Locally the West of England economy has shown particular resilience. Increases in both resident and workplace employment have seen the sub-region out-perform the national economy and the West of England Local Enterprise Partnership is seeking to build on this underlying strength by setting out ambitious growth proposals in its Strategic Economic Plan published in 2014. This Plan seeks to deliver a minimum of 65,000 new jobs by 2030 building on the area’s track record in innovation and creativity and a rich heritage and cultural vibrancy.

Bath and in particular the Bath City Riverside Enterprise Area, has a key role to play in delivering future economic growth. The Review highlights the importance of promoting additional employment in the Market Towns, supporting key housing & transport projects and addressing employability and skills in the workforce.

Cut Ben Stevens
Cabinet Member for Sustainable Development for B&NES

Colin Skellet OBE
Chair of West of England Local Enterprise Partnership

Jon Hunt
Director of Research & Innovation at University of Bath

Tim Middleton
Vice-Principal Research and Graduate Affairs Bath Spa University

Matt Atkinson
Chair of Bath and North East Somerset Learning & Skills Partnership

Ian Ball
Executive Director of The Initiative in B&NES

Angela MacAusland
FSB Branch Chairman for Bath
The revised Economic Strategy takes account of significant changes both locally and nationally including:

- The socio-economic impacts of the 2008 recession, changes to the welfare system and Universal Credit, the increase in the age of retirement and the raising of participation age.
- Reducing unemployment and the numbers of young people not in education, employment or training.
- The changes to external partnership relations with the demise of the Regional Development Agencies and Business Links and the creation of Local Enterprise Partnerships (LEPs).
- The pressure on resources, the ongoing challenge of moving to a low carbon economy and the demographic impacts of an aging population.

In 2010 B&NES Council approved its first Economic Strategy, developed in conjunction with the B&NES Economic Partnership. The Strategy contains a number of strategic priorities and detailed actions and a commitment to review and refresh the document after a period of three years.
Our Vision is Bath and North East Somerset will be internationally renowned as a “beautifully inventive” entrepreneurial 21st century place with a strong social purpose and a spirit of wellbeing, where everyone is invited to think big – a “connected” area ready to create an extraordinary legacy for future generations.

The review will also take into account the work of the B&NES Public Services Board. The Public Services Board is promoting a co-ordinated approach to local services and supporting the closer integration of key strategies to deliver sustainable communities working to a common vision.

Moving forward the Review will seek to build on the area’s strengths to create a more productive, higher value added economy. The focus will be on specific priority sectors and creating a range of local employment opportunities which can be accessed by the resident workforce.

To address the Strategic Vision, the Economic Strategy Review is structured around three key inter-dependent “Strategic Economic Themes” “Business”, “People”, and “Place” which are seen as key areas of activity. Within the three Themes there are nine “Strategic Economic Priorities”, with a framework of actions and measures for promoting sustainable economic growth.

To ‘set the scene’ for the Economic Strategy Review, an assessment of the local economy has been undertaken which:

- sets out recent past trends nationally and locally
- provides a current position statement as to where the B&NES economy is now.
- summarises our growth ambitions for the B&NES economy going forward to 2030.

ECONOMIC CONTEXT

In order to ensure that the Strategy also considers its relationship with the environment and equality/social inclusion two cross-cutting ‘core values’ have been established: ‘Sustainability’ and ‘Health & Wellbeing’.

By establishing each of these important economic issues as cross-cutting core values we can ensure a strategic approach to local economic development which is sustainable, includes all parts of the economy, and where no-one is excluded.

The Strategy Review document addresses each theme and its strategic economic priorities in turn, setting out the evidenced based economic strengths & weaknesses and issues & challenges within each, and establishing the opportunities for development and growth based on this analysis.

