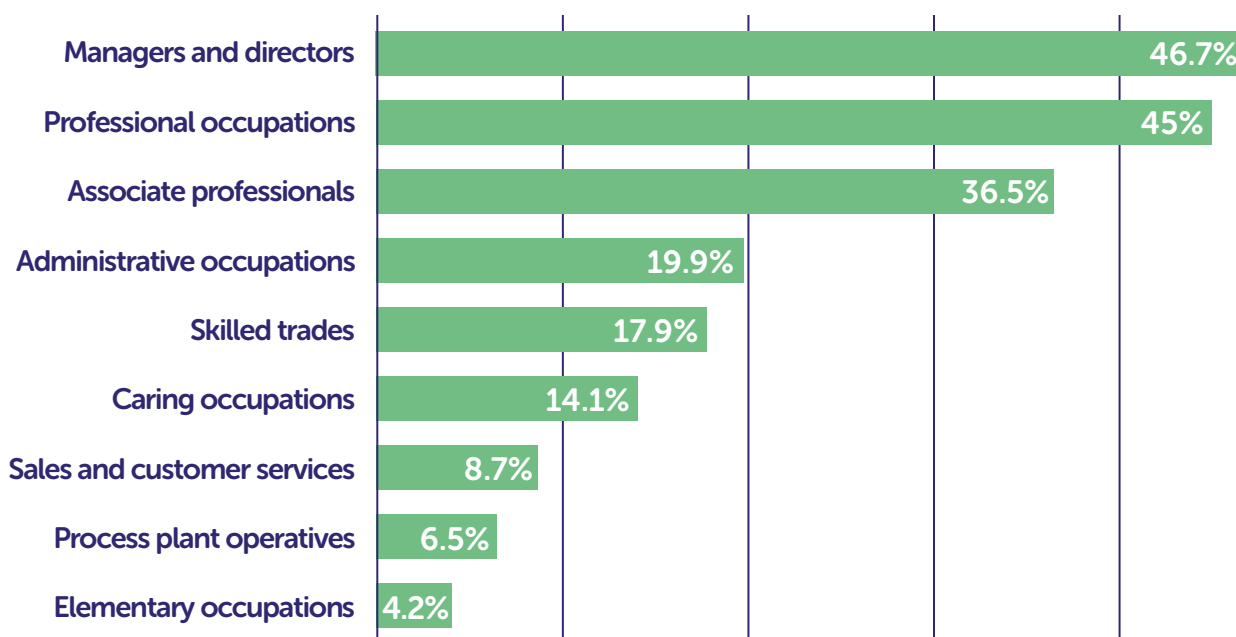
3: [Resolution Foundation \(2020\) Young Workers in the Coronavirus Crisis.](#)

1.2 Low Skilled Adults

Skills and qualifications are a vitally important currency for employment. Bristol has a high proportion of residents with level 4+ qualifications when compared to both the Core Cities and national average, at 51%. However, the city also has around one in six adults (15.8%) with level 1 or no qualifications.¹ The COVID-19 crisis has underlined the significance of skills and skilled employment as a critical resilience factor.

The implications can be seen in the profile of occupational areas, as a proxy for qualifications, able to change to working from home during the pandemic. As shown in figure 6,² higher skilled workers are more able to change their place of work i.e work from home, and therefore less likely to be furloughed or to have lost income during the pandemic, compared to workers in lower skilled customer facing and manual roles. Applied to Bristol, around one in five workers (20.5%) are employed in manual and customer service roles and less likely to be able to transfer their place of employment.

Fig 6: Ever worked at home, by occupation, UK 2019



With growth in higher skilled managerial and professional occupations in Bristol of 27% between 2009 and 2019,³ it is increasingly important to ensure that residents have the qualifications to effectively compete for and remain in employment. However, for all jobs the pandemic has demonstrated the need for digital skills as a basic requirement for jobs roles and for accessing information and financial support through public schemes.

Closing the digital divide is an important means to address unequal access to training and work. National studies clearly show that digital skills and internet use are closely related to income and employment status and to age.⁴ Results from Bristol's Quality of Life Survey shows that at a city wide level 82% of respondents felt comfortable with using digital services, compared to 72% of respondents from the 10% most deprived areas in Bristol, a ten percentage point gap.⁵

1: ONS Annual Population Survey 2019. Accessed 15 July 2020

2: ONS Coronavirus and homeworking in the UK 2019. Accessed 15 July 2020

3: ONS Annual Population Survey 2019. Accessed 15 July 2020

4: [ONS Exploring the UK's Digital Divide](#).

5: [Quality of Life 2019/20 Priority indicators: Deprivation Summary](#)

The benefits of acquiring digital skills include a lifetime earnings boost of between 3% and 10%, improved prospects of finding employment and household budget savings of internet shopping. Closing the divide requires individual and employer investment in skills, but also improvements to digital infrastructure including kit and data to connect priority communities and households. There is an urgent need to explore options for installing free broadband hotspots in Bristol's most deprived communities and prioritising investment in these areas.

A strategic priority for the city is to improve attainment of level 2 and level 3 qualifications, reflecting the minimum requirements for the labour market competitiveness. To achieve this goal, there is a need to improve the qualification level for young people entering the labour market, closing attainment gaps at 16–19. Research by the Children's Commissioner shows that there is a 28.3 percentage point gap in the attainment of 5 GCSEs (A*–C) for young people from low income households in Bristol.¹ The Bristol Post 16 Strategy identified a critical need for more flexible roll on roll off provision for NEET young people, including those who drop out of level 3 and A level courses – in light of COVID-19 and the anticipated spike in young people disengaged from education and training, this is now even more critical.

Re-engagement of young people and adults with low skills and qualifications will not be achieved through remote digital learning alone. There is strong evidence to show that community learning and youth

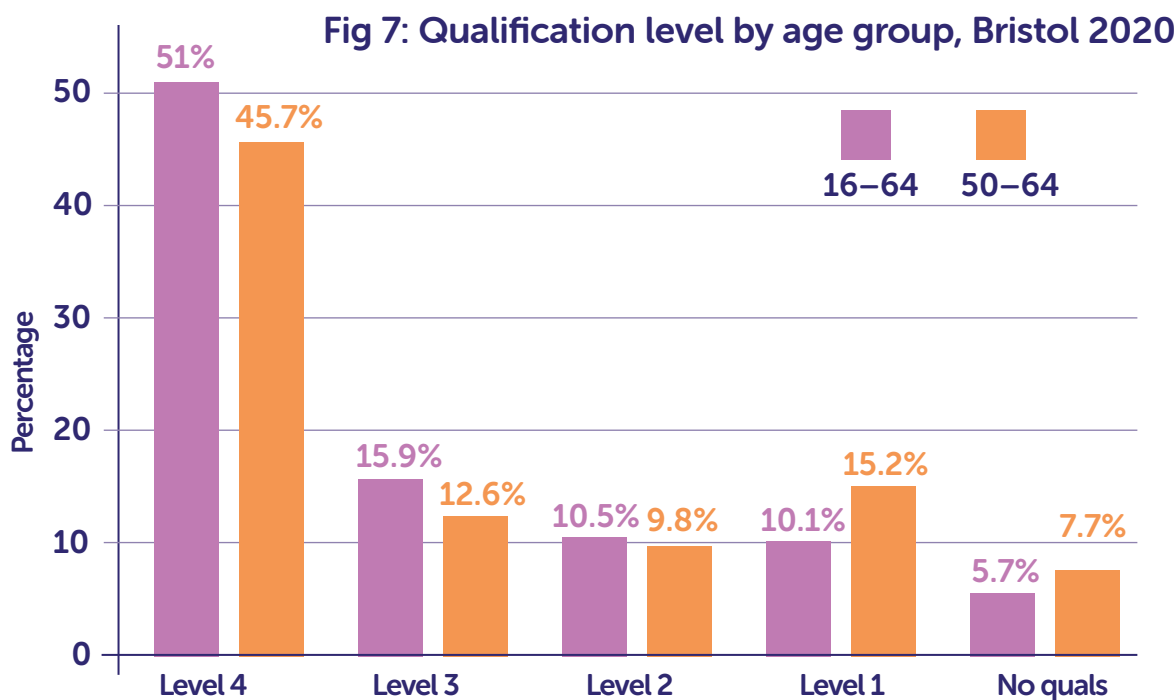
engagement services that work with priority groups 'bottom up' and provide face to face support are essential to get people onto the learning and employment ladder. In response to COVID-19, there is an urgent need to establish a number of accessible local learning hubs where learners of any age can be provided with the resources, skills and encouragement they need to engage in learning, boost their skills, and apply for employment opportunities. These could involve new hubs, or building on existing community and youth learning environments to meet the growth in need. There is also a need to increase the volume and flexibility of in-work adult learning to both ensure ability to move within the labour market and also contribute to the productivity of firms. This includes working with regional partners to ensure employment and skills interventions respond to the changing needs of residents and employers, with the [Future Bright](#) programme one example of how activity has been amended to respond to the impact of the pandemic.

Immediate concerns are to ensure that training programmes contribute to sustaining the employment and employability of local residents, but recognise the need to realign training provision as a means of realising a more inclusive labour market. Skills funding and delivery must be geared to support economic recovery, targeting provision to adults at risk of long-term unemployment. It must also become more flexible, to aid increased take-up among people in low skilled employment to create pathways towards the intermediate and higher skills levels required by employers.

1: [Children's Commissioner \(2019\)](#)

1.3 Older Workers

Men aged 50+ in the workforce face particular challenges due to comparatively lower qualification levels and concentrations in sectors and job roles due to shrink over the next decade. In Bristol, nearly one in four (22.9%) residents aged 50–64 has a level 1 or no qualifications and fewer than average 50–64 year olds hold level 4 qualifications – see below.¹



Older men are more concentrated in industries, such as manufacturing, that are moving towards higher skill requirements – 14% of men aged 50–64 work in manufacturing compared to 10% of men of all ages.² Older women have also experienced significant impacts from the pandemic, with the Office for National Statistics reporting 79,000 fewer women aged over 65 in work nationally between May and July 2020 than in the previous quarter, compared to 13,000 fewer men³. Older women are also likely to have lower pension savings than older men.

The economic impact of COVID-19 has exposed the vulnerabilities of workers with lower qualification levels, with severe medium-term risks for workers in craft, process and operative roles in manufacturing,

transport and construction sectors. Between January and June 2020, the number of people aged 50+ claiming unemployment benefits nearly doubled (88.9%) and while this was lower than the average rate of increase for the city, this group may face greater difficulties in returning to work once made unemployed. This has longer term implications increasing the risk of pensions not meeting the rising cost of living, potentially increasing the number of older people living in poverty.

The immediate challenge is to ensure the capacity of advice, training and employment support for people aged 50 and over and linked to this access to financial advice. It is likely that the full economic implications for this age group will not be visible until the end of government support programmes.

1: ONS Annual Population Survey 2020. Accessed 17 July 2020

2: ONS Census of Population 2011. Accessed 17 July 2020

3: www.independent.co.uk/news/uk/home-news/older-women-bearing-brunt-coronavirus-recession-new-figures-show-b448015.html

1.4 Low income families

Across a range of social groups, COVID-19 is having a significant impact on individuals and families with low income. For people in work, the loss of earnings due to reduced hours or being furloughed can have a disproportionate impact on household incomes, particularly where people are just about getting by through a mix of earnings and Universal Credits.¹ For those out of work, the crisis and prospects of large-scale increases in unemployment levels reduce the likelihood of securing a well-paid job.

With around 17% (some 14,600) of children under 16 in Bristol in low income families and around 5% of families in the city experiencing moderate to severe food insecurity over the last 12 months,² there is a significant proportion of households that will be badly affected by even a small loss of income. Nationally, over one in three (38 per cent) of households run out of money before their next weekly or monthly paycheque³ – equivalent to over 72,000 households in Bristol. Nationally, single parents have also seen their income fall by more than double the amount the rate of households with children and more than one adult, disproportionately affecting women, and this has been exacerbated by increased costs of childcare as children were not able to attend school or nursery, and maintenance payments were reduced or withdrawn.⁴

While 61% of the population nationally indicate that they have formal savings, this falls to 28% among unemployed and 37% among young people (aged 16 – 24 years).⁵ Vulnerability to debt is high for over one third of the population, with 37.6% of adults reporting that they could not currently afford an unexpected expense of £850. Increasing debt is likely, as the full impact of COVID-19

affects household incomes, as nearly half of adults expect their financial situation to worsen in the next 12 months.⁶ Of particular concern are lone parents and carers, who may experience additional hardship due to loss of income.

The immediate challenge is to ensure that households struggling with loss of income and debt, particularly after the end of the furlough grant funding, are provided with direct support. The council working closely with the voluntary sector have a key role to play to ensure that residents are able to access all entitlements to welfare support and any discretionary funding available. Taking this further consideration should be given to establishing a multi-agency approach to developing pathways out of crisis which could be tailored to specific communities. It will be vitally important to ensure that families do not extend their debt burden due to the crisis, given the clear implications for individual mental health, enhanced risks of homelessness and the life chances of children.



1: See for example [Resolution Foundation \(2020\)](#).

2: Bristol City Council State of Bristol – Key Facts 2020.

3: ONS Wealth and Assets Survey (2020)

4: www.theguardian.com/world/2020/jun/07/Black-Asian-and-minority-ethnic-and-single-parent-families-worst-hit-financially-by-covid-19

5: ONS Wealth and Assets Survey – User Request

6: ONS Coronavirus and the Social Impacts on Great Britain (2020)

1.5 Women

A growing majority of women work, with three quarters in the UK in paid employment¹. However the pattern of employment for women differs to men, often in part time roles, on average earning less than men, with women contributing a higher proportion of unpaid labour.

These disparities result in women having lower incomes over a lifetime, with less savings, lower pensions and are more likely to be living in poverty and debt during their working lives and into old age².

Industries where women provide the majority of the workforce include retail, hospitality and the health and social care sector; there is also a prevalence of women freelancers in creative industries. Many jobs in these sectors are typically precarious temporary employment, with poor career prospects, low status, low pay and weak pension structures.

The impact of the recession and job losses will have a significant impact on women in these sectors.

Focusing on health and social care, women and in particular Black, Asian and Minority Ethnic women are over represented in health and social care service jobs increasing their exposure to COVID-19. National estimates indicate that 80% of non-medical health service jobs in the NHS and 80% of all social care jobs are filled by women with 74% of these roles providing direct care.³

The health and social care sector is a major area of employment in Bristol, with around 43,000 jobs (15.7% of employment or 1 in 6 jobs in the city). The closure of school and childcare settings following national lockdown measures has resulted in significant challenges for women, balancing family and caring responsibilities with home working and/or shift patterns in front line service jobs.



1: ONS Annual Population Survey. Accessed 31/7/2020

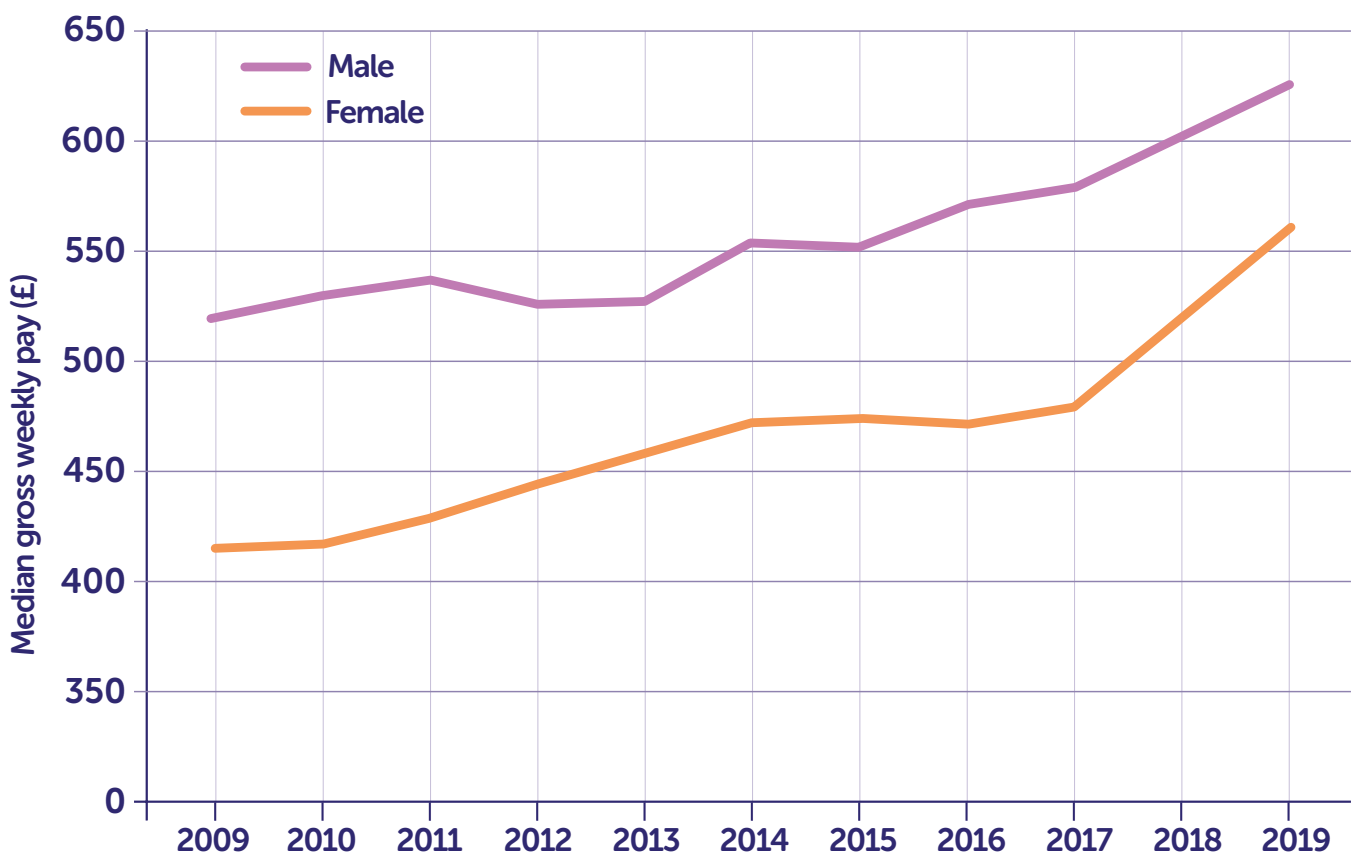
2: [wbg.org.uk/wp-content/uploads/2018/09/final-casebook-for-sharing.pdf](https://www.wbg.org.uk/wp-content/uploads/2018/09/final-casebook-for-sharing.pdf) Accessed 11/09/2020

3: The Kings Fund – [kingsfund.org.uk](https://www.kingsfund.org.uk)

The spotlight on the contribution of the health care workforce during the pandemic presents an opportunity for city partners to work collectively as part of the national agenda to improve pay and conditions for front line service sectors with a focus on health and social care. The contribution that care workers make to the economy must not be undervalued, and investment in care has been noted as having the potential to mitigate negative impacts on employment in both a more environmentally sustainable and more cost effectively than in many other industries¹.

The gender pay gap shows that women in Bristol overall earnings were 72.2% of male median gross weekly earnings in 2019. Comparing male and female full-time earnings, as figure 8, over the last decade shows a slow narrowing of the pay gap, but a £64 per week difference in 2019.² With the female employment rate rising from 67.8% to 75.2% over the period March 2010 – March 2020 there has been a substantial increase in the proportion of women in work.³

Fig 8: Gender Earnings Gap for Full Time Workers, Bristol 2009–2019



1: wbg.org.uk/analysis/reports/a-care-led-recovery-from-coronavirus/

2: ONS ASHE data. Accessed 31 July 2020

3: ONS Annual Population Survey. Accessed 31 July 2020

Key factors contribute to female employment patterns. The inadequate supply of infrastructure to support caring responsibilities and the pay and conditions of employment in sectors where part-time working is most commonly available and accessible. National evidence shows that women opt out of employment, move to part time work or to jobs with lower occupational status as a result of childbirth and childcare responsibilities, with prospects of occupational mobility reduced impacting on longer term career prospects and income.¹

The availability of quality and affordable childcare is vital to enable women to access and remain in work. Nationally, 15% of mothers and pregnant women surveyed in July had either been made redundant already or expected to be made redundant, with 46% of these stating a lack of childcare provision played a role in their redundancy². The TUC have also reported that two in five working mothers expected to be unable to secure childcare to cover the hours they worked at the beginning of the September 2020 term³. The affordable childcare report for Bristol highlights that in the UK 35% of the average family income is spent on childcare provision. In Bristol around one third (35%) of parents surveyed felt that they were able to pay the charges for childcare, highlighting key issues of affordability.

With nearly one in five (19.7%) of children in Bristol living in low income families, addressing issues of cost and availability are central to inclusive development. For women access to childcare can be a primary barrier to both to work and specifically access to good work. Where parents have limited family or social networks flexible child care is a

primary determinant for employment. While Bristol has a high rate of female employment, the provision of childcare is vital to empower women to progress in the labour market. The availability of adult social care is also a key factor in progression, with women making up three fifths of the 13.6m people in the UK providing informal care, 62% of whom are in paid employment.⁴

The current crisis has resulted in a shift to home working patterns for many professions – which have been balanced with childcare and home schooling commitments for many families. The immediate challenge is to work with employers to sustain and promote flexible working practices which present further opportunities for women with caring commitments to access jobs. This should be complemented by flexible training provision for upskilling to meet job requirements and support career development, particularly in sectors where home working has become accepted as the 'norm'.

