



Economic Strategy

2025–2035



Fair, Green and Thriving:
Bristol's Economic Strategy



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Foreword

The next decade will see significant transformation across Bristol, from the regeneration of our city centre to the transition towards Net Zero. Following the local and general elections of 2024, we will embark on this period of change against a backdrop of changing political priorities with a renewed focus on devolution and regional growth from national government, and on delivering a sustainable and inclusive city at local level. This Economic Strategy outlines our vision for, and commitment to, creating a fairer, greener Bristol, where all of our residents are supported to thrive.

Bristol’s economy is often described as high performing, with high levels of employment, educational attainment and wages, along with a burgeoning creative sector and strong track-record in financial and professional services. However, like many places, Bristol has faced significant challenges in recent years, from the impacts of the pandemic to the ongoing cost-of-living crisis. There are also longstanding issues around inequality in the city, with some of our communities feeling disconnected from the city’s growth and success – creating a ‘tale of two cities’.

Heightened accommodation costs, with house prices and rental increases outpacing wages, a fragmented transport system, and stark differences in educational outcomes between the wealthiest and poorest parts of our city, all present significant barriers to growth. Furthermore, the evidence indicates that our economy is experiencing declining productivity, particularly in key sectors where we might expect stronger performance. There is a risk that Bristol will fall behind as other core cities increase their productivity, further exacerbating existing inequalities. We cannot be complacent about this.

As we attract investment and develop our economy over the next 10 years, we want to be intentional about the kind of growth we achieve here and ensure that it serves our communities. This will mean supporting our foundational economy – those sectors which provide the essential services which underpin our city’s wellbeing and growth – alongside our growth-driving sectors. From clean energy and cyber, to

creative industries and innovation, it will mean championing the principles of ‘good work’, and striving to become a Living Wage city, as well as tackling gender, ethnicity, and disability pay gaps.

The next ten years will be pivotal in our journey to Net Zero, and we will need to support businesses to decarbonise, build climate resilience, and create opportunities to innovate and grow our green economy. To achieve this, we will need to work together with partners to strengthen our skills pipeline and ensure a just transition for our workforce to enable all residents to access the opportunities available here.

Luckily, we are not starting from scratch in this work. Bristol has a strong foundation of collaborative working between civic partners and business, and this new Economic Strategy builds on the work delivered as part of the One City Economic Recovery & Renewal Strategy. Our city is known for its creativity, cultural assets, and esteemed universities. We have a diverse business landscape, and businesses who have come forward and told us that they want to see themselves as not just employers, but key partners in Bristol’s community.

This economic strategy outlines the vision that we have developed in collaboration with partners for Bristol’s future economy, and we have identified the levers and role that the council can take in helping to achieve this. But delivering on our missions will need more than the council. This strategy, therefore, is a call to action, for all our partners and businesses to play their part, and work together to deliver a fair, green, and thriving economy for Bristol.

Councillor Tony Dyer

Leader of the Council &
Chair of the Strategy and
Resources Committee



Councillor Andrew Brown

Chair of the Economy &
Skills Committee



Introduction

A tale of two cities

As the regional capital of the South West, Bristol is a dynamic city with a rich maritime and industrial history. Renowned for creativity and cultural assets, top-tier universities, a diverse business landscape and robust economy, Bristol is also a hub of community activism, with an active voluntary, community and cultural sector. The city boasts an abundance of green and blue spaces – from Clifton Downs to the River Avon flowing out to the Severn Estuary at Avonmouth. These qualities, among others, make Bristol a highly desirable place to live and visit, as the 11th largest Local Authority in England and Wales¹ and 8th most visited town or city in the UK.²

We are a growing city. Counter to many parts of the UK, Bristol is getting younger, with high employment rates and levels of the workforce in professional occupations, anchored by a skilled population. Strong service sectors stand out as our specialisms – notably Professional, Scientific and Technical Activities; Financial and Insurance; and Information and Communication – the latter linked to our globally-recognised strengths within creative industries and cultural sector. We are internationally renowned for film and tv production and have been designated as a UNESCO Creative City of Film since 2017.³ Home to the BBC’s Natural History Unit for over 70 years, Bristol is a hub for film and tv production – including Channel 4, Bottle Yard Studios and Aardman.⁴ We have an international reputation as a green city and for leading on climate action.

Record levels of investment in the city region - such as the public private partnerships of Bristol City Leap and funding for Isambard-AI (the UK’s most powerful supercomputer) are generating high value jobs and catalysing the development of local supply chains in the city, responding to new market opportunities.⁵ Our universities are at the forefront of influencing change – through, for example, the creation of the Quantum Technologies Innovation Centre and the Bristol Robotics Laboratory. Additionally, the MyWorld initiative, backed by £30 million in government funding, is set to transform the creative sectors in Bristol, fostering innovation and creating over 700 new jobs in the region.⁶ The major regeneration works focused on central

Bristol including Broadmead, Temple Quarter, St Philips Marsh, Western Harbour and Frome Gateway will create new jobs, vibrant employment and community spaces, with an inclusive growth strategy for Temple Quarter ensuring that investment and regeneration builds a place where all our residents feel a sense of belonging and pride.

This is only one side of our local economy.

Bristol faces wide and entrenched inequality across education, employment and health outcomes. We have a growing productivity challenge, with a widening gap with the England average. House prices are rising faster than wages and some of our communities are cut off from economic opportunity due to poor transport connectivity across the city.⁷ Pressures on land are growing and competition for labour is high; Bristol is the 13th most expensive city in the world to build in.⁸



1 Bristol City Council, Bristol Key Facts November 2023 Update (2023).

2 Original by Bristol, Creative and Visitor Economy (2024).

3 Invest Bristol and Bath, Bristol wins City of Film Award at 2024 Global Production Awards (2024).

4 BBC, Broadcasting House Bristol (2024).

5 University of Bristol, Unprecedented £225m investment to create UK’s most powerful supercomputer in Bristol (2023).

6 Digital Catapult, MyWorld initiative launches £2 million funding opportunity (2022).

7 A report outlining Bristol’s productivity challenge was developed as a supplementary paper for this strategy.

8 Business Live, Bristol ranked 13th most expensive city in the world to build in in new study (2023).

National and global issues and trends, such as inflation and the cost-of-living crisis, may serve to deepen local inequalities. How we live and work are continuing to be shaped by macroeconomic trends, including the application of Artificial Intelligence (AI) and other emerging technologies. New working practices are emerging; demand

for hybrid work remains high and there is rising demand for employment opportunities which are compatible with portfolio careers. At a local level, we are seeing increased workforce shortages in the sectors which are essential to the running of our economy as well as noticeable consequences of the climate and ecological emergency.

Without intervention, Bristol’s two-tier economy will deepen. Purposeful and productive economic growth are not just buzzwords. They are the fundamental drivers for creating a greener Bristol, with safe, vibrant and healthy communities, education and career prospects which supports and retains a diverse workforce, responsive skills provision and an innovative business base at the cutting edge of sector developments.



Setting the direction for Bristol’s future economy

This economic strategy is a call for action. It describes how we will tackle stubborn challenges, as well as unlock economic opportunities for all our people, places and businesses. It identifies the successful activity and partnership working we want to continue and grow as well as areas where we need to do more. Not everything can or should be delivered across the whole city - there are areas where employment activity is booming and places which see particular disadvantage. This is what we want to change, taking a look at where to focus limited resource to have lasting impact. We have identified six challenges where we want to have an impact.



Addressing inequality and deprivation

Taking a spatial approach that integrates systems and services with community action and place making objectives, working with employers to embed good work practices which enable good health outcomes and tackle in work poverty.



Supporting the decarbonisation of our city’s economy

Planning for the necessary transformation within businesses, places and across infrastructure to ensure a sustainable future.



Maximising the benefits of regeneration and development

Outlining the pipeline of jobs coming forward and creating accessible pathways for residents to access opportunities.



Supporting our businesses and sectors to grow

Matching our skills provision, business spaces and inward investment efforts on Bristol’s growth sectors, focusing on growing the green and low carbon economy and providing responsive business support to the small and medium enterprise (SME) base.



Championing our workforce in the foundational economy

Addressing workforce challenges and shortages in the industries with typically high volume, low pay jobs.



Planning for our growing population

Ensuring there is a clear offer for our young people and working to improve the social, physical and cultural infrastructure needed for Bristol to be an attractive place to live, work and invest.

This economic strategy provides the roadmap for how we will realise our vision for a fair, green and thriving Bristol. We define this as:



A fair Bristol is one where partners and employers work together to build an equitable and resilient economy, ensuring all our communities can access opportunities and share in the city's success.



A green Bristol is one where businesses and communities drive a Net Zero economy by pioneering innovative climate solutions, promoting sustainable practices, and supporting access to new green jobs.



A thriving Bristol is one where creativity and innovation translates into new businesses, products and services that drive investment & growth, higher wages and prosperity for our people and places.

Introducing the Bristol Missions

We are proud of our reputation for doing things differently.

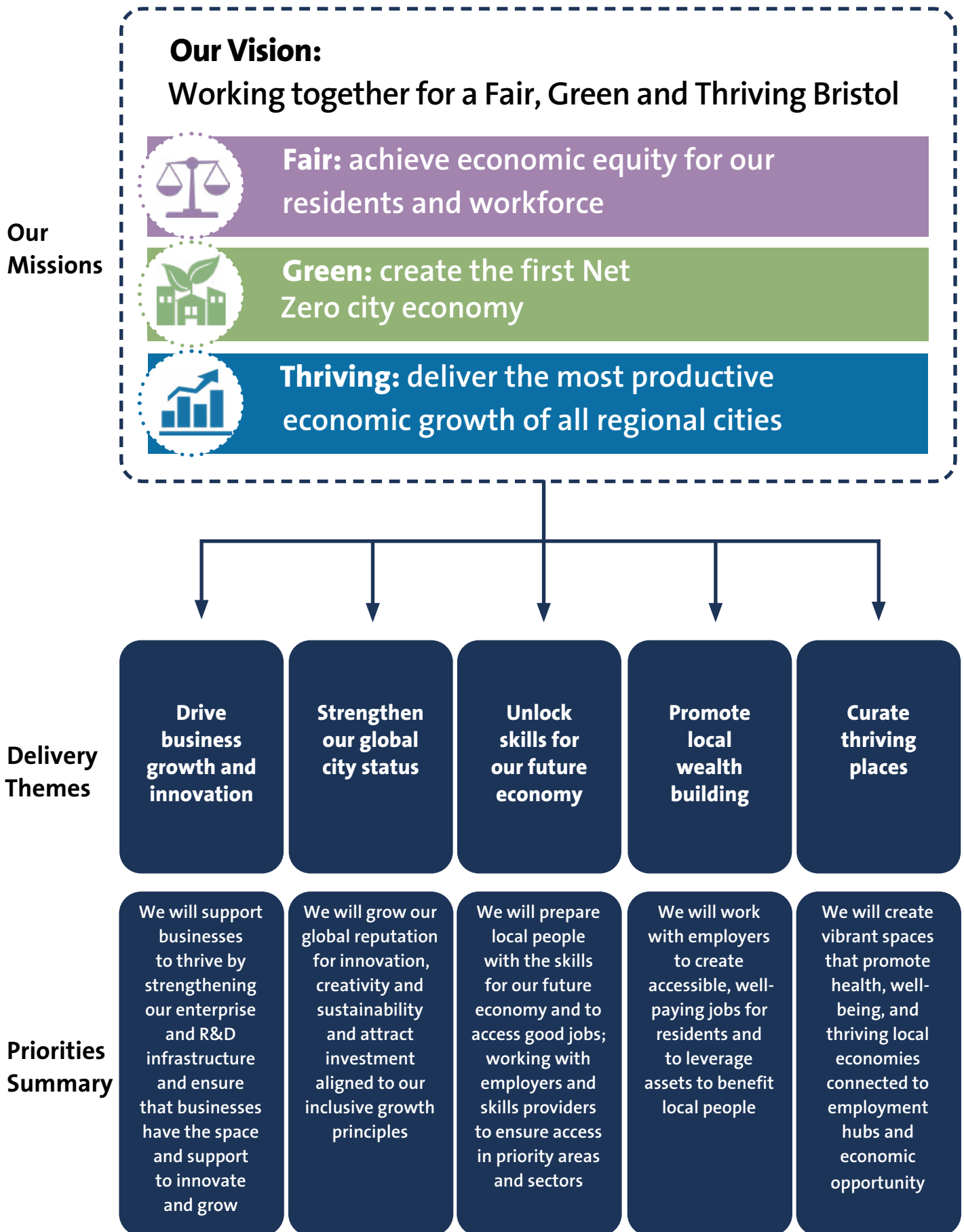
This economic strategy introduces a new mission-based approach to local economic development for Bristol. The Bristol missions serve as a clear statement of our ambitions for the local economy and provide a focus for how we prioritise limited resource - funding, land and staffing – to make a difference.

Underpinned by a wealth of quantitative and qualitative evidence, the Bristol Missions are deliberately ambitious and designed to create a targeted framework through which Bristol City Council, working together with city partners, can achieve our goals for the city whilst adapting to global trends and local needs. These missions will drive our collective action and will be a key mechanism by which we hold ourselves to account and monitor our progress.

These are the levers which the council and partners can influence or deliver – as a local authority, with partners, and with regional and national government. No one organisation can deliver this alone. Bristol's city partners, anchor institutions, organisations, employers and communities are essential partners to Bristol's future, shaping the economic landscape to benefit residents and places.



Figure 1. Bristol’s strategic framework



Building Bristol’s new economy

In 2020, the One City Economy and Skills Board developed the One City Economic Recovery and Renewal Strategy which directly responded to the economic challenges created by the Covid-19 pandemic and set out priorities to support the city to recover.⁹ Now, four years on, there are new issues which we need to respond to such as inflation and the cost-of-living crisis, as well as longer standing challenges we must continue to address, including persistent levels of deprivation and inequality, and the need to accelerate the decarbonisation of our city.

We also need to prepare for a future economy shaped by evolving macroeconomic trends and emerging technologies. As digitalisation, AI and other innovations transform how we live and work, we want to make sure that Bristol benefits

from these developments and local people are able to access jobs and opportunities. Similarly, as our economy shifts from more carbon-intensive activities towards greener jobs, particularly around construction, energy and manufacturing, we will need to make sure that our workforce is supported through a just transition.

Bristol’s new economic strategy responds to the priority identified in our Corporate Strategy 2022 – 2027 to deliver “economic growth that builds inclusive and resilient communities, decarbonises the city and offers equity of opportunity”.¹⁰ It sets out a refreshed narrative reflecting on Bristol’s history and our future ambitions for the city, including defining what good growth for Bristol will look like and the kind of investment we want to attract.

Table 1. Parameters for this economic strategy.

This strategy will:	This strategy will not:
Be owned by Bristol City Council but delivered in partnership	Cover all policy areas or produce a vast list of priorities - this is the first step
Be an economic strategy which draws on economic levers	Be overly theoretical or descriptive of the evidence
Lay the ground for new ways of working to tackle Bristol’s stubborn economic challenges and capitalise on future opportunities	Include areas that the council and partners do not have the authority to influence or deliver, or are unrealistic due to budgetary and resourcing constraints

⁹ Bristol One City, Economic Recovery and Renewal Strategy (2020)

¹⁰ Bristol City Council, Corporate Strategy 2022-2027 (2021)

Policy Framework – the strategy is aligned to existing local and regional strategies

While this is a council-owned strategy, through our missions-based approach we outline three long-term ambitions for the city that we will work to deliver with our partners. This document will be an important tool for guiding future policy making and investment decisions, and our united asks to regional and national government.

This strategy identifies specific economic levers that the council will draw on to deliver outcomes

for Bristol’s businesses, communities, and residents. It is not intended to cover all policy areas, or to duplicate the work of other council or partner plans. However, it does specifically align with our new Local Plan, and emerging Investment Prospectus for the city – and has a line of sight through to regional growth and investment plans, as well as spatial and infrastructure plans.

Table 2. Local, regional & national alignment.

	Local	Regional	National
Economic Plan	Economic Strategy	Local Growth Plan	Industrial Strategy
Spatial Plan	Local Plan	Spatial Development Strategies	National Planning Policy Framework. National Infrastructure and Service Transformation Authority (NISTA).
Investment Plan	Investment Prospectus	Investment Strategy	National Wealth Fund (UKIB) Public Services Investment

It also sits alongside and speaks to other core documents including our new Employment & Skills Plan (2024 – 2030), the emerging Healthier Together 2040 work and various strategies across climate change, regeneration, and planning, amongst others.¹¹

Our economic strategy outlines how Bristol can contribute to the government’s national mission towards securing the highest sustained growth in the G7 – with a focus on good jobs and productivity growth in every area of the country. As the government looks to develop a new Industrial Strategy for the country, Bristol offers a strategic opportunity to drive productivity through the co-location of innovative, cutting-edge sectors within our diverse city economy. We are keen to work with government, as well as our regional partners, to ensure that the right infrastructure is in place to enable our economy to thrive.

Bristol has particular strengths in high-growth sectors including cyber, tech, clean energy, media and culture as well as innovation. We will work with the West of England Mayoral Combined Authority to ensure that these strengths are reflected in the emerging Local Growth Plan, and that Bristol as a core city is recognised as a key economic driver for the region.

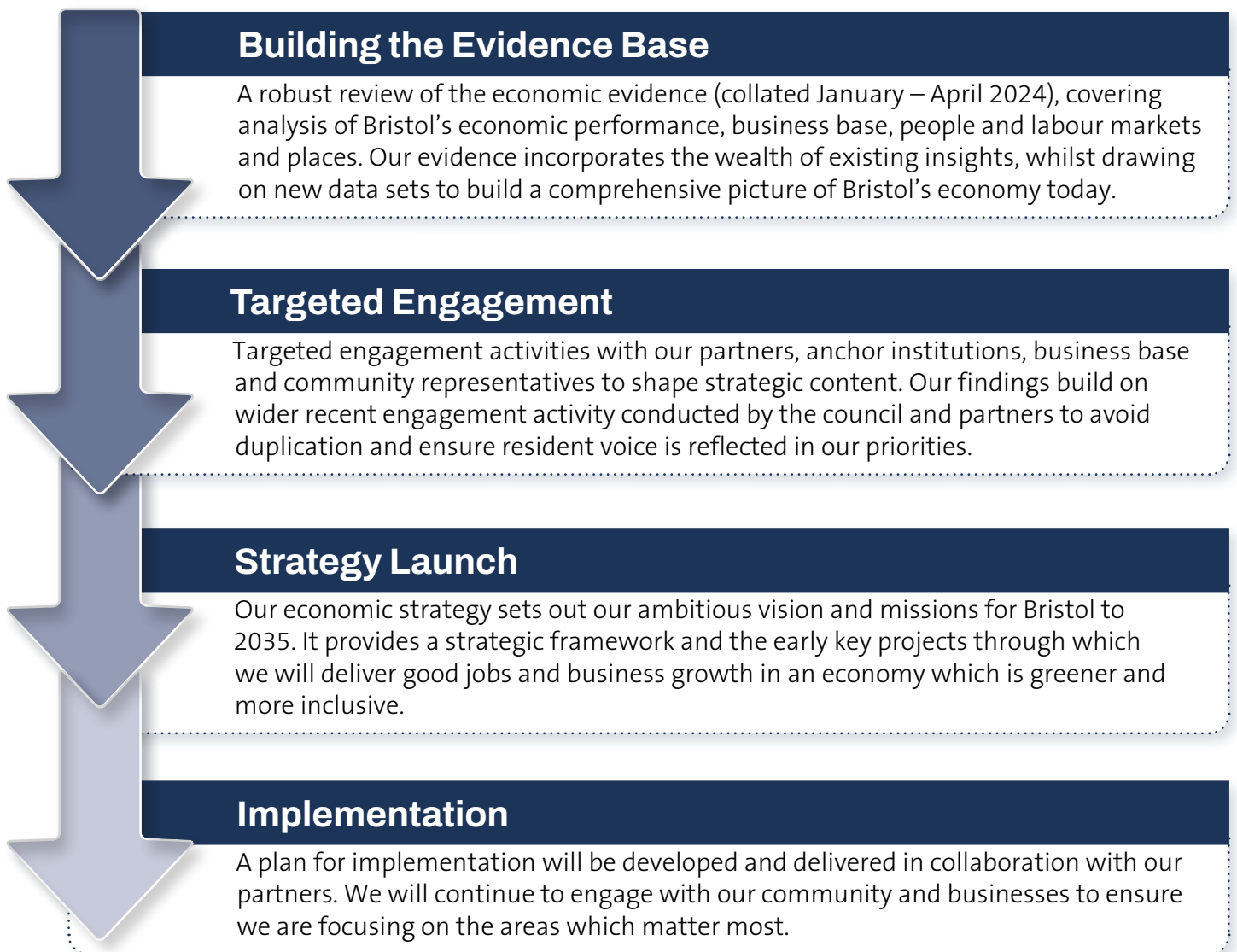
This strategy also speaks to how we will ensure that the benefits of growth are distributed across our economy, and recognises that tackling inequality in access to opportunities, skills and wealth will be critical to our success. Our priorities around local wealth building align with government’s ambitions to deliver a new deal for working people, including through the proposed Employment Rights Bill which will help enshrine principles around ‘good work’ in law. We will work with partners and local businesses to support the implementation of these policies and improve equity and inclusion across our economy.

¹¹ Bristol City Council, Bristol Employment, Skills and Lifelong Learning Plan 2024-2030 (2024).

This strategy is evidence-led and shaped by engagement with our partners and businesses.