As resources become more expensive, businesses with lean manufacturing methods will be at an advantage and residents that reduce their energy consumption will be better placed to benefit from the economic recovery. Promoting local production and purchasing will help to create a more sustainable economy. By building a dynamic and strong economy we will be better placed to tackle health & social issues in B&NES and establish a fairer more equitable community. By ensuring everyone has an opportunity to succeed we will fully maximise our economic potential.

HEALTH & WELLBEING & SUSTAINABILITY

Cross cutting core values

- Give all residents the opportunity to take part in BANES economic success, which will create fairer life chances, ensure healthy standard of living for all, and enable people to stay healthy.
- Businesses and residents are reducing their energy and waste costs and preparing for the future climate. This increases competitiveness and creates work for environmental businesses which grow and move to the area, bringing green jobs. Use of local food and energy is increasing economic resilience and a circular economy is developing, where waste is a valuable resource.
- Enable existing businesses and residents to “green” by reducing their energy use and adapting to the future climate.
- Focus on preventative spend to tackle the social and health problems which prevent people from realising their potential.
- Ensure a healthy standard of living for all.
- Support sustainable businesses and the Low Carbon & Environmental Goods & Services (LCEGS) sector.
- Create fairer life chances through good work for all.
- Increase local food production & consumption to raise the local multiplier effect, create economic & job growth and enhances cultural offer.
- Increase local & modernisation of energy efficiency & retrofit for homes.

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- sets out recent past trends nationally and locally
- provides a current position statement as to where the B&NES economy is now.
- summarises our growth ambitions for the B&NES economy going forward to 2030.
The Economic Strategy for Bath and North East Somerset (update 2014): Economic Context

A revised forecast upwards for UK GDP (Gross Domestic Product) growth from 2.4% to 2.7% in 2014 and from 2.2% to 2.3% in 2015, and forecasts GDP growth of 2.6% in 2016, 2.6% in 2017 and 2.5% in 2018.

GDP to return to its pre-crisis peak in the third quarter of 2014.

A revised forecast upwards for employment growth across the forecast period, expecting employment to reach 31.4 million by 2018.

Overall economic performance of the B&NES economy

In 2011, the B&NES economy produced an estimated £3.8 billion of GVA output with total workplace employment of almost 92,000, equating to an average productivity per employee of £41,600. B&NES productivity performance is slightly lower than across the West of England and nationally (£43,100 per job and £42,400 respectively).

The main driver of B&NES lower productivity is the area’s above-average employment in public sector activities such as education and health (36% of B&NES’ workplace jobs are in the predominantly public sector activities of Public Administration & Defence, Health & Education compared to 29% across the West of England and 27% nationally) and the relatively large concentrations of employment in sectors such as retail and tourism.

As with the West of England and nationally from 2007 to 2011 the B&NES economy shrank during the 2008 economic downturn. Overall the output of the B&NES economy fell by 5.1% between 2007 and 2011 compared to a 1.9% decline across the West of England and a 5.4% decline nationally. Productivity also fell across B&NES over this period, by 5.6%, compared to productivity declines across the West of England and nationally of 4.2% and 4.5% respectively.

Source: ONS, Office for Budget Responsibility, March 2014
UNEMPLOYMENT
The unemployment rate in BANES is 3.1% compared to 3.8% in the West of England and 4.9% nationally. Resident unemployment has remained consistently below the national average, although the percentage increase (37%) is greater than the England figure (31%).

The chart below shows trends in unemployment for 2007 to 2013 for the BANES economy. In 2007, prior to the economic downturn, BANES had 3,900 unemployed residents, 28% of whom were claimant unemployed. Overall unemployment reached a peak of 5,600 in BANES in 2012, but in 2013 numbers reduced significantly, suggesting that the BANES economy, in line with the national picture, is recovering from the downturn. Indications are that this trend will continue through 2014 and that unemployment could return to 2008 pre-recession levels.

However, whilst overall unemployment has reduced to the same level in 2013 as it was in 2007, the proportion of claimant unemployment at 54% is higher than it was pre-downturn with a steep rise in the proportion of long term unemployment. Nevertheless the overall unemployment rate remains well below the West of England and national figures.