Supporting women to address basic skills and digital skills gaps through community settings and flexible learning provision will also increase prospects for women with lower skills in the longer term. Provision of flexible skills pathways to higher level qualifications will enable women to access higher paid roles but it is essential that this is supplemented with an increase in employers advertising good quality part-time jobs. The UN Sustainable Development Goals recognise this, with action required to eliminate gender disparities in education and to recruit and retain women into the traditionally male pathways that lead to greater earnings potential.⁵

1: www.fairplaysouthwest.org.uk/manifesto/21-the-gender-pay-gap-and-how-to-eliminate-it

2: pregnantthenscrewed.com/childcare-covid-and-career/

3: www.tuc.org.uk/news/2-5-working-mums-face-childcare-crisis-when-new-term-starts-tuc-poll

4: www.carersuk.org/images/CarersWeek2020/CW_2020_Research_Report_WEB.pdf

5: sdg4education2030.org/the-goal

1.6 Black, Asian and Minority Ethnic Communities

Members of Black, Asian and Minority Ethnic communities have been disproportionately impacted by COVID-19. The effects have been in both higher mortality rates overall among Black, Asian and Minority Ethnic compared to White populations¹ and in the wider economic effects, given differential earnings and concentrations of employment in low paid hospitality, retail and social care sectors.²

Prevailing structural inequalities by qualification levels, employment rates and occupational level are also important determinants of income inequality, which has been identified as a key factor for COVID-19 infection and mortality.³ These disproportionate impacts will intersect with other aspects noted in this strategy, with for example Black, Asian and Minority Ethnic women being more likely to work in health and social care, to be living in poverty, and to be in single parent households.

We recognise that Black, Asian and Minority Ethnic communities are not a single homogeneous group, and different ethnic groups are likely to have experienced the varying economic impacts of COVID-19 in different ways, and likewise different pre-existing economic experiences and realities. At this stage, there is much more work to be done disaggregating the data to better understand the impact on our communities, and to better target recovery work. The forthcoming Action Plan, as well as future iterations of this strategy, will look to take this into account.

Bristol has a diverse population, with around 22% of all residents⁴ from non-White British categories. Recent analysis of school data indicates that the diversity has increased, with the proportion of non-White British pupils rising from 31% in 2011 to 38% in 2020.⁵

Black, Asian and Minority Ethnic communities have a higher concentration in customer facing occupations in the public and private sector, with around 54% working in (broadly defined) front line roles, compared to 44% of the White population. With around one in three employed in distribution, transport and hospitality jobs, Black, Asian and Minority Ethnic residents are working in sectors highly affected by lockdown and with continuing risk of unemployment. There are notable gender differences, with 30.5% of Black, Asian and Minority Ethnic women working in health and caring roles in Bristol compared to 11.2% of Black, Asian and Minority Ethnic men and 21.2% of White women.⁶ We also know that in Bristol, Black, Asian and Minority Ethnic citizens have the highest levels of concern that climate change will impact on their lives and have done the most to reduce flying for leisure⁷.

Barriers to labour market participation among Black, Asian and Minority Ethnic communities are also evident in employment rates. Despite Bristol's high pre-COVID-19 employment rate of 76.3%,⁸ there are significant differences across broad ethnic groups. Data indicates an approximate employment rate gap of 9 percentage points between White and Black, Asian and Minority Ethnic residents across the city.

1: PHE (2020) [Beyond the data: Understanding the impact of COVID-19 on Black, Asian and Minority Ethnic groups](#).

2: ONS (2019) [Ethnicity Pay Gaps in GB](#).

3: See PHE (2020) *op cit*

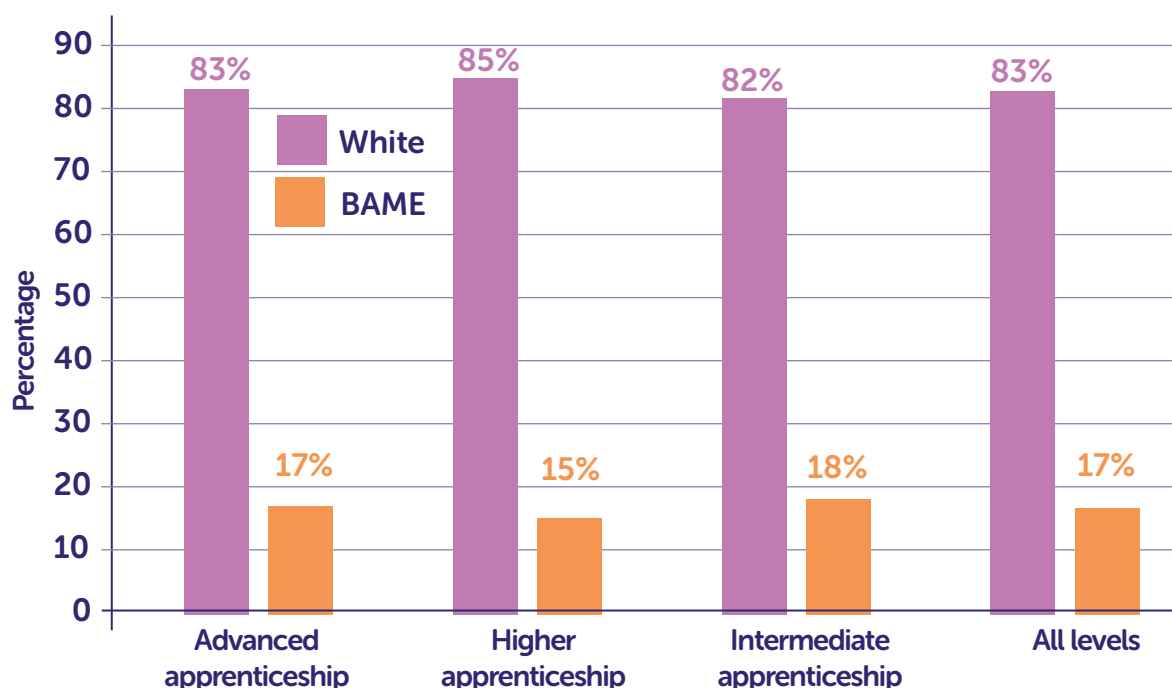
4: ONS Census of Population 2011. Accessed 17 July 2020

5: [Bristol City Council \(2020\) State of Bristol Key Facts](#).

6: ONS Census of Population 2011. Accessed 17 July 2020

7: <https://www.bristol.gov.uk/statistics-census-information/the-quality-of-life-in-bristol>

8: ONS Annual Population Survey March 2020. Accessed 17 July 2020

Fig 9: Apprenticeship Starts by Ethnicity, Bristol 2018/19

While the sample size means that the data should be treated with some caution, it suggests long-term structural barriers to employment. Participation in post 16 training also suggests an under-representation of Black, Asian and Minority Ethnic communities in apprenticeships programmes. As shown in figure 9, while non-White British pupils constitute 38% of the school population, non-White groups are just 17% of apprenticeship starts in 2018/19. Of the 2,870 starts in 2018/19 just 390 new apprentices were from non-White groups (excluding unknown ethnicity).¹

The immediate priority is to ensure that there is targeted engagement and provision to enable Black, Asian and Minority Ethnic residents access support. This includes a clearer understanding of specific barriers through Black, Asian and Minority Ethnic voices and perspectives and ensuring support is tailored specifically to address these. While provision will be available through sector focused programmes, recognising differential impact, where people are already vulnerable due to discrimination and structural inequalities, will be central to ensuring inclusive access to support.

Other key priorities, all of which must be informed and driven by robust outreach, include:

- Working with employers and in particular industry leaders who are able to champion diversity in the workforce is a key element of driving forward this agenda for change. Embedding recruitment practice which addresses indirect discrimination and unconscious bias is a key priority.
- Monitoring workforce profiles and transparent processes for accessing career development opportunities and promotions demonstrates a commitment to address under-representation of Black, Asian and Minority Ethnic employees and supports progression to more senior roles.
- Working in partnership with schools and businesses to create access for young people from under-represented groups in key industries through work experience, traineeships and apprenticeships is also critical to raising aspirations and increasing longer term career prospects. One route to supporting young people is through the work of the Careers Hub and Bristol Works, as detailed in the priorities section of this report.

1: DfE Apprenticeship data. Accessed 14 May 2020

1.7 Disabled People

Across the UK there are over 4.2 million disabled people in employment, nationally employment opportunities for disabled people have been improving over the last few years, with just over half (53%) of disabled people being in employment in 2019.¹

This overall figure however, masks significant levels of unemployment amongst specific groups of disabled people. For example, over 70% of people with a visual impairment are unemployed, and the employment rate for disabled people with severe or specific learning difficulties was the lowest rate of any impairment at 17.6%.² Again, intersectionality should be recognised given the disproportionate impact of the pandemic - working age disabled women have died from COVID-19 at a rate 11 times higher than the non-disabled population.³

Around 34% of working disabled people work part time, which is a much higher proportion than in the general population. Similar to employment patterns for women, part-time working is highly correlated with lower rates of pay, less senior roles, less career progression and more precarious employment.

The definition for disabled people includes people with mental health issues who often experience significant discrimination and disadvantage in many aspects of life including employment. Strong negative attitudes still exist around mental health which impacts on employers' perceptions of what people with mental health issues can contribute, 17% of people affected by 'depression, bad nerves or anxiety' experience difficulties in employment.⁴



1: [ONS Disability and Employment, UK 2019](#) Accessed 14/09/20

2: [ONS Disability and Employment, UK 2019](#) Accessed 14/09/20

3: www.ons.gov.uk/peoplepopulationandcommunity/birthsdeathsandmarriages/deaths/articles/coronaviruscovid19relateddeathsbydisabilitystatusenglandandwales/2marchto15may2020

4: [TUC, Disability and Employment](#), a social model study of the employment experiences of disabled people in Great Britain, with a focus on mental illness, 2015

Pay levels for disabled people are lower on average, at £10.63 an hour nationally, than non-disabled employees, who earn on average £12.11. This is a pay gap of 12.2%. The largest pay gaps are faced by those with a mental impairment, who lose out by nearly a fifth of what their non-disabled peers earn. People with a physical impairment face an average pay gap of nearly 10%.¹ This can be attributed to factors such as education and qualification levels.

In Bristol, there is a 27.7% gap between the employment rate for disabled people and non-disabled people which is higher than for other core cities but lower than for neighbouring authorities.²

Although employment rates have increased in recent years for disabled people, the unemployment rate remains higher than the rate for the overall population. There is genuine concern amongst disabled people and those organisations who work with them that as the economy struggles and unemployment rates rise over the coming year, people who already experience discrimination and disadvantage in the workplace will be affected disproportionately. The health inequality gap experienced by many disabled people will also inevitably increase as resources are reduced.

In terms of economic issues, many of the solutions to addressing disabled people's issues are those that have been highlighted for Black, Asian and Minority Ethnic communities and addressing inequality in the workplace for women.

- Working with employers and in particular industry leaders who are able to champion diversity in the workforce is a key element, as is promoting positive awareness of disabled people as employees and raising knowledge of schemes such as Access To Work which provide support for disabled people in employment.
- Embedding recruitment practice which addresses indirect discrimination and unconscious bias is a key priority, as is a move away from a medical approach to disability which sees the issue as the impact of the person's impairment to an approach which addresses policy and physical barriers.
- The move towards greater home working can create employment opportunities for some disabled people, but employers must ensure that home work is fully accessible.
- Monitoring workforce profiles and transparent processes for accessing career development opportunities and promotions demonstrates a commitment to address under-representation of disabled employees and supports progression to more senior roles.
- Working in partnership with schools and businesses to create access for young people from under-represented groups in key industries through work experience, traineeships and apprenticeships is also critical to raising aspirations and increasing longer term career prospects.

It is vital that disabled people and their organisations are fully engaged with the implementation of the strategy and all future measures relating to COVID-19; a fully co-produced, One City approach involving disabled people.

2: [Equality and Human Rights Commission, Research Report 107: The disability pay gap, 2017](#)

1: [JSNA Work and Health chapter 2017](#)

1.8 Longer Term Prospects

While the focus here has been on the short and medium-term economic impacts of COVID-19, it is important not to lose sight of the longer-term opportunities, and to make sure that any focus on short-term measures and mitigations do not deliver a return to 'business as usual' but deliver improvements to areas of existing inequalities.

Prior to the pandemic Bristol experienced rising numbers of jobs in the city and some improvement in workforce earnings. A significant proportion of the workforce, however, rely on insecure, low paid employment. While there is likely to be periods of recession and movement into and out of negative growth over the next 12–24 months, Bristol continues to have the strong foundations for a return to growth. The pandemic highlighted the vital role of key workers and there is strong support for a labour market that properly rewards them. There is an opportunity and a need for the city to focus on the role of the 'caring economy', and to explicitly recognise childcare and adult social care as key infrastructure for the city, and for improvement in pay and conditions to support recruitment in these sectors. The crisis has exposed the risks of relying upon a precarious workforce, especially those with no provision for adequate sick pay and vulnerable to exploitation.

There is likely to be renewed growth in Bristol's key industries, with both GVA and employment growth in higher value professional and administrative services, in the creative and visitor economy and in healthcare and social work.¹ It will be important to use the crisis to accelerate a tailoring of employment and skills policy to enable citizens to take the opportunities likely to become available in these growth sectors. This will benefit both residents that need to access new areas of employment, but deepening the skills pool will also make the city more attractive to prospective investors. The long-term trend, within and across sectors, is demand for higher level skills.

Increasing investment in routes to higher level skills, creating pathways from entry qualifications to degree and professional level training remains vital to close existing skills gaps. Prior to COVID-19, the region identified that one in five (21%) of employers reported skills gaps, while 41% were under-utilising staff.² More efficient deployment of skills, particularly in high demand areas such as software, data management and caring professions, is essential both to meet demand and to secure opportunities for local residents; with a focus on improving access to opportunities for key priority groups and addressing under-representation in high value sectors. This is also well aligned to a regional focus on innovation-led recovery and working together to identify investment to support this.

1: Oxford Economics (2020) Coronavirus: Economic Impact Scenarios for Bristol. Oxford Economics
2: WECA (2019) Employment and Skills Strategy Evidence Base

2: Business and Investment

Our Priorities for Response and Recovery

Our strategic priorities for business and investment in Bristol are focussed on supporting businesses to recover from the crisis, while promoting digital innovation, action to become a carbon neutral and climate resilient city – including investment in the low carbon sector – and attracting the location of new and established businesses into the region.

The recommended Response and Recovery interventions and actions for the city are set out below, based on the evidence and context detailed in the next section, and informed by expertise from city partners and stakeholders.

These actions are aimed at addressing the impact of COVID-19 and its effect on all parts of the economy, with businesses facing a loss of trade, temporary closure, displacement of staff, rising levels of debt and deep uncertainty about the future. While the full consequences remain unclear, estimates suggest that the immediate

impact has been a significant shrinking of the economy by around one third (GVA) during the second quarter of 2020¹ and over the year an expected contraction of around 6.6%.²

Analysis has been undertaken on the emerging impact on Bristol's businesses and investment with particular regard to the impacts on sectors of the economy including SMEs, professional and financial services, the creative and visitor economy, the retail and food sector, advanced manufacturing and engineering, the low carbon sector, construction – including housing and retrofit, logistics and distribution, education, health and life sciences, Black, Asian and Minority Ethnic-led businesses and the VCSE sector.

These priority actions seek to reduce poverty and inequality, increase the city's resilience and environmental sustainability, and to enhance the economic and social wellbeing of every community.



1: Centre for Progressive Policy analysis based on OBR forecasts.

2: Oxford Economics (2020) Coronavirus: Economic Impact Scenarios for Bristol. Oxford Economics

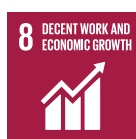
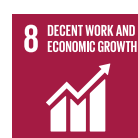
Priorities for response and recovery:

Reduce risk of business failure in the short term

- Targeted provision of business survival funds following end of national grants initiative. **SDG: 8.3**
- Work with regional partners to extend grant packages for cultural and hospitality (including food and drink sectors). **SDG: 8.9, 11.4**
- Work with national industry bodies and local partners, to lobby for financial support as required for the creative and culture sector, with a particular focus on freelancers and the festival and events sector. **SDG: 11.4**
- Lobby government for the extension of the furlough scheme in key sectors (culture, hospitality, night-time economy). **SDG: 8.3**
- Targeted enterprise and early growth support in areas of high deprivation focusing on South Bristol and North and East Bristol. **SDG: 8.1, 10**
- Targeted specialist financial and advisory support for Black, Asian and Minority Ethnic and women led businesses in Bristol. **SDG: 1.4, 5.5, 10.2, 10.3**
- Explore use of discretionary powers to award business rates relief to support economic growth. **SDG: 8.1, 11.3**
- Prioritise efforts to ensure affordable childcare provision is available to minimise short-term risks to businesses, including risks to childcare providers. **SDG: 5.4**

Supporting safe re-opening

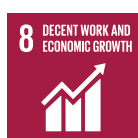
- Maintain focus and investment on city wide lock down exit plans aligned to the local outbreak management plan and ensuring the city can respond to further local lockdown measures. **SDG: 8.3, 8.9**
- Focus on public assurance and awareness, developing plans to increase footfall and spend in the city centre and high streets, supporting retail, hospitality and the visitor economy. **SDG: 8.9**
- Effective communications to businesses on government guidelines and public awareness on the use of outdoor space addressing issues around access and enabling businesses to trade in all weathers. **SDG: 3, 11.7**
- Develop guidelines and best practice for indoor venues (including museums, theatres and live music venues) and outdoor festivals and events including case studies to highlight operating models that meet Public Health and other criteria. **SDG: 8.9**



Priorities for response and recovery:

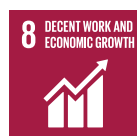
Support business to diversify and be more resilient

- Improve procurement arrangements to increase the share of local purchasing and B2B, and support procurement processes that support equality including ensuring improved representation of women and Black, Asian and Minority Ethnic-led businesses. **SDG: 10.2, 10.3, 12.7**
- Strengthen public procurement and planning obligations to increase the use of Bristol contractors and boost social value from capital programmes. **SDG: 12.7**
- Boost business advice and financial planning support after the lockdown – supporting small businesses managing / scheduling additional debt. **SDG: 1.4**
- Explore and promote alternative financial models for SMEs with a focus on the creative and culture sector using peer networks. **SDG: 8.3**
- Support businesses to diversify their operating arrangements, moving to online trading. **SDG: 8.2**
- Develop a community based enterprise model for the Black, Asian and Minority Ethnic business sector – including infrastructure for workspace. **SDG: 10.2, 10.3**
- Ensure new exporters have access to the support mechanisms needed to trade in new markets and build their business, protecting jobs. **SDG: 8.1, 8.2**
- Ensure that experienced exporters are provided with the support needed to access new markets and build their business, protecting jobs. **SDG: 8.3**



Address the shifting demand for skills in key sectors

- Link skills pathways to sectors which are undergoing transformation and increase capacity to deliver higher level construction, energy efficiency, renewable energy provision, building retrofit, digital design and project management skills. **SDG: 4.4, 4.5**
- Support skills gaps in professional services through a greater emphasis on digital and associate / professional level occupations from FE colleges and delivery of apprenticeships. **SDG: 4.4, 8.5, 8.6**
- Monitor trends in inward investment and the impact on employment in growth sectors and ensure skills provision adapts to reflect skills requirements, with targeted efforts to foster diversity and inclusivity, and tackle occupational segregation, and ethnicity and gender skills gaps. **SDG: 4.5, 5.5, 8.2, 8.3, 10.2, 10.3**



Priorities for response and recovery:

Support action on climate change and ecological recovery through businesses development

- Secure maximum local employment and business benefit from the government's economic recovery package, for example housing and energy efficiency grants (low carbon retrofit) overcoming the barriers for work undertaken by smaller local business qualifying. **SDG: 7.3, 11.1**
- Support business investment in the green/eco/biodiversity sector, including green/eco innovation and technology, directly and indirectly, for example through the use of the local supply chain for low carbon and sustainable goods and services – the 10 delivery themes of the One City Climate Strategy and 4 Goals in the Ecological Emergency Strategy set out the key areas where action is needed. **SDG: 8.4, 9.2, 9.4, 12.7**
- Increase and improve the green and low carbon skills offer to both upskill existing tradespeople and create bespoke pathways through vocational training to employment for young people, taking into account diversity considerations so as to achieve a 'just transition' to carbon neutrality and wider natural environment benefits. **SDG: 4.3, 4.4, 4.7, 8.4, 12.8**
- Engage with (inter)national and city stakeholders to develop toolkits to support environmental sustainability and a managed ecological footprint for filmmaking, festivals and events in Bristol. **SDG: 8.9, 11.4, 13**
- Work with creative venues to understand and map sector needs to reach carbon neutrality and climate resilience as well as reduce their ecological impact. **SDG: 13**
- Support translation of invention to commercial innovation in the development of low carbon goods and services for growing international markets e.g. through an eco-innovation fund and/or forum. **SDG: 12.2, 12.4, 12.8**

- Support investment in natural solutions to address the climate and ecological emergency benefiting people, place and nature helping businesses work together to influence the quality and performance of our natural assets eg rivers, biodiversity, land, forests. **SDG: 6.3, 8.4, 12.4, 12.6, 12.7, 14.1, 14.2, 15.1, 15.2, 15.9**
- Support bids and implementation of initiatives funded through the Green Recovery Challenge Fund. **SDG: 2.4, 6.3, 8.4, 12.2, 14.1, 15.1, 15.2, 15.5, 15.6, 15.9**



Accelerate development of growth sectors

- Identify grant programmes to encourage/support capital and market investment by SME manufacturers (advanced manufacturing). **SDG: 8.3**
- Increase investment in energy, digital and transport infrastructure networks. **SDG: 7, 9.1, 9.2, 9.4, 11.1**
- Promote business innovation networks for key target sectors. **SDG: 8.3, 9**
- Improve the alignment of qualifications and research to regional specialism to support high value business and product development. **SDG: 4.3, 4.4, 9.5**

Priorities for response and recovery:

- Support our flexible workspace infrastructure to survive and emerge from the pandemic to continue incubating high growth businesses, particularly in the creative and tech spheres.