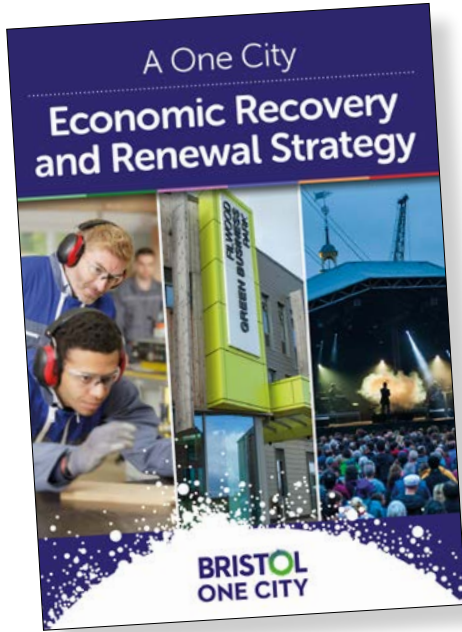
We have followed a thorough approach to strategy development to ensure our collective efforts and resources are focused on actions which will deliver the outcomes we want for the city.

Figure 2. Our roadmap of economic strategy development and delivery



We are not starting from scratch

This strategy builds on the priorities identified and work delivered as part of the One City Economic Recovery and Renewal Strategy. Our recovery strategy identified interventions across three key pillars, in response to the evidence at the time on the economic impact of the pandemic: People and Labour Markets, Business and Investment and Bristol’s Places. This was in line with the approach taken by other cities and, much like other voices in city development, One City partners re-iterated the need for growth in these areas to be inclusive and sustainable.



This new economic strategy builds on Bristol’s strengths and the good work already being delivered by the council, One City and wider partners. The long-term priorities in the 2020 Economic Recovery and Renewal Strategy remain relevant, and progress delivering short- and medium-term priorities has helped position Bristol’s economy for further prosperity.

The development of a new strategy is an opportunity to showcase some key areas of delivery against the priorities identified in the Economic Recovery and Renewal Strategy. Annex D provides a case study summary of key areas.

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



The start of a new way of working

It's not just about what we do, but how the strategy is implemented which will enable the effective delivery our vision of a fair, green, and thriving Bristol.

Harnessing Bristol's spirit and culture to achieve our goals.

Bristol's unique spirit is a key driver of what makes our city such an attractive place to live, work and invest. Economic success must protect and nurture the city's identity and our strategic implementation must serve to amplify the organisations, communities and places which are central to Bristol's dynamic culture.

Putting health and wealth at the core of the change we want to see.

We understand that health and wealth are two sides of the same coin. Our mission to deliver the most productive economic growth of all regional cities by 2035 is fuelled by our desire to raise the standard of living for all our residents, particularly for those facing the highest levels of deprivation and inequality. When businesses are more productive, they can afford to pay workers more which in turn leads to increased purchasing power in our local centres and a rise in wellbeing and healthy life expectancy.

Pioneering new and innovative solutions to address our biggest challenges.

We will leverage Bristol's track record for innovation by piloting new approaches to tackle stubborn challenges and maximise immediate and future opportunities.

This includes balancing city wide and hyper local approaches where appropriate, based on local insights and evidence. Bristol is home to diverse places and neighbourhoods, each of which is distinct in its character, opportunities, and challenges. We recognise that our priorities and interventions for wards and localities in South Bristol may not work in Avonmouth and we therefore need to be ambitious in taking different placemaking approaches in tandem with delivering city wide priorities, to ensure all our communities benefit from the city's economic success.

Promoting collaborative working with our partnerships, anchor institutions, VCSE sector and business base.

We cannot realise our vision for Bristol's economy on our own. We need to work across the system to unlock known barriers to economic opportunity – notably health, housing, transport, and skills – and co-develop a longer-term approach to our most entrenched inclusive growth challenges. We recognise that we need to work collaboratively, and each play our part, to address these barriers and unlock growth and prosperity for our city.

Bristol's economy benefits from our strong network of core anchor institutions and large employers which play a key role in driving inclusive and sustainable economic growth. Our membership of the West of England Mayoral Combined Authority provides a mechanism for collaboration to progress our investment priorities and to plan strategically and collaboratively for the type of growth that we want to see in our city and region.



Bristol’s economy today: Sectors and Places

Over the last century, Bristol has evolved from an engineering & manufacturing hub with a rich maritime heritage to a service-led economy distinguished by its world-leading creative ecology and reputation for innovation. This evolution has been driven in part by our location, but also by a series of strategic decisions and investments, underscoring the crucial role our anchor organisations, businesses and communities play in shaping our city’s economic landscape.

The creative and digital sector can trace links to the BBC’s investment in the Natural History Unit in the 1950s; today the city has an international reputation in film, TV and radio and a significant proportion of the world’s nature programmes are made here. In the 1950s-70s office space in Bristol tripled, providing a base for financial services.¹² Today, 19% of the city’s employment is in financial and professional services. Private and public investment in semiconductors – by Fairchild Supercomputers and INMOS¹³ – has seen the city develop skills and expertise which has led to Government’s investment in the country’s biggest supercomputer, Isambard-AI.¹⁴ The Port of Bristol has seen almost £600m investment in the last 33 years, creating a hub of industrial employment in Avonmouth and Bristol’s global gateway.¹⁵

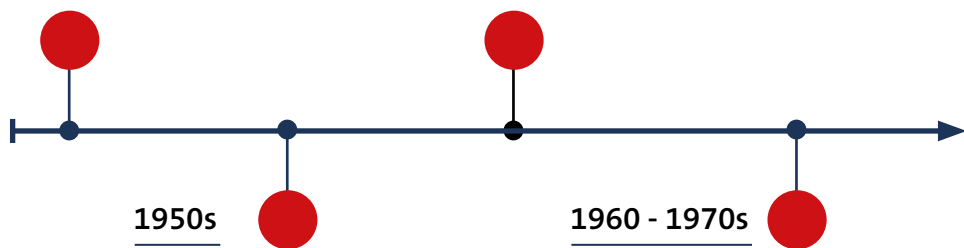
Figure 3. The development of Bristol’s sectors

1900s

- Bristol’s engineering expertise led to the birth of Britain’s aerospace industry. In 1910, the owner of Bristol tramways founded Bristol Aeroplane Company in tram sheds in Filton.

1950s - 1960s

- Major investments in transport connectivity: Bristol Airport (1957), Severn Bridge (1966-67) and M4 motorway (1965-1973) provide high speed links internationally and to major national and regional centres.



1950s

- Bristol City Council agreed to create a new dock in North Somerset, the Royal Portbury Dock opened in 1977 and became a major port for import.

1960 - 1970s

- In 1961, 44% of the city’s employment was in manufacturing. By 1971, service sectors provided the majority of jobs in Bristol. Between 1953 and 1975, office space in Bristol tripled.



¹² Structural Transformation, Adaptability and City Economic Evolutions, Case Study Report Bristol (2017).

¹³ Wired Consulting, How The UK’s South West Became A ‘Deep Tech’ Powerhouse (2024).

¹⁴ University of Bristol, Unprecedented £225m investment to create UK’s most powerful supercomputer in Bristol (2023).

¹⁵ Visit Bristol, The Bristol Port Company (2024).



1970s - 1980s

- Inward investment efforts result in a large silicon design cluster in Bristol: relocation of Fairchild Semiconductor in 1972; Inmos founded in 1978 and opening of Hewlett Packard in 1984.

1980s

- Bristol’s creative and digital sector continues to grow with BBC Natural History unit and Aardman Animations as key anchors. Bristol now has an international reputation in film and TV production.

2000 onwards

- The demolition and conversion of former industrial and commercial premises in central Bristol transforms the city scape.
- Aerospace, advanced manufacturing financial services, tech and creative industries remain integral to the city’s economic structure - there is marked growth in visitors to the city for tourism and leisure due to the city’s growing reputation as a destination for heritage and cultural attractions.

1970s

- London’s financial services firms begin to relocate to Bristol. By 2000, Bristol is the 4th largest provincial financial centre.

1990s

- City centre and East Central regeneration is kick-started following investment from the Bristol Development Corporation and partners, with significant residential and office conversions following a population decline in 1981-1991.

A thriving sector base

Bristol’s economy is now diverse. We have notable strengths in aerospace and advanced engineering, finance and insurance, information and communication sectors – and also professional, scientific and technical activities, with employment in this sector 1.5 times more concentrated here than the national average.¹⁶

Information and communication is one of our fastest growing sectors, experiencing a 191% rise in economic output between 2011 and 2021.¹⁷ Our strength within Information Services activities is strongly linked to our strengths within the creative and cultural industries, notably in radio and television broadcasting, publishing, and motion picture programming. Bristol is one of only 26 UNESCO Cities of Film worldwide, recognising the city’s world leading production and broadcasting capabilities, as well as a pioneering approach to moving image culture, technology and education. Film and TV productions shot on location in Bristol or at The Bottle Yard Studios generated an estimated £30 million towards Bristol’s economy in the 2023-24 financial year. Of the 32 major productions hosted by the city, 23 were high-end TV drama series, produced for the BBC, ITVX, Paramount+, Amazon, Netflix, Disney+ and other international players¹⁸.

We have growing specialisms in FinTech (boasting the highest density of industry startups and scale ups outside of London), Quantum, Clean Tech

and Energy, Health and Life Sciences, Food and Drink production. Digital and AI is also growing significantly, with Bristol Digital Futures and the Smart Internet Lab being key local cluster drivers.

The human health and social work sector is our largest employer, providing 16% of local jobs in 2022.¹⁹ It is also a key part of our growing night time economy, which, alongside roles in hospitality, culture, warehousing and logistics, manufacturing, and broadcasting, employs almost 117,000 individuals in Bristol.

Bristol city centre is a primary hub for the region’s visitor economy, alongside Bath, with an abundant retail, leisure, and cultural offer. The value of Bristol’s visitor economy has grown by 37% between 2011 and 2019 to reach nearly £1.2 billion.²⁰ Our latest data for 2022, shows there were approximately 1.5million domestic staying trips, 10.8m day-trips and more than 450,000 international visitors.

We are also home to a dynamic Voluntary, Community and Social Enterprise (VCSE) sector which advocates and provides services for different groups, causes and places across our city. As well as driving the strong social purpose which sits at the core of Bristol’s reputation for activism, our VCSE partners are important economic actors who provide high quality employment opportunities and bring substantial investment into Bristol.



16 ONS, Business Register and Employment Survey (2022).

17 ONS, Regional gross value added (balanced) by industry (2021).

18 Invest Bristol and Bath, Bristol wins City of Film Award at 2024 Global Production Awards (2024).

19 ONS Business Register and Employment Survey (2022).

20 Original by Bristol, Creative & Visitor Economy (2024).

As shown in the following map, employment here is concentrated in Avonmouth, Southmead and central Bristol. Many of our leading sectors are clustered around the city centre, acting as the epicentre of economic activity. In the North West of the city there is a broad mix of industrial sectors, dominated by logistics and distribution with Bristol Port Company as a key anchor. On our border with South Gloucestershire there is a significant hub of employment related to health and social care, with Southmead Hospital as a dominant employer. The new YTL Arena site, in a repurposed Brabazon Hangar just within Bristol City Council’s boundary, will enhance the region’s leisure and tourism offer, creating new jobs in hospitality and supply chains.

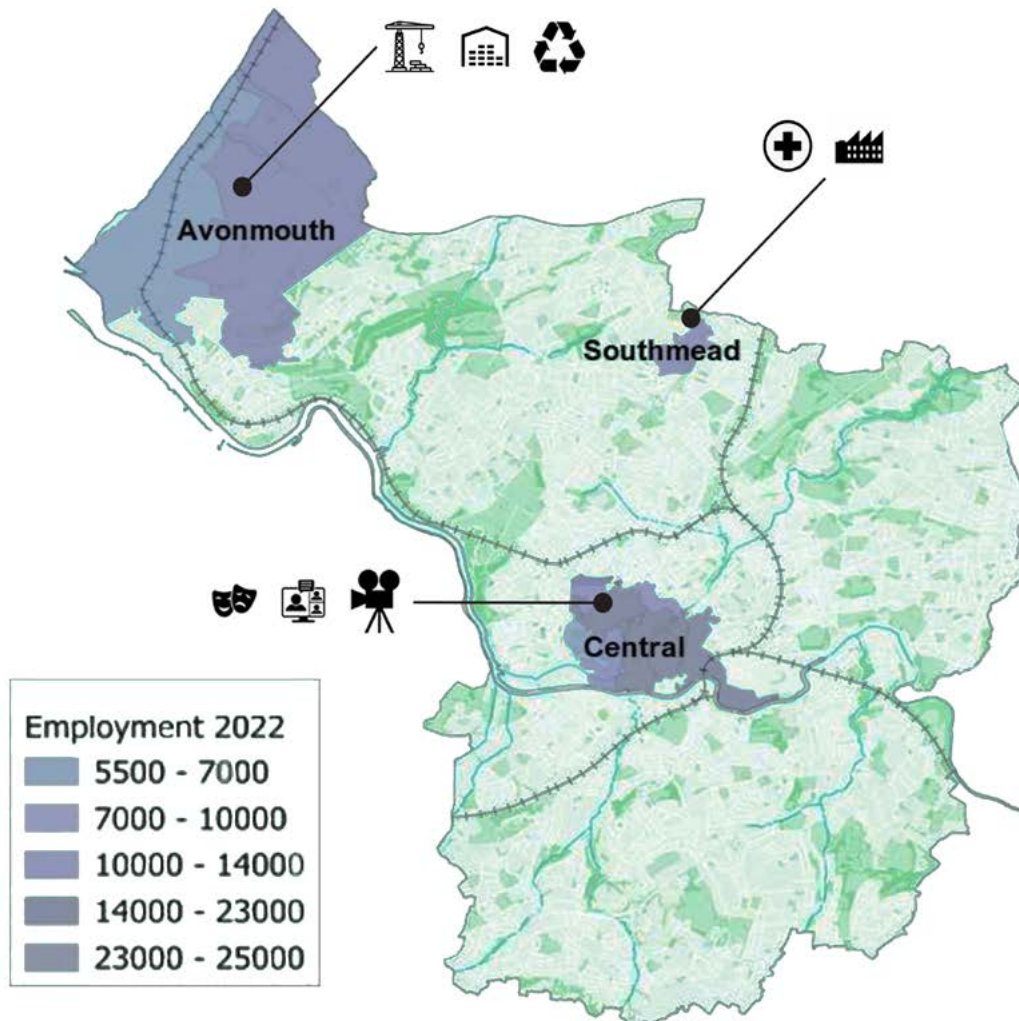
Beyond the city boundary but within the regional economic functional area there are industrial clusters and key employers which offer jobs to our workforce and supply chain opportunities for our businesses, as well as significantly

contributing to the regional investment offer.

For example, there is a flow of employees from Bristol into Filton which hosts a high value aerospace and defence cluster, estimated to employ around 8,000 people, many of whom are Bristol residents. To the south of the city, Bristol Airport located in North Somerset is home to approximately 4,100 full-time equivalent jobs, with more than 50 business partners operating on-site.²¹ The Airport provides employment opportunities across a wide range of skill levels which are accessible to residents in areas of deprivation in South and East Bristol. Currently 29% of people employed at the Airport live in Bristol.²²

Working with our regional partners is critical to ensuring our residents and businesses can access and benefit from the wider regional economy, extending the reach of successful and growing sectors into the city.

Figure 4. Bristol’s key employment areas



21 <https://bristolairport-futureplans.co.uk/>

22 <https://bristolairport-futureplans.co.uk/>

Central Bristol

Central Bristol is known for its clustering of diverse knowledge-based industries, cultural organisations and thriving retail and hospitality sector. Examples of notable sectors and employers include:

- **Financial services:** Hargreaves Lansdown is headquartered in the city centre, employing over 2,000 people.
- **Professional services:** leading law firm Burges Salmon are headquartered in Bristol. Firms such as Osborne Clarke, PwC, KPMG, Deloitte and TLT have a large presence in the city.
- **Creative Industries:** employing approximately 10,000 staff, BBC Bristol are a key employer based in city centre locations. Aardman Animations are headquartered on Bristol harbourside and based out of Finzels Reach, Channel 4 has a growing presence in the city.
- **Education:** University of Bristol (8,639) and City of Bristol College (1,000) have a large presence in central Bristol. University of the West of England also has its City Campus for creative and digital disciplines at various sites in the centre - in addition to the Frenchay Campus on the north fringe (4,400 staff in total).
- **Retail and Tourism:** Cabot Circus and Broadmead Shopping Area are important leisure spaces. Sites such as SS Great Britain, Bristol Museum and Art Gallery, M Shed and We the Curious are notable tourist attractions, providing employment in heritage and culture.
- **Culture:** The city centre is home to over 100 cultural organisations and venues employing a significant workforce with range of skills from front of house staff, musicians to artistic directors' full time and freelancers.



Avonmouth

Avonmouth is the dynamic hub within the wider cross- boundary, port-industrial area of Portbury Avonmouth Severnside (PAS) with over 50% of its business population. Avonmouth Severnside was designated an Enterprise Area (ASEA) in 2012 and has seen major infrastructure projects to improve flood defences from Avonmouth Docks to the Severn bridges, provide new wetland habitats and a new M49 junction in Severnside. It has a broad mix of industrial sectors but is dominated by

logistics and distribution, energy generation, waste and water management activities. There are also small clusters of construction and civil engineering as well as niche manufacturing, e.g. food & drink, bio-tech, automotive parts. Overall, there are an estimated 14,000 jobs at Avonmouth including 600 at Bristol Port (BRES, 2022), and a further 11,000 accessible to Bristol residents across the wider PAS area.



Southmead

Covering over 60 acres and owned by North Bristol NHS Trust, Southmead Hospital is one of Bristol's largest employment sites (c.8500 staff). The £431m Brunel building was opened to the public in 2014, and construction of The Elective Centre, a new £49.9m surgical centre based at Southmead,

began in 2024. A range of clinical and non-clinical roles are available at Southmead hospital and other North Bristol NHS Trust operated sites in the area. In partnership with UWE, North Bristol NHS Trust fund Nursing Degree Apprenticeships to help improve the accessibility of local job opportunities for our residents.

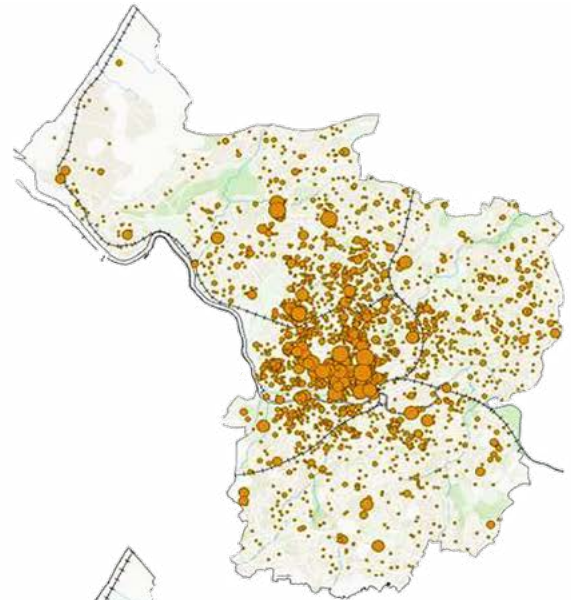


We must also recognise that just to the north of Southmead in Filton (South Gloucestershire) is the extensive and high value Bristol aerospace and defence cluster dominated by Airbus, Rolls Royce, GKN and Boeing and its supply chain. This is estimated to employ around 8,000 people, many of whom are Bristol residents. The new YTL Arena site is also on the Southmead-Filton boundary, offering a step change in the region's leisure & tourism offer and new jobs in hospitality and creative supply chains.

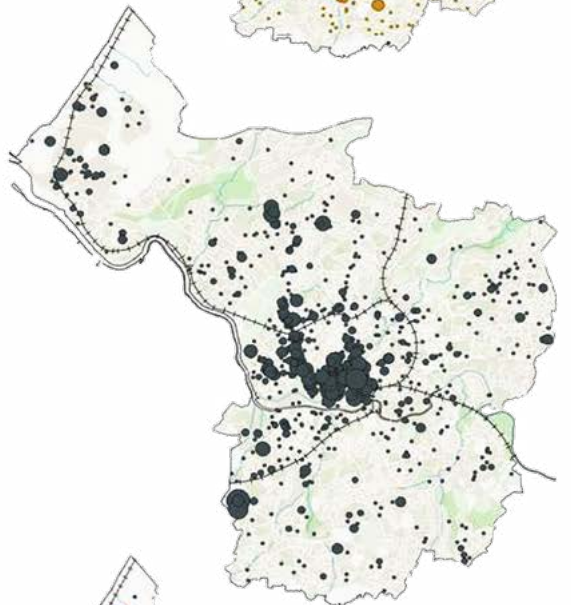
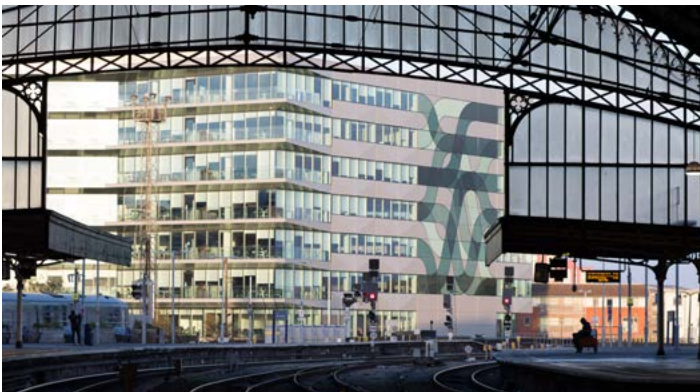
It is important to complement the analysis of Bristol’s key employment centres with further sector analysis of business locations across the city. This helps us to understand the location of existing and emerging clusters and if some of our key sectors have business locations which are more dispersed across Bristol. The following maps show concentrations of Bristol’s three most specialised sectors.