EMPLOYMENT
The chart below shows trends in resident and workplace employment for 2007 to 2013 for the BANES economy. In 2013 BANES had resident employment of around 87,000, around 1,000 more than pre-downturn. However, workplace employment in 2013, at 87,000, is some 2,000 lower than the pre-downturn level of 89,000.

Over the period, resident employment has been relatively more volatile, declining by far more than workplace employment before recovering more quickly in 2011 as employment fluctuations in the wider sub-region affect people working outside BANES.

The chart below compares the trends in resident and workplace employment in BANES with the performance of these measures in the West of England sub-region and nationally for 2007 to 2013.

As with England, resident employment in BANES has risen by just over 1%, though across the sub-region this is much higher at 3%.

Workplace employment in BANES has declined by 3%, a very different situation to growth of 4% across the West of England and growth of almost 1% nationally.
The overall picture painted by this assessment of the B&NES economy is that whilst resident unemployment has remained low, the wider economy has performed less well in relation to workplace employment, output and productivity driven principally by changes in public sector employment. However, growth in the knowledge economy locally has outstripped both the West of England and England (5% compared with 4% and 2%).

The above average representation in sectors such as Information & Communications, Creative & Digital, Environmental & Low Carbon and Health & Wellbeing is also supporting the local economy to recover more quickly.

As part of the West of England Local Enterprise Partnership (LEP) we share our partners’ ambitions for promoting growth across the sub-region. The LEP has recently submitted its Strategic Economic Plan to government. This sets a baseline for delivering 65,000 jobs and 2.6% GVA growth in the West of England to 2030, with an ambition to promote higher levels of growth dependent on the level of government funding for infrastructure and employment projects.

Historically the B&NES area has contributed 15% of total jobs and economic output in the sub-region and the ambition is that this will continue to be the case. Moving forward, the Economic Strategy is seeking, in line with the LEP’s growth plans and the Council’s Core Strategy, to increase the number of jobs in B&NES by 11,500 by 2030. Taking into account job losses, this will require some 16,900 new jobs to be created as set out below.

<table>
<thead>
<tr>
<th>Employment by Sector (SIC 2007)</th>
<th>2010</th>
<th>2030</th>
<th>Net Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture &amp; fishing</td>
<td>700</td>
<td>500</td>
<td>-200</td>
</tr>
<tr>
<td>Energy &amp; water</td>
<td>1,100</td>
<td>1,200</td>
<td>100</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>4,700</td>
<td>4,500</td>
<td>-200</td>
</tr>
<tr>
<td>Construction</td>
<td>4,100</td>
<td>5,300</td>
<td>1,200</td>
</tr>
<tr>
<td>Distribution, hotels &amp; restaurants</td>
<td>21,800</td>
<td>24,800</td>
<td>3,000</td>
</tr>
<tr>
<td>Transport &amp; Communication</td>
<td>6,600</td>
<td>9,500</td>
<td>2,900</td>
</tr>
<tr>
<td>Banking finance &amp; insurance etc.</td>
<td>13,800</td>
<td>22,100</td>
<td>8,300</td>
</tr>
<tr>
<td>Public admin, education &amp; health</td>
<td>31,100</td>
<td>25,900</td>
<td>-5,200</td>
</tr>
<tr>
<td>Other services</td>
<td>4,900</td>
<td>6,500</td>
<td>1,600</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>88,800</td>
<td>100,300</td>
<td>11,500</td>
</tr>
</tbody>
</table>

Summary of Key Economic Indicators 2010-2030

<table>
<thead>
<tr>
<th></th>
<th>BA&amp;NES</th>
<th>WofE</th>
<th>England</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Annual Growth – Productivity</td>
<td>3.7</td>
<td>2.3</td>
<td>2.3</td>
</tr>
<tr>
<td>Average Annual Growth – Jobs</td>
<td>0.6</td>
<td>0.8</td>
<td>0.8</td>
</tr>
<tr>
<td>Average Annual Growth – GVA</td>
<td>3.2</td>
<td>3.2</td>
<td>3.1</td>
</tr>
</tbody>
</table>
To promote business growth which delivers increased productivity and earnings and provides local people with access to sufficient quality sustainable jobs across the economy.