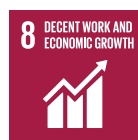
SDG: 8.1, 8.2, 9.1, 11.3



Inward investment

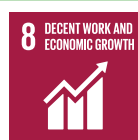
- Develop a clear brand and proposition for Bristol, reflecting the city's sectoral strengths, USPs as a city of festivals, films and music, core values, including Bristol's position as the UK's only European Green Capital, home to numerous environmental/green/sustainability organisations and the first Local Authority in the UK to declare a Climate Emergency and Ecological Emergency. **SDG: 8, 17**
- Work in partnership with Invest Bristol and Bath (IBB) to agree regional sectors and markets following the international market prioritisation and analysis by OCO Global, and ensure international promotion targeted on those markets.
- Work with DIT and Core Cities to promote trade and investment opportunities.
- Use the One City approach to champion Bristol through education, business and diaspora networks.
- Use Bristol's membership of influential international networks to support our Covid recovery and delivery of the SDGs, including exploring innovative finance mechanisms. **SDG: 17**
- Build regional capacity to engage in and support the promotion of Bristol in key markets, and in twin cities and other partner cities, showcasing the city's strengths including exchanging ideas on action on climate change and ecological recovery. **SDG: 8, 17**

- Secure funds for initiatives that connect Bristol with our international UNESCO Creative City partners and provide opportunities for film-based education, research, international collaborations and sustainable industry development. **SDG: 4**



International trade

- Develop a coordinated approach to supporting Bristol business who have aspirations to grow sustainably in their business overseas. **SDG: 8.2**
- Work in partnership with service providers to support businesses that need access to finance, training and technical advice in order to grow their trade. **SDG: 8.2**
- Identify new ways in which local businesses can achieve success in Europe, North America and Asian markets in a sustainable way, navigating the challenges of EU exit with confidence and the support needed. **SDG: 8.2**



Indirectly related SDG targets

SDG: 3.9

SDG: 5

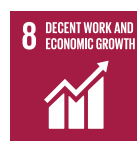
SDG: 7.2, 7.3

SDG: 8.2

SDG: 11.2

SDG: 12.2, 12.4, 12.8

SDG: 13

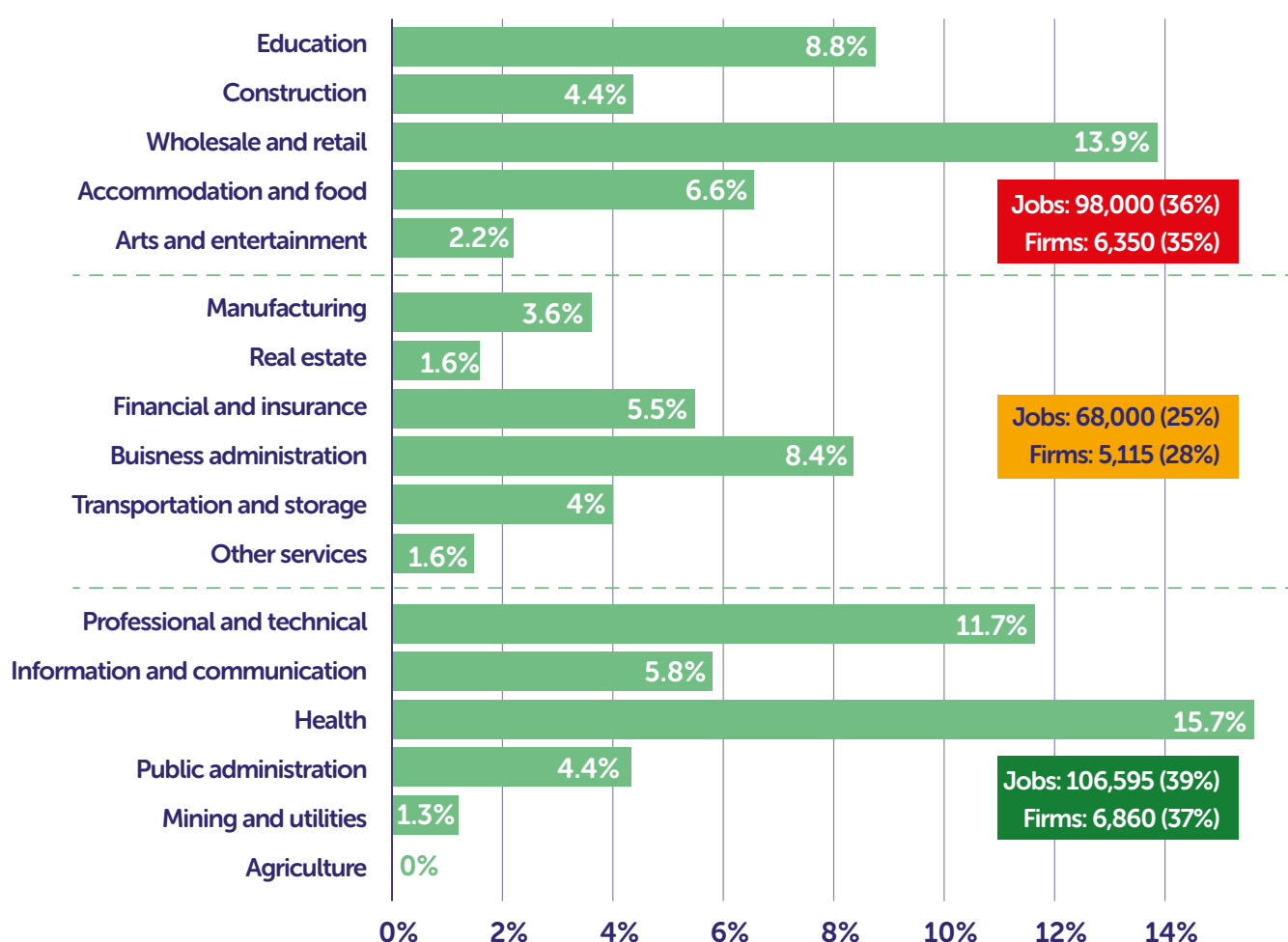


Evidence and Context

The impact of the crisis has been uneven across sectors, with customer-facing businesses in retail, the visitor economy, culture and education experiencing the greatest shock, but across the economy a majority of businesses have seen a reduced turnover.

As shown in figure 10, there are severe implications in the short term, until the need for social distancing is removed, and for many businesses longer term challenges to rebuild their customer base and repay debts accumulated during the lockdown period.

Figure 10: Employment by Sector and Impact Risk, Bristol



Forecasts for the city suggest that Bristol will be less affected in the medium term than the region due to the resilience of its industrial structure, and the city's efforts to create a more climate resilient city should help to build investor confidence. Compared to other areas in the South West, the city has a higher proportion of professional services, information and communication sector, health and public administration and a lower dependency on tourism and retail. Professional and public sectors have been most able to quickly adapt their operations

to transition staff to home-working or to increase the use of on-line / virtual team working, but we should acknowledge that unpaid caring responsibilities may significantly impact people's ability to work remotely, disproportionately affecting women. While in the short term these sectors have been able to protect much of their core activity, changed global demand for goods and services and a permanent adoption of more flexible working practices may lead to a period of restructuring.

A key factor in determining the level of long-term damage, is the length of recovery. Forecasts vary significantly, with cautious assessments, by sector, indicating a gradual return to pre-COVID-19 levels of output over the period 2020 to 2025. The phased restoration of business includes reopening of retail, hospitality and cultural businesses, with conditions of social distancing, alongside a staged return of international travel and office-based activity. Over the next six months this will contribute to improvements in national economic performance, but will be short of a return to 'normal'¹ pre-COVID-19 conditions.

Similar to effects on the labour market, COVID-19 is a transformative moment for businesses. The recovery process is an

opportunity to protect those areas of the economy vital to the future development of the city, accelerate investment in infrastructure – including social infrastructure – and skills that contribute to productivity; and work with businesses to improve the quality of work. As businesses rebuild, there is also an opportunity to build resilience, resource efficiency and sustainability through supply chains and procurement, as well as supporting local business growth. Building back better is about a more inclusive, sustainable and equitable economy, with businesses supported as leaders of change.

The following draws together current information and analysis to highlight key areas of intervention and support.

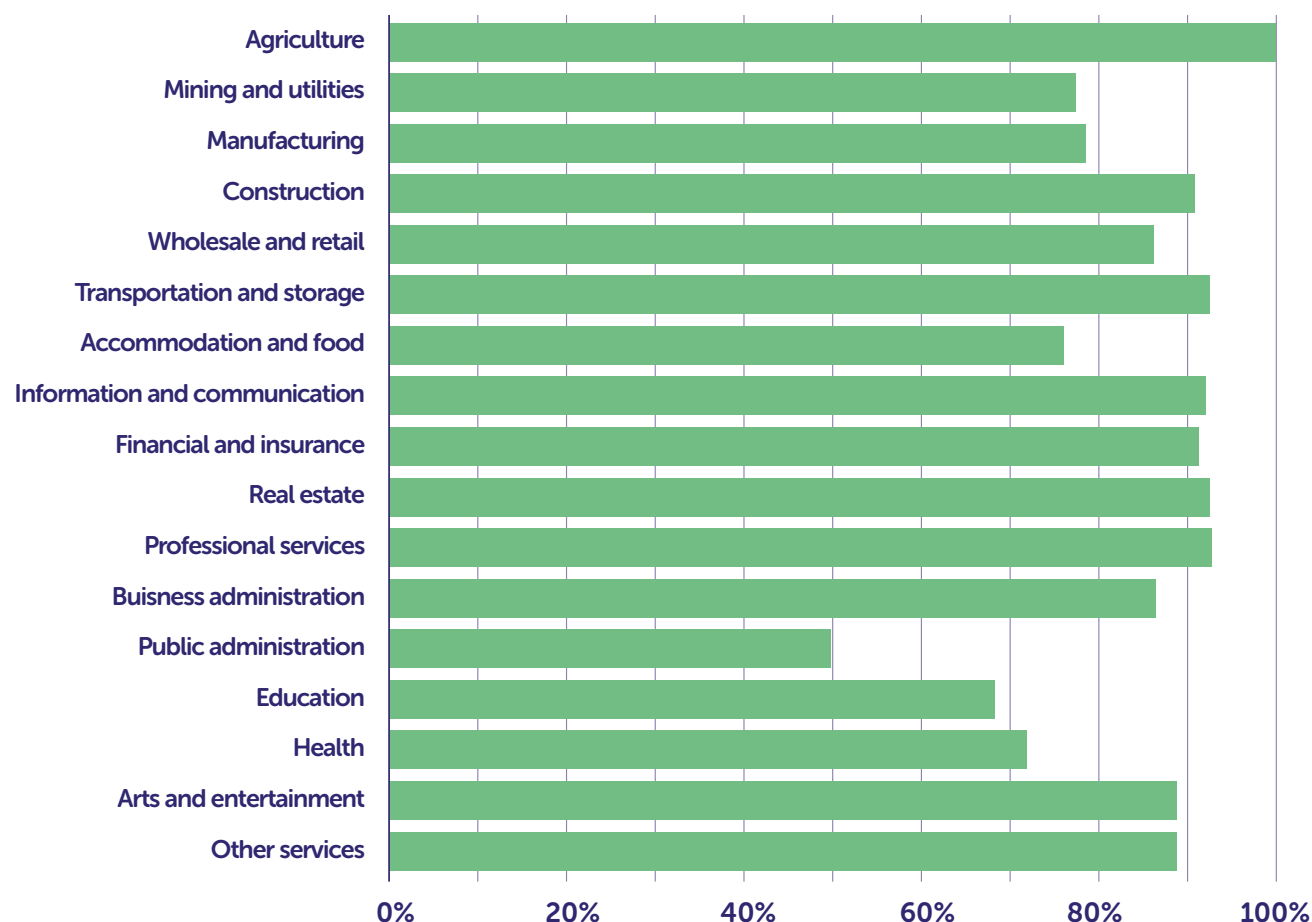


1: Noting that simply returning to 'normal' conditions is not the aim of this strategy

2.1 Micro and Small Enterprises

In line with the UK economy, a majority of businesses in Bristol are small, with around 88% of enterprises employing between 0 and 9 people. As shown in figure 11,¹ the proportion of micro business varies by sector, but overall is reflective of the UK economy. The dominance of micro businesses suggests a degree of dynamism and enterprise and the potential for responsiveness to changing market conditions.

Fig 11: Proportion of Micro Enterprises, Bristol 2019



COVID-19 has demonstrated the adaptability of many enterprises in Bristol that have reshaped their activity and sought to protect jobs during the crisis. However, it has also highlighted the vulnerability of some businesses to periods of sustained shock, particularly in respect to limited capital reserves and financial planning. Micro businesses, notably in food, retail and cultural activity have taken on significant additional debt and, despite national grant programmes,

will struggle to re-establish profitability in the context of social distancing. Similarly, specialist businesses in manufacturing supply chains and some professional services have limited scope to recover in the short term, without significant improvement in national and international markets. While there is a strong prospect of recovery, the consequences for business performance and viability is likely to continue over the next 2–3 years.

The immediate challenge for SMEs is survival as the economy slowly recovers. A Business West Survey for April shows that only 16% of business think they can cope (continue trading) if the lockdown continues for a further six months – falling to 11% for businesses with 5–9 employees.¹ Among sole proprietors, which make up 14.5% of enterprises in Bristol,² the challenges may be more stark. These businesses are least likely to have significant capital reserves and more likely to rely on small numbers of clients. In sectors such as transport, personal services, food and arts and entertainment with a high proportion of sole traders, there is a need for on-going support and assistance. SME and self-employed respondents to the Bristol City Council business survey highlighted the need for general cashflow support and top up grants, particularly where they are ineligible for existing schemes.

In the short-term extension of grant funding arrangements linked to recovery plans will aid survival. However, there is a need for small businesses to become more adaptable to crises. More effective business and finance planning, investment in skills and where possible online market development. There is a key role for both financial service providers and for public agencies to encourage reinvestment by micro and new businesses to build agility into their operations.



1: Business West Survey 23rd April 2020
2: ONS UK Business Counts. Accessed 24 July 2020.

2.2 Sector Analysis

As highlighted above the COVID-19 crisis has had an uneven effect on businesses, as well as drawing to attention the economic, as well as social, value of key social infrastructure including the childcare and adult social care sectors. While all have been impacted, the short- and medium-term implications differ significantly. It will be important to recognise these differences in the design of support interventions: identifying the specific needs for assistance for recovery and also the growth opportunities. The economy remains fundamentally strong, tailored investment guided by businesses into the services and infrastructure can maximise the pace and impact of recovery. The following section identifies the key factors important to manage the immediate consequences of COVID-19 on business and also secure longer term sector growth.

2.2.1 Professional and Financial Services

Including finance and insurance, professional services and information and communications, these sectors constitute around one quarter (23%) of jobs and over one third (35%) of enterprises in Bristol. Generally, these sectors have been able to adapt to COVID-19 conditions, with a high adoption of online and home-working by employees. While the majority of businesses, particularly small firms, have seen a fall in turnover due to lower client demand for services, the sector is expected to have a strong recovery.

Some specialist areas have seen an increase in demand, areas such as employment law, HR support, insolvency accountancy in finance and professional services and businesses involved in generating digital content and computer technical support. These areas provide good prospects for growth. However, there is a strong possibility of rationalisation in these sectors, with some smaller and specialist firms failing or being bought out as the market readjusts.

Additionally, key issues for Bristol include:

- implications for long term requirements for office space – risk to city centre and commercial developments predicated on large floor plate tenants;
- accelerating digitalisation of professional services, leading to reduced demand for intermediate skilled workers;
- increased demand for improved telecoms networks, the normalisation of remote working will heighten need for both commercial and domestic access to fast internet speeds – becoming a key factor in locational decision making; and
- shifting demand for skills – greater emphasis on digital and associate / professional level occupations, requiring a response from FE colleges and from delivery of apprenticeships.



2.2.2 Creative and Visitor Economy

The Creative Economy as defined by the Department for Digital, Culture, Media and Sport are the sectors which centre on creative expression from architecture, design, theatres and museums through to IT, software development, advertising, music, and film and TV.

In 2018 Nesta, the innovation foundation¹ identified Bristol as an exemplar creative economy with an estimated £496m generated by over 6000 cultural and creative organisations and businesses. This creative ecology is highly specialised, regionally integrated and contains a large number of nationally and internationally significant 'anchor institutions'. It is also well served by a dynamic, talented and agile population of micro and SME businesses and some of the most talented freelancers in the world.

Key sector strengths in Bristol include an internationally renowned event and festivals scene, a dynamic music culture originating from the city's diverse communities, a thriving TV, film and animation industry and varied arts and culture sub-sectors covering everything from circus, street-art, theatre and dance.

Eurostat Cultural Statistics found that 4.5% of the UK workforce is employed in Cultural and Creative Industries.²

Applying this figure to Bristol this equates to approximately 10,220 workers; and the true figure is likely higher, with Nesta estimating over 16,000 workers in Bristol's 'globally significant, high-growth creative cluster', 'characterised by a large proportion of SMEs and micro-businesses'. According to Creative Industries Federation an estimated third of the culture and creative industries sectors are self-employed. This equates to approximately 3,407 self-employed freelance workers providing goods and services to the culture and creative industries. Although this is likely to be higher due to the strength and diversity of the sector.

The city's renowned cultural offer is a significant strength in the visitor economy, with a record year for international visits into the region during 2019, breaking the 1m international staying trips milestone for the first time and Bristol and Bath featuring in the top 12 destinations in the UK for staying overseas visitors.

More so than any other sector, the creative economy is what makes Bristol unique. The collaboration, dynamism and talent within the sector makes Bristol one of the premier European destinations to live, work, invest and play. The creative economy in Bristol grew by 30% between 2010 and 2018³ and some parts of the creative economy are projected to grow even faster in the coming years.



1: https://media.nesta.org.uk/documents/creative_nation-2018.pdf

2: <https://ec.europa.eu/eurostat/documents/3217494/10177894/KS-01-19-712-EN-N.pdf/915f828b-daae-1cca-ba54-a87e90d6b68b>

3: <https://www.ons.gov.uk/economy/grossvalueaddedgva/datasets/regionalgrossvalueaddedbalancedlocalauthoritiesbynuts1region>

Fig 12: Cultural and Creative Industries survey



The sector has a highly diverse business base with a significant number of micro and small and medium sized businesses. Headlines of large investment and fast growing turnover in some parts of the sector mask the significant challenges many businesses in the creative economy faced even before COVID-19. Difficulty in accessing finance and talent have long persisted and the increasing cost of commercial, production and performance space is becoming an acute challenge, requiring new models of operating and investment to ensure the sustainable growth of the creative economy.

COVID-19 has had a devastating effect on the sector, along with hospitality and leisure, the majority of the creative economy is predicated on performance and production live and in-person experiences which museums, theatres, festivals and events, film and TV production all ceasing activity and closing their doors in mid-march 2020. Due to the employment patterns present within most of the sector, short-term, project-based work and often transitioning between PAYE and self-employed contracts in a single year, creative economy freelancers have been one of the groups which have been unable to benefit from many of the Government support schemes open to other sectors.

Surveying undertaken throughout the early phase of the pandemic demonstrate the scale of the impact, over half of Bristol's cultural organisations were ineligible for any of the grants or reliefs that provided support for other sectors. Average combined weekly loss of income across the city's cultural organisations ranged between £314,485 and £375,316 with predictions that many organisations will have exhausted all unrestricted reserves by Autumn 2020.

Based on the Association of Independent Museums Economic Impact Toolkit the combined economic impact of museums in the city is over £35m. All venues closed in March and are only just beginning to reopen and as such have lost a significant proportion of their projected income. Nearly two-thirds of festival and event organisers were forced to cancel planned events, 42 of the large outdoor/indoor festival and live events who responded identified a £5million loss due to cancellations in summer 2020, with a further £6.5million impact on the wider supply chain.

Film and TV production over the last 10 years has become the jewel in the crown of Bristol's creative economy. Providing tens of millions of inward investment and hundreds of high paying direct and indirect jobs each year this is key sector in Bristol's economy.

These sectors are made up of many micro-organisations with no premises, limited contracted staff and a huge pool of freelancers, so government support has had limited impact.

For those contracted employees in the creative economy most exposed to COVID-19 and social distancing measures 70% are or have been furloughed under the Coronavirus Job Retention Scheme, this has been vital in supporting the living standards of those in the sector, as this scheme comes to a close we expect to see a significant number of redundancies, pay-cuts and reduced hours as organisations and businesses seek to manage a trading environment characterised by restricted capacity, weak consumer demand and rising fixed costs to enable social distancing and enhanced health and safety measures.

The digital aspects of the sector have been able to adapt quickly, with the skills and capacity to work remotely and with the additional demand for digital entertainment and business content. This increases the importance of digital literacy as a core skill and the need to have tailored apprenticeship and vocational training pathways into digital creative careers.

The cultural and night time economy has seen an opening up, however social distancing arrangement may lead to insufficient revenue to meet operating costs.

Additionally, key issues for Bristol include:

- greater support is required for businesses without significant premises, freelancers and festival and event operators to address gaps in financial support and investment through the Culture Recovery Fund
- essential to reinstate social contact as a basic requirement of creative project working – limited scope for broadcast production under distancing conditions;
- particular pressure on freelance workers and specialist micro-companies dependent on supply chain from media production – with disproportionate impacts on women;
- development of a long-term skills pipeline in creative and production occupations targeting young people through entry level roles, apprenticeships and work experience; and
- longer term skills supply with uncertainty in the sector affecting willingness of individuals to establish new enterprises in an unstable market.



2.2.3 Retail and Food Service Sectors

Wholesale, retail, food and accommodation provide around one in five jobs (20.4%) and also one in five enterprises (18.8%) in Bristol.¹ COVID-19 is having a devastating impact on the retail and food service sectors, affecting both established chains and independent operators.