Figure 5. Concentrations of Bristol’s three most specialised sectors

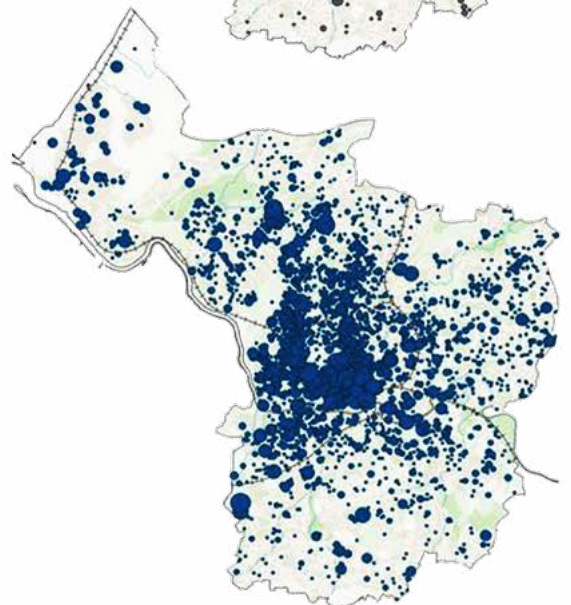
Information Service activities



Financial and Insurance activities



Professional, Scientific and Technical activities



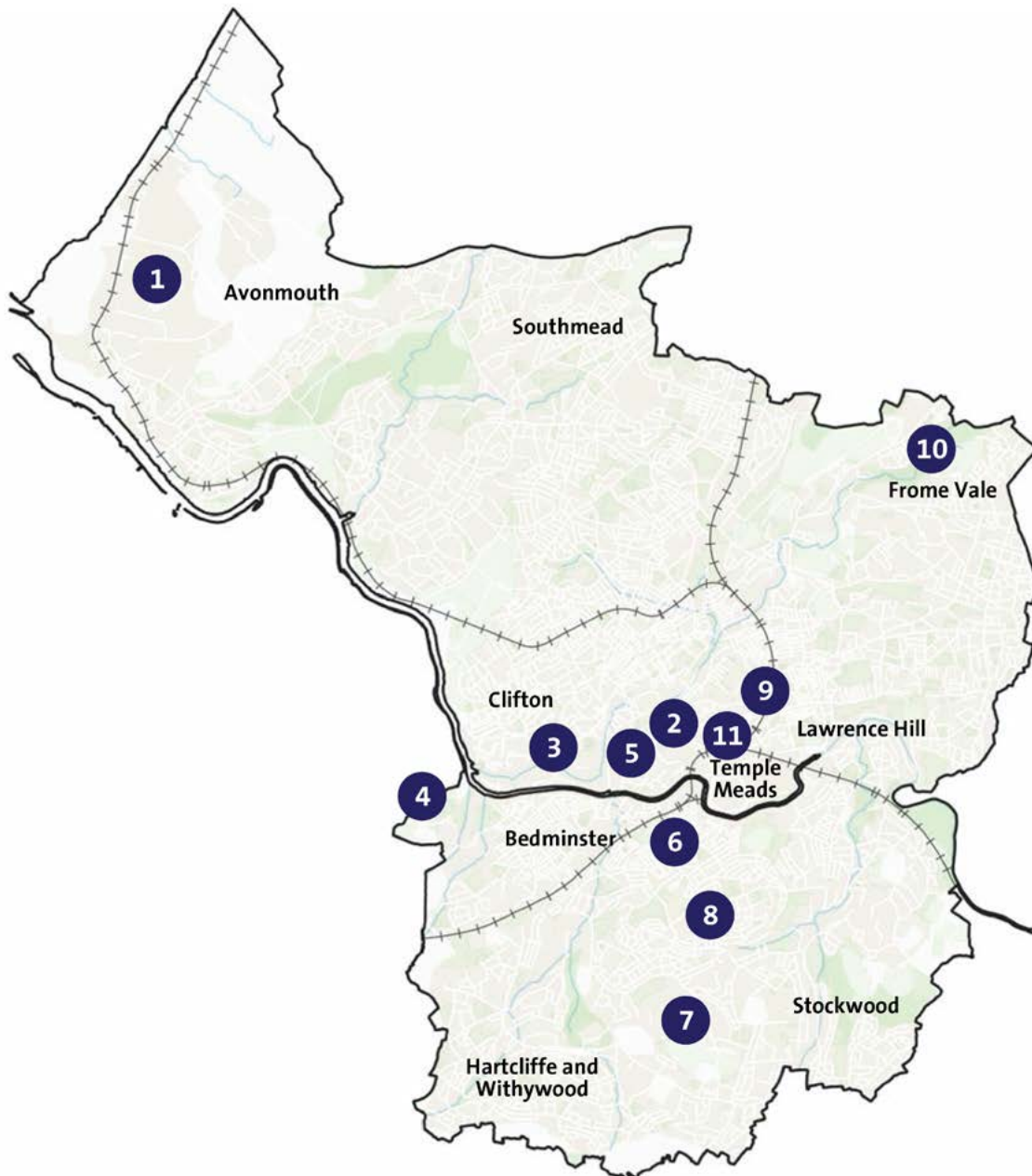
An impressive investment pipeline

Bristol is an appealing city for investors and developers due to our dynamic sector strengths, strategic location, reputation for quality of life and culture, and good connectivity to London and other major cities. It continues to transform, with investment and opportunities planned across the city to create new and improved space for jobs, leisure, and housing.

Our city is set to undergo significant transformation and will continue to be shaped by a pipeline of investment. Bristol's new Local Plan sets out the detail and is a complementary document to this strategy.²³

A sample of the existing and planned investment & development is shown in the following diagram. This is just a snapshot of the recent and planned investment into the city, representing just over £2.1bn.

Figure 6. A snapshot of Bristol's investment pipeline



- 1. Avonmouth and Bristol Port:** DESNZ and Innovate UK has funded a public-private group, the West of England Industrial Cluster, to develop an Industrial Decarbonisation Plan (LIDP) for the port industrial area including Portbury Dock and Severnside This aims to unlock or accelerate investment in green energy and circular industrial infrastructure up to 2035.
- 2. Bristol Temple Quarter:** One of the UK’s largest city centre regeneration projects, projected to deliver 22,000 jobs and 10,000 new homes, extensive new green public spaces. Development includes the **Temple Quarter Enterprise Campus** - a £500m investment by the University of Bristol focused on digital, business and social innovation - and the **St Philip’s Marsh** regeneration to create new mixed use workspace, homes and enhanced active travel routes.
- 3. BrisSynBio:** over £15m of BBSRC/EPSC funding for the Synthetic Biology Research Centre at the University of Bristol. **Western Harbour** – proposals for the regeneration of Cumberland Basin to extend the western end of the floating harbour for residential.
- 4. Ashton Gate Sporting Quarter:** £200m development of 5,000 seat arena and conference centre, hotel, offices, and apartments next to Ashton Gate stadium.
- 5. City Centre Regeneration:** Revitalisation of Broadmead, Castle Park and the Old City. 10% of ground floor space to be available for creative and cultural group use at affordable rents.
- 6. Bedminster Green:** Mixed use regeneration will revitalise 6 hectares of fragmented and low-density sites. The project will provide a mix of new housing, restoration of the River Malago, improved local public transport and include the installation of a low-carbon district heating network. **Whitehouse Street:** The regeneration of Whitehouse Street will deliver 2000 new homes and 15,000 sqm of new employment space. It will also include new and improved sustainable travel routes and high-quality public realm.
- 7. Hengrove Park:** £300m phased regeneration of 49 hectares site by Goram Homes for 1435 homes, public park, offices, education and community facilities over 10 years. **Bottle Yard Studios:** £12m expansion of The Bottle Yard Studios completed – the largest film and TV Studio in the West of England.
- 8. Filwood Broadway Levelling Up:** £14.5m from the Levelling Up Fund will help Filwood Broadway become the attractive centre of Filwood, including a new library and community and cultural space.
- 9. Frome Gateway:** Long-term transformation of the land either side of the River Frome in St Jude’s, creating capacity for 1,000 new homes, employment land and green spaces.
- 10. Wider developments in Greater Bristol:** Brabazon: a major new mixed development area at Filton/Patchway in North Bristol delivering residential, leisure, retail and industrial space, including the new 12,000 seat YTL Arena. **Isambard-AI:** £225m investment from the Government to create the UK’s fastest supercomputer based at the National Composites Centre. **West of England Transport Plan:** MetroWest re-opening of Temple Meads to Portishead line £24.4m for the Future Transport Zone and £15m to upskill the region.
- 11. Science Creates:** Deep tech science and engineering ecosystem offering incubation space, Venture Capital and accelerator support, in partnership with the University of Bristol and Research England. £8.5m project to build third deep tech incubator for spinouts in quantum, cyber and engineering biology.
- 12. Bristol City Leap (not referenced in figure 6 as city wide):** Partnership between Bristol City Council, Ameresco and Vattenfall Heat UK which will enable the delivery of over £1 billion of investment into Bristol’s energy system including large-scale renewables (wind and solar) and district heating network

Home to dynamic local places and communities

Our vibrant city centre is the economic engine of the Local Authority area, the city region, and the South West, a hub for employment, business and culture, as well as education, healthcare and transport. It will be a focus for ongoing and planned regeneration activities over the next 10 years including Broadmead, Bristol Temple Quarter, St Philip’s Marsh, Frome Gateway and Western Harbour.²⁴

But Bristol is much more than the city centre. Home to bustling high streets and local centres like St. Mark’s Road, Gloucester Road, North Street and Clifton Village. East Bristol is a lively part of the city, famous for its independent shops, iconic cultural hubs (such as the Trinity Centre) and easy access to green spaces. In fact according to Time Out’s annual hot list the cultural quarter of Stokes Croft and St Paul’s, is the coolest neighbourhood in the UK – and the sixth in the world.²⁵

North Bristol is primarily residential in nature but is anchored by industrial areas linked to port activity at Avonmouth as well as advanced engineering assets in Filton and neighbouring South Gloucestershire. Encompassing many of our most deprived communities, South Bristol is a priority area for development and infrastructure improvements, and a growing hub for our creative and digital sector.

Spotlight on Bristol City Centre

Bristol’s city centre will undergo significant change in the next 10 years, as outlined in our Development and Delivery Plan.²⁶ The plan, adopted in December 2023, sets out a transformational vision and strategy for how the city centre should evolve based around six themes: Destination and Identity, Community and Culture, Movement and Connections, Public Realm and Open Space, Green Infrastructure and Nature, Land Use and Development.

The city centre plays a crucial role in Bristol’s economy, hosting 47% of the city’s jobs and a diverse range of business sectors, with 143,300 people employed across nearly 5,000 business units.²⁷ Sectors such as retail, leisure, and hospitality are particularly significant, contributing to both employment and the overall vibrancy of the area.

Over the last decade, population growth in the city centre has made it an increasingly important residential hub. From 2011 to 2021, the city centre’s population surged by 49%, compared to a citywide growth of just over 10%.²⁸ This growing residential base, along with an active culture and events programme, helped the city centre bounce back from the pandemic. However, in 2024, the cost-of-living crisis has slowed this momentum, with footfall figures down across key areas such as Broadmead and Bedminster.



There are several significant development projects already underway in the city centre, including the large-scale regeneration at Bristol Temple Quarter. This development will create a thriving hub of business and office space, as well as residential and leisure space.

Other major developments including Broadmead, Western Harbour, St Philip’s Marsh, and Frome Gateway will help transform the city centre into a more diverse, vibrant place to live, work, shop, and visit.

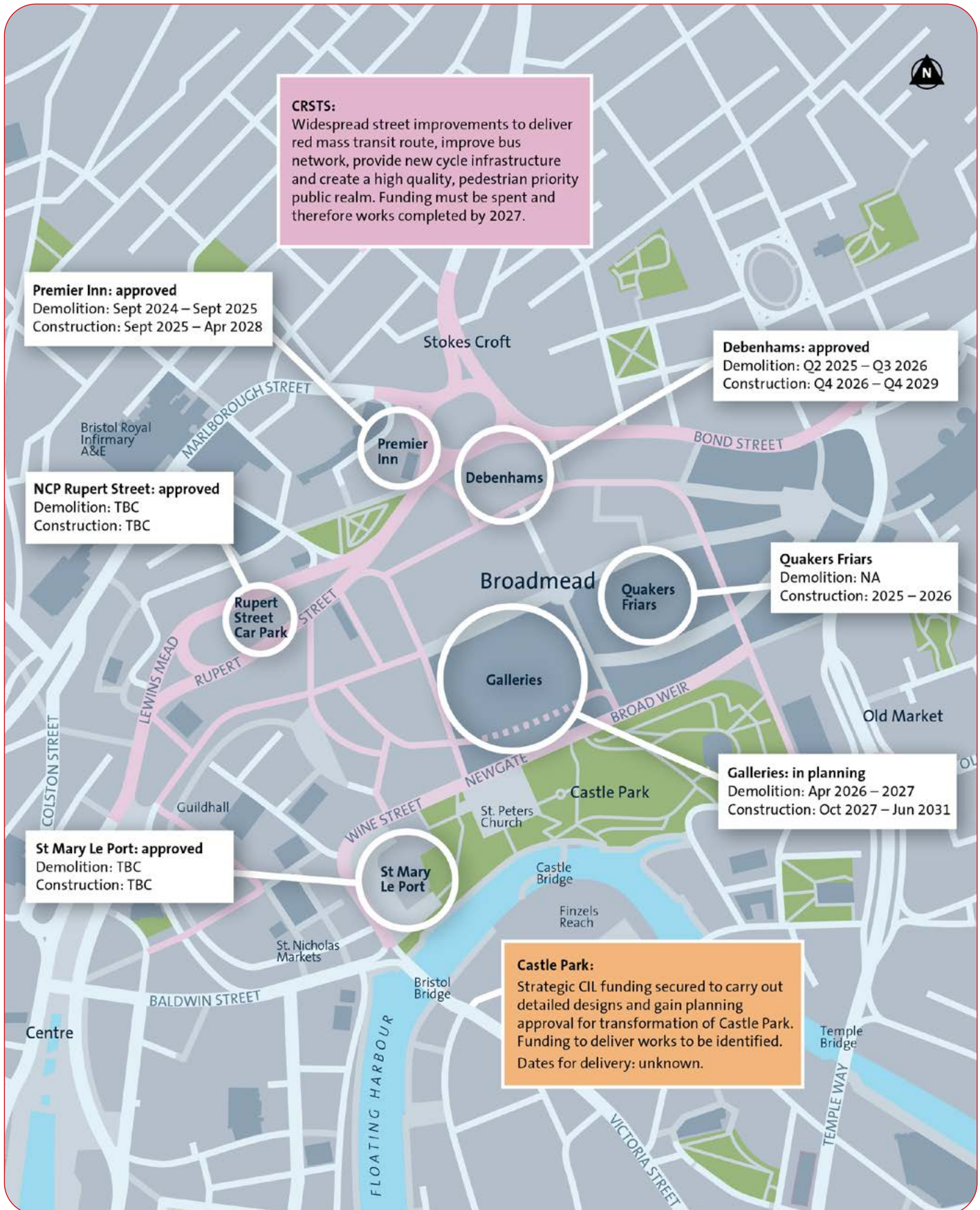
These changes will strengthen Bristol’s role as a regional centre and global city, encouraging a more efficient use of land and a greater mix of activities. It will be critically important that businesses are supported during this time of significant change, ensuring they can adapt and thrive in our revitalised city centre. We will work with our colleagues in culture, transport and city planning to ensure that visitors and residents are able to navigate and engage with Bristol’s city centre as it undergoes this transformation.

²⁶ Bristol City Council, Bristol City Centre Development & Delivery Plan (2023).

²⁷ Bristol City Council, Bristol Local Plan (2023).

²⁸ ONS, Census Data (2021).

Figure 7. City Centre Developments



Spotlight on Temple Quarter

One of the UK’s largest city centre regeneration projects, Bristol Temple Quarter will deliver thousands of jobs and new homes through the transformation of 135 hectares on the south eastern edge of the city centre. Fair and inclusive growth is at the heart of plans for the area, with it offering many and significant opportunities for innovative placemaking, skills development and the chance to build on Bristol’s existing economic strengths whilst tackling stubborn deprivation and inequity challenges.

Since enterprise zone status was conferred in 2012, over 4000 jobs have newly located into the area.²⁹ It has developed as a hub for professional and legal services, finance, high tech and creative sector businesses, amongst others. St Philips Marsh in the eastern part of the regeneration area is a long-established base for industry and warehouse-based activity, home to 170 businesses employing over 4000 people.

The core of the area is home to two assets of national significance. Network Rail have recently invested over £100m into futureproofing Bristol Temple Meads Station, the city’s grade 1 listed mainline railway station with its direct links to London and other major UK conurbations. The University of Bristol is investing £500m in its Temple Quarter Enterprise Campus, with the Bristol Digital Futures Institute already operating and the new main building due to open in September 2026.³⁰

At the heart of the Temple Quarter concept has been an unwavering commitment to a shared vision for change by the four partners – Bristol City Council, Homes England, Network Rail, and the West of England Mayoral Combined Authority, alongside the University of Bristol and others in the public and private sector.



Recognising the potential of the area and the scale of partners’ ambition, Government awarded Temple Quarter a £94.7m grant in 2022 to progress 3 new entrances to Temple Meads Station, improving accessibility in and around the complex, as well as for land assembly and master planning.³¹ A new company – Bristol Temple Quarter LLP – has been created by the partners to progress the programme.³²

The work of the LLP is informed by the Bristol Temple Quarter Inclusive and Sustainable Growth Strategy, which sets out a clear aspiration for the type of economy which partners want to evolve and grow at Temple Quarter, shows how it will benefit local people, and provides a blueprint for its delivery. The focus is on ensuring that regeneration helps to make Bristol and the West of England a more prosperous, fair and sustainable place.

²⁹ Bristol City Council Economic Development Service

³⁰ University of Bristol, Major milestone for University of Bristol’s new world-leading Enterprise Campus (2024).

³¹ Bristol Temple Quarter, A vision for the future (2022).

³² Bristol Temple Quarter, Bristol Temple Quarter Limited Liability Partnership incorporated (2024).

The strategy identifies three long term missions to help guide future delivery across the area:

- People are happy and well. Temple Quarter is a place where all residents are able to access and enjoy a good quality of life and a place which, via sustained investment and opportunity creation, helps to improve lived experience and reduce inequality across Bristol’s neighbourhoods.
- A vibrant and successful economy. Temple Quarter plays a central role in Bristol and the West of England’s success via growth in the size and productivity of the economy. The future economy will be reflective of the city’s reputation for creativity and enterprise and play a leading role in driving forward the region’s aspirations to be an innovation powerhouse. It will build upon the unique platform provided by the established business ecosystem within the area, enabling existing businesses to stay and thrive where possible.
- Inclusive and environmentally resilient places. Development at Temple Quarter leads the way in supporting Bristol’s Net Zero transition and enables daily life which is genuinely reflective of Bristol’s demographic and cultural diversity.

The Bristol Temple Quarter LLP Inclusive and Sustainable Growth Team is overseeing day to day delivery against these missions, working closely with Bristol City Council, the Mayoral Combined Authority, and partners across the city and the region. The delivery approach is focused on:

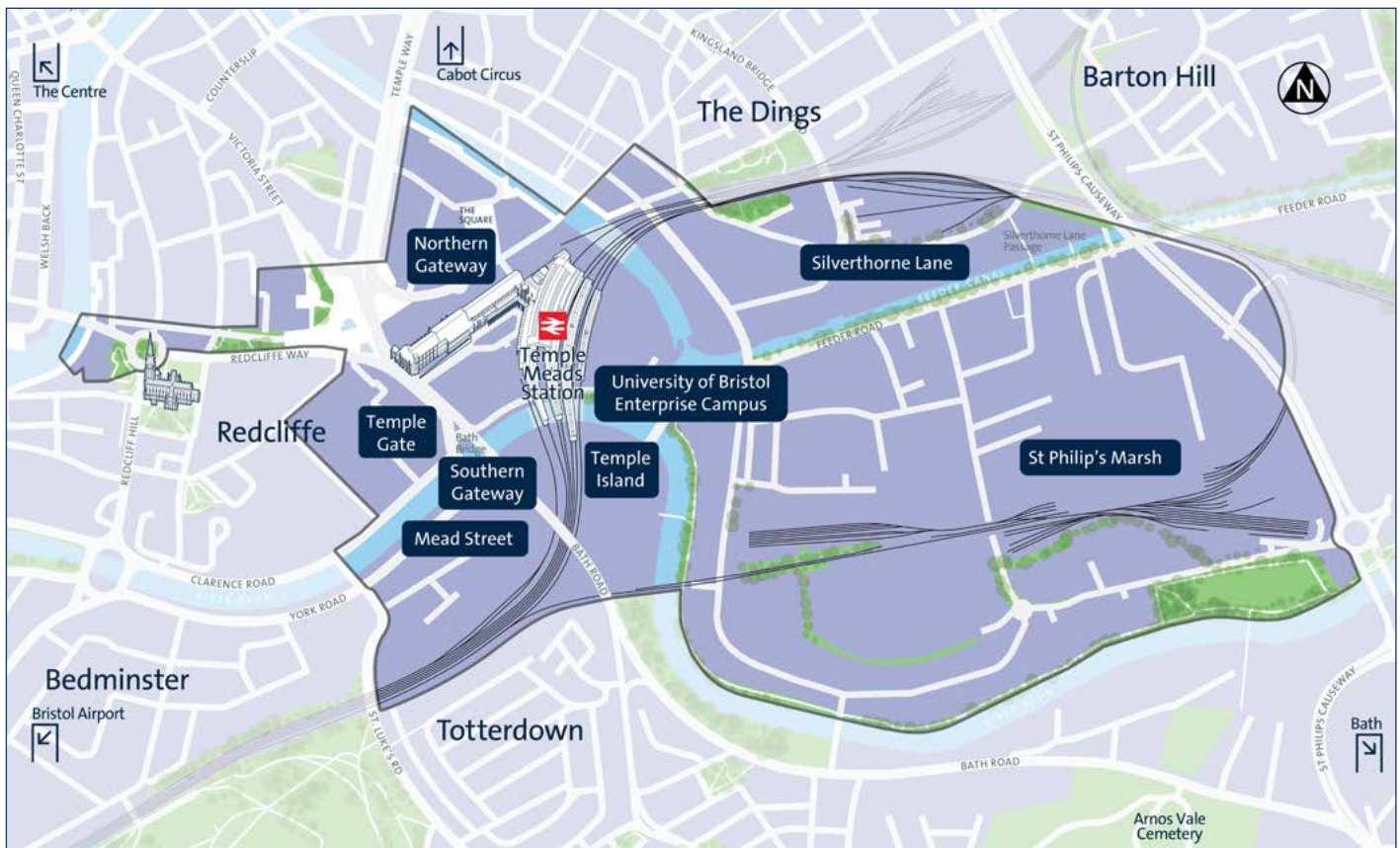
- Convening partners around a shared set of aspirations, bringing conversations into one place and maximising the benefit of collective intent and energy. Establishing a shared approach to social value delivery which helps us work towards our missions is an important part of this.
- Embedding community involvement and participation throughout the delivery programme, empowering communities to get involved and play a meaningful role in the long-term evolution of the area.