### BUSINESS THEME

**INTRODUCTION**

The business theme provides an overview of the issues, challenges and opportunities for business and entrepreneurship in Bath and North East Somerset, and sets out a strategic approach to address these issues and challenges. Encouraging and enabling businesses and entrepreneurs to grow and prosper is fundamental to ensuring a competitive local economy for the future and realising the aim of the business theme.

### THREE KEY PRIORITIES FOR ACTION

- **PROMOTING APPROPRIATE BUSINESS GROWTH & INVESTMENT**
- **DELIVERING A SUPPLY OF BUSINESS SPACE THAT MEETS LOCAL BUSINESS GROWTH NEEDS**
- **PROVIDING A COMPREHENSIVE BUSINESS SUPPORT SERVICE FOR SMALL AND MEDIUM-SIZED BUSINESSES**

BUSINESS AND ENTREPRENEURSHIP

B&NES’ £3.8 billion of annual economic output is produced by around 8,500 business enterprises (VAT/PAYE registered businesses) and over 13,000 self-employed. These businesses are also responsible for B&NES’ 92,000 total workplace employed population, who each produce an average of £42,000 per annum of output.

ISSUES AND CHALLENGES

Business Size

The average size of businesses in B&NES is smaller relative to the national picture (only 15% employ more than 10 people compared with 19% and 17% for the sub-region and nationally). Overall local businesses tend to be more established with 65% having traded for more than 3 years (compared with 60% in the West of England and nationally).

Productivity

The main indicator of the overall competitiveness of the B&NES economy and its businesses is productivity. As established earlier the main driver of B&NES’ lower productivity is the area’s above-average employment in the public sector and the relatively large concentrations of employment in sectors such as retail and tourism. This is further exacerbated by above average part-time employment (42% compared with a sub-regional figure of 36% and a national rate of 33%) and a below average representation of larger businesses which tend to have higher productivity than smaller businesses.

Entrepreneurship

The priority business sectors

Priority sectors are seen as strategically important to the local economy. Their “strategic” importance is because they are large employers and/or higher value added and/or higher growth, or are expected to demonstrate higher growth in the future. They are the sectors to ‘prioritise’ for support and intervention as they are essential in ensuring the longer-term competitiveness and stability of the local economy.

There are 8 Priority Sectors in B&NES defined as “Core” or “Key” sectors. Core sectors currently employ significant numbers of people locally and will continue to be important in employment terms. Key sectors are generally smaller in employment terms but higher value added and offer the potential for significant future expansion.

The priority business sectors

- Core Sectors
  - Tourism, Leisure, Arts & Culture
  - Retail
  - Health & Wellbeing
  - Finance & Professional Business Services

- Key Sectors
  - Creative & Digital
  - Information & Communication (ICT)
  - Advanced Engineering & Electronics
  - Environmental & Low Carbon

OppORTUNITIES

To address the inter-linked issues of low productivity, limited entrepreneurship and below average wages the focus has to be on building on the areas business strengths and business specialisms in specific priority sectors. By supporting business growth and investment in these areas, B&NES can close the productivity gap and workplace earnings gap which exists between itself and the broader West of England and the national economy.

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The priority sectors have the potential to deliver up to 11,500 new jobs in B&NES by 2030 and make a significant contribution to increasing the area’s GVA output and productivity.
BUSINESS ENGAGEMENT, INVESTMENT AND PROMOTION

To take full advantage of the potential for growth in the area’s key sectors and knowledge economy, a proactive approach to business engagement and business investment and promotion will be required. Understanding the business needs of key sector companies and providing a close relationship with the leading businesses in each sector will be an important pre-requisite for enabling local economic growth and an acknowledgement that the bulk of future business investment and growth will come from indigenous companies.