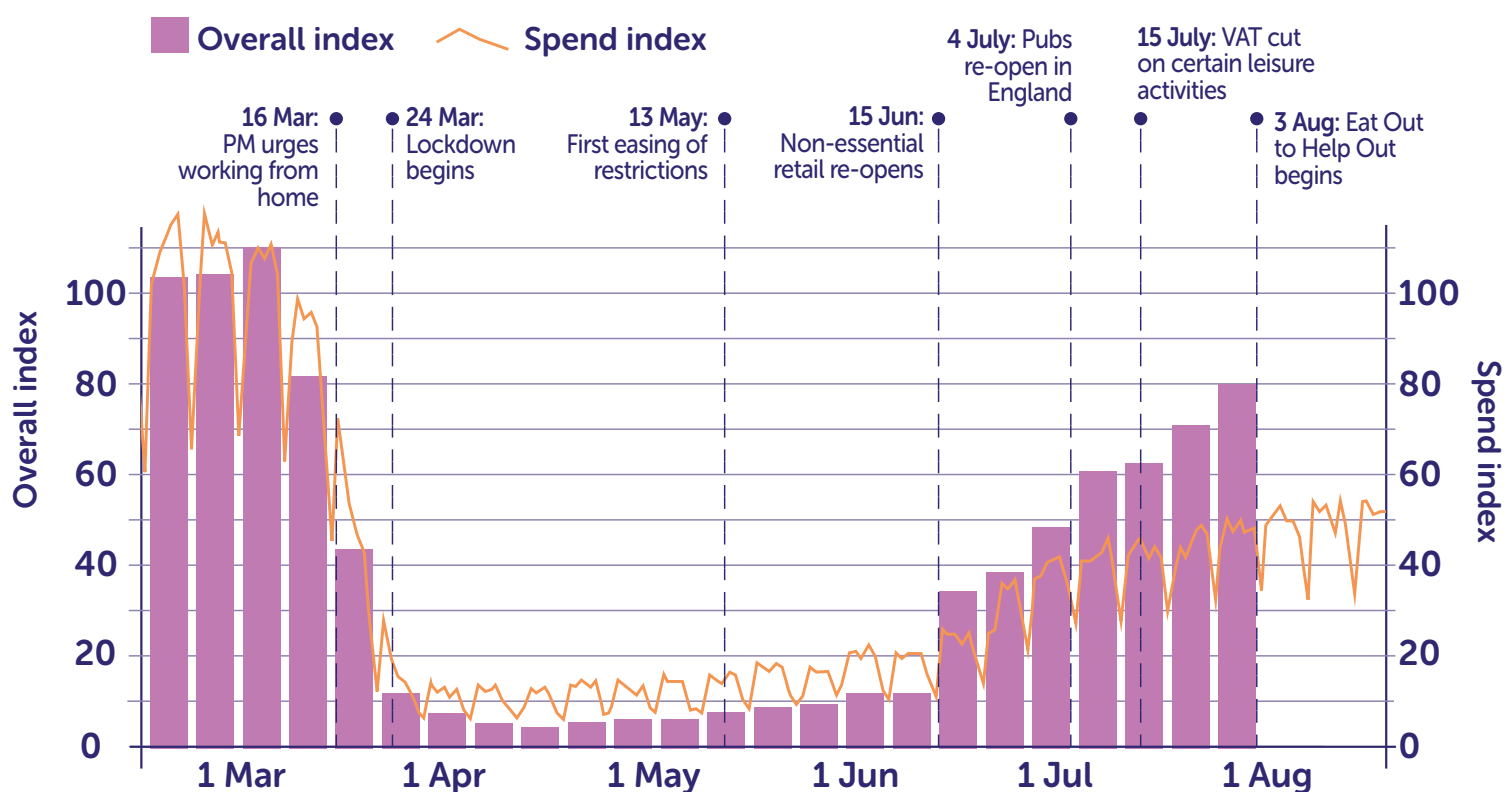
The lockdown of retail, food, leisure and personal service businesses came at a time when the city centre and local high street retail offer is changing, with the pandemic accelerating the move to online shopping. This risks increasing market share going to retailers based outside the region, bringing costs to the local economy and reducing environmental sustainability. While the reopening of a majority of retailers has re-animated highstreets and local centres,

social distancing rules have limited turnover and ongoing health concerns have impacted footfall, with numbers in Bristol around half of the pre-lockdown levels.² Information from footfall data provider Springboard (which supplies such data to the UK Government's High Street Taskforce) suggests that Bristol is outperforming other UK high streets. For week commencing 13th September 2020 footfall in the Broadmead area was down 31% year-on-year compared to an overall figure for UK high streets, down 34.3% year-on-year. Broadmead has consistently outperformed the UK high streets figure since lockdown restrictions were first lifted.

Businesses operating in the night time economy have been adversely impacted by many of the restrictions in place to control the spread of the virus, with some not having a date for reopening. Many of those that are open are facing ongoing viability issues.

Fig 13: Centre for Cities high streets recovery tracker³

Overall recover and spend index: This index looks at everyone who was in the city centre at any time of the day, compared to a pre-lockdown baseline of 100. The **spend index** looks at relevant offline sales made in the city centre at any time of the day, compared to a pre-lockdown baseline of 100.



1: ONS Business Register and Employment Survey 2018; Business Count 2019. Accessed 23 July 2020

2: WECA Second Recovery Taskforce Report, July 2020

3: www.centreforcities.org/data/high-streets-recovery-tracker/

The lockdown has increased retailer engagement in online marketing and sales, as businesses have adapted their methods of customer engagement. While the retail grants schemes have been essential for short term survival, rateable value ceilings have effectively excluded some city centre businesses, exacerbating the short-term financial challenges. Non-food retail, food outlets and leisure operators will need to continue to diversify their operating arrangements and engage in physical and online trading. This will generate significant issues both for businesses, in developing new skills and capacities in marketing and financial management, and for local government to provide lower cost options for high street trading – such as pop up units, short term letting, street markets.

Additionally, key issues for Bristol include:

- significant implications for both city centre and local high street functions – reduced demand for retail space will require more creative land use and meanwhile uses to reinvent functions and maintain viability of highstreets;
- maintain focus and investment on public assurance campaigns and incentives to increase footfall and spend in the city centre and high streets, which will link to supporting the visitor economy
- a better understanding of the economic contribution of the night time economy to the city, and the role it plays in the city centre and highstreets
- the need for ongoing support to businesses on social distancing requirements and options for the use of outdoor space, including traffic measures and pedestrianisation of key locations where there are clusters of hospitality businesses
- business resilience packages to address the ongoing frailty of many businesses, with limited potential to grow turnover and management of debt incurred during the lockdown; and
- impact of job losses on specific groups and communities over represented in the sector including employment opportunities for young people.



2.2.4 Advanced Manufacturing and Engineering

The manufacturing and engineering sector in Bristol is a relative small part of the total economy, but high value. There are around 10,000 jobs (3.6% of employment) across 785 firms (around 4.3% of enterprises).¹

Bristol and the West of England is key to the regional aerospace and advanced engineering sector, with specialist design and manufacture of military and civil aircraft, satellite technology and advanced engine design. Parts of this sector have been particularly hard hit by COVID-19, with a global slump in demand due to restrictions in movement, particularly international travel, reflected in a 40% reduction in civil aerospace orders.²

While the immediate impact is severe, the sector is undergoing longer term change in the automation of production processes, a shift in labour and skills demand and convergence of some parts of the industry. To retain local investment and support longer term productivity, it is timely to identify opportunities for strategic investment

that contributes to sector integration and incentivises innovation, for example, the ground-breaking Digital Engineering Technology and Innovation programme. With reduced production output, increased emphasis on development and the identification of new markets can have long term benefit.

Additionally, key issues for Bristol include:

- the need for intensive support for the advanced manufacturing supply chain to retain both existing investment and skilled labour force – such as the Made Smarter South West programme to support digitalisation of the manufacturing supply chain, to which a bid for government funding has been led by WECA on behalf of 6 LEPs across the South West;
- public investment in digital, energy and transport infrastructure to enable longer term growth; and
- raising the skills (including accreditation of experience) of craft and operative staff and brokerage of redundant workers to related industries (energy, transport, waste etc).



1: ONS Business Register and Employment Survey 2018; Business Count 2019. Accessed 23 July 2020

2: WECA Second Recovery Taskforce Report, July 2020

2.2.5 Low Carbon Sector

Reducing energy usage and waste and contribution to mitigation of the climate emergency is a key issue for Bristol, as set out in the One City Climate Strategy 2020, and emphasised by the declaration of climate emergencies and the development of Climate Emergency Action Plans at both Bristol and West of England level. The sector is diverse and high value and includes craft level construction firms through to cutting edge manufacturing and design companies in the renewable energy sector.

The One City Climate Strategy estimated that to become carbon neutral Bristol would need 10,000 person years of work. Much of this is in the construction and low carbon sectors.

The impact on sector performance has been minimal, with a shift in energy consumption from commercial to domestic use and a reduction in business to business services.

The sector is already forecast to experience a high level of growth over the next decade and increased levels of government grant announced in the Chancellor's Summer Statement and anticipated in the Autumn Statement provides an opportunity to accelerate investment in green building retrofit and renewable energy, support the development of high value green technologies in energy management, control systems and materials design, and increase skills training for vocational routes into green construction and engineering careers. There are also plans to expand the existing Low Carbon Challenge Fund and Local Energy Schemes as part of the regional recovery efforts.

Additionally, key issues for Bristol include:

- secure maximum local employment and business benefit from central government housing and energy efficient grants, overcoming the barriers for work undertaken by smaller local business qualifying;
- improve green skills offer to both upskill existing tradespeople and create bespoke pathways through vocational training to employment for young people; and
- support translation of invention to commercial innovation in the development of low carbon goods and services for growing international markets
- encourage those Bristol businesses who wish to decarbonise their operations to use the local supply chain



2.2.6 Construction

The construction sector is traditionally viewed as a barometer of wider economic conditions, as it quickly feels the effects of recession and when the economy is buoyant. In Bristol, the sector is responsible for 12,000 jobs (4.4% of employment) and 2,045 enterprises, around 11.2% of the total in the city. The sector is primarily made up of micro businesses, with 91% employing fewer than 10 staff and a high proportion of self-employed and sole traders in craft occupations. Employment and skills within the construction sector is changing to reflect both technology changes in the use of digital, changing building methods (including off-site prefabrication) and the rising requirement for low carbon and energy efficient buildings.



While the sector has been significantly affected by COVID-19, with 63% of employment furloughed at the end of July in the South West, there are strong prospects for recovery. Significant grants will be available in the autumn to fund low carbon improvements to buildings, as above, but also an acceleration of infrastructure investment is planned. With existing employment and training services in place, including OnSite Bristol, there is scope to leverage housing, public realm and infrastructure schemes to stimulate recovery.

Additionally, key issues for Bristol include:

- strengthening public procurement and planning obligations to increase the use of Bristol contractors and boost the creation of employment and training opportunities for local residents from capital programmes;
- secure maximum local employment and business benefit from central government housing and energy efficient grants, overcoming the barriers for work undertaken by smaller local business qualifying;
- increasing capacity among colleges and higher education to deliver higher level construction, energy efficiency, digital design and project management skills required in the sector; and
- improving career pathways into the sector, addressing long standing gender and diversity issues, with Black, Asian and Minority Ethnic and women workers particularly under-represented.¹
- building capacity in green and modern construction methods to meet the demand needed to deliver carbon neutrality

1: www.gmb.org.uk/news/construction-industry-just-125-women-and-54-bame

2.2.7 Logistics and Distribution

Transport and storage in Bristol employ some 11,000 people, representing around 4% of the workforce. There are some 810 enterprises in the sector, with the vast majority (92.6%) micro, employing fewer than 10 staff.

The sector has adapted to the COVID-19 pandemic, largely maintaining scale of activity, although with significant adaptations in both the transport of goods and the operation of public transport services. The main affects have been a collapse in demand for air travel and loss of trade for small scale services such as taxis and courier services.

There are a number of longer-term trends in the sector affecting the demand for skills that include increased requirement for digital skills, improved customer service skills and wider changes in the use of technology to manage advanced logistics systems. COVID-19 is expected to accelerate these trends with more transactions moving online. The sector faces a key challenge in replacement demand, with a need to both fill vacancies as workers retire while also adapting job roles to reflect changing technological requirements.

Additionally, key issues for Bristol include:

- employment support and job brokerage for transport workers / drivers for training and movement from low to high demand areas of the sector;
- increased emphasis on digital skills for advanced logistics, customer management and marketing activity; and
- need for workforce development to reflect move towards greening of the sector, transport management, sustainable fuel and reduced pollution.

2.2.8 Education

The education sector in Bristol makes a substantial contribution to employment, with some 8.8% of jobs in the city.¹ With a network of schools, large further education colleges and two major international universities, the sector's importance extends through its supply chain, strengthening the labour market, the attractiveness of the city to students, researchers and businesses and the capacity for enterprise and innovation, across a wide range of sectors. As Bristol has double the concentration of education employment² compared to the wider South West region, a major loss of students and revenue will have a significant economic impact beyond the education sector on retail spend, the student housing market as well as the vitality of the city.

Universities – The sector is facing unprecedented financial challenges, with a loss of international students, increased deferral of UK students and additional costs of adapting teaching and research activity to meet social distancing requirements impacting on Universities and also on the language schools in the city. For Bristol, the economic impact is likely to affect employment, particularly among support staff and may slow the speed of delivery of major capital programmes. Preserving a strong academic and research capacity in the city will be vital to both accelerating the recovery and realising the full economic potential of high value growth.

Additionally, key issues for Bristol include:

- identification of the supply chain impacts for local business of reduced education expenditure, using wider public sector procurement to support local firms;
- the creation of more flexible pathways for teaching and learning that increase participation in higher education among residents of Bristol; and
- improve the alignment of qualifications and research to regional specialism to support high value business and product development.

1: ONS Business Register and Employment Survey, 2018.

2: A location quotient of 2.2 – based on analysis of ONS BRES data for Bristol compared to South West region.

2.2.9 Health and Life Sciences

The health and social care sector is a major area of employment in Bristol, with around 43,000 jobs (15.7% of employment). The majority of health employment (69.4%) is in hospital and primary care activities, with additionally over 12,000 jobs in social care.¹

Alongside these front-line services is a significant and growing health technology sector, which extends across advanced manufacturing and design through to the development and production of digital and diagnostic systems. This sector also includes “Deep Tech” firms working in emerging technologies such as biotechnology and synthetic biology, artificial intelligence and quantum computing, with innovation in these sectors in Bristol supported by the Engine Shed/Set Squared Centre, and leading Bristol initiatives including Unit DX and the University Enterprise Zone.² Innovation in this sector has been at the forefront of the fight against COVID-19.

The impact of Covid -19 has seen severe pressure on health sector employment and in some respects a re-evaluation of the skills of care workers. The sector has traditionally faced challenges in recruitment and had a poor reputation for pay and terms

of employment. There are expected to be continuing labour and skills gaps in the sector, potentially exacerbated by the UK’s exit from the EU and tighter immigration controls, that need to be met locally. This is a local crisis, as well as a national one, and also hinders the ability of the sector to enable unpaid carers to contribute to the wider economy. At the same time there is a growing demand for high level digital and design skills in medical technology and a major opportunity to capture national and international markets in the wake of COVID-19.

Additionally, key issues for Bristol include:

- accelerating the development and delivery of the Temple Quarter Enterprise Zone and its innovation district as a key facility for the development and translation of digital research into technical product innovation and commercialisation;
- improved career pathways into health and care roles, accompanied by better access to in-work training and development and contract terms and conditions; and
- increased investment in digital convergence technology training, focusing on the development of medical devices, diagnostic and display systems.



1: ONS Business Register and Employment Survey, 2018.

2: unitdx.com/bristols-university-enterprise-zone-gets-1-5m-boost-for-biotech/

2.3 Black, Asian and Minority Ethnic Businesses

While there is limited data on the impact of COVID-19 on Black, Asian and Minority Ethnic businesses in Bristol, available research¹ suggests disproportionate effects of premises closure and reduced consumer demand on Black, Asian and Minority Ethnic businesses viability.

The primary issues are a combination of the high proportion of businesses in retail, food sector and leisure closed during the pandemic, the limited scope to transfer business functions on-line and financial capacity to cover running costs in a context of severely reduced income. Given these factors, there is a risk that Black, Asian and Minority Ethnic businesses (including sole traders) will experience a higher than average failure rate when support programmes end.

Both the immediate and long-term implications are likely to be exacerbated by structural issues affecting Black, Asian and Minority Ethnic businesses. 77% of Black, Asian and Minority Ethnic led businesses responding to the BCC business survey in May highlighted the need for financial support through government schemes and small business grants. In additional qualitative responses on business need highlighted freezing business rates, assistance with rent and other operating costs and better police patrols to protect closed business premises. Black South West Network research highlights barriers to accessing emergency grant funding due to higher than average use of co-working spaces and public venues that reduced eligibility for support. There are also language issues and a closure of VCS services that may have provided advice and support to Black, Asian and Minority Ethnic businesses.

These immediate issues are made worse by existing barriers to Black, Asian and Minority Ethnic businesses accessing loan finance

and specialist advice services. In the context of COVID-19, improving access is vital for firms to develop options to preserve business activity into a recovery phase. Ensuring access to financial and legal advice will be particularly important to assist businesses to manage additional debt accumulated during the lockdown period.

Key issues include:

- clarifying and prioritising support to address the additional financial and operational risks faced by Black, Asian and Minority Ethnic businesses in Bristol;
- targeting additional financial, legal and HR support to support Black, Asian and Minority Ethnic businesses to implement recovery plans; and
- tailoring financial management and digital training to build the resilience and capacity of Black, Asian and Minority Ethnic businesses, and providing appropriate advice, support and funding opportunities to Black, Asian and Minority Ethnic communities and individuals to support self-employment and start-up businesses.



¹: [Business West Coronavirus \(COVID-19\) Business Impact Survey Report](#) and [Black South West Network Research: Impact of COVID-19 on BAME Led Businesses, Organisations & Communities](#)

2.4 Voluntary Community and Social Enterprise (VCSE) Sector

While many business and organisations temporarily closed as a result of lockdown measures, the VCSE sector has had a critical role leading support for communities, mobilising quickly to support those in need particularly in disadvantaged groups. New research suggests that only a fifth closed their doors, with four-fifths instead offering new, existing or modified services to continue to meet need.

The VCSE sector rely on income from trading of services for example cafés, childcare and room rental are a significant part of their overall income; and community anchor institutions exposed to trading income have been hardest hit during the pandemic. The sector's capacity for fund raising has been significantly reduced as a result of the current crisis, impacting on the immediate and longer term sustainability of organisations. In line with guidance, charity reserves are low, often covering only 3-6 months' running costs, local research indicates that 22% of local organisations are at risk of reducing or closing services. The recovery of the VCSE sector most likely implies a mixed funding models with grants, earned income and commissioned services all key. The role of the VCSE sector alongside business as an economic driver should also be recognised, and the sector has the expertise and desire to champion and co-produce economic recovery, based on frontline work with communities.

Alongside the business sector, support for and investment in the VCSE sector will need to be prioritised particularly once government funding packages and the furlough scheme ends. Strengthening the longer term resilience is a key priority, focusing investment on capacity building to strengthen the sector, embed more sustainable business models, financial planning and digital skills and infrastructure. This includes guidance and support adapting spaces and community hubs in line with social distancing requirements including the potential use of outdoor spaces, providing assurance to local communities who continue to access services.

Engagement and localised targeted support is a key strand of the city's recovery strategy, both from a place based and community perspective. Building capacity in the VCSE sector to sustain what works and continue to innovate will be a key mechanism for the city's response. In particular utilising the city's ecosystem to facilitate the creation of community-led solutions with communities experiencing systemic inequality and those furthest away from the labour market.

The VCSE Strategy Group informed research by Black South West Network in partnership with VOSCUR and Locality will set out the ambition for the VCSE role in the city. Moving forward, the ongoing development of the city's economic recovery plan needs to be aligned to the emerging priorities for the sector.

2.5 Growth sectors and building international trade and inward investment

Bristol is historically an international city. This is reflected in the diversity of our resident and business populations, with 91 languages spoken and people with roots in nearly every country in the world. Bristol is connected through our citizens of international heritage, international businesses and supply chains, through our airport, the students and research networks of our universities, and through our ambitions to be a global citizen - focusing our actions to help achieve the UN Sustainable Development Goals (SDGs).

Our global links and aspirations underpin efforts to promote awareness of Bristol's assets and opportunities to attract and nurture successful global companies from our city, led by the work of Invest Bristol and Bath. We lead with our values and our strong collaborative ethos, with an aim to build the strengths of our higher education institutions, the reach of creative and media production sector, the development of applied digital technologies in areas such as cyber security, our advanced manufacturing sector in aero-engineering and green technology, and the major export opportunities provided in professional services. The WECA International Market Prioritisation study also provides an opportunity to drive a more targeted approach to inward investment and trade opportunities.

The way the world operates has changed. We will adapt by doing some things differently in the longer-term. For example, we will continue to develop our international reputation as a world leader in festivals and events, but many of these will now be virtual or with limited numbers of physical participants. We will use our creativity to ensure we remain world leading in this, and

explore how we can develop and promote such events in a coordinated way to further promote the city and ensure it remains a growth sector for our region.

In the same vein, global trade is changing, due to shifting supply chains during the pandemic, changing consumer trends and expectations, and the effects of the UK exit from the EU. While trade is changing, the international connectivity available in Bristol remains significant, and Bristol Port remains fully operational and continues to import supplies essential to the UK, and provides the closest deep-sea port to the Midlands and the UK's industrial centre. It will be vital to ensure that 'brand Bristol' and the markets and sectors we are focusing on, are clear, to ensure that the city maximises opportunities to attract high value investment and our businesses have access to the support they need to trade in overseas markets. As the level of international investment enquiries returns to pre-pandemic levels, a clear approach to aligning sector opportunity, key development sites (particularly Temple Quarter and Western Harbour), other non place-based areas for investment, and the skills and capacity in the workforce are vital to realising our growth goals.

Key actions include:

- Developing a clear brand and proposition for Bristol, reflecting the city's sectoral strengths, USPs including city of festivals, film and music, core values and opportunities for growth into international markets;
- Develop a coordinated approach to supporting Bristol businesses who wish to sustainably grow trade and business overseas, including working with service providers who offer finance, training and technical advice

- Utilising the One City approach to champion Bristol through education, business and global diaspora networks;
- Use Bristol's membership of influential international networks to support our COVID-19 recovery and delivery of the SDGs
- Building regional capacity to engage in and support the promotion of Bristol in key European, North American and Asian markets, building on the evidence base identified in the WECA International Market Prioritisation Report, and support the work of Invest Bristol and Bath
- Work with regional partners to produce robust market analysis to identify and prioritise future growth sectors, and support businesses through the West of England Growth Hub, which is extending the reach of its support into local areas, to create more flexibility in provision
- Explore the potential for new economic models, the encouragement of employee ownership and community wealth building to build a more inclusive and wellbeing-focussed economy.