The strategy and delivery approach will be dynamic in nature, evolving over time as new opportunities, needs and policy imperatives arise.



Figure 8. Temple Quarter regeneration programme

BTQ Regeneration Programme spans across a wide geographical area, mixed-use Bristol Temple Meads Station and the area to the East (St. Philips Marsh). The programme will be delivered along the next 30 years, includes nine main strands:



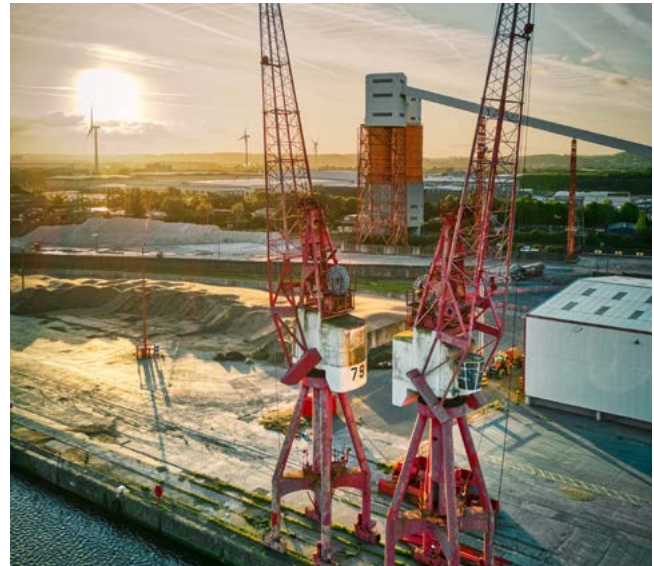
- 1. Bristol Temple Meads Station (0-5 years):** investment to enhance capacity, reliability and passenger experience. Schemes at the station include: Bristol East Junction Remodelling; Station Main Shed Roof Refurbishment; Station Rewire; Construction of a new Eastern Entrance.
- 2. Northern Gateway (0-10 years):** investment in the station surrounds and interchange to enable enhanced connectivity and journeys to/from the station, and increase passenger facilities. New development nearby will provide a lively destination for living and working that complements the station improvements.
- 3. Temple Gate (10-15 years):** new development with affordable homes and associated infrastructure that will deliver city centre living and office space, together with local retail offering and enhanced movement links.
- 4. Mead Street (0-5 years):** new urban neighbourhood and community with a mix of new homes and workspaces, including a new green space and sustainable travel connections.
- 5. University of Bristol Temple Quarter Enterprise Campus (0-5 years):** enterprise campus providing space for 4600 students, around 650 members of staff and 350 industry partners in the main building.
- 6. Temple Island (0-5 years):** mixed-use scheme of up-to 500 homes, office space, a 350-bed hotel and conference facility, as well as bars, cafés and retail.
- 7. Silverthorne Lane (0-5 years):** mixed-use development, including a new secondary school, student accommodation, new homes, employment space and a new building for the University of Bristol.
- 8. St Philips Marsh (10-30 years):** new mixed-use neighbourhood with residential, commercial and industrial uses, alongside new greenspaces and community infrastructure.
- 9. Southern Gateway:** new transport hub to serve the station with car parking, cycle pavilion and new direct access into the station.

Spotlight on Avonmouth

Avonmouth has long been at the heart of one of the largest and most commercially successful ports on the western seaboard of the UK, but, in response to the urgent national challenge to decarbonise, is set to expand its role as one of the new green industrial powerhouses of southern England, attracting major new public-private investment in the emerging fields of carbon capture, green hydrogen production, alternative transport and industrial fuels such as bio-CNG and RDME, and circular processing of material waste streams, water and sewage for energy and agri-products. The 2024 Local Industrial Decarbonisation Plan (LIDP) will plot technology and project pathways to decarbonisation for the larger emitters and different industrial sectors across the cluster by 2035, and model the prospective ‘green growth’ (output and job creation) of existing and new companies and activities attracted by the upgraded infrastructure of the area and key sites such as the proposed Green Industrial Park at Hallen Marsh.³³

Due to the £80 million flood defence and eco-mitigation infrastructure programme now almost completed across Avonmouth Severnside Enterprise Area, a significant amount of industrial land has been developed over the last 12 years for new occupiers both at Avonmouth docks, e.g. related to Hinckley Point new nuclear station construction, and at estates such as Access 18, Cabot Park, Rockingham Park and an ex-Sevalco site, creating hundreds of jobs in logistics, manufacturing, engineering, energy and waste sectors.³⁴ However around 100 hectares of land remains to be developed across Avonmouth (including 60 ha greenfield land being released under the new Local Plan) potentially creating 2,000-3,000 additional jobs.³⁵

Against this background of growth prospects, it should be noted that the zone is surrounded by the city’s largest residential ward comprising Avonmouth, Lawrence Weston, Shirehampton



and Sea Mills, with a population of 22,200, a high proportion of children under 16, and several disadvantaged neighbourhoods.³⁶ A major challenge and potential barrier to growth and de-carbonisation over the next 10 years will be the supply of intermediate and higher-level skills for the new green industries and increasingly tech-driven logistics and port sectors, and the need to better promote and connect young people to the career opportunities on their doorstep. Skills shortages have been experienced over several years in transport, logistics and other activities with 24/7 operations at Avonmouth. The local business network, SevernNet, has been long advocating for improvements to the public bus and rail transport, as well as cycling and walking networks serving the area. In the last 5 years the bus and rail connectivity to Avonmouth docks and Cabot Park has improved somewhat but there remain key parts of the industrial area that are not served at all by public transport.

Another operational constraint at Avonmouth is the often-severe traffic congestion of heavy goods, commercial and private commuter vehicles on the arterial routes at peak times. It is expected that some relief will be given by the opening of the new M49 junction at Severnside in late 2025.³⁷

³³ SevernNet, LIDP (2024).

³⁴ South Gloucestershire Council, Avonmouth Severnside Enterprise Area (ASEA) Ecology Mitigation and Flood Defence Project (2016).

³⁵ Bristol City Council, Bristol Local Plan (2023).

³⁶ Bristol City Council, Ward Profile Data (2024).

³⁷ Newsroom, Planning application submitted for M49 Junction Link Road (2023).

Spotlight on South Bristol

South Bristol (the 11 wards south of the Avon) has a different economic profile to the centre and north of the city. It has a lower density of enterprise, and hence employment relative to its population. While it has 32.7% of the city’s population (2022)³⁸, it only has 25% of its businesses.³⁹ Due to the higher prevalence of micro and small businesses, this translates into just 17.4% of the city’s employees.⁴⁰ South Bristol has only 15% of the city’s larger (employing 250+) and 17% of its medium sized businesses.⁴¹ Its share of the city’s employees appears to be static or declining with a 1.1% drop since 2015, against the background of the level of employment in the city as a whole growing by 16% since 2015.⁴²

Another key difference is in the sectoral structure of the South Bristol economy. The area has a significantly lower proportion of the city’s higher value service sectors such as finance & insurance, professional, scientific & technical and information and communications (9-22%) and a higher proportion of manufacturing, transport & storage, motor trades and construction sectors (31-43%).⁴³ In terms of total employee numbers, the top six sectors in South Bristol are (in order of size): education, health, retail, manufacturing, construction, and business admin & support. However, there is a discernible trend towards diversification with employee numbers in arts, entertainment & recreation sector growing by 86%, and in professional scientific & technical services by 54% and information & communications by 20% since 2015. At least one driver for this change is likely to be the growth of the film and tv production industry around The Bottle Yard Studios next to Hengrove Park, which has seen a steady expansion in recent years boosted by a £12 million public investment over 2021-22 in new facilities and is forecast to create over 500 new jobs directly and in supply chains.⁴⁴



However, cutting across this wider area employment and sectoral picture, is a broader socio-economic division between inner and outer South Bristol with wards such as Southville, Windmill Hill and Bedminster benefiting from greater proximity to the vibrant city centre and market-led investment in small workspace, retail, hospitality and culture offer alongside new residential. By contrast, outer South Bristol has the 10 most deprived neighbourhoods in the city concentrated in the wards of Hartcliffe & Withywood, Filwood and Hengrove & Whitchurch Park.⁴⁵ There are also neighbourhoods on the fringes of Brislington and Stockwood within the top 30 most deprived in the city. A persisting issue is that this outer area has been, since the demise of South Bristol’s traditional industries (tobacco, paper, packaging etc) in the 1990s, more remote from the major employment zones of central and northern Bristol. Nonetheless, there are several new opportunities and development ‘poles’ across South Bristol which could collectively address the deficit in employment and higher value sectors – the Bottle Yard Studios linking to a creative and leisure quarter at Hengrove Park; the Growth & Regeneration Area at Brislington identified in the new Local Plan and Hicks Gate (over the boundary with B&NES); modernisation/renewal of industrial estates such as at Hartcliffe Way; and the Ashton Gate development.

38 ONS, Census data (2021).

39 UK Business Counts (2023).

40 ONS, Business Register & Employment Survey (2022).

41 ONS, UK Business Counts (2023).

42 ONS, Business Register & Employment Survey (2022).

43 ONS, Business Register & Employment Survey (2022).

44 The BottleYard Studios, £12m expansion works underway at The Bottle Yard Studios (2022).

45 Department for Levelling Up, Housing and Communities and Ministry of Housing, Communities & Local Government, English Indices of Multiple Deprivation (2019).

Bristol's Economy of Tomorrow: Our Missions

A fair city economy



26,800 residents live in the 10% most deprived LSOAs in England.⁴⁶



3 wards in South Bristol are in the 5 worst performing areas in the country for young people going into higher education.⁴⁷



The median hourly wage for a resident in the 10th percentile in Bristol is £11.80 compared to £32.78 for someone in the 90th percentile.⁴⁸



Between 2019-2021, there was a 125% increase in use of food banks for children.⁴⁹

There are significant disparities in experience and outcomes across Bristol in terms of socioeconomic background, ethnicity, race, gender and disability. Clusters of deprivation exist around the Port, north & east of the city centre and along our southern border, interspersing the affluent neighbourhoods of Clifton, Redland and Westbury-on-Trym.⁵⁰ 41 of Bristol's Lower Super Output Areas (LSOAs) fall in the most deprived 10% in England, accounting for over 26,800 of our residents. With the greatest levels of deprivation experienced in Hartcliffe & Withywood, Filwood and Lawrence Hill.

This geography of inequality speaks to the existence of a two-tiered economy in Bristol.

14 Bristol wards have child poverty higher than the national average; 1 in every 2 children in Lawrence Hill ward is in poverty.⁵¹ In 2022,

65% of under 5s in Bristol were assessed as having a good level of development at the end of the Early Years foundation stage, however attainment varies from 46% of children in Hartcliffe & Withywood to 86% in Redland.⁵²

This trend continues at Key Stage 2; 50% of pupils living in our most deprived wards reach the expected level of reading, writing and maths compared to 82% of pupils living in the 10% least deprived areas and persists to A-level attainment and participation in Higher Education, which ranges from 9% in Hartcliffe to 78% in Westbury Park.⁵³

46 Department for Levelling Up, Housing and Communities and Ministry of Housing, Communities & Local Government, English Indices of Multiple Deprivation (2019).

47 Bristol City Council, Bristol Employment, Skills, and Lifelong Learning Plan 2024-28 (2024).

48 ONS, Annual Survey of hours and earnings- resident and workplace analysis (2021).

49 Bristol City Council, Food Insecurity JSNA Health and Wellbeing Profile 2023/24 (2024).

50 Department for Levelling Up, Housing and Communities and Ministry of Housing, Communities & Local Government, English Indices of Multiple Deprivation (2019).

51 Department for Work and Pensions, Children in low income families: local area statistics (2022).

52 Bristol City Council, JSNA Health and Wellbeing Profile (2023).

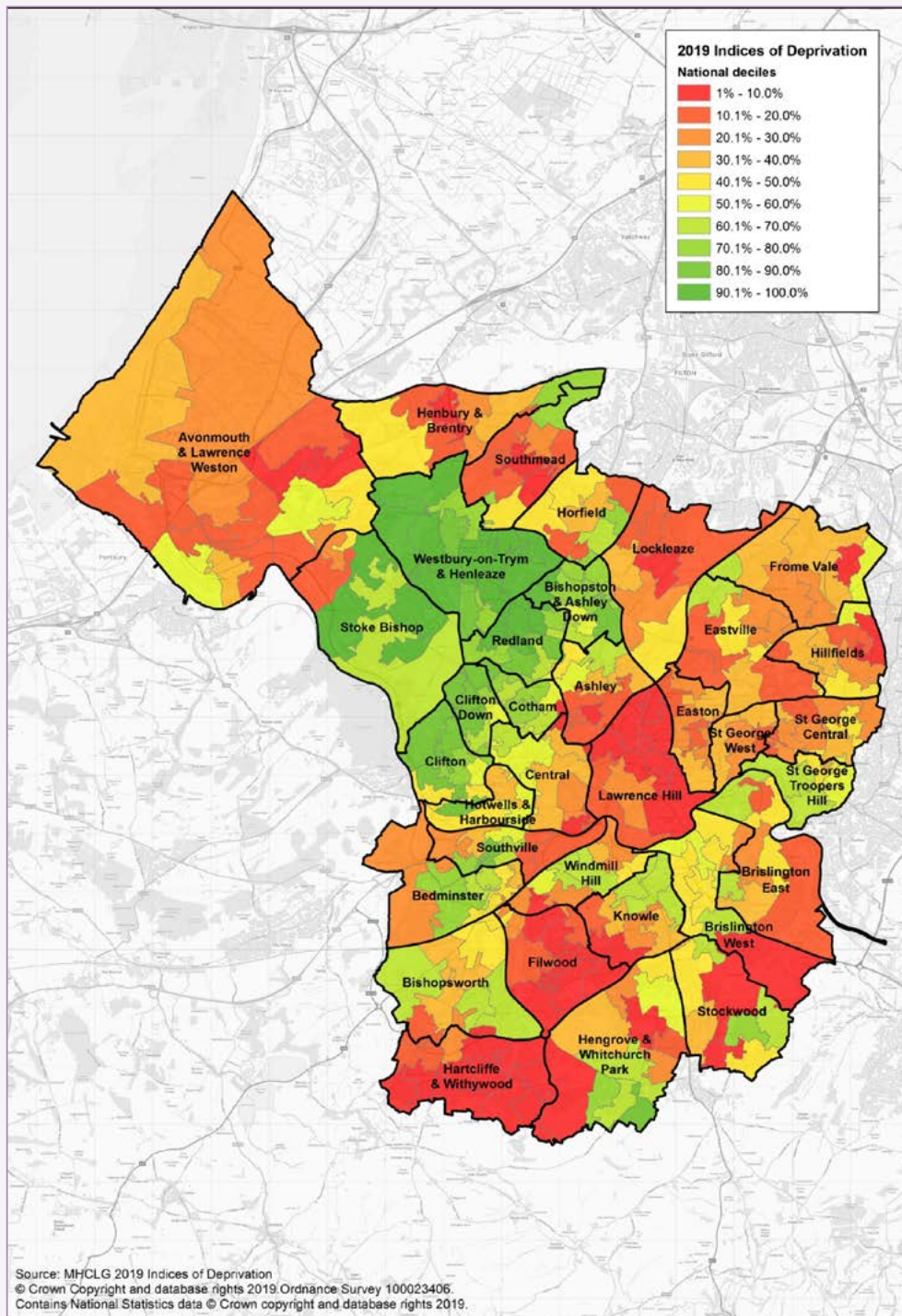
53 Bristol City Council, Bristol Employment, Skills, and Lifelong Learning Plan 2024-28 (2024).

Figure 9. Map of Indices of Deprivation

There are also disparities in the experience and attainment levels within education and employment based on ethnicity, with an over-representation of minoritised communities in elementary occupations.

Nationally, the number of people reporting a long-term health condition or considered disabled under the Equalities Act continues to rise. Despite this, the employment rate for Disabled people

has yet to return to the positive trend observed before the pandemic, underscoring the urgent need for systemic changes to create inclusive and accessible workplaces. According to the 2021 Census⁵⁴, less than half (45%) of Bristol’s Disabled population were in employment, compared to 72% of non-disabled people. Bristol City Council is committed to the social model of disability, which emphasizes that people are disabled by societal barriers rather than their impairments.



⁵⁴ Bristol City Council has adopted the social model of disability, however the Office for National Statistics, who publishes the data used in this profile does not use the social model. The statistics and language are based on the question asked in the Census 2021 (not on whether people identify as a Disabled person) and so may not reflect the language normally used by the council.

There is a £69 pay gap between the average full-time weekly pay between men and women in Bristol.⁵⁵ There are gender disparities in terms of representation across different sectors and professions, as well as significant differences in the percentage of women who move to part-time working, particularly as they take on caring responsibilities. Many caregivers face career interruptions or reduced working hours, leading to slower career progression and lower lifetime earnings. We need comprehensive policies that support caregivers and promote flexible working arrangements to ensure care giving does not hinder progression or drive disparity.

People in the most deprived areas of Bristol live approximately 16 fewer years in good health when compared to the least deprived areas.⁵⁶ Improving health outcomes can boost economic growth, by enabling more people to move into and stay in work, which in turn supports better health and wellbeing.

A fair Bristol is one where partners and employers work together to build an equitable and resilient economy, ensuring communities and residents can access opportunities and share in the city’s success.

A city where investment is leveraged to tackle longstanding challenges around inequality and create a more level playing field for our communities. Where entrepreneurs and SMEs are supported to access the space, skills and resources needed to grow their business, create good jobs and vibrant local places. Where our employers and businesses are proactively engaged in addressing social mobility, from championing good work practices to reaching out into communities to promote opportunities and career pathways. And, where our skills provision is lined up with our jobs pipeline, and there are clear pathways to ensure local people can access and benefit from the opportunities available here.

Our mission is to achieve economic equity for our residents and workforce.



Our measures of success for a fair Bristol are:

- Increase in household income
- Reduction in the income gaps and between the least and most deprived areas of the city
- Reduction in deprivation
- Increase in jobs paying real Living Wage
- Reduction in pay gaps for women, disabled people, and residents from black and minoritised communities
- Reduction in unemployment and economic inactivity
- Increase in residents accessing jobs from inward investment
- Increase business startups and growth in areas of high deprivation
- Improve housing affordability ratio
- Reduction in Healthy Life Expectancy gap between the most and least deprived areas of the city

⁵⁵ ONS, Annual Survey of Hours and Earnings (2023).

⁵⁶ Bristol City Council, JSNA Health and Wellbeing Profile (2022).

A green city economy



City wide carbon emissions have decreased by 45% between 2005-2021.⁵⁷



48% of c. 50,400 total net jobs required across the region for WECA to reach Net Zero will be created in Bristol.⁵⁸



An estimated £10 – 12bn needed for all of Bristol’s sectors to reach Net Zero.⁵⁹



Low carbon electricity is projected to be Bristol’s largest green sector by 2030 and is set to provide c. 3,200 new jobs.⁶⁰

Despite the steady decline in CO2 emissions between 2005 and 2021, Bristol’s economy is threatened by a variety of climate hazards.⁶¹ Our location next to the Severn Estuary and River Avon makes flooding a key risk to the city’s economic future, including threats to industrial and office premises, transport infrastructure, access to facilities (such as healthcare) and the movement of supply chains.

Bristol City Council declared a Climate Emergency in 2018, and worked with One City partners to develop a shared Climate Strategy that outlines the challenge and work that needs to be done to reach our Net Zero goals.⁶² And, in 2023, Bristol City Council formally endorsed Bristol’s Just Transition Declaration which outlines key principles around ensuring that the transition to a net-zero economy is just.⁶³ These principles include ensuring the voices of disadvantaged communities are heard, empowering local action, and creating sustainable jobs for the future.

Our business base has a significant greenhouse gas footprint and is a major contributor to the city’s overall emissions, including through industrial sites, manufacturing, construction, and tech. To reach our goal of being carbon neutral, we need to grow our economy without overusing or further damaging our natural

resources. This will mean finding new ways to create value by using what’s already in circulation. By doing this, we can address resource shortages, improve efficiency, and reduce our emissions.

It is projected that investing 0.4% (£58m) of Bristol’s annual GVA to exploit energy efficiency and low carbon opportunities (e.g. in building retrofit and district heat networks), could result in 0.7% GVA (£102m) annual savings in the city’s energy bill.⁶⁴ In addition, this investment could deliver up to 2,000 jobs in the low carbon goods and services sector and wider social and economic benefits such as a decrease in fuel poverty and improved resource efficiency.