However, if the area is to achieve the planned levels of economic and employment growth new inward investment will also be required.

Historically the area has not attracted significant inward investment but the development of the Bath City Riverside Enterprise Area will provide opportunities to attract new companies to the area building on Bath’s strong international brand and the quality of life offered by the area as a “beautifully inventive” place. This will also enable opportunities in N.E. Somerset & the market towns to be promoted to a wider audience.

The Local Enterprise Partnership Strategic Economic Plan sets out how the 5 LEP Priority Sectors will be supported by investing in four well- evidenced levers of growth. One of these levers is as follows:

SUSTAINABLE GROWTH

The business opportunities related to sustainable growth are essentially threefold:

• The establishment and growth of the environmental & low carbon business sector as a business sector in its own right which can in turn help to facilitate:
  • The opportunity to encourage businesses and business supply chains to adopt efficiency measures which will use fewer resources and boost profits through associated cost savings.
  • The opportunity to encourage businesses to explore their exposure and risk to problems associated with climate change, and to undertake appropriate mitigation and adaptation.

BUSINESS SPACE

ISSUES AND CHALLENGES

Space

Overall in the main urban areas in B&NES there is 205,000sqm of office floorspace. By far the largest amount (84%) is in Bath with the remaining 16% shared equally between the Somer Valley and Keynsham. This reflects the importance of Bath as the predominant office market area with the market towns catering for specific local demand.

In addition there is 371,000sqm of industrial floorspace in the urban areas. However this time the split is different, with 40% of the floorspace and Keynsham Bath and the Somer Valley each providing 30% of the floorspace. This reflects the historic role of the Somer Valley as the remaining 20%. The split confirms 40% of the floorspace and Keynsham Bath and the Somer Valley each providing 30% of the floorspace. This reflects the historic role of the Somer Valley as the remaining 20%. The split confirms 40% of the floorspace and Keynsham Bath and the Somer Valley each providing 30% of the floorspace. This reflects the historic role of the Somer Valley as the remaining 20%. The split confirms 40% of the floorspace (84%) is in Bath with the remaining 16%.

In Bath the rate is less than 1%. This is one of the major drivers in this process. This in turn contributes to a perception of an oversupply of office accommodation and reduced rental income. The typical vacancy rate for industrial premises is in part a result of the availability. The availability of workspace for business space that meets business growth needs in B&NES will require the following key issues to be addressed:

Addressing the shortage of industrial floorspace in Bath There is a pressing need for new industrial floorspace in the city. Economic forecasts indicate that, to deliver the required level of economic growth and in particular to facilitate the expansion of the key business sectors, up to 50,000sqm of modern centrally located floorspace is required.

The situation in the office market is different. There is little availability in N.E.Somerset given the limited local nature of demand, although this balances the potential demand for office floorspace in its location and good connectivity.

In Bath the vacancy rate for offices is 7.5% which suggests that the market is broadly in balance. However the quality of the overall office stock and the potential supply of new floorspace is low.

On a yearly basis depending on specific requirements.

of Bath which covers most of the northern half of B&NES has meant that no new industrial sites have come forward.

in Bath is generally of the available space in the preferred central Bath locations is generally of poorer specification. This results in a perception of an oversupply of office accommodation across the city.

In Bath the rate is lower at around 2,000sqm per annum. The take-up of industrial floorspace is generally restricted as a result of the availability of poor quality accommodation and reduced rental income. The typical vacancy rate for industrial premises is in part a result of the availability of workspace for business space that meets business growth needs in B&NES will require the following key issues to be addressed:

Making provision for the specific space needs of small creative and knowledge based businesses by increasing the supply of flexible managed workspace and facilitating the expansion of innovation and incubation facilities. This is an issue, where managed workspace is under represented compared with neighbouring authorities and whilst there is operator interest there are few potential opportunities.