Bristol's Places

Our Priorities for Response and Recovery

Our strategic priorities for Bristol's places are focussed on enabling development to ensure provision for future homes, jobs and quality places, improving connectivity and the protection of green spaces, and concentrating on areas with communities experiencing long term deprivation – which must all be achieved while tackling the climate and ecological emergencies at every step.

The recommended Response and Recovery interventions and actions for the city are set out below, based on the evidence and context detailed in the next section, and informed by expertise from city partners and stakeholders.

While COVID-19 has affected the whole city, the specific impacts have varied across Bristol's places in relation to underlying issues of poverty and business structure. The effects have been amplified in the locations and communities most vulnerable to shock, whether this is through a sudden loss of trade, rising levels of exclusion from work or from a lack of access to the digital infrastructure that has become essential during the pandemic. COVID-19 has provided a fundamental challenge to the established functions of places and to the efficacy of public policy intended to deliver inclusive and sustainable development.

Key to addressing many of these challenges will be delivering improvements in Bristol's strategic transport infrastructure, and improving the quality of our transport planning - alongside measures to address air quality - must be closely aligned to the economic recovery and renewal Action Plan. For many, COVID-19 has highlighted that improving the quality of our urban public spaces is more important than

ever, and there have been many benefits from changes in travel patterns that were established during lockdown. Efforts to lock in these benefits may even enable the city to achieve compliance on nitrogen dioxide emissions without the need for a charging zone. Either way, addressing air quality is part of the economic recovery and businesses must be adequately supported to prepare and adapt to Clean Air measures

The need to address the economic impact of COVID-19 does not reduce the urgency of the climate and ecological emergency declared in the city, and efforts to promote carbon neutrality, increase climate resilience and protect the natural environment remain key. The One City Climate Strategy and the new Ecological Emergency Strategy must be aligned with our economic recovery not just as they relate to the priorities identified for Bristol's Places, but for our people, skills, businesses and investment priorities, and work will continue to build closer alignment as the Action Plan is developed.

Analysis has been undertaken on the emerging impact on Bristol's places with particular regard to longer-term place based interventions, development and areas of regeneration, physical and digital connectivity, parks and open spaces, the impact on the city centre, highstreets and local centres, and a detailed focus on Avonmouth and South Bristol and how unlocking potential opportunities will support recovery and renewal.

These priority actions seek to reduce poverty and inequality, increase the city's resilience and environmental sustainability, and to enhance the economic and social wellbeing of every community.

Priorities for response and recovery:

City Centre – a key destination for work, leisure, tourism and investment

- Commission a Development and Delivery Plan to build on the City Centre Framework – to set out ambitions for regeneration, land use, transport, public open space and quality and safe walking/cycling routes. **SDG: 5.3, 11.2, 11.3, 11.7**
- Continue with transport and public realm interventions to support social distancing measures. **SDG: 3, 11.2**
- Support meanwhile uses on land and within properties to support retail, leisure and hospitality businesses and animate spaces. **SDG: 8.3**
- Work with City Centre and Broadmead BIDs to gather, analyse and understand footfall/spend information in order to inform initiatives, and build data on perceptions of safety in city centre public spaces. **SDG: 11.7, 16**
- Assess and implement recommendations from the newly commissioned retail and leisure study.



Protect and enhance the viability of highstreets and local centres

- Ensure highstreets reopen within the guidelines of the Government's Recovery Strategy, working with businesses to assist them in the use of public space to enable them to trade safely. **SDG: 3, 5.3**
- Promote the city as a safe destination, including incentives to use public transport, and supporting the #BristolTogether campaign. **SDG: 11.2**
- Investment in local centres and highstreets to diversify and create new functions in addition to retail, including small flexible workspace and increased local leisure. **SDG: 11.3**
- Short to medium term focus on maximizing the approach to space use and placemaking throughout to encourage cultural, hospitality, night time sectors. **SDG: 11.3**



Priorities for response and recovery:

Address long term unemployment and income deprivation in South Bristol

- Targeted national and international marketing to promote film, TV and digital production facilities in South Bristol.
SDG: 8.3
- Deliver area based support to South Bristol entrepreneurs and SMEs.
SDG: 8.3
- Increase provision of business start-up and scale-up space, working with commercial sector partners.
SDG: 8.3
- Ensure adequate allocation of employment land to support existing business expansion and inward investment.
SDG: 8.1, 8.3
- Work with regional partners to identify area based targeting of the Workforce For the Future programme – to support businesses with future skills requirements and upskilling staff.
SDG: 4.3, 4.4
- Engage with schools and colleges to support young people to access work experience, vocational training (including apprenticeships) to enhance prospects for training opportunities in creative industries.
SDG: 4.4, 8.6
- Deliver Hengrove Park a housing led mixed use development – with Covid secure community work hub and skills pathways for local residents.
SDG: 4.3, 4.4



Develop an area based economic strategy for Avonmouth which maximises the locational advantages and sectoral strengths

- Strategic brown and green field sites development – for logistics, green manufacturing and engineering, energy and waste sectors.
SDG: 7, 11.3, 12.2, 12.4, 13
- Industrial estates infrastructure improvement and intensification (Efficient Smart Sustainable Industrial Areas vision) – to include a focus on SMEs.
SDG: 9
- Develop a Skills Academy project – located within the area linking local communities to Enterprise Area opportunities.
SDG: 4.3, 9
- Public and sustainable transport – address bus and rail service and cycling /walking infrastructure gaps, especially across the Bristol, South Gloucestershire and North Somerset boundaries, subject to on-going Portbury, Avonmouth and Severnside Transport Strategy process (West of England Joint Local Transport Plan).
SDG: 9.1, 11.2



Priorities for response and recovery:

Focus public policy and action on the delivery of place change

- Ensure alignment of public policy supports integrated and intensive local regeneration activity with a whole place focus.

SDG: 17.3

- Maximise opportunity of local plan to define and protect progressive use of key sites.

SDG: 11.3



Accelerate infrastructure investment to create the conditions for equitable and sustainable growth

- Improve transport infrastructure and the efficiency of public transport and support a modal shift to walking and cycling – improving accessibility of place, for communities and workforce. **SDG: 9.1, 11.2**

- Ensure that social infrastructure including affordable childcare and adult social care are treated as essential infrastructure and are sufficiently prioritised for investment.

SDG: 3, 5.4

- Major boost for digital infrastructure that includes 5G and rapid expansion of fibre to the premises networks. Priority for lower income areas to support digital literacy and competitiveness of places for business investment.

SDG: 9.1, 9.c



Develop targeted place based interventions to connect people with opportunity

- Ensure that jobs and skills elements are integral to public funded regeneration programmes with a particular focus on maximising potential economic benefits of the flagship Temple Quarter regeneration programme. **SDG: 4.4, 8.1, 8.2, 11.3**

- Ensure the development pipeline is linked to targeted training and employment brokerage to promote local jobs in areas of need – reducing the need for travel to work and enhancing the viability of local highstreets and centres. **SDG: 4.3, 4.4**

- Support the use of the city's property assets to deliver on community priorities, including supporting assets of community value, community asset transfer, asset management and community right to buy, and helping to lever larger regional and national investment. **SDG: 11.3**



Indirectly related SDG targets

SDG: 1, 1.5

SDG: 3, 3.9

SDG: 7.2, 7.3

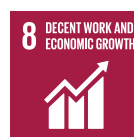
SDG: 8.5

SDG: 9.4, 9.5

SDG: 10, 10.1, 10.2

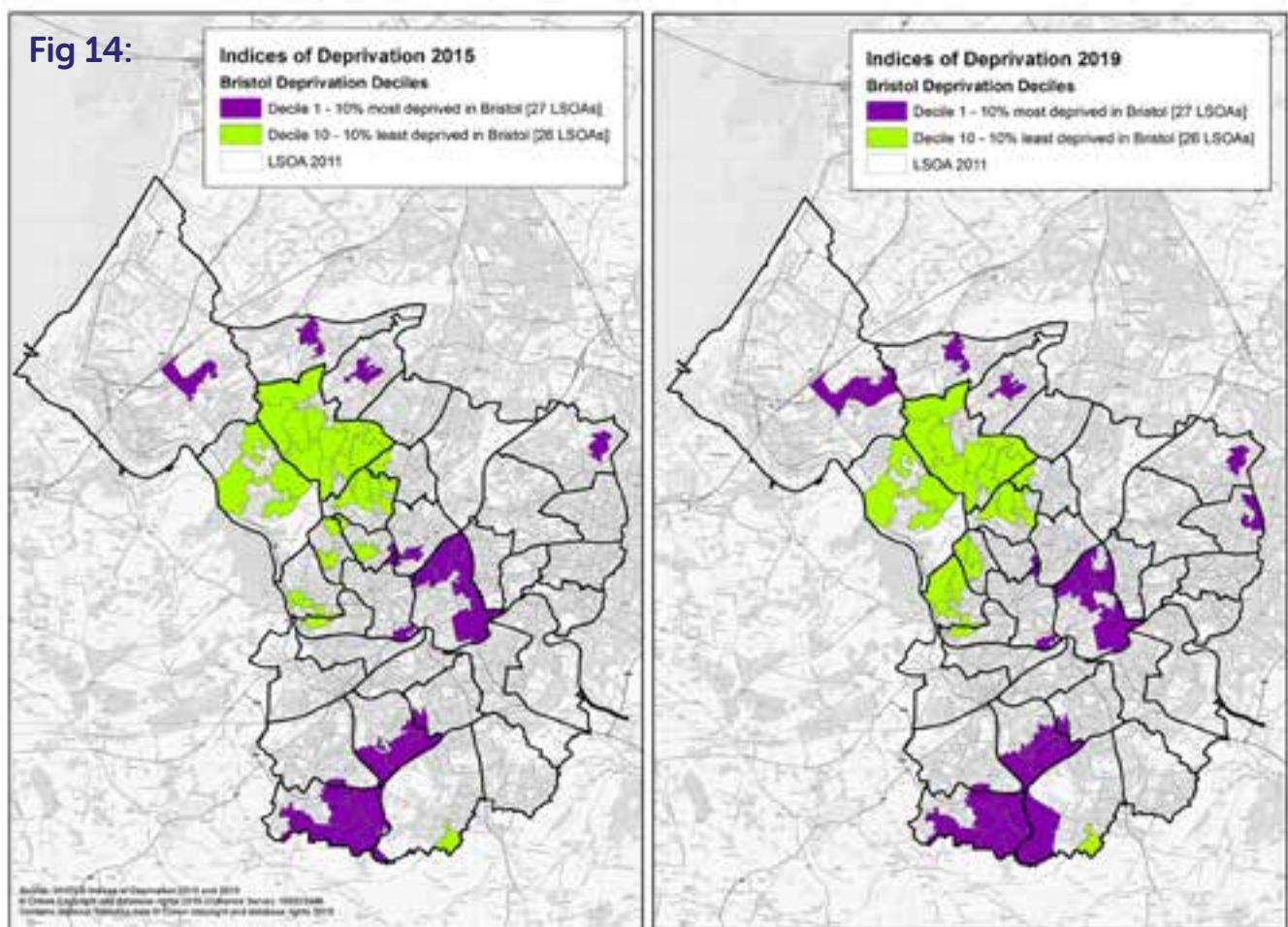
SDG: 11.2, 11.6, 11.7

SDG: 13, 13.1



Evidence and Context

Against key economic indicators, Bristol has experienced significant growth over the last decade, however the distribution of benefits and investment has been uneven. Viewed through the changes in the Index of Multiple Deprivation, there have been notable overall improvements between 2015 and 2019 against individual indicators, however there has been limited progress in changing the relative position of the most deprived neighbourhoods (figure 14).¹ Recent research has clearly shown that people in poverty prior to the pandemic have experienced the highest economic impact from the crisis.² The crisis more deeply embeds the complex and multiple deprivations at a neighbourhood level.



Bristol Lower Super Output Areas (LSOAs), a geographical area with an average population of 1,500, when ranked from the most deprived (rank 1) to least deprived (rank 263), allow analysis of patterns of deprivation over time. In 2019, there were 27 LSOAs which fell within the most deprived 10% and comparing 2015 and 2019 patterns shows that four LSOAs have moved into the most

deprived 10% decile and four LSOAs have moved out of the most deprived decile. The underlying structural conditions that reproduce deprivation are the most difficult to change, but in the context of building back a better Bristol after COVID-19, the spatial and locational characteristics of need provide a clear focus for intensive and targeted interventions.

1: Bristol City Council (2019) Deprivation in Bristol 2019 Report. Accessed 7 August 2020

2: [Social Metrics Commission \(2020\) Poverty and COVID-19](#)

The differing sectoral impact of COVID-19 creates some major issues for places in Bristol. The lockdown of customer services has severely impacted retailers and cultural businesses in the City Centre and in districts across Bristol. The current and future demand for office and industrial space may also change as flexible working practices are embedded, with potentially a significant effect on both the pace of development and the profile of local employment.

The Bristol Local Plan sets the framework and context for growth and the use and development of land across the city. With a base adoption date of 2011 this policy document is under review and the Local Plan Review consultation document March 2019 identifies key growth and regeneration areas for future investment. Policies will support growth to meet the cities needs for homes and jobs and quality places.

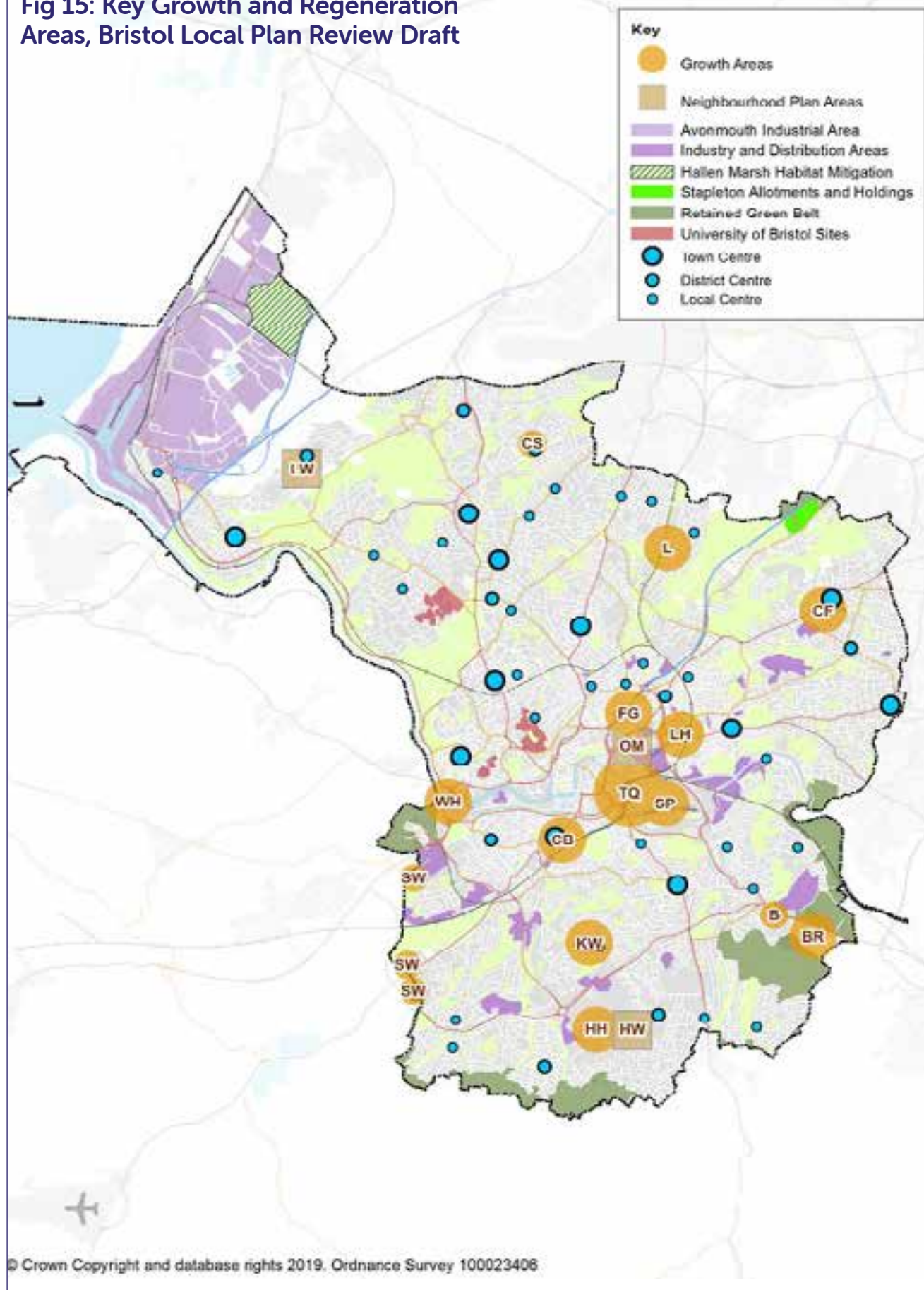
The Local and Strategic Plan is supported with evidence from the Bristol Employment Land Study, developed for Bristol City Council by specialist property consultants over the last two years. This considers the requirement for office, industrial and warehouse space and land to accommodate it over the next 20 years. Its findings and those of a strategic employment land assessment carried out

to inform the development of the West of England Spatial Development Strategy will be used to inform policies in the Plan to deliver space in the locations that local workforces and businesses need it to be, responding to the changing structure of the city's economy and pressures from alternative uses such as residential. This may mean in some locations increasing the density of economic activity and creating new space for the growth of higher value sectors. The use of land for office and industrial development forms a key pillar of realising delivery of the sustainable development goals.

The place impact of COVID-19, alongside Bristol's existing commitments to clean and inclusive growth, tackling the climate and ecological emergencies and delivery of the Sustainable Development Goals are reflected in the Local Plan statement – Progressing Bristol's Development. Bristol's planning objective is to support sustainable and inclusive economic growth across the city. Within a policy framework enabling the delivery of quality housing, town centres, infrastructure and green spaces, the local plan also supports the creation of new work space and protection of key commercial and industrial sites across the city.



Fig 15: Key Growth and Regeneration Areas, Bristol Local Plan Review Draft



Connecting Places

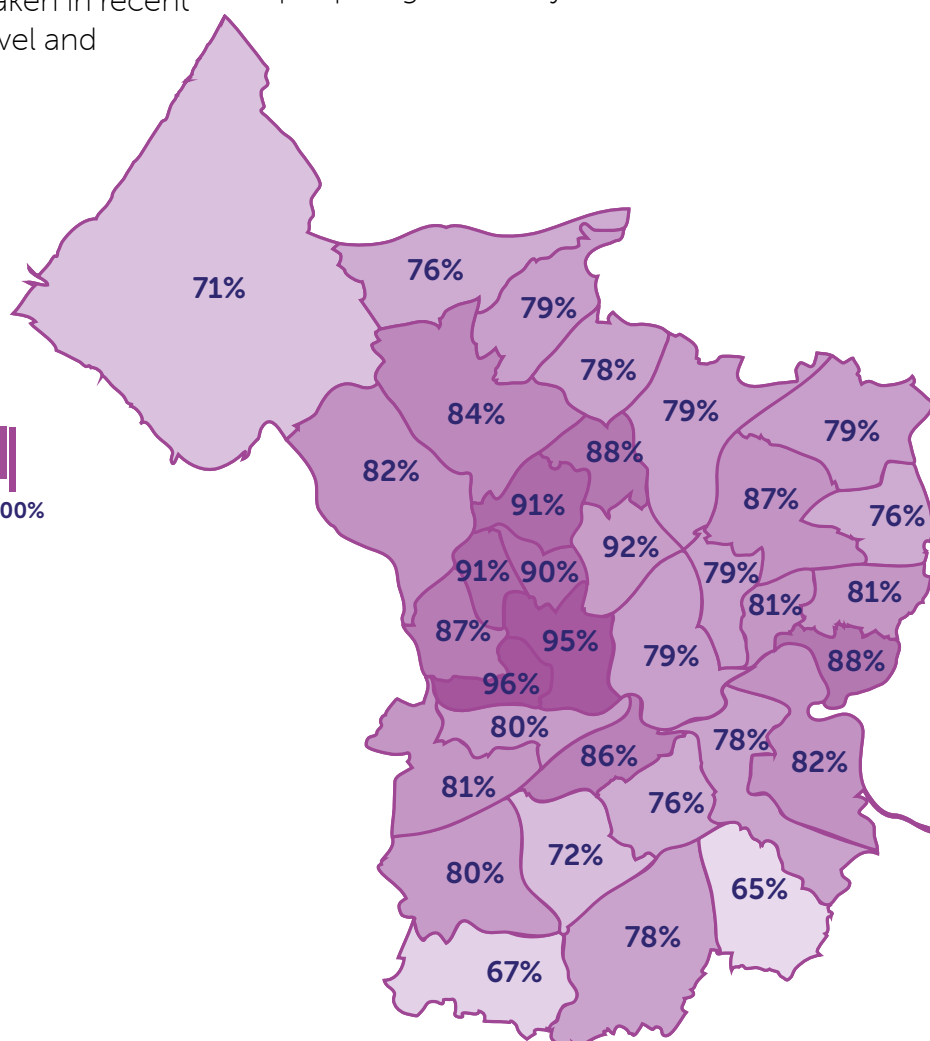
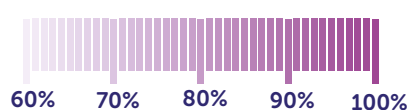
As One City, Bristol is focused on improving its physical and digital connectivity. Strengthening transport links and enhancing the public realm in ways that encourage a transition from car use to safe walking, cycling and public transport is vital to both to realising our sustainability goals and to creating liveable and attractive places.

Bristol's transport strategy sets out actions to connect places, to meet the additional demand created by growing populations and contribute to liveable places with lower air pollution and safer roads. The strategy envisions a step change driven by significant investment in transport networks and facilities, but also through changing behaviours to reward modal shift towards more sustainable movement in the city, building on the work undertaken in recent months to support active travel and maintain public transport.