Bristol has growing expertise in green tech and clean energy, particularly within our knowledge-based economy and leading Universities with research institutes including the Cabot Institute for the Environment, Southwest Nuclear Hub, Institute for Advanced Automotive Propulsion Systems (IAAPS) and the Centre for Sustainable Energy. We have also led the way in demonstrating how to crowd in private investment for public benefit through our £1 billion City Leap which aims to transform the amount of renewable energy and decarbonised heat powering our city.⁶⁵

57 Department for Energy Security and Net Zero, UK greenhouse gas emissions: local authority and regional (2021).

58 Bristol One City, One City Climate Strategy (2020).

59 Bristol One City, Bristol net zero by 2030: The evidence base (2019).

60 Ecuity, Green Skills Market Analysis (2021).

61 Department for Energy Security and Net Zero, UK greenhouse gas emissions: local authority and regional (2021).

62 Bristol City Council, Mayor’s Climate Emergency Action Plan (2019).

63 Bristol City Council, Bristol City Council’s Alignment to the city’s Just Transition Declaration (2023).

64 Bristol One City, A strategy for a carbon neutral, climate resilient Bristol by 2030 (2020).

65 Bristol City Leap, Bristol City Council secure £1bn investment to help city become net zero (2022).

Bristol is renowned for its innovative grassroots activism and civic leadership in sustainability and climate change action. Our city has a strong network of environmental organisations and voluntary groups, from community energy projects to liveable neighbourhoods and city greening initiatives. As the first UK city to become a European Green Capital in 2015⁶⁶, we are consistently ranked as the greenest major city in England.⁶⁷ Our natural assets are part of

what makes Bristol such an attractive place to live and work, providing cultural enrichment and wellbeing as well as being vital to our local food systems and environmental resilience. In response to continued local biodiversity loss, the council joined city partners in declaring an Ecological Emergency in February 2020.⁶⁸ Together, we are working towards ambitious targets to ensure Bristol becomes a nature positive city.

We want Bristol to be a green city economy.

A green Bristol will take the lead in developing the first Net Zero city economy in the UK. Building on our leadership position in attracting investment to drive the green revolution, where all our businesses are carbon neutral and climate resilient. A city fuelled by clean energy, where businesses have been supported to transition to carbon neutrality through engagement, training, technical and operational support. Where businesses are resilient to climate hazards and supply chains are sustainable and secure, and where sustainable lifestyles and practices are supported – from the way we travel, to the food and resources we consume. It will be a Bristol that values and protects our city’s biodiversity.

Our mission is to create the first Net Zero city economy



Our measures of success for a green Bristol are:

- Reduction of CO² emissions across the business base
- Reduced CO² emissions from Avonmouth industrial site
- Increased size of the green economy (jobs)
- Increased generation of renewable electricity
- Increased city greening and biodiversity
- Increase in number of businesses receiving green business support
- Increase in investment for sustainable transport and active travel
- Increase in investment for clean energy and net zero initiatives
- Reduction in carbon intensity of economic output

⁶⁶ Centre for Cities, Bristol: European Green Capital (2013).

⁶⁷ Invest Bristol and Bath, Bristol named greenest city in England in new study (2024).

⁶⁸ Bristol City Council, Ecological Emergency Action Plan 2021-2025 (2020).

A thriving city economy



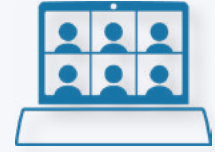
£15.5bn in economic output in 2021, but less productive now than in 2004.⁶⁹



58% of working age population are educated to degree level or higher, exceeding the national rate of 45%.⁷⁰



10% population increase between 2013 – 2023, making Bristol the second fastest growing core city.⁷¹



High employment rate (78.6% as of March 2024) but lower than the regional average.⁷²

Home to 483,000 people, we have a growing, young and increasingly diverse population, representing over 287 ethnic groups, 45 religions and 91 main languages spoken by residents⁷³. This includes a substantial student population which has grown by approximately 8,000 over the last ten (census) years and makes up 9.2% of the usual resident population; many of whom choose to stay and work in the city after completing their studies at one of our world-leading Higher Education Institutions (HEIs) or from our range of high-quality Further Education provision.⁷⁴

Our universities are anchor institutions and have a key role in shaping city and regional economic development leading to wider societal and economic impact. They provide local employment in a range of occupations, research and innovation capabilities which attract investment and support business growth. Through the Civic University Agreement, we will continue to work with our higher and further education partners to deliver meaningful opportunities and benefits for Bristol and ensure that we are maximising the positive impact we can have as key anchor organisations in the city.

Our highly qualified workforce is the engine of our local economy and a key driver for inward investment into the city. Over half of

those employed (52%) work in managerial, professional and technical occupations⁷⁵, contributing to the median annual resident wage in Bristol (£35,100) being higher than both the national and regional averages.⁷⁶

Despite high average earnings, Gross Disposable Household Income (GDHI) per head in Bristol is the lowest among neighbouring Local Authority areas, at £21,084.77. GDHI measures how much money individuals have left to spend or save after accounting for taxes, pensions, and property costs. Lower GDHI per head is indicative of the significant costs of living in Bristol, which are most evident in rising housing costs: in the decade to 2022, house prices have risen by 90% and rental costs are at an all-time high at an average of £1,286 per month as of March 2022.⁷⁸ The city's population growth creates pressure on existing infrastructure, specifically housing and transport, as well as increasing demand for public services.

Bristol also has a productivity challenge. Whilst our growth in GVA has largely outperformed regional trends, since 2016 we have a widening productivity gap with England. In 2021, output per hour in Bristol was £34.31, no higher than it was in 2004.⁷⁹ 10 out of the 17 broad sectors in Bristol note productivity gaps with England averages, and 9 have seen a fall in productivity between 2016-2021.

69 ONS, Regional gross value added (balanced) by industry: all ITL regions (2021).

70 ONS, Annual Population Survey (2022).

71 ONS, Population estimates- local authority based by single year (2021).

72 ONS, Annual Population Survey (2023).

73 Bristol City Council, Population of Bristol (2023).

74 ONS, Census Data (2021) – 9.2% student population in Bristol, lower than other core cities for example Nottingham 17%, Newcastle 13.8% and Manchester and Cardiff over 11%.

75 ONS, Census Data (2021).

76 ONS, Annual Survey of Hours and Earnings (2023).

77 ONS Regional gross disposable household income (GDHI): local authorities by ITL1 region (2023).

78 ONS, House price statistics for small areas in England and Wales, (2021).

79 ONS. Subregional productivity: labour productivity indices by local authority district and UK ITL2 and ITL3 subregions (2021).

A range of factors are contributing to Bristol’s productivity slowdown, which if not addressed, threatens the longer-term economic vitality of the city, and could further entrench disparities in opportunity for our residents. By addressing our

productivity gap and unlocking economic growth, we can tackle inequalities across our city and create the conditions for greater health and wellbeing, ensuring all our communities are able to thrive.

We want Bristol to be a thriving city economy.

A thriving Bristol is one where businesses and people prosper. Where we have the right infrastructure in place to enable innovation and growth – from workspaces to digital connectivity, transport to housing – and build on our strengths in Clean Energy, Cyber & Tech, Creative Industries and R&D. It is a Bristol that supports people to achieve their full potential and take advantage of the opportunities we have here, and where communities are recognised as key partners in our economic success. A Bristol that builds on our international reputation for innovation and disruptive thinking, celebrates its rich cultural sector, and attracts visitors and investment to the city.

Our mission is to deliver the most productive economic growth of all regional cities



Our measures of success for a thriving Bristol are:

- Increased productivity
- Maintained levels of employment in tradeable jobs
- Increased business innovation
- Increased innovation support for our sector specialisms
- Increased jobs created through inward investment
- Increased entrepreneurship and early growth of SMEs
- Increase in employment & cultural space across the city

Bristol’s Economy of Tomorrow: Our Delivery Themes and Priorities

Drive Business Growth and Innovation

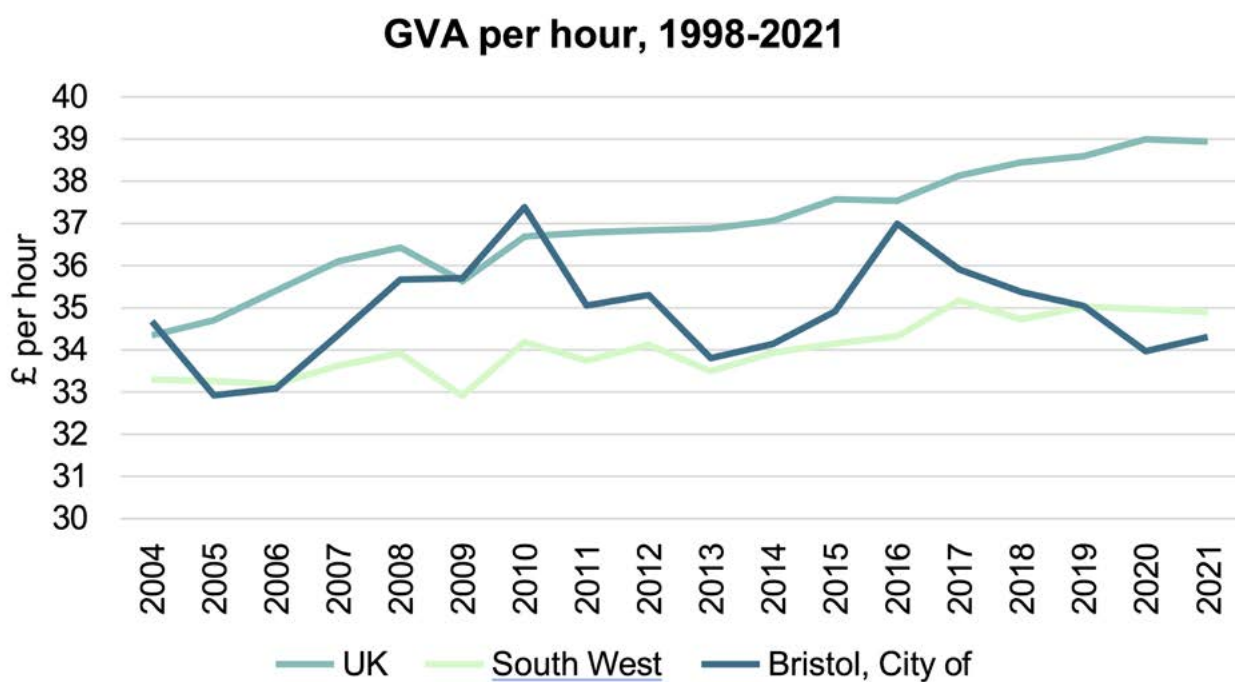
We will support businesses to thrive by driving inclusive business growth and innovation. Strengthened enterprise and Research & Development infrastructure should be accessible at the right time and provide tailored solutions to meet employers’ needs and connect innovation assets to local sectors and communities.

Bristol is home to a strong enterprise ecosystem, with our business base expanding by 11% between 2015 and 2022.⁸⁰ This growth has been largely driven by the birth of micro-enterprises, which made up 87% of the business base in 2022. Our most successful start-up sectors have consistently been in real estate and professional services, wholesale and retail, transport storage and communication. Over the last year however, Bristol has been on a downward trend for the number of new start-ups – 12.9% fewer starts in 2024 compared to 2023. Support to

maintain a dynamic and resilient SME base is vital to the economic success of the city.⁸¹

Despite our reputation as a high-performing city, Bristol’s productivity gap with the UK average is widening, and the city is now less productive than it was in 2004. This gap spans multiple sectors and calls for cross-sector solutions that will strengthen the foundations of our economy, support our areas of expertise, and ensure all residents have access to economic opportunities.

Figure 10. Trends in Bristol’s productivity



⁸⁰ UK Business Counts, IDBR (2023).

⁸¹ BankSearch, Bristol City of Start Ups Report (2024).

Source: ONS. Subregional productivity: labour productivity indices by local authority district and UK ITL2 and ITL3 subregions (2021).

Our sector specialisms, including immersive creative technologies, FinTech, Quantum, and Energy and Environmental technologies, will drive future growth and create significant employment opportunities for our city. The development and delivery of the Local Industrial Decarbonisation Plan (LIDP) by the West of England Industrial Cluster (WEIC), primarily focused on Portbury, Avonmouth, and Severnside, will grow Bristol’s reputation for leading on the green agenda and help us achieve our Net Zero targets while supporting local business growth. There is an opportunity to explore the potential of the council’s extensive property portfolio (managed through the Corporate Landlord Service), to contribute to the delivery of this agenda, for example through the development of a green industrial park at Hallen Marsh.

Our business support offer, delivered through a robust provider network, is pivotal in linking local businesses to advisory and financial resources and technical support. Coupled with our world-class innovation ecosystem—comprising incubators, science parks, and catapults such as Engine Shed, Bristol SETsquared Centre, National Composites Centre, and Bristol Robotics Laboratory—we have firm foundations as a leading city to start and grow a business. Our two universities are central to this innovation ecosystem, with the University of Bristol ranking 7th among UK universities in the number of spinouts between 1998 and 2018, and 5th in spinout value.⁸²



82 Source Advisors, Universities spinout report (2021).

Our priorities to deliver a Fair Bristol:

- Improve our business startup, scale up and survival rates, enabling entrepreneurs in deprived areas and groups underrepresented in entrepreneurship to access tailored support.
- Work with our business support ecosystem and VSCE sector to strengthen our enterprise and early growth support offer in South Bristol.
- Agree and implement an affordable workspace policy for our designated Areas of Growth and Regeneration in line with the Local Plan, ensuring there is sufficient and accessible workspace across the city.
- Work with our business support providers and the Growth Hub to design support services which increase access to finance, trading, & supply chain opportunities for local micro businesses and SMEs.

Our priorities to deliver a Green Bristol:

- Work with Bristol City Leap and the Growth Hub to encourage SMEs to take up local green business support, including green business grants and net zero action planning.
- Stimulate innovation-led green growth by providing targeted support focused on clean energy, advanced low carbon manufacturing, circular economy technologies, sustainable construction and retrofit.
- Support the development of a green industrial park at Avonmouth as proposed by the concept study linked to the Local Industrial Decarbonisation Plan for the area, and in collaboration with BCC and City Leap.
- Work with our regional partners to develop a long-term strategy and interventions to boost the resilience and growth of the local food & drink and hospitality sectors - with a strong focus on Bristol's diverse food producers and entrepreneurs.

Our priorities to deliver a Thriving Bristol:

- Monitor the health and composition of our sectors and engage with our diverse business base to identify unmet financial and/or advisory support needs and co- design evidence based responsive services and secure funding for delivery.
- Work with Invest Bristol and Bath and regional partners to support cluster growth for emerging specialisms (Quantum and AI, health and life sciences) and existing sectors (including FinTech, low carbon and creative industries), focusing on new projects and funding.
- Work with our Universities, regional partners and specialist providers to strengthen and expand our innovation ecosystem, drawing from the Connected Catapult approach to inclusive innovation.

Strengthen our Global City Status

We will grow our global reputation for innovation, creativity and sustainability and attract investment aligned to our inclusive growth principles. We have a strong track record for securing investment to deliver socioeconomic and environmental outcomes for our local people and places. We must leverage this reputation to ensure that our communities feel the benefit of the investment in our city.

Bristol is a globally connected city – our citizens represent over 187 countries of birth, speak over 91 languages and 18.8% of our citizens were born outside the UK.⁸³ We have a growing global reputation, links and twin cities around the world, offering opportunities for developing a shared approach to meeting global challenges and knowledge sharing. As a city we recognise the value and share the contribution that our citizens with diverse international heritage bring through work, culture, education, and business opportunities. We work in partnership to co-ordinate a strategic approach to developing relationships and business links internationally.

Bristol is an attractive investment destination, our dynamic sector strengths, strategic location, reputation for quality of life and culture coupled with ongoing regeneration all enhance our appeal. As a major driver of foreign investment in the region, we account for over 18% of South West services exports.⁸⁴ In 2022/23, 36 FDI projects were recorded in the Bristol and the West of England LEP area, creating over 1,400 jobs.⁸⁵

We have a strong track record of attracting socially driven investors and brokering innovative public-private partnerships designed to tackle some of the biggest problems facing Bristol, spanning across housing, community and wellbeing and Net Zero. We have a growing reputation as a city leading on and taking ambitious action to be a Net Zero city in a socially just way, winning the World Economic Forum Award for public – private collaboration for Bristol City Leap and we are one of Europe’s Smart and Climate Neutral Mission Cities.

Achieving our goal of reaching Net Zero by 2030⁸⁶ will require significant levels of investment across both our business sector and in adapting our infrastructure including heat networks, building energy performance improvements, individual heat pumps, electricity network upgrades, electric vehicles and charging infrastructure, public transport improvement and expansion, and road layout redesign. By building on partnerships such as 3Ci, Mission Net Zero and our Civic University Agreement, we can secure the long-term finance necessary to reach Net Zero through collaboration between universities, industry, and the council.

The city’s high tech and digital sector depends on world class digital infrastructure to support business, employees and residents and the wider economy. The city is currently transitioning to optimal digital via full fibre and 5G, led by investment from the private sector. Attracting more digital investment is a priority to improve choice, competition as well as coverage in the city. The council has developed its own corporate asset of duct and fibre network (BNET), this infrastructure being key to developing commercial opportunities and improving productivity. We are also working in partnership with the private sector to improve coverage and support digital access in underserved areas. We will be proactively securing inward investment to ensure the city meets its goal of all premises having optimal connectivity leading to gigabit capable broadband.

To build on our successes, we must continue to prioritise social value in all investment into the city and actively explore ways to maximise our impact through our Section 106 agreements, Community Infrastructure Levy and social value policies.

⁸³ ONS, Census Data (2021).

⁸⁴ Department for Business & Trade Inward Investment Results 2022-23 (2023).

⁸⁵ Ibid.

⁸⁶ Bristol One City, Bristol net zero by 2030: The evidence base (2019).

Promoting our emerging and established sector strengths on the national and global stage will enhance our reputation as an attractive location for physical investment, inward investment, and sector development. Aerospace and advanced engineering, high tech, creative and digital, energy/low carbon, health and life sciences and professional & financial services are projected to attract future investment into the city region. We will work to

link investment to wider sectors through local supply chains to ensure that industries such as construction, food & drink, and other relevant local industries benefit from new developments. The council, working with Invest Bristol and Bath, will explore the potential to match sites in its extensive property portfolio to opportunities for inward and business investment that will create jobs and support growth of key sectors.

Figure 11. Snapshot of Bristol’s emerging innovation specialisms

Health and Life Sciences



Leading health science and technologies are based in Bristol. The newly launched SouthWest Life Sciences partnership will be an important platform for showcasing Bristol’s cutting-edge SMEs and research specialisms. University Hospitals Bristol and Weston NHS Foundation Trust, along with North Bristol NHS Trust, is central to this innovation, with significant involvement in research, teaching and hosting four large NIHR (National Institute for Health and Care Research) infrastructures. Both Trusts are members of Bristol Health Partners and Health Innovation West of England.

Engineering Biology



We have nationally significant engineering biology infrastructure, building on substantial UKRI investment such as BrisSynBio – one of the UK’s 6 Synthetic Biology Research Centres– and the Oxford-Warwick-Bristol Synthetic Biology Centre for Doctoral Training. Science Creates, a leading deep tech ecosystem, helps accelerate and translate local ideas into disruptive businesses with real world application and hosted the UK’s first Engineering Biology Accelerator.

Artificial Intelligence



We are a hub for digital and AI innovation. The University of Bristol has been chosen to host the UK’s AI Research Resource (AIRR), a £300m funding package, which includes Isambard-AI.⁸⁷ Leading start-ups, spin outs and Unicorns play a key role in putting Bristol on the map for innovation. UWE’s Digital Cultures Research

Centre (DCRC) is a cross-cutting partnership which explores responsible technical futures, principally focused on the creative industries, securing over £10m AHRC funding for the Creative Economies Lab.⁸⁸

Robotics and smart machines



The Bristol Robotics Library, a partnership between UoB and University of the West of England, is home to over 450 academics, researchers and industry practitioners.⁸⁹ The Lab plays a leading role in supporting the area’s robotics businesses with the BRL Hardware Incubator, the Robotics Innovation Facility and West of England Robotics Network.

Energy and environmental technologies



Bristol is home to research institutes including Southwest Nuclear Hub and Centre for Sustainable Energy. We have growing expertise in areas such as clean propulsion, low carbon materials, renewable energy (particularly green hydrogen, onshore and offshore wind and nuclear) and community energy.

Creative Innovation



Backed by £30 million in government funding through the UK Research and Innovation’s Strength in Places fund, MyWorld is transforming the region into a global hub for creative technology.⁹⁰ Bringing together leading partners from academia and industry to pioneer advancements in immersive media, digital production, and creative tools. Fostering collaboration and providing access to cutting-edge facilities, funding, driving technological innovation.

87 University of Bristol, Unprecedented £225m investment to create UK’s most powerful supercomputer in Bristol (2023).

88 UWE Bristol, Digital Cultures Research Centre (DCRC) (2024).

89 Bristol Robotics Laboratory (2024).

90 UK Research and Innovation, The UK Research and Innovation Strength in Places Fund (2024).

Our priorities to deliver a Fair Bristol:

- Work with Invest in Bristol and Bath to agree targets to deliver jobs for local people in key growth sectors from FDI, inward investment projects and markets that reflect the city’s international diaspora – connecting employability support and skills provision to growth in the city.
- Embed and monitor the socioeconomic outcomes leveraged by the council’s Section 106 and social value policies as a key mechanism to foster collaboration with developers, investors, suppliers and VCSE sector.
- Position Bristol for digital inward investment working with the Mayoral Combined Authority Digital Office. Use BNET to attract investment and improve coverage, particularly in underserved areas and communities.

Our priorities to deliver a Green Bristol:

- Collaborate with Bristol & Bath Regional Capital to promote the South West Net Zero Accelerator Fund to boost investment to support business growth and climate resilience in green tech and decarbonising sectors.
- Ensure green and sustainability requirements in investment opportunities are clearly communicated, delivered, and monitored through social value and ESG levers.
- Work with Mission Net Zero partners to create a West of England regional climate investment plan to encourage investment into projects that reduce greenhouse gas emissions.

Our priorities to deliver a Thriving Bristol:

- Work with city and regional partners including Visit West and our global priority networks to showcase our visitor economy nationally and internationally – promoting our key strengths as a city of culture, creativity, film, festivals and music.
- Develop an investment prospectus which builds on Bristol’s reputation as a global leader in existing & emerging sectors and link this to our investment pipeline.
- Build on our international networks and twinning arrangements to create new trade and economic opportunities, connecting our businesses who want to grow and trade internationally.
- Build on the existing bioengineering cluster to convene academic, industry and public sector partners to shape the health innovation opportunity in Bristol and wider region.

Unlock Skills for our Future Economy

Our aim is to prepare local people with the skills for our future economy and to access good jobs. As work patterns continue to evolve, we must prioritise core transferable skills and behaviours across our workforce, whilst enhancing digital capabilities to empower our residents to seize new opportunities.

Whilst Bristol boasts a highly qualified working-age population, 14% of our businesses reported vacancies due to skill shortages in the 2022 Employer Skills Survey, a figure higher than other core cities.⁹¹ Insight from our evidence review and engagement revealed that employers across the city are struggling to hire individuals with the necessary skills – including both foundational and advanced digital skills. The 2023 West of England Local Skills Improvement Plan also identifies critical skills shortages in priority sectors such as advanced manufacturing and engineering, construction, health and social care, and the creative industries.⁹²

Bristol’s Employment, Skills and Lifelong Learning Plan (2024 – 2030) identifies priority areas that the council and its partners will focus on over the coming years to tackle the skills challenge, including through the provision of careers information, advice and guidance and the Inclusive Career Pathways programme.⁹³ We need to ensure that our growth sectors, as well as our foundational economy, are able to access the skills they need.⁹⁴ By working with businesses and our workforce to adapt to the changing demands of the job market we will be able to drive growth and improve our productivity as a city.

The landscape of work has shifted rapidly. There is an increased demand in Bristol for flexible working

arrangements, an increasing trend towards portfolio careers (where people have multiple part-time jobs or freelance projects) and higher levels of entrepreneurship. National shortages in hospitality, health, and social care are straining our foundational sectors and front-line service jobs. Initiatives like the Health and Social Care Inclusive Career Pathway programme will be crucial to supporting our employers and championing diverse career pathways, as well as supporting our young, older, and vulnerable residents who will play an important role in the future of our communities.

Bristol businesses have told us they would like to take a leading role in raising aspiration within the communities where they are located, through showcasing the range of local job opportunities and routes to access, in order to support the development of home-grown talent across all of our communities. We want to harness this enthusiasm and collaborate with businesses to ensure they are not just employers but active partners in community development, working together to uplift local talent, foster long-term career growth, and create a more equitable and prosperous city. From school outreach programmes to engaging with our tech hubs and spinouts, businesses can play their role in ensuring we have a workforce ready for the future.



⁹¹ Department for Education, Employer Skills Survey (2022).

⁹² Business West, West of England Local Skills Improvement Plan (2023).

⁹³ Bristol City Council, Employment, Skills and Lifelong Learning Plan 2024 – 2030 (2024).

⁹⁴ The foundational economy refers to sectors providing essential goods and services, such as health and social care, food, housing, energy, utilities, construction, and retail, which are crucial for societal well-being and economic growth.

Table 3. Estimated number of jobs in green sectors in Bristol by 2030

Estimated Jobs	Number	% of estimated total green jobs
Low-carbon electricity	3,617	41%
Low-carbon heat	1,314	15%
Alternative fuels	305	3%
Energy Efficiency	1,202	14%
Low-carbon services	1,239	14%
Low emission vehicles & infrastructure	1,158	13%

Local Government Association estimates suggest that to achieve Net Zero by 2030, an estimated 50,383 new jobs will be needed across all sectors in the West of England Mayoral Combined Authority region, with 48% of these jobs located in Bristol. Green sectors will be pivotal, with 41% of the new jobs focused on low-carbon electricity.⁹⁵ The South Bristol Skills Academy at Hengrove, part of the City of Bristol College, has developed specialist courses focused on green skills and construction.

As our green economy grows, we will need to work with skills providers to ensure that the right provision is available, in the right places to ensure that local people are able to access and take advantage of the opportunities available here. Investing in and developing our construction workforce will be key to delivering the significant development and regeneration opportunities in the city over the next decade, including addressing our housing needs, along with the need for retrofit and sustainable construction. This will mean supporting our existing workforce to retrain, as well as ensuring that the next generation of workers have the skills they need to succeed.

Business engagement, particularly with those around Avonmouth, has highlighted the scale of investment required to expand our green capabilities and ensure a just transition across sectors. To realise our green ambitions, we must strengthen green capabilities within businesses and equip our residents with the skills needed for the transition to a green economy. This investment is crucial to unlocking and delivering investment in the city and ensuring a pipeline of skilled workers that meets the demands of green sectors.

We need long-term commitments, and funding, to ensure that businesses and employers have the confidence to invest in this transition and ensure we have a workforce that is fit for the future.



Our priorities to deliver a Fair Bristol include:

- Build on the Inclusive Career and Talent Pathway programmes targeting sectors and neighbourhoods – with a focus on sectors identified in our regional Local Skills Improvement Plan and Bristol Employment Skills and Learning Plan including health and social care, logistics, hospitality & food.
- Use our role in the Bristol Temple Quarter LLP to support the implementation of the Bristol Temple Quarter Inclusive Growth Strategy. Ensuring the jobs pipeline linked to phased development informs local skills provision, enabling access to jobs for local residents.
- Champion and support the adoption of basic digital skills, including working with partners to tackle digital exclusion and ensure communities have access to devices, resources, and digital infrastructure.
- Develop an employer ambassador programme to promote local employment opportunities (in education and employment support settings) to improve social mobility and reduce workforce shortages.

Our priorities to deliver a Green Bristol include:

- Work with industry leaders and key employers to identify those roles which are likely impacted by sector transitions as we move to greener economic growth, and work with local partners to provide early guidance and training on up-skilling and re-skilling.
- Work with City Leap, Future Leap, SevernNet and city partners to launch a Bristol Green Skills Academy to stimulate a local pipeline of skills required to meet Net Zero targets and support residents to access green jobs.

Our priorities to deliver a Thriving Bristol include:

- Strengthen Bristol’s position as a Centre of Excellence for Film, TV and Animation, connecting digital, animation and creatives, and maximising opportunities to build local talent pipelines and accessible start up space.
- Work with universities and further education partners to develop inclusive skills programmes that address underrepresentation in growth-driving sectors like finance, professional services, scientific and technical activities, and advanced manufacturing.
- Collaborate with developers and skills providers to create skills pathways, including apprenticeships, to meet the needs of our construction sector and support the transition to more sustainable construction practices.
- Engage with industry to understand emerging digital skills needs and support the development of training provision which enables employers to adopt AI and equip residents to benefit from digital transformation.

Promote Local Wealth Building

We will work with employers to create accessible, well-paying jobs for residents and to leverage assets to benefit local people. Empowering residents to actively participate in participatory models and the development of green and community infrastructure will not only support a just transition, but also improve fairness, opportunity, and prosperity.

Our approach to local wealth building will be key to delivering a fairer Bristol, ensuring that our communities have greater ownership of, and agency within, our economy. There is a clear role for employers in generating local wealth through the provision of ‘good work’, but there is also a role for anchor organisations in the city who have significant spending power and can ensure that they are driving social impact through local procurement practices. Alternative business and funding models, including mutuals and cooperatives, will play an important role in not only driving growth in our local economy, but also in ensuring that the wealth generated here is regenerative and continues circulating within our communities and city, rather than flowing out.

‘Good Work’ – employment which is secure, fairly paid, offers flexible working patterns and development opportunities and operates fair recruitment practices – is the backbone of a healthy workforce and a healthy economy. Despite high employment rates in Bristol, wage disparity persists, with 22,000 residents earning below the Real Living Wage.⁹⁶ Part-time and precarious work are concentrated in certain areas, such as Avonmouth and Lawrence Hill,

where 34% of people are employed in part-time work, and Southmead, where 7% of residents are on zero-hour contracts (compared to the Bristol average of 2%).⁹⁷ Demand for part-time work is often driven by individuals’ personal circumstances – from caring responsibilities to health needs, or desire for flexibility in order to pursue other opportunities. However, given the significant increase in part-time jobs in Bristol over the last decade, we want to work with partners to investigate what is driving this trend in Bristol and what this means for our workforce.

Good work practices are particularly relevant to our night-time economy businesses and workforce. Over 116,000 jobs operate between 6pm and 6am, representing over 40% of the city’s employment.⁹⁸ Priorities around safety and health and wellbeing, as well as pay and secure employment are important for retaining and supporting this workforce. Our night-time economy is made up of a range of activities from health and social care, warehousing and logistics to hospitality and nightlife. Between 2012- 2022 employment in night-time industries in Bristol increased faster than all other core cities, except for Manchester who follow a similar growth rate.

96 ONS, Number and proportion of employee jobs with hourly pay below the living wage (2024).

97 ONS, Annual Population Survey (2023).

98 ONS Centre for Subnational Analysis, Employment in night-time industries-UK (2022).



The Employment Rights Bill (2024) will enshrine some of the principles around good work in law.⁹⁹ We will continue to work with businesses and employers to champion fair employment and just labour markets within our city economy. We know that Bristol businesses often see themselves as not just employers in our city, but as active partners in communities who want to work together to uplift local talent, foster long-term growth and create a more equitable and prosperous city.

Bristol's thriving VCSE sector, composed of 1,495 charities and 316 social enterprises, lies at the heart of the city's social economy contributing an estimated £292m per year in GVA and employing over 5,868 FTEs.¹⁰⁰ As employers, funders, owners, and managers of community assets, the VCSE sector plays a crucial role in attracting investment into our local centres and retaining money within communities to the benefit of our local residents and places.

Rising demand, increasing complex support needs, and growing competition for funding are creating pressures for our local groups, where the loss of core organisations and/or facilities often ripples across the wider economy and can lead to the underserving of local communities and causes. Continued support for the VCSE sector is essential to empower residents, maintain local prosperity, and ensure the resilience of Bristol's economy and communities. We will work with the VCSE sector to ensure that our social economy has the right financial and business skills, including through our partnership with Social Economy West.

Community ownership can help embed regenerative and sustainable practices within our economy, ensuring that wealth is shared across the city and that local groups and businesses are able to manage assets for the benefit of the community. We will continue to support participatory and democratic methods that enable communities to take an active role in decision-making and resource management, empowering them to shape the future of their local economy. For example, by building our cooperative and mutuals sector base and supporting community energy projects, which enable local communities to generate and control their own energy, reduce environmental impact, and reinvest profits locally. The Bristol Music Fund could be another example of how we can use alternative business models to support local wealth building and regenerative economic practices. This fund, which aims to support local music venues, rehearsal spaces, and promoters, could help to nurture local talent, create vibrant cultural hubs, and ensure that the benefits of the music industry are felt within the community.

Community asset transfers allow groups to manage key assets, transforming them into vibrant hubs of activity that serve local needs. These kinds of community-led initiatives help foster resilience, create sustainable livelihoods, and nurture a sense of shared responsibility, building a more inclusive economy where resources are used efficiently and promote long-term prosperity for all.



⁹⁹ UK Parliament, Employment Rights Bill (2024).

¹⁰⁰ Voscur, Bristol VCSE Strategy: Into a New Era 2019-2029 (2019).

Our priorities to deliver a Fair Bristol include:

- Address in-work poverty through Bristol Living Wage City, focusing on low pay sectors, engaging businesses through campaigns and providing support through peer networks.
- Work with employers to champion good work practices to address under representation of equalities groups in managerial and professional occupations and work with the equality commissions to address pay gaps.
- Address workforce shortages and raise the profile of the caring economy through a collaboration with Value the Caring Economy Alliance (childcare infrastructure, care workers and care givers) and regional partners to explore piloting initiatives to enhance employment conditions, pay and training.

Our priorities to deliver a Green Bristol include:

- Promote the Community Energy Fund to support projects in areas at risk of exclusion from the just transition.
- Support communities in deprived areas to invest in, and benefit from, green energy through participatory models, working with the VCSE sector and established networks.
- Develop our food and drink sector, increasing local production and supply chains through technical skills and a network of community facilities to support our food and drink entrepreneurs and SMEs.

Our priorities to deliver a Thriving Bristol include:

- Increase community ownership of local assets and properties including through Community Asset Transfers and Community Land Trusts.
- Leverage the council's purchasing power to support local suppliers, in particular small and medium-sized enterprises (SMEs).
- Work with the Integrated Care Partnership and One City partners to secure new funding for health and work initiatives and ensure Healthier Together 2040 promotes the link between good health and the economy, with a focus on helping people access and maintain employment.
- Build our social economy (including cooperatives and mutuals) through work with third sector representative bodies to understand the specific VCSE support needs to improve sector resilience, including upskilling local leaders and training on effective financial and business planning.
- Advocate for our night time economy employers and workforce, improving safety and health and wellbeing outcomes for the sector, sharing our best practice on national and international platforms.

Curate Thriving Places

Our goal is to create vibrant spaces that promote health, wellbeing, and thriving local economies connected to employment hubs and economic opportunity. The city’s ongoing regeneration offers opportunities for residents and businesses, fostering creativity, social cohesion, and sustainable growth. We must improve connectivity to all parts of the city, as well as more local employment opportunities, and preserve green spaces by integrating the built and natural environments.

Bristol is a dynamic, 24-hour city of unique neighbourhoods at the centre of which is our city centre and 47 designated local high streets.¹⁰¹ The city centre is pivotal to our economy. It is home to 30,940 residents (an increase of 49% in the decade to 2021) and serves as a vibrant hub for retail, leisure, culture and the region’s visitor economy.¹⁰²

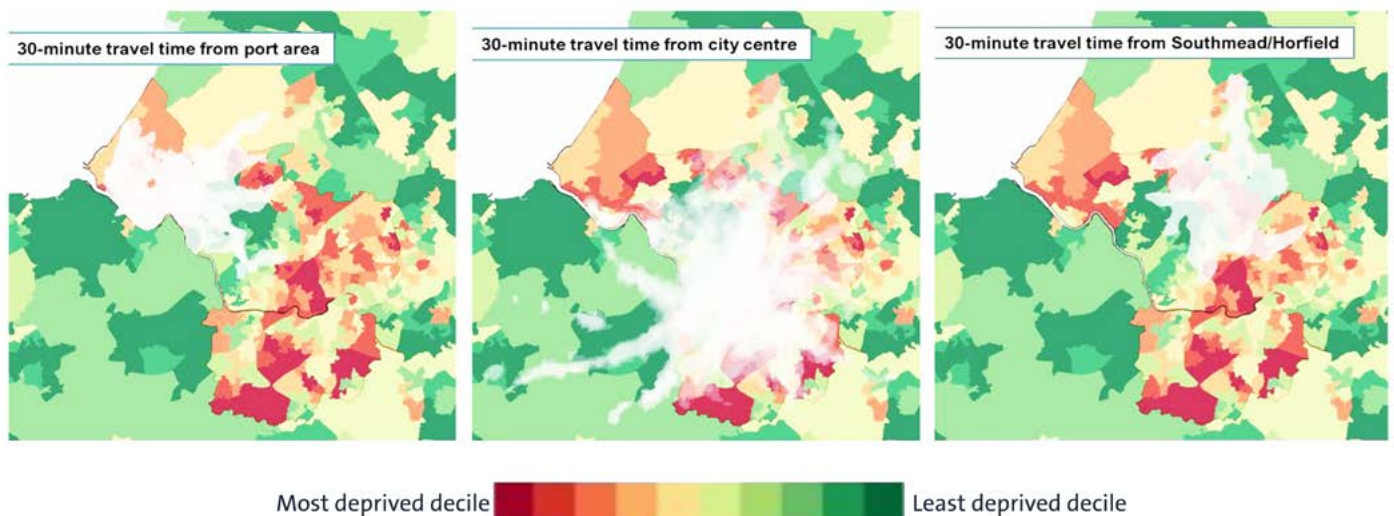
With 47% of Bristol’s jobs located here, the city centre supports 143,300 employees across a diverse range of sectors within 4,945 business units.¹⁰³ Avonmouth and Southmead are our other standout employment centres, which alongside central Bristol, account for 53% of local employment opportunities.

Engagement with private, public and third sector employers highlights the scale of the challenge for Bristol and the need for collective action. Potential hires are deterred from relocating to the city because of the high commuting costs

and competition to access the housing ladder or rental market. Some of our residents, who perform essential roles in the local economy, report feeling priced out of Bristol, taking their valuable technical skills to other areas.

Some communities, especially those in the southern part of the city and around Avonmouth, are potentially cut off from job opportunities because they cannot reach these employment centres within 30 minutes using public transport or walking.¹⁰⁴ Residents in Hartcliffe and Withywood (59%), Hengrove and Whitchurch Park (59%), and Avonmouth and Lawrence Weston (55%) are the most reliant on private car usage to travel to work.¹⁰⁵ This results in many residents being trapped in car dependent lifestyles with the costs of buying and maintaining a car adding to the cost of living for households.

Figure 12. Areas accessible in 30 minutes by public transport from our core employment centres



101 Bristol City Council, Local Plan 2040 (2023)- Bristol’s new Local Plan will identify 68 high streets when published in 2025.

102 ONS, Census Data (2021).

103 ONS, Annual Population Survey (2023).

104 ONS, UK Travel Area Isochrones (Nov/Dec) by Public Transport and Walking (2023).

105 ONS, Census (2021).

Evidence¹⁰⁶ shows that investment in active travel in particular can bring wider economic benefits. Residents walking and cycling visit high streets more frequently, increasing local spend and supporting local economies. These transport modes are more inclusive ways to travel which can help residents access employment opportunities, promote healthier lifestyles and improve quality of life which in turn supports a more productive workforce, talent retention and business growth.

Promoting more space efficient and sustainable modes of transport will also reduce the impacts of congestion which will only worsen if no action is taken.

Working with regional and national government to improve the range, affordability and sustainability of local transport options is crucial to creating a fairer, greener and more prosperous economy by opening up supply chains, creating new jobs, and connecting our residents to high quality employment opportunities. We are making a historic investment in our transport network through the City Region Sustainable Transport Settlement which seeks to improve the end-to-end user experience, delivering more bus, walking and cycling provision and focussing on better interchange and integration between modes of transport.

Improved transport infrastructure is only one part of realising our ambition for a thriving Bristol. Improved digital infrastructure (notably around the Port) and the provision of safe and affordable homes are ensuring the city is seen as an attractive place to live, work and invest.

Bristol’s economy suffers from high house prices, with the average price of a home reaching £337,600 in 2023¹⁰⁷, and an unmet demand for homes that continues to grow. Our local plan has identified housing need of over 3,000 new homes per year.¹⁰⁸

Supporting the infrastructure needs of our residents and workforce is vital for a successful city economy and this includes delivery of a mix of housing types and tenures. Over recent years housing supply has been impacted by significant build cost inflation and higher levels of business failure in the construction sector impacting on supply chains and leading to viability challenges and slow growth. There is a clear need to focus on

place-based investment, community building and working in regeneration areas to develop robust strategies for delivering a diversity of housing types and tenures to meet the city’s housing needs. Bristol City Council’s Affordable Housing Delivery Plan outlines our vision and strategy for delivering affordable housing in Bristol. This will include investing in a greener and more sustainable construction sector and workforce.

Growing our housing stock places renewed emphasis on ensuring our neighbourhoods include a range of locally accessible amenities and services.

A time of change in the retail sector has seen the take up of high street units by new commercial and community uses as well as independent businesses. This has led to a varied service, leisure, evening and night time economy offer in many centres. To maintain the ongoing success of our high streets and local centres, the local plan proposes to recognise and support their role, enabling them to diversify in a way which keeps them at the heart of their local communities.

Our high streets are vital local hubs, yet resident satisfaction varies across neighbourhoods. While 74% of respondents in the Central ward reported satisfaction with their local area in the Bristol Quality of Life Survey 2023, this figure drops to 68% in Avonmouth and Lawrence Weston, 62% in Southmead, and 52% in Lawrence Hill.¹⁰⁹ Although overall our local high streets are generally well-utilised, our more deprived communities are less likely to visit their local shopping streets weekly. We should aim to close these satisfaction gaps by diversifying the uses of our local centres, ensuring that Bristol’s high streets remain vibrant, sustainable, and responsive to the needs of their communities. This includes working to bring vacant properties back into use and ensuring a diverse retail mix; providing access to community services and facilities and enhancing the culture and leisure offer; public realm improvements and increasing the green infrastructure.

Our plans should be informed by ongoing engagement with local communities and businesses and build on the characteristics of the city’s distinctive and diverse neighbourhoods. They should consider improving access to local high streets to and from adjacent neighbourhoods through improved pedestrian, cycle and public transport infrastructure.