COVID-19 has clearly demonstrated the significance of digital networks for work, for access to information, to connect people and for access to public services. Increasing digital literacy and skills is important, but this should be connected to a rapid expansion of 5G and fibre networks, particularly in those parts of the city with the most limited access with a focus on targeting areas which have the highest income and employment deprivation levels.

Bristol's Quality of Life (QoL) survey provides some evidence of the digital divide across the city. 95% of respondents reporting they had access to the internet at home although this reduced to 89% in areas of high deprivation, 82% of people were comfortable using digital services, and 42% were comfortable using smart technologies, this reduced significantly for some communities and in particular older people age over 65years.¹

Fig 16: Percentage of Quality of Life survey respondents comfortable using digital services



1: [Quality of Life in Bristol 2019-20](#)

Bristol's Smart City aspiration is to become the UK's –

"most connected city with high-quality, secure and reliable digital connectivity. This will ensure that all communities and businesses across Bristol can benefit from a world-class network and communication infrastructure, meet growing demands for digital services and make sure than no one is excluded from the digital economy due to poor connectivity".

Digital divide is a term that reflects the disparity between communities with and without adequate access to technology and the internet. The Smart City strategy focuses on how technology, data and innovation can play a role in making Bristol a better place, by ensuring that the city's digital infrastructure is fit-for-purpose and accessible by everyone. Accelerating the deployment of full fibre and mobile networks, in line with UK policy, will support world-class digital connectivity across Bristol which will support growth and investment prospects and increase digital inclusion.

Delivery of pilot schemes such as social housing broad band pilots and discovery work comparing Bristol's position on digital connectivity in relation to the other UK Core Cities will help inform the city's strategic approach. The impact of COVID-19 and planning for economic recovery presents a real opportunity to align economic and digital agendas.

Developing the places in Bristol is also about creating and preserving essential green spaces. These help to punctuate the urban environment and open up areas for people to socialise, take exercise and to breathe. The city is already recognised for its environmental quality and the distinctive assets of the Avon and countryside surrounding the city. However, we need apply green principles to all aspects of urban design, moderating density and continuing to improve the quality and permeability of development. This is about raising the quality of life, but is also a pillar of our response to the global climate emergency.

In recent months over the period of lockdown, the importance people attribute to its parks and open spaces has grown, with visits to parks increasing by 34% . While other community spaces such as leisure centres and libraries had to close, parks have remained an important resource, providing space for people to get out and about safely, and remain engaged in community life.

Open space provision varies significantly across Bristol, with residents in the outer urban areas typically having access to 5 times the amount of an inner urban resident. There is also a high correlation between social deprivation and inadequate provision of open space.

The need for new and improved open space is particularly acute to the east of the city centre where inadequate supply of public open space is exacerbated by low levels of private open space and high deprivation. Not only will investing in our open spaces improve the quality of life for many people, it will drive investment and help us respond to the global climate emergency.

The focus on place highlights the significant risks for Bristol from COVID-19, but also spotlights opportunity to inform the emerging Local Plan, infrastructure investment and connecting interventions to ensure that local people and businesses benefit from change. By fully exploiting existing commitments land and infrastructure development and devising long-term investment models, Bristol has the opportunity to transform the prospect and performance of its places. Building on the significant talent and assets present in Bristol provides the foundation for inclusive and sustainable growth – maximising the full potential of One City working together as a centre for high value growth within the region.

The following draws together current information and analysis to highlight key areas of intervention and support.

There are seven key areas of regeneration identified for Bristol where there is particular potential for reinvigoration of the local economy, which between them have the potential for major upgrades in employment opportunities, housing capacity, and places for leisure, business, and retail, as well as new open spaces. Crucially, these can be delivered in a way that builds in climate resilience and carbon neutrality, as well as offering wider social value.

This theme focuses in detail on **Avonmouth**, the **City Centre**, the **Temple Quarter Enterprise Zone**, and **Hengrove/ South Bristol**. The other three are **Frome Gateway**, **Bedminster Green** and **Western Harbour**. Locations of these regeneration areas are highlighted in figure 17.

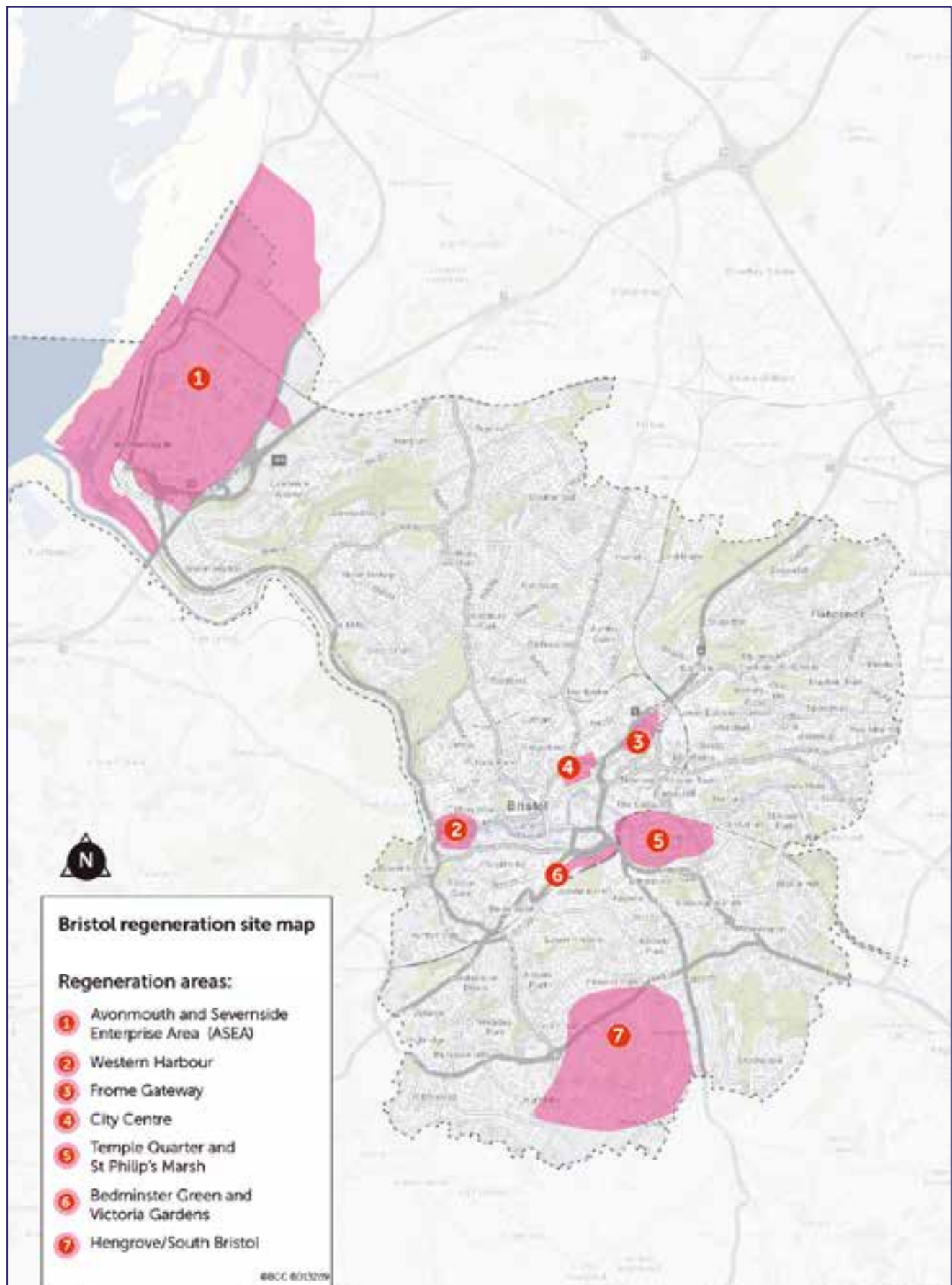
At Frome Gateway, Bristol's first climate resilient housing and mixed use development, the council is working with the community and developers to create at least 1,000 new homes, new workspace and improved green spaces.

Five brownfield sites will come together to create Bedminster Green, an enhanced and sustainable urban area, built around attractive open spaces that will have excellent transport links to reduce carbon use and make the area more sustainable. Alongside 1,500 new homes and student accommodation the project will strengthen business, retail and employment opportunities acting as a catalyst for the overall regeneration of the area.

At the entrance to Bristol's Historic Harbour, the aspiration for Western Harbour is to create a vibrant neighbourhood which responds to the needs of local and citywide communities, featuring new homes, retail and leisure and high quality public open spaces whilst maintaining and enhancing links to the water and its historic setting.



Fig 17: Bristol regeneration site map



3.1 Bristol City Centre

The City Centre of Bristol is a primary economic location in the West of England. With a high density of employment and economic activity, it is the administrative, professional, healthcare, cultural, transport and educational hub of the city.

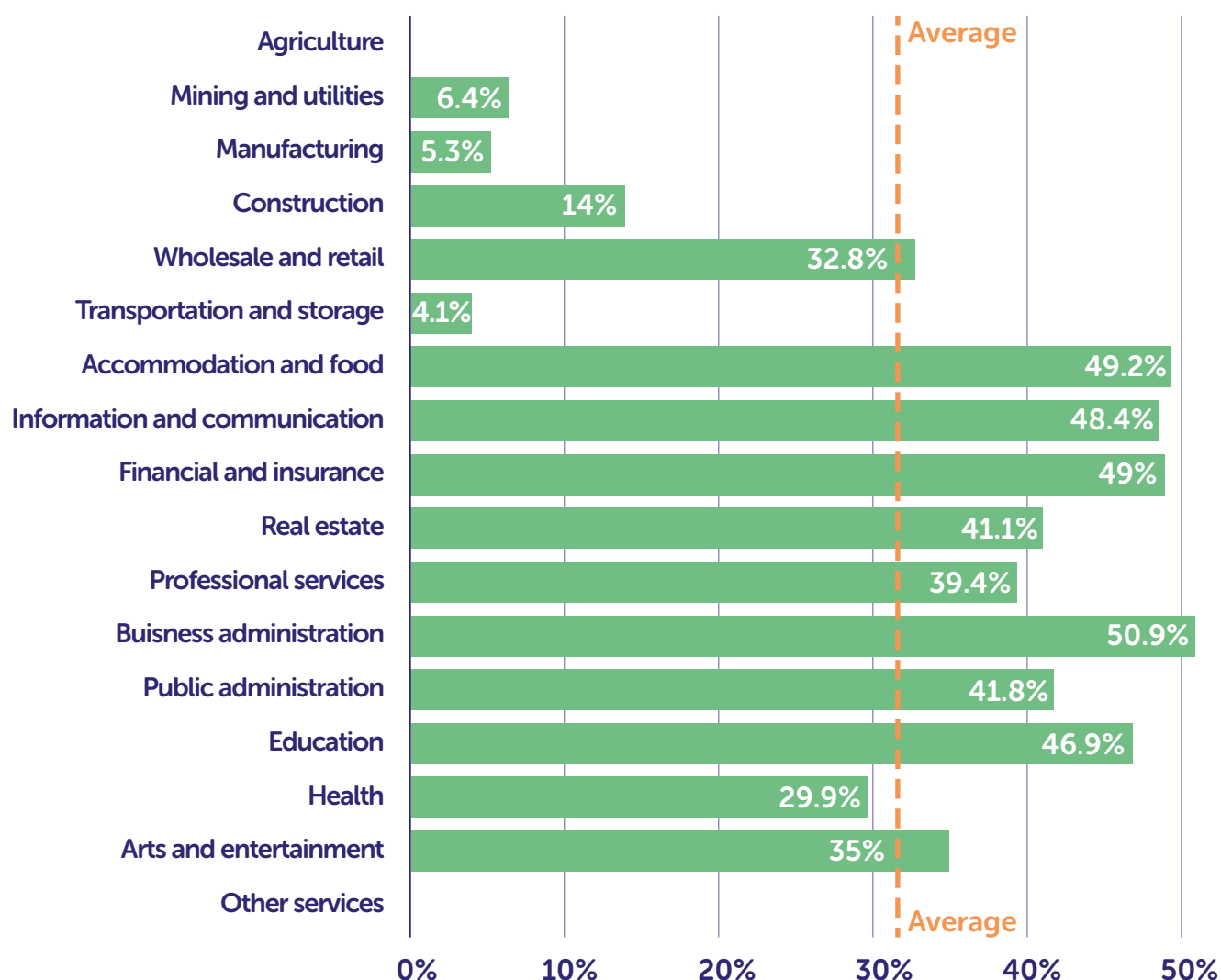
Building on the economic success of the City Centre, the Local Plan will focus on further strengthening its role as a regional hub. There is scope for at least 11,500 new homes across central Bristol alongside workspace, educational, leisure and cultural uses within a dynamic and diversifying area. The City Centre Framework sets out the council's ambitions for development, transport and

public space improvements in and around Broadmead, St James Barton Roundabout and Castle Park areas.

The City Centre is home to around 45% of the city's jobs and approximately one quarter (24.2%)¹ of the enterprises. As shown in figure 18, there is a clear concentration of employment by sector in the City Centre area.

The key areas of concentration of employment, compared to the average for all sectors, is in the visitor economy, where the City Centre is responsible for 37.8% of jobs; the finance and professional services sectors at 57.5% of jobs; and education sector where the City Centre has 46.9% of jobs.

Figure 18: Concentration of employment in the City Centre, vs average for all sectors, 2018



1: ONS Business Count data 2019, accessed [21 August 2020]



COVID-19 and the public health responses have provided a fundamental shock that challenges the core function of the City Centre. Overall, the number of people visiting the City Centre in July was around 45% of the pre-COVID-19 levels in March 2020. With a high proportion of office, education and visitor economy employers having closed or scaled back functions, the number of weekday workers in July was just 19% of the level of pre-lockdown. This is also reflected in the night-time economy (Friday and Saturday evenings) that was just 30% of the pre-Covid levels.¹

While this data provides a measure of footfall, it is also indicative of a wider set of behavioural changes. These may reduce overall demand for City Centre office space, with higher levels of home and flexible working; condense requirement for large scale retail, with greater online shopping and lower levels of destination travel for leisure activity; and a smaller market for arts and cultural facilities, with a slow return of national and international tourism. A key concern for core cities such as Bristol, is the implications for office and housing-led regeneration schemes – where demand is less certain.

3.1.1 Business Demand

Bristol has been hugely successful in attracting new business into the City Centre. Over the last decade there has been significant new investment that has boosted the number of jobs and enterprises in the area. There is an estimated 1,232,000 sqm/ 13,500,000 sqft of office and commercial space (JLL estimate 2019) in the City Centre. At the end of June there was 473,759 sqft of pre-let and speculative office space under construction with a total market vacancy rate of 3.6%.² Realising the full potential of developments under construction will generate at least 2,000 additional jobs as they become operational.

While there is limited hard information on the impact of COVID-19 on demand for office space, there are indications that business use of offices is likely to change. The pandemic and the transfer of workforces to flexible and home working has been successful for many businesses and has proven the effectiveness of digital technology. While it is unlikely that the change represents a full-scale revolution in office use, there is likely to be lower demand for large inflexible floor plates and a greater requirement for smaller higher quality units.

1: Data sourced from Centre for Cities High Street Tracker – Available here. Accessed 7 August 2020
2: Knight Frank, Bristol Office Market Research, Q1 2020 Review

Evidence from inward investment enquiries over the previous six months indicate that activity has continued, with foreign and UK companies continuing to register interest in Bristol and a desire to commence or relocate operations in the city, particularly in the high-tech and digital sectors, although challenges relating to travel have impacted on visiting Bristol and decisions are being delayed.

3.1.2 Visitor Economy

The City Centre is the hub of Bristol's visitor and cultural economy. Overall, the tourism economy in Bristol and South Gloucestershire is worth in excess of £1.4 billion and responsible for around 29,000 jobs. In 2018, there were around 2.1 million domestic staying trips and 20.5 million day-trips to the area and nearly 600,000 international visitors, placing Bristol as the seventh most visited city or town in the UK.¹

The visitor economy (hospitality, leisure, retail and cultural sectors) has been severely affected by the COVID-19 lockdown and subsequent social distancing measures. The impact has been seen both in the employment levels and turnover of cultural and visitor economy venues and businesses, but also more widely across the supply chain of specialist and independent contractors that support the sector. The viability of many establishments has been affected and even taking account of grant payments from government, the medium-term loss of visitor revenue and fall in footfall poses a serious risk to the sector.

The City Centre offer was already changing and the pandemic has resulted in the acceleration of online trading and businesses adapting their methods of customer engagement and sales. People facing industries such as hospitality and leisure will take longer to move towards recovery. Full and partial international travel bans and quarantine rules have already taken their toll on the UK tourism industry with digital conferencing platforms reducing the need to travel for work.

The immediate priority for the sector and City Centre is to work with Bristol's Destination Management Organisation and partners to continue to promote the city as a safe destination for visitors. Developing an effective regional offer and range of products, including exploring the feasibility of a regional Tourism Zone will further amplify the city's offer and potentially increase the share of visitors to Bristol. Business resilience packages focused on the sectors making up the visitor economy will continue to be a priority including direct financial help, debt advice and support to adapt and diversify operating arrangements.

Fully understanding the impact of the pandemic on shopping, leisure and travel patterns will be critical to developing policy and practical steps which will strengthen the City Centre's offer and support the visitor economy in recovery in the medium term.

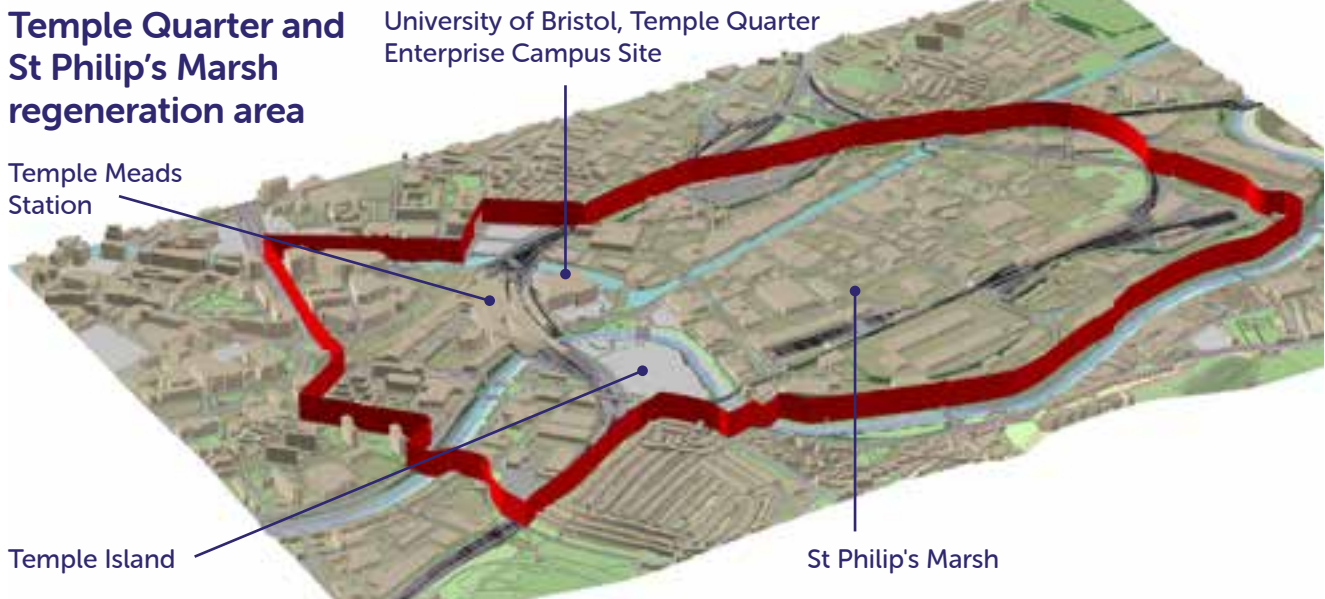
1: [Visit Bristol Data](#)

3.1.3 Temple Quarter Regeneration Programme

Temple Quarter is a transformative mixed use regeneration programme to create a new urban quarter at the heart of the city. With Temple Meads station at its core it aims to attract 22,000 new jobs, 10,000 homes and generate an economic boost of £1.6 billion per year to the city.

Temple Quarter releases a strategic, but underutilised area of the city as a location for innovation and business growth centred around a new university campus and major public transport hub. The scale of potential here makes it a national asset in levelling up the UK economy and helping to power the UK's economic recovery post COVID-19.

Temple Quarter and St Philip's Marsh regeneration area



The programme will transform a vast area close to significant areas of deprivation in the city, improving access from the south and east to Temple Meads station and the wider city centre. Job opportunities will be created for local people, as well as new places to live in and enjoy leisure time. Plans include well developed infrastructure schemes – such as the delivery of critical infrastructure around

Temple Meads station and the delivery of phase one of the University of Bristol Temple Quarter Enterprise Campus – that have the potential to create new job opportunities in the near term, playing an important part in the early stages of the city's economic recovery and building momentum for the region's future growth.



The regeneration programme builds on the success of the Temple Quarter Enterprise Zone. 4000 jobs have located there since its launch in 2012, and business rates from the area have supported investment in infrastructure to support economic growth across the region, through the West of England Economic Development Fund.