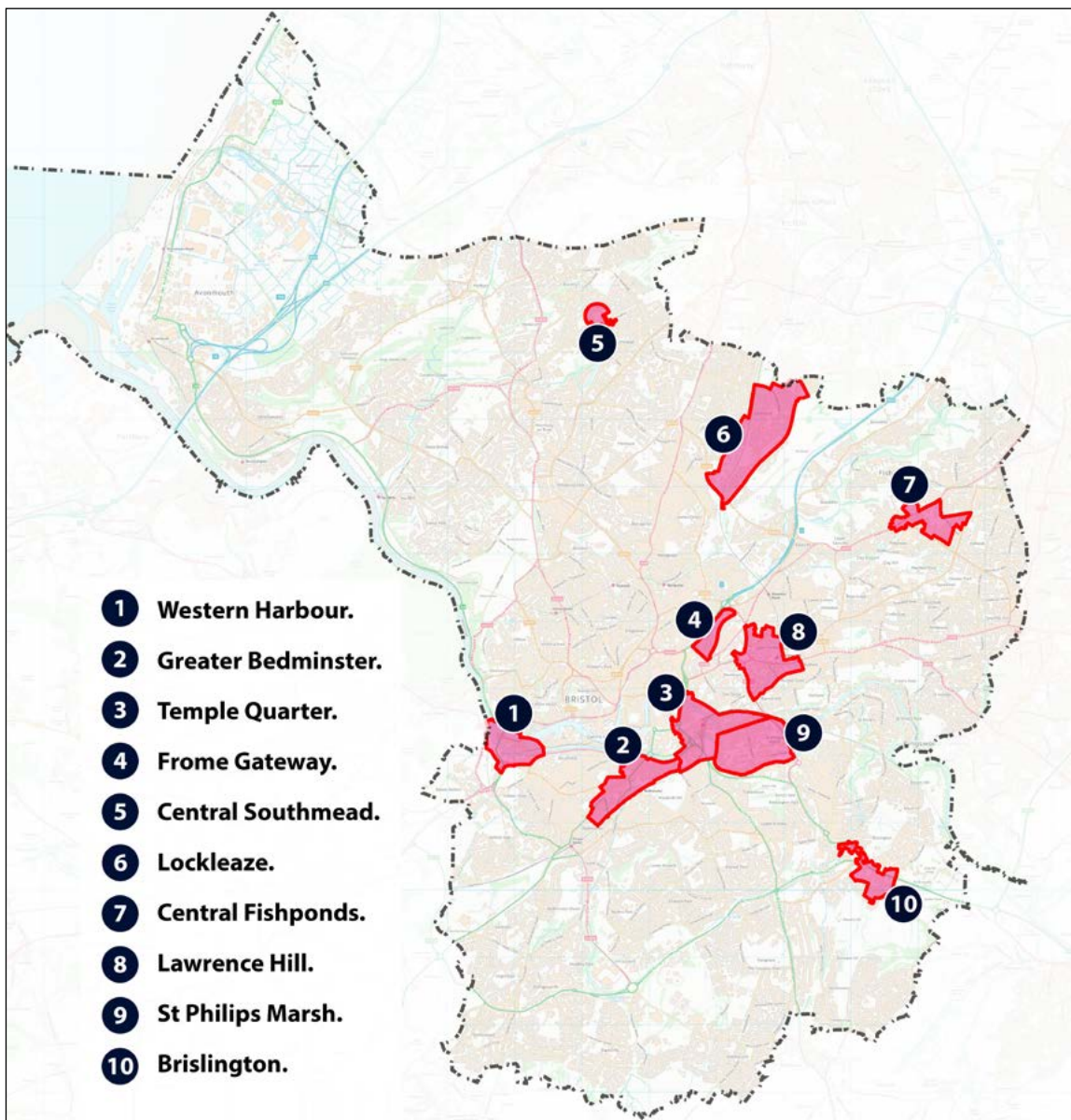
106 Walking and cycling: the economic benefits

107 ONS, House price statistics for small areas in England and Wales (2021).

108 Bristol City Council, Local Plan 2040 (2023).

109 Bristol City Council, Bristol Quality of Life survey 2023/24 (2024).

Figure 13. Designated areas of growth and regeneration



As our city’s economic geography evolves, we will work with communities to uphold a strong sense of place. Our strategy for protecting and enhancing the city centre economy through regeneration and transformation is articulated in the City Centre Development and Delivery Plan (DDP) but our commitment to supporting business and community cohesion is citywide as part of our blueprint for sustainability and inclusive regeneration.¹¹⁰ This includes meeting the high demand for employment space. To accommodate the projected addition of 31,000 to 53,000 jobs in our local economy by 2043, an estimated 164,000sqm of office and research

and development space, along with 164,000sqm of industrial and warehousing space, will be required.¹¹¹ We will promote cross-agency working to not only advocate for the appropriate blend of employment spaces, but also tackle auxiliary employment land challenges such as grid capacity and ensuring sufficient electrical supply. We will explore the potential to use Bristol City Council property assets to respond to challenges, including the need to deliver industrial spaces in the urban core of the city more intensively at greater footprint to site densities, and provide employment spaces in new developments that improve access to job opportunities for our workforce.

¹¹⁰ Bristol City Council, Bristol City Centre Development and Delivery Plan (2023).

¹¹¹ Bristol City Council, Bristol Employment Land Review (2023).

Our priorities to deliver a Fair Bristol include:

- Support the diversification of high streets (retail, leisure, cultural and community uses) to ensure their vitality and future viability, building on the success of our high streets renewal work and positioning Bristol for future investment.
- Work with our city’s cultural ecology to facilitate and embed community voice into master planning for regeneration areas.
- Strengthen the link between economic growth and housing delivery to address the broad range of housing need, including delivering genuinely affordable housing, which will support our workforce, attracting and retaining the skills and talent required for the city’s economy.

Our priorities to deliver a Green Bristol include:

- Prioritise investment in active and public transport to improve affordable and sustainable connectivity to and between all parts of the city; ensuring access to employment centres and job opportunities, local centres and high streets, for our workforce, residents, businesses and visitors.
- Deliver the Liveable Neighbourhood and Net Zero Neighbourhood programmes ensuring communities and places are supported to reach Net Zero.
- Embed city greening as a key aspect of public realm improvements across regeneration programmes, city centre development and high streets renewal.
- Facilitate the sustainable growth of Bristol and its businesses by planning for and enabling the provision of energy and flood defence infrastructure that the city will need for the future.

Our priorities to deliver a Thriving Bristol include:

- Encourage and enable the development and provision of workspaces to meet the requirements of key growth sectors such as health and life sciences, low carbon and creative and digital.
- Develop a locally targeted economic plan for South Bristol which weaves together existing assets and programmes to maximise their impact and identifies new opportunities including improving connectivity, to enable business development and jobs growth.
- Protect and enhance the City Centre economy through transformation and regeneration in Broadmead, Temple Quarter, Western Harbour and Frome Gateway, future proofing the retail and leisure core and ensuring Bristol remains a dynamic destination for businesses, residents and visitors.
- Develop an ambitious cultural strategy for Bristol that drives growth in new and existing subsectors and supports the creation, activation, and preservation of cultural space and heritage assets citywide.

Towards Delivery

This strategy is our blueprint for future working. The next step will be the development of implementation plans, working through the Economy and Skills Committee to support partnership working and avoid duplication of efforts by the council and partners. Implementation plans will be reviewed regularly to ensure activity is responsive to emerging opportunities and to changes in socioeconomic need.

Spotlight on Year 1

To guide early delivery, we have identified ten priorities (in table 4) which will be areas of focus for Year 1 of the strategy implementation. These represent a mixture of priorities and programmes

which are either underway, identified as an area for acceleration or as key opportunities to influence partners and investors.

Measuring and communicating our success

Progress against the Bristol Missions will be reviewed annually, using the high-level monitoring framework set out in Annex C. These will be monitored to understand the impact of our strategic activity, alongside other metrics the council uses to track the economic health of the city. Monitoring publicly available socioeconomic data will only help us tell part of the story. We will work with partners to understand any intelligence they hold and promote the sharing of insights. This will support the future development of our monitoring framework, ensuring we create a city wide and holistic picture of our impact and enhance our understanding of economic trends.

We will produce an annual report which articulates progress against our priorities and to highlight success stories and best practice. Recognising the important role employers, anchor institutions and our creative and cultural organisations will play supporting the delivery of the strategy, we will work with these groups to produce this public-facing briefing. This will enable the report to be both a promotional tool which helps build the narrative of Bristol’s new economy and a mechanism for continued engagement with our business base.

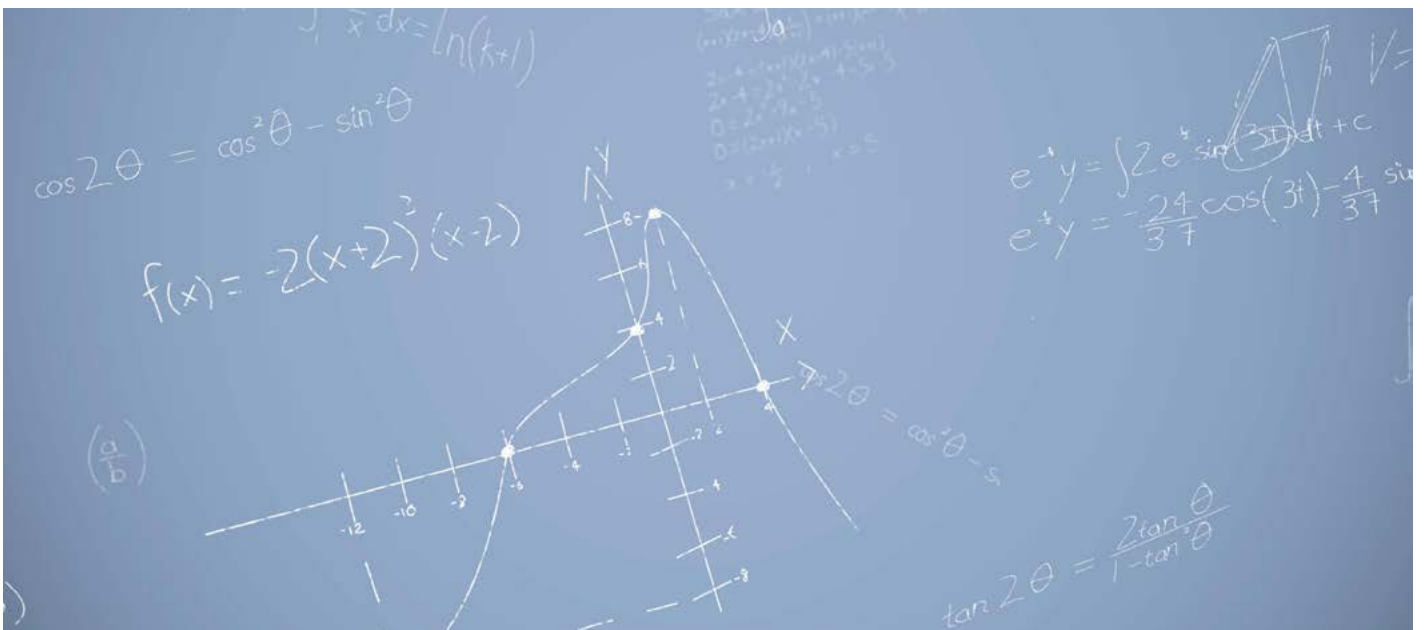


Table 4. Areas of focus for Year 1 delivery

Mission	Priority
Fair	<p>Support the diversification of our high streets (retail, leisure, cultural and community uses) to ensure their vitality and future viability, building on the success of our high streets renewal work and positioning Bristol for future investment.</p>
	<p>Address workforce shortages and raise the profile of the caring economy through a collaboration with Value the Caring Economy Alliance (childcare infrastructure, care workers and care givers) and regional partners to explore piloting initiatives to enhance employment conditions, pay and training.</p>
	<p>Use our role in the Bristol Temple Quarter LLP to support the implementation of the Bristol Temple Quarter Inclusive Growth Strategy. Ensuring the jobs pipeline linked to phased development informs local skills provision, enabling access to jobs for local residents.</p>
Green	<p>Support the development of a green industrial park at Avonmouth as proposed by the concept study linked to the Local Industrial Decarbonisation Plan for the area, and in collaboration with BCC and City Leap.</p>
	<p>Work with City Leap, Future Leap, Building Bristol and other partners to launch a Bristol Green Skills Academy to stimulate a local pipeline of skills required to meet Net Zero targets and support residents’ access to green jobs.</p>
	<p>Work with Mission Net Zero partners to create a West of England regional climate investment plan to encourage investment into projects that reduce greenhouse gas emissions.</p>
Thriving	<p>Work with Invest Bristol and Bath and regional partners to support cluster growth for emerging specialisms (Quantum and AI, health and life sciences) and existing sectors (including FinTech, low carbon and creative industries), focusing on new projects and funding.</p>
	<p>Develop a locally targeted economic plan for South Bristol which weaves together existing assets and programmes to maximise their impact and identifies new opportunities including improving connectivity, to enable business development and jobs growth.</p>
	<p>Protect and enhance the city centre economy through transformation and regeneration in Broadmead, Temple Quarter, Western Harbour and Frome Gateway, future proofing the retail and leisure core and ensuring Bristol remains a dynamic destination for businesses, residents and visitors.</p>
	<p>Develop an ambitious cultural strategy for Bristol that drives growth in new and existing subsectors and supports the creation, activation, and preservation of cultural space and heritage assets citywide.</p>

Annex A: Delivery Themes and Priorities Summary

Working together for a Fair, Green and Thriving Bristol					
	Drive business growth and innovation	Strengthen our global city status	Unlock skills for our future economy	Promote local wealth building	Curate thriving places
Achieve economic equity for our residents and workforce	Improve our business start-up, scale up and survival rates. In deprived areas and under-represented groups.	Work with Invest Bristol and Bath to agree targets to deliver jobs for local people in key growth sectors – connecting employability support and skills provision.	Build on the Inclusive Career and Talent Pathway programmes targeting sectors and neighbourhoods.	Address in-work poverty through Bristol Living Wage City, engaging businesses through campaigns and support through peer networks.	Support the diversification of high streets (retail, leisure, cultural and community uses) to ensure their vitality and future viability and position Bristol for future investment.
	Work with our business support ecosystem and VCSE sector to strengthen enterprise support in South Bristol.	Embed and monitor the socio-economic outcomes leveraged by the Council’s Section 106 and social value policies, fostering collaboration with developers, investors, suppliers and VCSE sector.	Support the implementation of the Bristol Temple Quarter Inclusive Growth Strategy, enabling access to jobs for local residents.	Work with employers to champion good work practices and work with the equality commissions to address pay gaps and under-representation in high value occupations.	Work with our city’s cultural ecology to facilitate and embed community voice into master planning for regeneration areas.
	Agree and implement an affordable workspace policy for our designated Areas of Growth and Regeneration.	Position Bristol for digital inward investment working with the Combined Authority. Use BNET to attract investment and improve coverage, particularly in under served areas and communities.	Champion and support the adoption of basic digital skills, working with partners to tackle digital exclusion.	Work with Value the Caring Economy Alliance and regional partners to address workforce shortages and initiatives to enhance employment conditions, pay and training in the care sectors.	Strengthen the link between economic growth and housing delivery to address the broad range of housing need to support our workforce and attract and retain skills and talent.
	Work with our business support providers and the Growth Hub to design support services which increase access to finance, trading and supply chain opportunities.		Develop an employer ambassador programme to promote local employment opportunities to improve social mobility and reduce workforce shortages.		
Create the first Net Zero city economy	Work with Bristol City Leap and the Growth Hub to encourage SMEs to take up green business support and grants.	Collaborate with Bristol and Bath Regional Capital to promote the SW Net Zero Accelerator Fund to boost investment, growth and resilience in green tech and de-carbonising sectors.	Work with industry leaders and employers to identify roles impacted by sector transitions to greener economic growth. Work with local partners to provide guidance and training.	Promote the Community Energy Fund to support projects in areas at risk of exclusion from the just transition.	Prioritise investment in active and public transport to improve affordable and sustainable connectivity to and between all parts of the city, ensuring access to employment centres and jobs.
	Stimulate innovation-led green growth focusing support on clean energy, advanced low carbon manufacturing, circular economy technologies, sustainable construction and retrofit.	Ensure green and sustainability requirements in investment opportunities are clearly communicated and delivered.		Support communities in deprived areas to invest in, and benefit from, green energy through participatory models.	Deliver the Liveable Neighbourhood and Net Zero Neighbourhood programmes.
	Support the development of a green industrial park at Avonmouth.	Work with Mission Net Zero partners to create a strategic climate investment plan.	Work with city partners to launch a Bristol Green Skills Academy to stimulate a local pipeline of skills required to meet Net Zero.	Develop our food and drink sector, increasing local production and supply chains through SME support, technical skills and a network of community facilities.	Embed city greening as a key aspect of public realm improvements across regeneration and high streets renewal programmes.
	Work with regional partners to boost resilience and growth of the local food and drink and hospitality sector.				Facilitate sustainable growth by planning for and enabling the provision of energy and flood defence infrastructure.
Deliver the most productive economic growth of all regional cities	Monitor the health of our sectors and engage with our diverse business base to identify support needs and co-design services and secure funding for delivery.	Work with city and regional partners to showcase our visitor economy – promoting our key strengths as a city of culture, creativity, film, festivals and music.	Strengthen Bristol’s position as a Centre of Excellence for Film, TV and animation and maximising opportunities to build local talent pipelines and accessible start up spaces.	Increase community ownership of local assets and properties including through Community Asset Transfers and Community Land Trusts.	Encourage and enable the development and provision of workspaces to meet the requirements of key growth sectors.
	Work with Invest Bristol and Bath and partners to support cluster growth for emerging specialisms (Quantum and AI, health and life sciences) and existing sectors (including FinTech, low carbon and creative industries).	Develop an investment prospectus which builds on Bristol’s reputation as a global leader in existing and emerging sectors.	Work with Universities and further education partners to develop inclusive skills programmes in growth-driving sectors.	Leverage the council’s purchasing power to support local suppliers, in particular SMEs.	Develop a locally targeted economic plan for South Bristol which weaves together existing assets and identifies business development and jobs growth opportunities.
		Build on our international networks and twinning arrangements to create new trade and economic opportunities.	Collaborate with developers and skills providers to create skills pathways to meet the needs of our construction sector.	Work with the Integrated Care Partnership and One City partners to secure new funding for health and work initiatives.	Protect and enhance the city centre economy through transformation and regeneration, future proofing the retail and leisure core.
	Work with our Universities, regional partners and specialist providers to strengthen and expand our innovation ecosystem.	Build on the bio-engineering cluster to convene academic, industry and public sector partners to shape health innovation opportunity.	Engage with industry to understand emerging digital skills needs and support the development of training for employers to adopt AI and residents to benefit from digital transformation.	Build our social economy (including co-operatives and mutuals) through work with third sector representative bodies to support the sector and build resilience. Advocate for our night time economy employers and workforce, improving safety and health and well-being outcomes.	Develop an ambitious cultural strategy that drives growth in new and existing sub-sectors and supports cultural space and heritage assets citywide.

Annex B: Engagement Summary

Our thanks go to all those involved in shaping strategic content. Strategy development is only the start of realising our economic ambitions for Bristol. Throughout implementation, we will continue to speak to our partners and community representatives and commit to broader engagement with our business base to ensure we are responsive to their needs.

What we heard...

Brand Bristol: This strategy needs to set out a narrative for Bristol to enable us to build a recognisable brand that works for both investors and our communities. Partners told us that having a cohesive narrative around our place was important in terms of securing global investment and business opportunities. This includes the welcome that we can provide to visitors when they arrive in the city – from our placemaking and connectivity – alongside the opportunities and incentives for investing here. For local communities, it also matters that the story we tell about Bristol makes sense to the people who live and work here – that means being honest about the challenges we have and the work that needs to be done to address inequality in our city, as well as celebrating the history, spirit and culture that makes our city so great.

Infrastructure: The need for good infrastructure to underpin and support our economy was recognised by all partners through our engagement. While it is not within the scope of this economic strategy to address the challenges around housing and transport, it is important that we recognise the independencies between these issues and our economic growth. Similarly, we need to work with partners to ensure that digital, water and waste management infrastructure are all in place to enable businesses to thrive.

Productivity: Partners challenged us to think critically about the kind of growth and productivity we want to see for Bristol – and how we should measure this. It is important that we are intentional about the kind of growth we want to see in our city, and that we make sure that everyone here has the opportunity to benefit from our economic success. While measures around GVA and output are important, we also need to consider the impact of our economy on factors like quality of life, wellbeing, equality and sustainability. To enable Bristol to thrive, we need to think about our economic success in a holistic way that accounts for all these measures.

Resilience: The next 10 years will be pivotal in how we respond to both the climate crisis, as well as technological advancements and significant infrastructure changes and regeneration. We need to work conscientiously to support businesses to adapt to meet these challenges – from adaptations to address flooding, rising heat and colder winters. We will also need to work with employers, as well as education and skills providers, to ensure that our skills-base is adapting to suit the needs of our changing economy – from clean energy and green construction to AI and technological skills.

Changing practices: In recent years, we have seen a significant change in patterns and modes of work. There has been a significant increase in part-time working and portfolio careers, as well as growing expectations and requirements around flexible and hybrid working. Increased flexibility can help to promote inclusivity and support more people to be economically active. However, we know that for some businesses this has been challenging and will require them to adapt their policies and practice. We have also seen that as our ways of working have changed, it can be difficult to get a true picture of what is happening in the economy – because traditional ways of capturing data have not yet caught up. We want to have continued, open conversation with partners to ensure that we can understand as best as possible what is happening in our city.

Collaboration: The missions set out in this strategy are deliberately ambitious. We know that there are big challenges ahead of us, and we will need to work together with partners across Bristol and the wider region to address them. Through our engagement partners across the city expressed their support and willingness to get involved – from businesses promoting the city as ambassadors through global networks, to VCSE organisations championing local places and initiatives. To unlock economic growth and prosperity across the city, and address our productivity gap, we need to work together to tackle longstanding and pervasive issues around inequality.

Who we spoke to

Partners

- One City Economy and Skills Board
- One City Health and Wellbeing Board
- Bristol’s Women’s Commission
- Commission on Race Equality (CORE)
- Bristol Disability Equality Commission
- Business West
- Temple Quarter LLP
- YTKO
- Western Training Provider Network
- University of Bristol
- University of the West of England
- North Bristol NHS Trust
- Bristol Property Agents Association
- West of England Combined Authority
- Bath and North East Somerset Council
- Visit West
- Social Justice Network (CUA Network)
- Living Wage Action Group
- Trade Union Congress
- Bristol Bids

Employers

- Ameresco UK
- Vattenfall
- AtkinsRealis
- SevernNet
- Sanoh
- Sparks Bristol
- Wildstar Films
- Bottle Yard Studios
- Spike Island
- Federation of Small Businesses
- Savills
- Triodos
- Bristol and Bath Regional Capital
- Bristol Food Network
- Plant Ex Ingredients
- Science Creates
- Professional Hygiene
- Burges Salmon
- Bristol Music Trust
- Babcock International
- Taste Tech
- Bristol Port Company

Bristol City Council

- Executive Director - Growth and Regeneration Directorate
- Director of Public Health
- Director Economy of Place
- Director Management of Place
- Director of Children and Education Transformation
- Director of Workforce and Change
- Chief Planner and Head of Planning
- Head of City Transport
- Head of Culture and Creative Industries
- Head of Employment, Skills and Learning
- Head of Equalities & Inclusion
- Head of Housing Delivery
- Head of International Affairs
- Head of Procurement & Contract Management
- Head of Regeneration
- Sustainability City and Climate Change Service Manager
- Deputy Director Commissioning Adult Social Care
- Director for Policy, Strategy and Digital

Existing engagement

Where possible, we have drawn on the findings from recent engagement undertaken by the council and partners:

- Temple Quarter Visioning Engagement
- Temple Quarter Inclusive Growth Engagement
- Temple Quarter Business Engagement
- High Streets Engagement
- Bristol Employment, Skills and Lifelong Learning Plan Engagement

Annex C: Draft Monitoring Framework

Mission	Measure of success	Suggested indicator of progress	Baseline	Year	Desired direction	Source
Fair	Increased household income	Gross Disposable Household Income (GDHI) per head	£21,084	2021	▲	ONS, Regional gross disposable household income
		Proportion of jobs which pay below the Real Living Wage	7%	2024	▼	ONS, Number and proportion of employee jobs with hourly pay below the living wage
	Reduction in pay gaps	Gap in median gross weekly income between parliamentary constituencies (2010) ¹¹²	£42	2023	▼	ONS, Annual Survey of Hours and Earnings
		Gap in median weekly income between men and women	£69	2023	▼	ONS, Annual Survey of Hours and Earnings
	Reduction in unemployment	Gap in economic inactivity rates between parliamentary constituencies (2010) ¹³	12%	2023	▼	ONS, Annual Survey of Hours and Earnings
	Reduction in deprivation	Number of LSOAs which fall in the most deprived 10% in England	41	2019	▼	ONS, Annual Survey of Hours and Earnings
	Improved housing affordability	Ratio of median house price to median gross annual full-time residence-based earnings	9.81	2023		
	Increased Healthy Life Expectancy	Proportion of residents who are economically inactive due to long term sick	26.3%	2024	▼	ONS, Annual Population Survey
		Male Healthy Life Expectancy	59.8	2018	▲	ONS, Health State Life Expectancies
		Female Healthy Life Expectancy	61.5	2018	▲	ONS, Health State Life Expectancies

Mission	Measure of success	Suggested indicator of progress	Baseline	Year	Desired direction	Source
Green	Reduction of CO2 emissions across the business base	Territorial per capita CO2 emissions	3.3 tonnes CO2e	2022	▼	DESNZ UK local authority and regional greenhouse gas emissions
	Reduced CO2 emissions from Avonmouth industrial area	Reduction in CO2 from major emitters in the Avonmouth industrial area	2,460 kt	2024	▼	Local Industrial Decarbonisation Project, Annual Reporting
	Increased size of the green economy	Number of green job postings	TBC	TBC	▲	Burning Glass Labour Insights
	Increased generation of renewable electricity	Proportion of energy generated from renewable electricity	8%	2019	▲	Department for Energy Security and Net Zero, Renewable Energy Statistics
	Increased city greening and biodiversity	Provision of green space per capita	55.64sqm	2024	▲	Fields in Trust, Green Space Index

Mission	Measure of success	Suggested indicator of progress	Baseline	Year	Desired direction	Source
Thriving	Increased productivity	GVA per hour worked	£33.63	2021	▲	ONS, Subregional Productivity: labour productivity indices by local authority district and UK ITL2 and ITL3 subregions
	Maintained levels of employment in tradeable jobs	Proportion of employment in tradeable jobs	39.7%	2022	▲	ONS, Business Register Employment Survey
	Increased business innovation	Business R&D expenditure per person	£528 (SW)	2018	▲	Eurostat, R&D Expenditure
	Increased jobs created through inward investment	Jobs created from FDI per 100,00 population	68 (SW)	2022	▲	Department for Business & Trade, Inward Investment Results
	Increased entrepreneurship and early growth of SMEs	Number of business births	540	2024 (Q4)	▲	ONS, Business Demography
Number of high growth enterprises		115	2022	▲	ONS, Business Demography	

Annex D: Economic Recovery and Renewal Strategy Case Studies

Pillar - People and Labour Markets

Strategic Priority - Respond to rising unemployment

Throughout the pandemic, the council together with One City Partners worked quickly to share crisis communications to drive awareness and compliance with restrictions and boost grant applications. Regional partners worked collectively to implement a **Rapid Redundancy Response** to support businesses and their employees at risk of redundancy, including a Growth Hub helpline.

With flexible support funding from DWP, the council set up and managed the One Front Door service; an inclusive employment support programme connecting job seekers living in Bristol's most deprived communities to employers, training providers and support agencies. Working with employers, One Front Door helps to fill vacancies and find innovative new ways of matching the right people to the right jobs. Claimants work to identify and set personal goals, build their confidence, learn new skills, and update their existing skills and experience through supported work trials and apprenticeships. One Front Door has received 1,040 referrals with 558 registrations – exceeding the target of 400 registrations.

261 have entered training programmes and 200 have entered paid employment. The project was extended for a year with UKSPF funding, and the council is negotiating a further 2-year extension through the West of England Mayoral Combined Authority's Mayoral Priority Skills Fund.

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

Bristol Living Wage City has a clear mission to increase fair pay and encourage more employers to pay a wage that meets the actual cost of living. Paying a Living Wage is good for business, helping to build a stronger reputation, recruit and retain staff, and increase workforce productivity. Paying the real Living Wage also shows commitment to social value and can boost the attractiveness of a business' bid in competitive tendering situations. Bristol became a Living Wage City in December 2019. The Living Wage action group, made up of city anchors and key employers from across the city, work together to promote and champion the Living Wage across industry sectors. This partnership approach has delivered significant successes. Bristol now has over 270 Living Wage accredited employers headquartered in the city, resulting in salary uplifts for over 6,000 people, which adds an estimated £343,000 GVA to Bristol's economy annually.

Launched in 2022 by the West of England Mayoral Combined Authority, the Good Employment Charter is a voluntary accreditation scheme supporting businesses of all sizes and sectors to become better employers. The Charter was designed with trade unions, employers and employees from across Bristol, Bath and South Gloucestershire. The Charter aims to develop good jobs, deliver opportunities for workers to progress, and support employers to raise standards and practice across a number of areas, including recruitment, worker engagement, wellbeing and development.

Strategic Priority - Investment to address the digital divide

Covid-19 lockdowns increased the impact of digital poverty due to changes in working practices and the move to online education during lockdowns. The changes were evident in people with limited or no access to digital devices resulting in significant barriers to education, training and employment, as well as reduced social connections, in particular with more vulnerable people in isolation or shielding.

Anecdotal evidence indicated households in Bristol's most deprived areas do not have a computer, laptop or tablet, access to broadband, or the confidence and skills to fully utilise these digital devices. To address this, the council's Community Learning Team used £250K of Covid-19 funding to cleanse and distribute 3,060 recycled council laptops to priority individuals, and provided data and skills support to increase people's confidence and skills to get online safely, to improve access to education, training and employment, and to improve social contact and access to services.

As part of this initiative, the post-16 team distributed laptops to young people at risk of leaving college early due to not having access to a digital device. NEET young people were given laptops to support them to re-engage back into education, employment or training, and laptops were given to providers including HWV who distributed them to their learners giving them continued access their Access to Achievement course.

Strategic Priority - Increase access to employment support services

The strategy highlights both the pay gap and employment rate gap for disabled people compared to non-disabled people. The employment rate gap has closed but remains higher for disabled people, in particular for disabled people with severe or specific learning difficulties. Set up by the council's ESL service, the We Work for Everyone programme engages people with learning disabilities, learning difficulties and autistic people and explores pathways into paid work. Following the success of phase 1 of the programme, the service secured additional funding to run a second phase from January 2024. Funding for a third phase in the process of being finalised which will extend the programme for a further two years.

Phase 1 completed in December 2023. 1,457 participants engaged in the programme. 334 participants secured paid employment, beating our target of 291. Phase 2 is working with 320 people and is on track to get 75 (23%) into paid employment across the WECA region.

Move In, Move On, Move Up, (MIMOMU) formed part of a multi-agency approach and was established to support rough sleepers access benefits, healthcare, housing and to gain skills and paid employment after they were moved into hotels in response to the Covid pandemic. Phase 1 saw 70 gain new skills (target of 84). 30 participants went on to gain paid employment through the programme. MIMOMU was extended for a further 3 years through the Government's Rough Sleeper Initiative, and we are currently negotiating a further extension to the programme.

Strategic Priority – Boost support for young people

Bristol City Council is a leading intermediary for the Kickstart programme, a government funded programme to get 16 to 24-year-olds on Universal Credit, who are at risk of long-term unemployment, into fully funded work placements. Wrap around employment support and skills development was provided through the council's Employment Support, Adult and Community Learning and Apprenticeship Teams. Of the 201 young people on the programme, 160 entered paid employment upon completion of the programme, 99 of which remained in employment with the employer who provided their original placement. Bristol WORKS engaged with young people from local schools most at risk of becoming NEET to deliver experiences of work, bringing careers to life, to help inspire the next generation of workers. This included leading on a global work experience programme and "Raising Aspirations" event for over 1200 young people. Examples include:

A Week in the life of Virtual Work Experience – Bristol Works (bristolesl.com) National Careers Week 2021 Roundup – Bristol Works (bristolesl.com)

Between 2019 and 2022 WORKS delivered 13,893 experiences of work and engaged over 88 employers in WORKS delivery.

Developed by One City Partners and delivered by Babbasa, the OurCity2030 initiative aims to support 2,030 young people in inner-city Bristol to secure a median salary (£30,353) by 2030. Launched in 2022, the initiative was developed in response to the equality gap that exists for young people from minoritised backgrounds across Bristol, and particularly the underrepresentation of and lack of diversity within some of our key sectors. Working with partners, Babbasa have secured six industry pathway agreements, which will provide 120 career-oriented opportunities.

The first two pathways launched last year are the Pathway into Creative & Tech and the Built Environment Pathway.

Pillar – Business and Investment

Strategic Priority - Reduce risk of business failure in the short term

With around 88% of Bristol’s businesses employing 0 to 9 people, the dominance of micro businesses in the city contributes to the dynamic nature of the city’s economy. Supporting SMEs to survive and adapt during the pandemic was therefore critical. The council, together with partners, were quick to respond, focussing on retail, leisure, hospitality, creative industries and culture, some of the sectors most impacted. Almost 7,400 businesses were supported with £93.8M from the core Small Business Grants and Retail, Leisure and Hospitality Grant during the height of the pandemic.

The council and regional partners commissioned a range of business support services these included; an emergency helpline, online trading and financial resilience support, advice and guidance on mental health issues, adaptations grants and tailored support for SMEs led by residents from black and minoritised communities – who were disproportionately impacted by the pandemic. Supported by European and regional funding, the council commissioned enterprise and business support programmes specifically targeted to areas of high deprivation in the South, North and East Bristol. Almost 2,000 startups, early stage and existing SMEs were supported across the two programmes with over 150 new jobs created and £150,000 in small grants distributed.

Strategic Priority – Support safe re-opening

The council worked closely with partners to support the safe reopening of the city following Covid-19 lockdowns, distributing guidance to the hospitality sector and culture venues to create a safe environment for trade and tourism, business facing activities, temporary public realm changes and pavement licenses to support outdoor hospitality. The council, city centre BIDs and partners delivered the **#LoveBristol and #BristolTogether** city-wide marketing campaign to promote businesses, including the popular ‘hearts in the parks’, encouraging social distancing in the city.

Strategic Priority - Support businesses to diversify and be more resilient

During 2020, following a successful bid, The Black South West Network (BSWN), the Bristol-based and Black-led racial justice organisation took over the lease of the Coach House in St Paul’s. BSWN had an ambitious vision to double the floorspace and transform the 200 year old building into a new enterprise and cultural development and innovation hub to serve Black, Asian and minoritised entrepreneurs and communities across the city. In November 2023 the council approved a ground-breaking Community Asset Transfer involving the grant of a 125 year lease of the building at nil rent to enable the charity to raise £5 million with capital funding to refurbish and expand the building to environmental standards over a 5 year period.

The centre will provide co-working space for up to 150 entrepreneurs and employees, and events, meeting and training spaces for up to 100 people, plus a café and training kitchen. It will host enterprise and cultural incubation and innovation programmes, and so support black entrepreneurs and communities in a better way and at a larger scale than any previous project in the city. The local economic impact of the enterprise services to be delivered has been estimated at £712,040 GVA per year, plus £3.3 million in social value from the refurbishment project.

Bristol Nights supports the city at night and over 116,000 employees who work between 6pm and 6am, by advocating for better jobs, safer spaces, wellbeing support and training for night workers. Bristol Nights has a public health approach to the night time economy, and Bristol has gained international recognition for spearheading the Night Governance movement with pioneering campaigns on Drink Spiking, Harm Reduction, Mental Health and Wellbeing support and the Women’s Safety Charter.

The heart of Bristol Nights is collaboration, working together with nightlife stakeholders across the city to help the city flourish after dark. Every Bristol Nights intervention is co-designed alongside public bodies, night time economy businesses, universities, third sector organisations and audiences who enjoy the city after dark.

Strategic Priority - Support action on climate change and ecological recovery through businesses development

City Leap is a transformative project to build a citywide energy system – representing a huge step towards a cleaner, greener Bristol. It represents a world first, game-changing approach towards decarbonisation at city scale. This 20 year joint venture partnership between Bristol City Council, Ameresco and Vattenfall Heat UK will enable the delivery of over £1billion of investment into Bristol’s energy system. During the first five years of the partnership, at least £424million will be invested in a range of large infrastructure projects including the significant expansion of Bristol’s award winning heat network, providing local businesses and residents with reliable, affordable heat from sustainable sources. Solar panels and low carbon heating systems will be installed in local schools, and the council’s social housing will be made more energy efficient.

As well as delivering 140,000 tonnes of carbon savings, Bristol City Leap will deliver a minimum of £61.5million of social value to the city over 5 years including 1000 new jobs, apprenticeships and work placements, and a new community energy development fund worth £1.5million.

Strategic Priority - Accelerate development of growth sectors and inward investment

The Original by Bristol website promotes the city’s sectoral strengths, culture and creativity, sustainability credentials and core values to potential inward investors. The website outlines our ambitions for the future and celebrates the uniqueness of the city, giving an insight into what it’s like to work, live and do business here. Original by Bristol is a core asset for the council and its partners, used for investment pitches and promoting the city to investors at investment conferences.

Invest Bristol and Bath (IBB), the West of England’s inward investment service, works to attract and support new investors to bring new jobs, businesses and investment to the region. The council works in partnership with the service to agree regional sectors and markets to promote, and to present the city to investors and make the investment process as smooth as possible. Sectors targeted in promotional campaigns include Financial and Professional Services, Creative and Digital Media, Clean Tech and Energy and Health and Life Sciences. IBB provides enquiry handling, sector promotion and aftercare services.

Pillar - Bristol's Places

Strategic priority - Protect and enhance the viability of highstreets and local centres

High streets and local centres have traditionally been at the centre of community life, providing local employment opportunities and services. The way they are being used is changing due to competition and shifting patterns of consumption, and these changes were expected to accelerate due to the pandemic. Supporting the city centre was therefore seen as a priority as it is the economic and cultural hub of the city and region.

Funding from government, regional and council sources were brought together to deliver investment across the city, with a focus on 12 designated high streets and the city centre. The City Centre and High Streets programme aims to safeguard and create businesses and employment opportunities across multiple sectors including retail, leisure, tourism, creative, events and hospitality. The programme covers city wide business development, marketing and promotion, a Vacant Property Grant scheme, geographically targeted interventions, culture and events, and street scene and greening enhancements to improve the look and feel of these areas. In the city centre, the initial focus was to boost footfall by encouraging people into the city centre (during and post pandemic) with the delivery of free, inclusive, culture and event activities. Ending in October 2023, phase 1 of the culture and events programme delivered a diverse range of events including markets, Little Amal, Grand Iftar, Light Festival, Windrush 75 Stories through Film, Summer of Film Takeover, lantern/community parades, public art workshops and installations.

The programme engaged 1,257 businesses and provided support to 638 of these. 132 Vacant Commercial Property Grants were approved resulting in 266 jobs created and a reduction in the citywide high street property vacancy rate from 10% in October 2021 to 7.2% in June 2024. Evaluation of 112 events delivered through the City Centre and High Streets Culture and Events Programme shows a good level of economic benefit and return. 216,557 extra visitors were attracted to Bristol's city centre and high streets, generating £4.725 million of additional spend in Bristol's businesses and supported 945 paid jobs in culture and events. St Nicholas Market benefitted from hosting several events, with footfall of 3.7m, an increase of 16.4% in 2023 compared to 2022.

Strategic Priority - Develop targeted place based interventions to connect people with opportunity

Bristol Temple Quarter is one of the UK's biggest, most exciting city-centre regeneration projects, transforming 135 hectares of brownfield land in two phases. The headline figures reflect the scale of ambition: 10,000 homes, thousands of jobs, £1.6bn annual boost to the regional economy, and new opportunities for placemaking, skills and innovation. In 2022, Temple Quarter received a significant boost from central government, with a £94.7m grant from the Department for Levelling Up, Housing and Communities. The funding, primarily for three new entrances to the Grade I listed Bristol Temple Meads station, alongside infrastructure and land assembly, gave further momentum to the project, which continues to have widespread national and local political support.

A new Vision for Place has been developed which sets out the placemaking approach, reflecting Bristol's unique spirit and history, and building on feedback from the community, business and stakeholders. A new Inclusive Growth Strategy is being developed to articulate how we will deliver the sustainable, accessible jobs and skills the city-region needs to succeed, both during the construction phase and longer-term, creating a pipeline of skills to ensure local people benefit from these local opportunities. To secure this vision, Homes England, Bristol City Council and the West of England Mayoral Combined Authority incorporated the Bristol Temple Quarter LLP in March 2025. The new LLP will drive the regeneration of Bristol Temple Quarter, helping to create a blueprint for sustainable, 21st century urban regeneration on a significant scale.

Strategic priority - Address long term unemployment and income deprivation in South Bristol

Defined as the 11 wards south of the River Avon, South Bristol has one of the most extensive concentrations of socio-economic deprivation in the city, centred on the three wards of Filwood, Hengrove & Whitchurch Park, and Hartcliffe & Withywood, but also in neighbouring areas intersecting Bishopsworth, Knowle, Stockwood, Bedminster and Windmill Hill wards. Over the past few years work to address some of the long-term inequalities and deprivation in South Bristol has focused on both capital and infrastructure investment and targeted place-based support programmes.

Over 2021-22 the film sector and **The Bottle Yard Studios** contributed almost £21 million to the city's economy. With £12m funding through the West of England Combined Authority, the expansion of the Bottle Yard Studios into a neighbouring south Bristol industrial site will add three new stages, boosting film and TV production in Bristol and the region, and help secure a further 1,000 jobs.

Whitchurch Lane Enterprise Park provides 14 new light industrial units adjacent to The Bottle Yard Studios and Hengrove Park regeneration area in South Bristol. The £7m of capital investment secured provides 'grow on' space for local or inward investing SMEs in creative/media, manufacturing and engineering. The project aims to deliver 102 jobs and £42.27m GVA by 2033.

In January 2023, Filwood was awarded £14.5m of funding from the government's Levelling Up Fund. Along with £1.72m of Bristol City Council funding, this will enable key six projects identified in the Filwood Broadway Framework to come forward, including a new Filwood library, multi-use games area and football pitch, expansion of the Filwood Community Centre, improvements to public space and high street, revitalisation of shopfronts on the east side of Filwood Broadway and renovation of properties on the west side.

The **South Bristol Talent Pathway Project** has engaged and supported SMEs in south Bristol to help develop their workforce and grow their business, by linking businesses to business support services and skills training providers. SMEs have also been supported to offer experiences of work to children and young people from local schools to give them the skills they need to secure meaningful employment and establish a 'talent pipeline' across South Bristol communities.

Annex E: Glossary and Sources

We have conducted a review of the following local and regional documents to compile an updated narrative for Bristol.

Corporate

- One City Plan
- BCC Corporate Strategy
- Bristol Local Plan 2040
- Bristol Key facts 2023

People

- WECA Employment and Skills Plan
- BCC Employment and Skills Plan (data)
- Bristol Race Equality Strategic Leaders Group: Data Product 2019
- Bristol Employment, Skills and Lifelong Learning Plan (draft)
- Ofsted

Business

- Bristol City Centre Economic Strategy
- One City Economic Recovery and Renewal Strategy
- Bristol Global City International Strategy
- Draft Local Plan’s Employment Land Topic Paper
- West of England Local Industrial Strategy
- WECA - Plan for Innovation (Draft)

Place

- WECA Digital Plan (Draft)
- One City Climate Change Strategy
- BCC Climate Emergency Action Plan
- City Region Sustainable Transport Settlement
- Retail and Leisure Study
- Ward Profiles (IMD)
- Bristol Quality of Life Survey 2022-23
- Temple Quarter Socioeconomic Baseline
- Frome Gateway Framework (Employment Land Analysis)
- St Philips Marsh Business Audit
- WECA State of the West of England: Emerging Evidence
- Bristol Employment Land Survey
- OCO WECA International Market Prioritisation

Where relevant, we have added to the Strategy by looking at the following data to draw out longer term trends for Bristol or bring new insights:

- ONS Census 2011 and 2021
- Data produced by ONS including Annual Population survey, Annual survey of Hours and Earnings, Travel and Employment survey, Subregional productivity
- The Data City
- Eurostat
- Business register and employment survey
- English Indices of Multiple Deprivation
- Social Mobility Index
- The Charity Commission



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