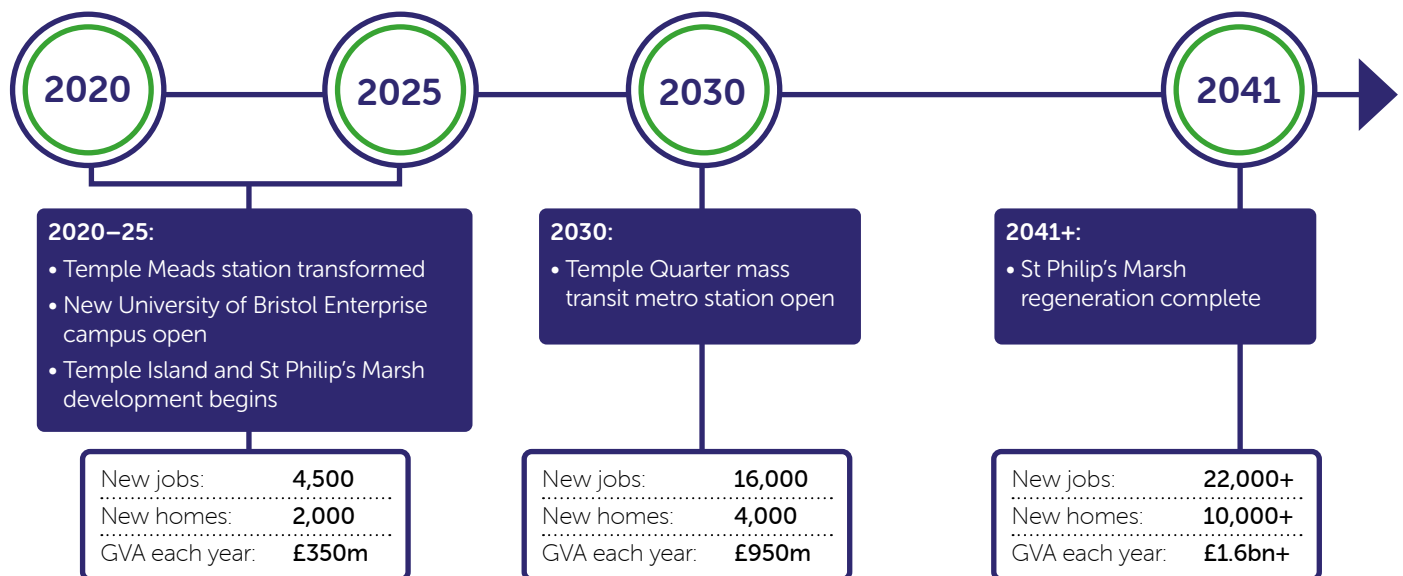
The Temple Quarter regeneration programme has four key components.

- Regeneration of the Temple Quarter and St Philips Marsh districts, including as a first stage the development of vacant and underdeveloped sites surrounding Temple Meads Station, to deliver new station entrances and an improved transport interchange.

- University of Bristol's Temple Quarter Enterprise Campus, a new innovation hub which will help grow the city's strengths in digital, business and social innovation, quantum technology, engineering and green growth yet further.
- Upgrading and renewal of Temple Meads Station, to support a doubling in passenger numbers to 22m per year.
- Delivering flood resilience infrastructure to address key site constraints and build in climate resilience from the beginning.

The programme is being shaped and delivered by the Temple Quarter Strategic Board, chaired by the Mayors of Bristol and the West of England, with board level representation from key stakeholders including Network Rail, Homes England, University of Bristol, Historic England and the Environment Agency.

Key milestones for the programme:



3.1.4 Temple Island

The development of Temple Island site is a key component of the wider Temple Quarter programme that will make a major economic contribution to the city and the region. Located adjacent to Temple Meads station the site has remained vacant for over 20 years. Following public sector remediation and infrastructure investment, the planned development is expected to generate some 1,200 jobs and an economic impact of £620m GVA over a 25-year period.

Legal and General are working with the council to bring forward a mixed development, which initially comprises 180,000 sq ft of commercial space and 400 residential units and will be added to by a hotel and conference facilities, major improvements to the public realm and further residential development. The scheme will make a strategic contribution to the delivery of Temple Quarter redevelopment and the creation of new commercial and residential district of the City Centre in addition to attracting business tourism.

£32m of enabling works to support development on the site will be started imminently, itself generating £16m of net GVA to the West of England economy two years after construction start.



3.2 Highstreets and local centres

Highstreets and local centres have traditionally been at the centre of community life. They are vital sources of employment, of local services and social venues. However, the function of high streets and local centres has been changing over the last two decades, due to competition and changing patterns of consumption – most notably the growth of online shopping and use of supermarkets and out of town retail parks. It has been widely acknowledged that the pandemic has intensified and accelerated these trends.

Tracking Bristol's retail vacancy rate over a number of years shows that the city's high streets perform well against both regional (South West) and national indicators. Recent business rates data (July 2020) suggests that the retail vacancy rate for Bristol's designated Town, District and Local Centres, including the City Centre, is 7%, with the regional and national vacancy rates standing at 12% and 10.8% respectively.¹

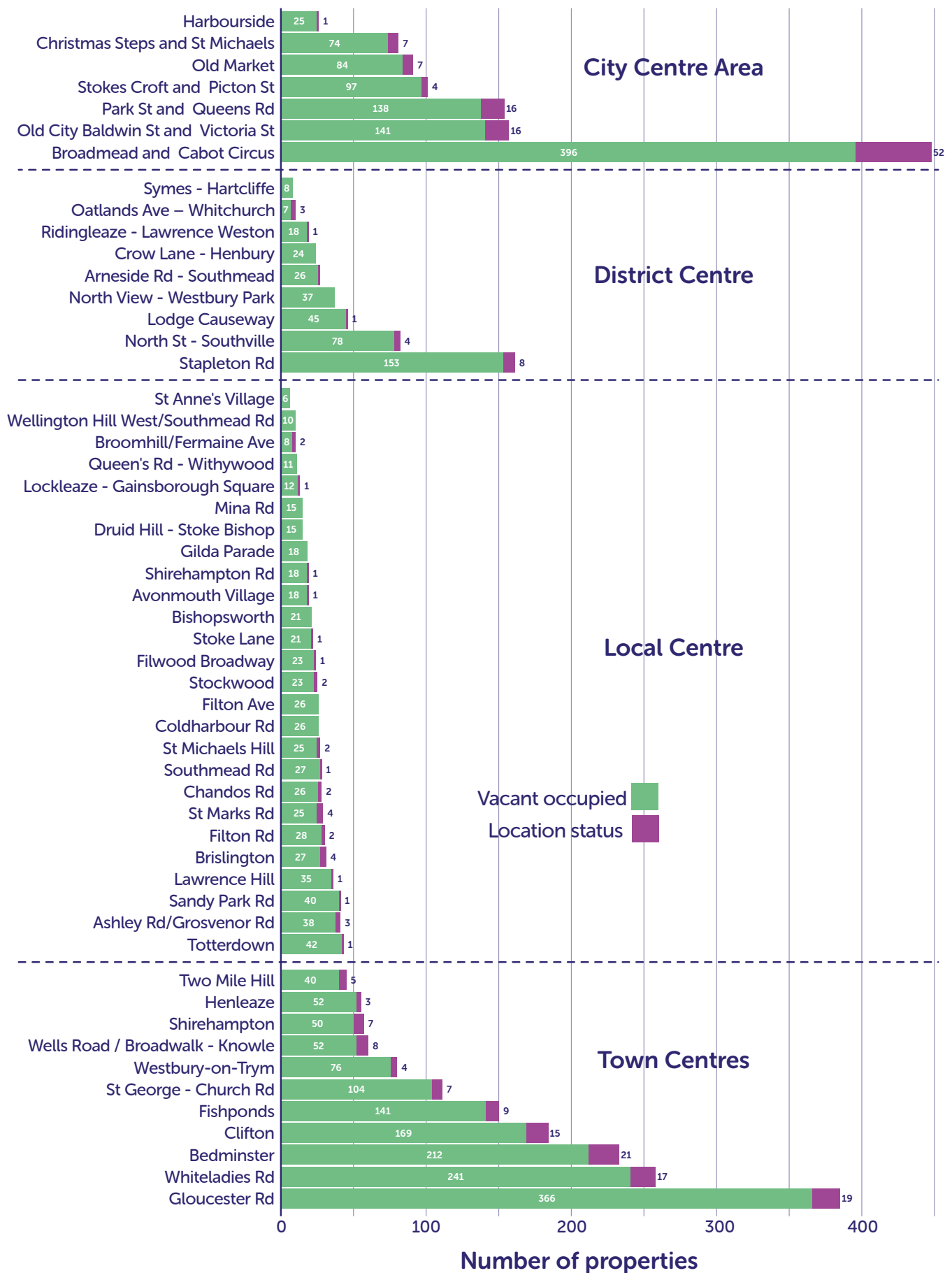
Vacancy rates for individual centres across the city range between 0% and 30%. It is important to note that for smaller centres – those with a relatively small number of units – the status of just one or two empty properties can significantly affect the centre's vacancy rate when it is expressed in percentage terms.

Positive action has been taken to reinvent local retail experience through physical investment in transport and public spaces. Furthermore, through business engagement and communication activities (the @ShoplocalBristol Twitter account has over 20,000 followers) the city's unique identity has been enhanced through promotion of its independent high street businesses, with the Council also supportive of the development of Bristol's Business Improvement Districts (BIDs).



1: Springboard (July 2020)

Fig 19: High street vacancy rates, July 2020



While these actions have buoyed performance, COVID-19 has accelerated the longer-term processes of change and increased the risks to high streets. At the same time, the pandemic has arguably presented an opportunity for high streets to build on evidence suggesting that local people were using them more during lockdown and will continue to do so. Nevertheless to facilitate their adaptability and to ensure the survival (while balancing the needs of the city centre as a major retail and leisure destination) work is needed to diversify their activities, update the environment and create new functions consistent with consumer behaviour. This will include retail, but will also need to take advantage of the demand for small flexible workspaces, increased local leisure and demand for affordable housing.

Some high streets appear to have developed a greater role over recent months, serving the local neighbourhood as many people continue to work from home, and prefer local shopping compared with larger stores. Temporary initiatives to provide more space for walking, cycling, and use of outdoor space for restaurants are proving popular in local neighbourhoods and hint at permanent public realm improvements that can support longer term economic and social recovery. COVID-19 poses a range of challenges for highstreets and local centres within major cities, in the immediate term ensuring highstreets reopen within the guidelines of the Government's Recovery Strategy and working with businesses to assist them in the use of public space to enable them to trade safely is essential. Working with partners to maintain the viability of high streets and local centres through local initiatives such as meanwhile uses for vacant premises, including for creative and cultural uses is a priority.

Successful placemaking is key to the long term success of our high streets and local centres – harnessing continued investment in new homes, to repair and reinvigorate existing neighbourhoods, strengthening physical connections between areas, creating vibrant, resilient and healthy communities. Urban intensification can help support thriving high streets and local centres, ensuring that for local trips, walking and cycling become the most convenient option, and for trips further afield, public transport becomes a viable option. Public and private spaces should be clearly defined, accessible, well managed and safe.

In the longer term there is an opportunity to reshape policy and implement programmes of ambitious change to deliver more inclusive and greener centres.

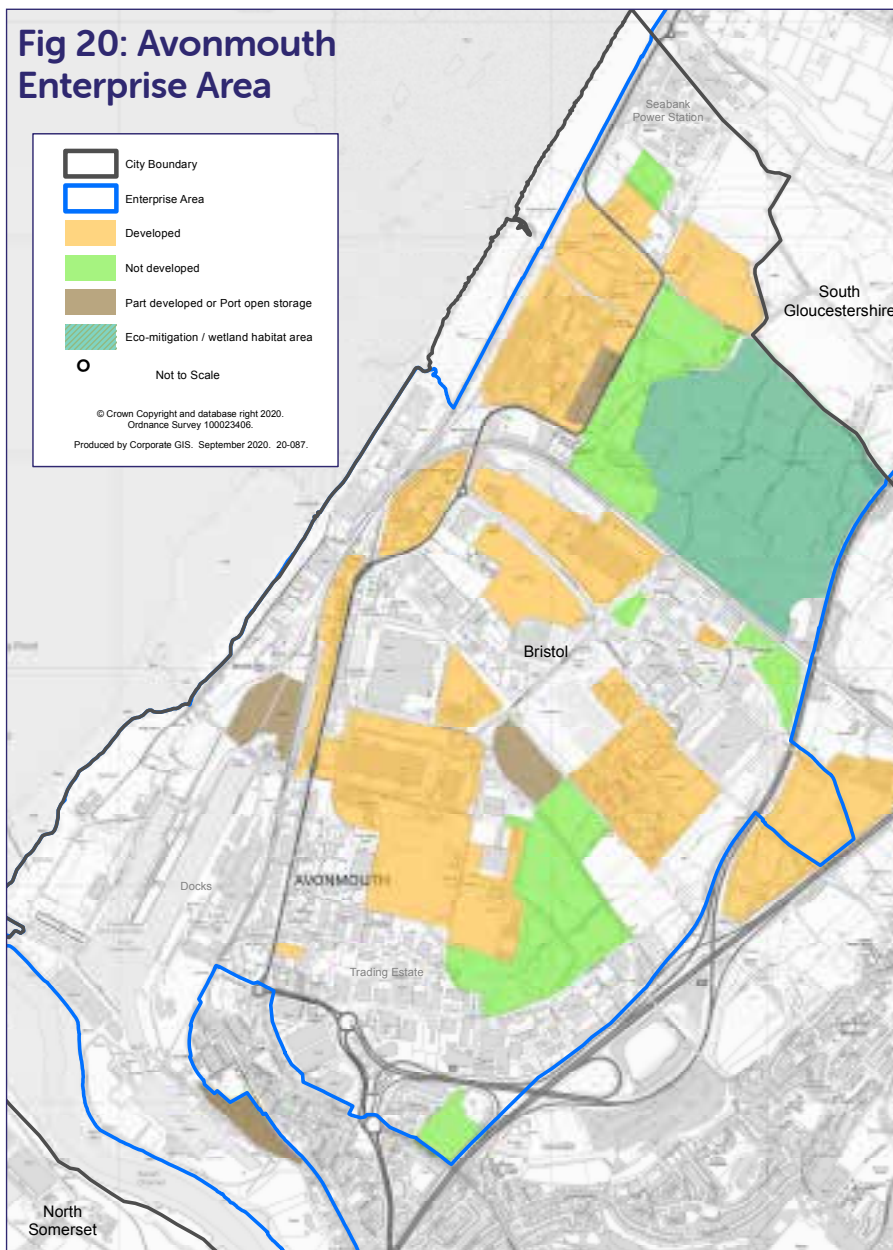
- Increased provision of space for cycling and walking, with better radial connections to Bristol's communities, expanding the fleet of low emission public transport vehicles.
- Work with residents to create Liveable Neighbourhoods across the city, reducing traffic and supporting footfall and trade in high streets and local centres.
- Increased housing development on and around high streets to support housing need and support viability of high streets
- Improved infrastructure connectivity including a rapid expansion of 5G and FTTP networks to close the digital distances between workspaces.
- Provide further protection and support to cultural and visitor businesses at the end of the national support programmes
- Focus public finance on the delivery of keystone developments (such as Temple Quarter regeneration programme) able to leverage large scale public and private investment and create long term revenue streams to ensure equitable distribution of benefits.

3.3 Avonmouth

Avonmouth is the major centre for general industrial, warehousing, energy generation and recycling and reuse management activities in the city. Half of the jobs in the area (50%) are in transport, storage and wholesale activity and nearly half of all of the transport and storage jobs in Bristol (45.8%) are located in the area.

Adjacent to the Port of Bristol it is a strategic location for the city and for the region that has been underutilised for a number of years. The Avonmouth Severnside Enterprise Area (ASEA) was designated in 2013 for

local retention of business rates to support a 25 year growth strategy, and has since received around £100m of public investment, most notably for improved flood defences and a new junction to the M49, from the local authorities, Environment Agency and Highways Agency. This is improving the long term climate resilience and accessibility of the location and opening up significant potential for strategic development of 60 hectares of both brown and green field sites within the Bristol City Council area both close to the Port and further north along Severn Road.



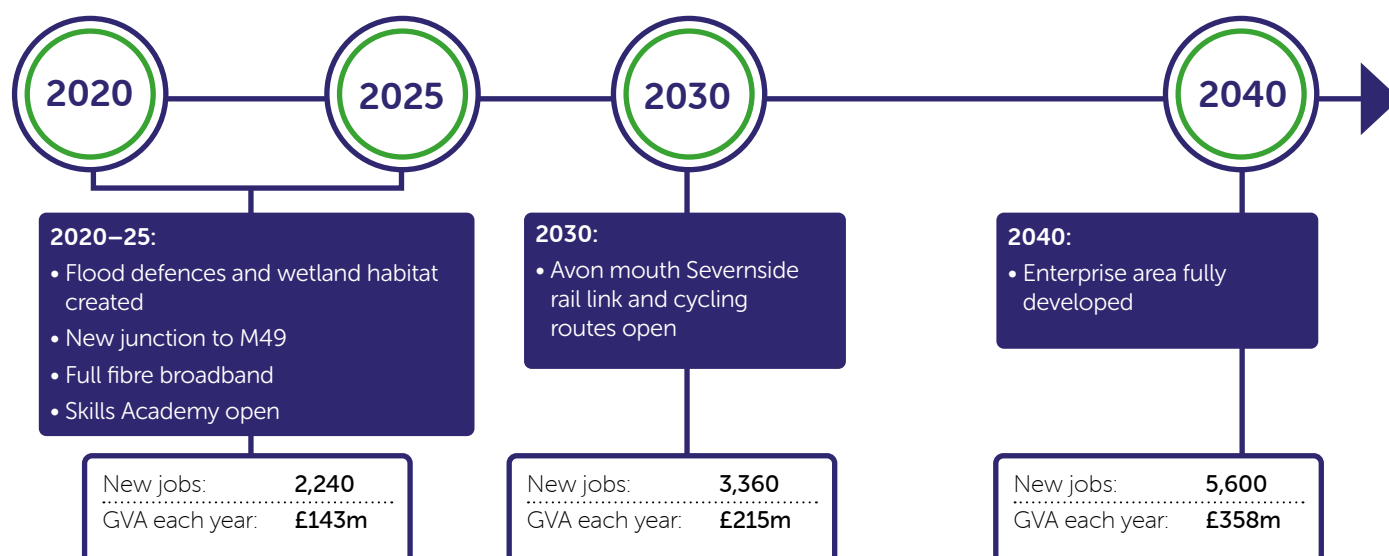
The communities of Avonmouth and Lawrence Weston ward reflect the long history of industrial and port-related activities in the area, with residents having relatively low skill levels and pockets of high deprivation persisting. While Avonmouth Severnside has seen significant employment growth in low and intermediate occupations, mainly in the logistics, energy and waste sectors over the last decade, the communities are still not fully connected by public transport or safe cycling/walking routes to access those jobs, which are often on a '24/7' shift basis, across the very extensive industrial area, especially in its northern half towards the Severn bridges.

Given the sectoral composition of the area, there has been some impact from COVID-19, resulting from reduced demand for industrial and consumer products in specific sectors, and related services, and furloughing of employees on the industrial estates. Businesses are often part of longer supply chains and likely to have experienced a significant fall in turnover during the pandemic. The full implications of this may not be visible until the end the furlough period. For residents in this area the loss of lower skilled/operative roles may be very significant, as there may be few alternative and easily accessible sources of employment elsewhere in the city.

The more significant challenge for Avonmouth is to design a strategy for the area that fully exploits the combination of locational advantages, port access and expertise present in the aerospace and advanced engineering sector in North Bristol and South Gloucestershire. Elements might include:

- Improvements to connecting road, rail and cycle networks – strengthening the accessibility of the area for the workforce.
- Infrastructure improvements and intensification of industrial estates supporting SMEs – under a vision of Efficient, Smart and Sustainable Industrial Areas (ESSIA) – towards zero carbon, zero waste and clean air, and served by full fibre broadband and 5G networks.
- Investment in adult skills and employment, including a new Skills Academy based within the area – with particular focus on logistics, green manufacturing / engineering, energy efficiency, renewable energy and 'circular economy' technologies.
- Attract higher value manufacturing and engineering activity to build on existing sectoral strengths in the north of Bristol – encourage the creation of engineering assembly roles including ultralow carbon electric vehicles, offshore wind, wave and tidal turbines.

Key milestones for the programme:



3.4 South Bristol

South Bristol – defined as the 11 wards south of the River Avon – has one of the most extensive concentrations of socio-economic deprivation in the city, which is centred on the three wards of Filwood, Hengrove & Whitchurch Park, and Hartcliffe & Withywood, but also in neighbourhoods on the periphery of this area intersecting Bishopsworth, Knowle, Stockwood, Bedminster and Windmill Hill wards.

According to the IMD 2019, within that core area around 80% of residents fall within the 10% most deprived population cohort in England, and an estimated 84,000 people within the top 20% most deprived in England. Since the loss of much of its traditional manufacturing base in the 1980-90s, its peripheral communities have become largely disconnected from the vibrant and faster growing 'knowledge' economy of the city centre and north fringe, with the exception of a small cluster of larger employers who continue to rely on the local workforce. In terms of the demographic trend over the last 10 years, the overall South Bristol population has hardly grown at all in contrast to the city as a whole, but there is a mixed pattern of significant falls in some wards offset by growth in other wards, where new housing has been delivered. Another key difference is that South Bristol has a 3-4% higher proportion of under 16s and over 65s compared to the wider city, thus reducing its economic activity rate.

While unemployment levels and trends have broadly resembled the rest of the city in the last decade, there has been a sustained rise since mid2018 in the 25-49 age group claimant count, particularly in the most deprived core area and amongst young families. And since the Covid recession, the unemployment rates in both the South Bristol wide and core areas have increased to 7-8% in comparison to the city average of 6%,

with particular hotspots in Filwood and Hartcliffe & Withywood wards of 9-10% (July 2020). Related to these are the persisting lower levels of adult skills (i.e. people with no or very low qualifications) and post 16 entry to higher education in the core area in comparison to the city average. On the plus side, South Bristol has a much better record for the progression of young people into apprenticeships, particularly in the construction trades, than the rest of the city.

Another structural economic issue is the relative weakness of the enterprise culture with business start-up rates in 7 South Bristol wards being historically amongst the lowest in the city, although over the last decade the business stock across the wider area has gradually recovered from the 2009/10 crisis. The sectoral profile of the area has some significant differences from the city or regional economy – a greater concentration of industrial and warehousing premises related to construction, maintenance and various small manufacturing and engineering services, and fewer office centres supporting professional, technical and knowledge-based services. To date there is no clear evidence that the Covid recession has impacted South Bristol business sectors more greatly than the city as a whole.

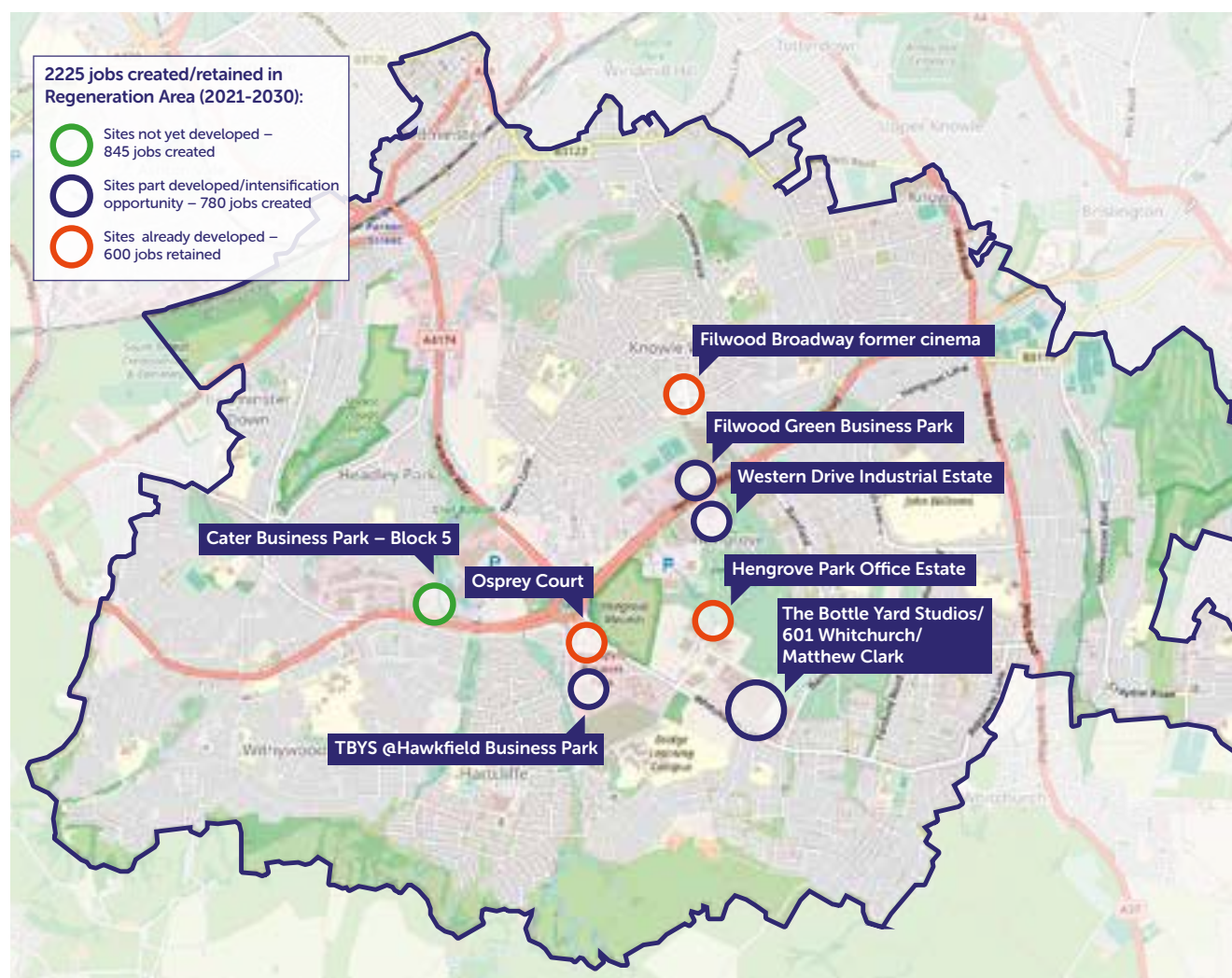
Against this background, there have been periodic programmes with EU and now WECA match funding to promote and support business and social enterprise start up and growth across South Bristol, with a particular focus on the core deprived communities and stimulating new emerging sectors around creative, digital and green technologies alongside the traditional construction and engineering centred activities of the area. This is set to continue with the largest ever (£1.7 m) enterprise support programme dedicated to the area now under delivery until April 2023, and the objective to adjust and extend that locally tailored model until 2026.

Additional ERDF and WECA funding (£3.9 m) is under application to build new light industrial workspace aimed at growing small creative, construction and manufacturing enterprises at Whitchurch Lane adjacent to the Bottle Yard Studios.

The further mixed use development of Hengrove Park also has enormous importance for the future economy of South Bristol. Partially developed since completion of Phase 1 in 2012 with anchor occupiers (City of Bristol College, South Bristol Community Hospital and Hengrove Park Leisure Centre) and approval of the Phase 2 master plan in Feb 2020, this is the single largest regeneration scheme in the city at 49 hectares, and in conjunction

with the nearby Hartcliffe Campus and Park View housing sites, should have a very beneficial socio-economic impact for the surrounding communities, provided that the local job creation, business supply and residents upskilling opportunities from all of the new infrastructure, housing, office and commercial development can be fully realised. Alongside the 2,000 new homes across the 3 sites, 9,000 sq m of new office and education/training space (including an extension of the College for an Advanced Construction Centre), plus 2,440 sq m of commercial/retail space is to be provided. Subject to Covid restrictions, this could create 700+ new FTE jobs, in addition to temporary construction jobs.

Fig 21: South Bristol Core Regeneration Area – Pipeline Projects



Base map © OpenStreetMap contributors www.openstreetmap.org

While there are weaknesses, South Bristol offers significant potential to develop existing assets in film and TV production and associated supply chain. The increasing global demand for content means that this sector is likely to see significant growth in future years. A new site for the expansion of the existing Bottle Yard Studios has been purchased by the council nearby at Hawkfield Business Park, and is driving current work on a strategic justification and framework to deliver a long-term programme of investment on both sites. If both sites are developed to the maximum potential (11 studios), it has been estimated that around 700 new jobs could be created over a 10 year period (338 directly and 362 indirectly in supply chains and increased local spending). Even if only 50% of the indirect or induced job creation benefited South Bristol residents, it would have a substantial economic impact.

COVID-19 has brought severe challenges to a sector that is essentially small craft businesses and independent contractors whose work has been highly constrained by social distancing requirements. The structure of the sector is such that businesses will have limited financial capacity to sustain their operations in the absence of contract opportunities.

There is a requirement for significant and strategic investment in the development of key production facilities centred around

South Bristol, with 'ribbons' connecting smaller and more flexible office and maker centres across the city. Similar to the approach being developed for the Thames Gateway¹ the model would provide location specific facilities (that complement place offers) that form a wider network of capacity and expertise. The development of the sector will require significant improvement to digital capacity and infrastructure.

There is strong potential for aligning skills as a driver to both address educational performance issues and adult skills, and integration of local employment and training programmes that connect residents with job opportunities and offer enterprise support.

- Increased provision of business start-up and scale-up space, working with commercial sector partners.
- Strengthening engagement of school and college pupils in work experience, vocational training (including apprenticeships) to enhance prospects for training opportunities in creative industries, supported by the work of the WECA Careers Hubs which now covers every secondary school in the West of England region.
- Targeted national and international marketing to promote film, TV and digital production facilities in South Bristol.



1: See www.london.gov.uk/sites/default/files/tepc_case_for_investment_2020.pdf

Feedback and themes for future development

We are grateful to a wide range of city partners whose expertise has helped shape and inform this strategy, which includes all of the One City thematic boards, the City Leaders group, the Bristol Climate Change Advisory Committee, the SDG Alliance, the City Fellows, the Bristol Women's Commission, the International Strategy Board, Black South West Network, Business West, the Bristol Commission on Racial Equality, and many more.

The involvement of these organisations and networks in this process does not constitute formal endorsement, but has greatly strengthened the strategy, alongside the wider engagement listed in Appendix 1.

While most of the outputs of this engagement process have been incorporated within this strategy, two key themes in particular warrant further exploration and consideration as the Action Plan is developed. These are summarised briefly in this section.



1: <https://cles.org.uk/community-wealth-building/what-is-community-wealth-building>

Community Wealth Building and non-standard business models

A number of partners emphasised the importance of a commitment to community wealth building and to exploring how to support non-standard business models. Community wealth building is a new approach developed in contrast to traditional economic development, and based on five key principles, several of which are explicitly featured in this strategy:

- Plural ownership of the economy
- Making financial power work for local places
- Fair employment and just labour markets
- Progressive procurement of goods and services
- Socially productive use of land and property¹

The One City Economy Board will continue to explore how community wealth building principles can be embedded in future versions of this strategy and the forthcoming Action Plan, and the potential for the use of, for example, reforms to procurement practices to support locally owned businesses, promote sustainability goals, and increase resilience to global economic shocks is clear. Similarly, the role of micro-businesses, employee-owned businesses, start-ups, social businesses, B-corps¹ and other forms of purpose-led businesses was emphasised by many partners, and support for developing these areas of the economy has significant potential to meet the priorities outlined in this strategy. The role of Bristol City Funds in creating positive change, and the mechanisms they offer to support practical action in support of the city's economic renewal, will also be key.

Supporting businesses and individuals to adapt to change

Another issue raised by several partners was the need to support adaptation and transition as part of the recovery for businesses in areas already facing challenge and change. COVID-19 has brought some completely new challenges, while other changes and trends have been accelerated. A key issue for many partners is around how to incorporate recovery and renewal into sectors or places already facing transition. Long term transitions in city centre and high street retail, or the need for significant changes in the construction sector to address carbon neutrality, must be met with a balanced approach, with existing businesses and employees supported to transition and adapt to change, and take advantage of new opportunities.

A related issue is how changes in the future of work will affect Bristol. As many businesses have adapted to accommodate greater working from home, there may be demand for new homes which better suit home-working, including mixed home/office/workshop spaces; the city may feature a greater intensity of businesses, with the numbers of office-based workers for each business reducing; and there may be continued rise in the number of dispersed, communal work spaces. Future iterations of this strategy will build intelligence on these and other developing trends, and adapt accordingly.

1: <https://bcorporation.net/>

Appendix 1: Summary of One City Engagement

The impacts of COVID-19 are multi-faceted, constantly evolving and touch all aspects of our city. From early March 2020 it was recognised that in order to respond in the short, medium and long-term we had to work with community leaders, business leaders and citizens to understand the evolving picture in our city. Outlined below is a snapshot of the formal engagement sessions held. These, combined with a myriad of informal engagement, have helped to build an interim picture that has informed this plan. We recognise that the picture will continue to evolve and as things change there will be other sectors and communities we need to engage with and there may be areas we have not yet been able to engage with. This work will therefore continue over autumn and winter 2020 and we are keen to hear from organisations and partners who would like to contribute to this. Thank you to everyone who has participated.

The City Office team

1 May 2020: Economy Board Recovery Workshop 1

A workshop that brought together the members of the Economy Board and wider networks of public, private and VSCE sector representatives. This workshop focused on the challenges but also the changed reality in response to COVID-19 and what opportunities this could enable in the future. Thank you to hosts Simon Cooper and Business West.

12 May 2020: Economy Board Recovery Workshop 2

This workshop explored what impact was being felt in specific economic sectors, what sectors felt they needed in the short and long-term to rebuild and what support they needed to enable this. Thank you to hosts Simon Cooper and Business West.

13 May 2020: One City Economy Board COVID-19 Webinar: Rebuilding a Fairer City

The webinar brought together a panel to discuss and share practical approaches to building a fairer economy in Bristol,

and how taking an inclusive approach to business can help local businesses and our economy make a faster and more resilient recovery post COVID-19. The webinar gave participants practical ideas on how they can involve different people in the (re)growth of their business/organisations, and how they can collaborate to create a fairer city. Thank you to panelists from Gap square, Black South West Network, WECIL, Women in Property South West, Wessex Water and Bristol City Council.

20 May 2020: Rebuilding Bristol Webinar

This brought together academics from University of Bristol and University of the West of England to consider how academia could support the city's response and recovery. Members of the World Economic Forum presented an overview of the anticipated global impact and what long terms changes society could see emerging. Thank you to presenters Robert Muggah, and Thomas Ermacora, and panellists from University of West of England and University of Bristol.

18th June 2020: Bristol SDG Alliance Recovery Workshop.

This workshop explored the role of the SDGs in recovery planning for the city. It brought together members of the Bristol SDG Alliance representing public, private, VCSE and community groups to discuss how our recovery planning can deliver economic, environmental and social sustainability. Thank you to hosts Jenny Foster and the Global Goals Centre.

1 July 2020: One City Economy Board Recovery Webinar: Tourism and the Visitor Economy.

The webinar brought together a panel to explore how COVID-19 and social distancing measures have fundamentally transformed tourism and related industries, not just in the short term but potentially permanently. Tourism and the visitor economy is a key facet of Bristol's economy. Given this, there is a clear need to establish how to safely reopen our visitor economy and restore visitor confidence, in a way that promotes Bristol's ambitions to re-build a more inclusive, more sustainable economy. Thank you to panellists from Destination Bristol, Brunel's SS Great Britain, We the Curious, YTL, SUP Stand Up Paddle Boarding, Fleurets, ALVA, Bristol Association of Restaurants, Bars and Independent Establishments (BARBIE)

6 August – 9 September 2020: Your City Our Future Survey.

A citywide survey to identify citizen's issue and priorities. Early results have helped inform the strategy with the final results informing the next iteration. Following the survey the next step will be an online forum to crowd source and prioritise proposals and then a Citizen's Assembly to deliberate and agree recommendations. Thank you to the Council's Consultation and Engagement Team, Cllr Asher Craig and Cllr Paula O'Rourke.

12 August 2020: One City Economic Recovery Webinar – Young People's Perspectives

This session explored the ways in which the One City Economic Renewal Strategy can help create an environment in which supports young people in the city to achieve their aspirations. Thank you to panellists from Bristol City Council's Youth Mayors and Youth Council, Babbasa, Bristol Junior Chamber, Freedom Youth (Off the Record), WECIL Youth Board

9 September 2020 - Night Time Economy Webinar

Innovation in the Cultural and Creative Industries Webinar - to follow ASAP – please note that in order to avoid duplication the One City session was decided to be incorporated into a session hosted by Thangam Debbonaire MP

Events and Festivals Sector Webinars – led by Cllr Asher Craig and BCC Culture team; most recent event 5 August 2020, awaiting outputs.

Bristol Food Business (Eating Out) Sector Webinar – led by BCC in partnership with the City Office, held on 17 June 2020, awaiting outputs.

Supporting events that contributed to the evidence base

March 2020: present day. Weekly One City COVID-19 recovery calls

Thank you to University of Bristol, University of West of England, City of Bristol College, First Bus, Bristol Airport, Business West, Chamber of Commerce, Brunel Care, Oasis Academies, Avon & Somerset Constabulary, Police & Crime Commissioner, VOSCUR, TUC, Bristol Green Capital Partnership, Bristol City Council and the Bristol Port Company.

March 2020 – July 2020: Weekly Economy Board COVID recovery calls (three weekly in August)

Thank you to Bristol City Council, Business West, Destination Bristol, Bristol Women's Voice & Women's Commission, VOSCUR, JLL, Bristol 24/7, Techspark, WECA, Darren Jones MP and Thangam Debbonaire MP, Black South West Network, Bristol Junior Chamber, CBI, Bottleyard Studios, University of Bristol, Bevan Britain, the Law Society, IoD, TUC, FSB, Gloucestershire Cricket Club, Gap Square.

March – July 2020: Weekly VCSE and Business Webinars

These sessions were held to provide regular updates to organisations on national and local policy and to ask questions / obtain clarification on practical points. Thank you to Bristol City Council (Stephen Peacock, Denise Murray and the Business Rates team, Penny Germon, Nuala Gallagher, Anesa Kritah, Guillian Castle), VOSCUR (Sandra Meadows) and YTKO (Toby Howkins)

Business engagement

There has been engagement with 600+ businesses via webinars held with BARBIE, BIDs and other focused sessions around pedestrianisation of the Old City/King Street.

Bristol Association of Restaurants, Bars and Independent Establishments (BARBIE).

BARBIE liaised with around 250 businesses to communicate our support, understand their needs in terms of using the highway/public space to trade to enable social distancing. BARBIE ran four workshops focused on areas where there are a cluster of hospitality businesses. These sessions focused on information sharing about support available but also built a picture of the practical challenges being faced by hospitality businesses in the city.

30 June - Stokes Croft, Ashley Road/ Grosvenor Road, Picton Street, Mina Road

1 July - St Marks Road, Stapleton Road, Church Road

1 July - Whiteladies Road, Cotham Hill, Chandos Road

2 July - Gloucester Road, Zetland Road, Ashley Down Road, Kellaway Avenue, Cheltenham Road

Thank you to BARBIE and to Bristol City Council's City Centre Revitalization Board.

26 June 2020 – June City Gathering

This event focused on three key themes an acknowledgement of loss of life, liberty and livelihood, and supporting people to move towards hope; 'where we are now' and a discussion of how to place recent events in Bristol in their historical context; and recovery and rebuilding, including national policy context and the importance of devolution, as well as the launch of the Economy Board Statement of Intent.

Thanks to all the speakers including University Hospitals Bristol and Weston NHS Foundation Trust, Bristol City Council Social Services, the Bishop of Bristol, Professor David Olusogaa, Lord Bob Kerslake, UWE, Going for Gold, Feeding Bristol, Business West, Gap Square, VOSCUR, Black South West Network, Global Goals Centre, Bristol City Council Housing Services.

24 July 2020: Community Development Workers Annual Gathering.

This focused on the impact on the VCSE sector and what support was needed for that sector and then looked at the impact in local communities and the support needed across the city. Thank you to all participants and Bristol City Council's Neighbourhoods Team.

19 March, 18 May and 30 July: Bristol@Night Panel.

The meetings have sought to set out support available to the sector, understand concerns, identify gaps and areas for collaboration. This has ranged from strategic discussions about where there are gaps in national support and more practical issues such as creating smoke-free outdoor areas (workshop 2 September)

Contact details:

Please visit www.bristoloncity.com for more information on One City and the Economy Board and to contact the City Office and One City Economy Board using our [contact form](#).

Outcome Framework – UN SDGs

The Sustainable Development Goals (SDGs) are a collection of 17 global goals designed to be a "blueprint to achieve a better and more sustainable future for all".

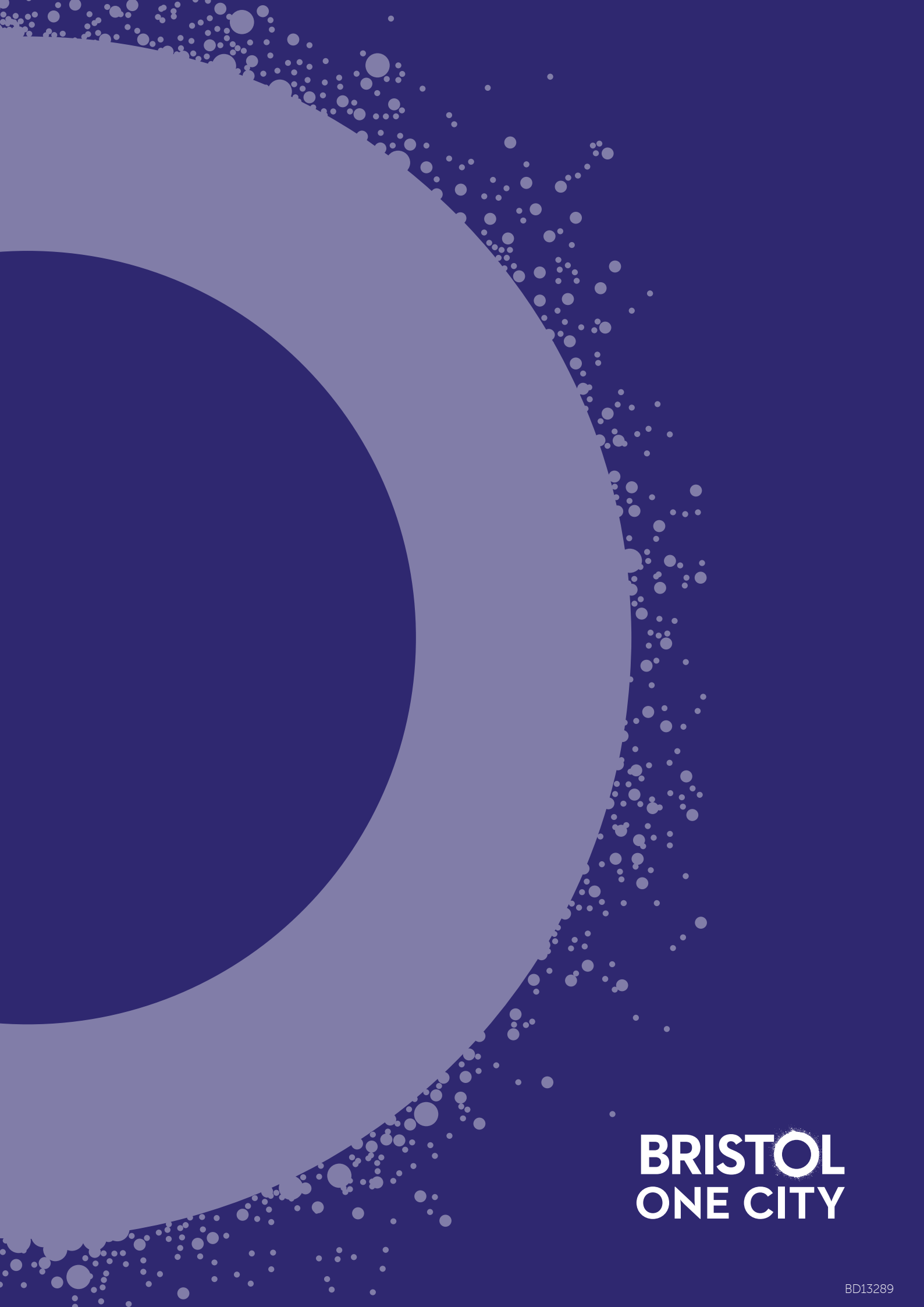
The 17 goals are broad and interdependent underpinned by a list of targets and measures.

www.un.org/sustainabledevelopment/



Other formats:

If you would like this information in another language, Braille, audio tape, large print, easy English, BSL video or CD rom or plain text please contact:
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