OFFERINGS

To deliver a supply of business space that meets business growth needs in B&NES will require the following key issues to be addressed:

Raising the quality of office floorspace in Bath

In Bath and is driven in the main by indigenous business expansion. Annual average take-up is around 10,000sqm per annum. The take-up of industrial space is lower at around 2,000sqm per annum, although this can vary on a yearly basis depending on specific requirements.

in Bath being focussed on local service manufacturing alongside the historic role of the Somer Valley as the remaining 20%. The split confirms 40% of the floorspace and Keynsham Bath and the Somer Valley each providing 30% of the floorspace. This reflects the historic role of the Somer Valley as the remaining 20%. The split confirms 40% of the floorspace and Keynsham Bath and the Somer Valley each providing 30% of the floorspace. This reflects the historic role of the Somer Valley as the remaining 20%. The split confirms 40% of the floorspace and Keynsham Bath and the Somer Valley each providing 30% of the floorspace. This reflects the historic role of the Somer Valley as the remaining 20%. The split confirms 40% of the floorspace (84%) is in Bath with the remaining 16%.

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The overview of the challenges facing the delivery of future business growth and investment highlighted the need to improve entrepreneurship in B&NES raising the level of business start-up (particularly in higher value added private sector business activities), whilst at the same time improving business survival rates through targeted business support measures is an essential element in delivering future economic growth.

There is a wide range of business support programmes and products already in existence and in terms of local provision the priorities should be to:

- Add value to existing business support activity
- Fill gaps in provision
- Ensure businesses are aware of the support available and how to access it
- Secure funds and develop local support programmes
- Work with the Local Enterprise Partnership and other local partners to ensure appropriate local business support provision

Building the local business stock is a cornerstone of the LEP’s approach, with the main focus on the high-performing minority of start-ups which they will seek to identify, support and persuade to grow in this area.

In the Plan there are three key components of SME Business Support:

- Increasing the number and quality of start-ups
- Building the local business stock
- Improving the capability of existing businesses

To help new companies through their formation phase proposals include:

- Establishing an angel investor network and increasing the availability of investor readiness support
- The establishment of flexible workspace and ‘landing pads’
- Creating outward looking networks that connect companies to talent and opportunities to meet customers, partners and investors
- Encouraging companies to increase trade overseas
- Improving the capability of existing businesses

There will again be an emphasis on high-growth potential key sector companies but sustainable jobs growth in any SME will not be ignored.

Evidence indicates that businesses that access support and advice have a better chance of survival and it is proposed to develop a ‘menu’ of start-up and existing business support services linked to a centralised clearing and brokerage service including:

- Access to existing local business support.
- Alignment with Enterprise Zone/Areas and existing business incubator / enterprise centres.
- Interfaces with the SME Growth Fund, including business finance schemes, banks, angel investors and venture capital funds.

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Working with the Local Enterprise Partnership

In its Strategic Economic Plan the LEP sets out the ‘levers of growth’ that will be used to promote economic growth in the sub-region. One of these levers concerns small & medium size (SME) business support as follows: ‘SME Business Support – supporting the 85% of businesses in the region that are the engine for growth in our area’.

- Add value to existing business support activity
- Fill gaps in provision
- Ensure businesses are aware of the support available and how to access it
- Secure funds and develop local support programmes
- Work with the Local Enterprise Partnership and other local partners to ensure appropriate local business support provision
THE WEST OF ENGLAND GROWTH HUB

The LEP propose to deliver these services through an SME Growth Hub, serving the West of England, which will become part of the national Growth Hub Network. The Growth Hub is funded through the government's Local Growth Deal and income from users. It is intended to take a “no wrong front door” approach to accessing the Hub using a range of public and private sector partners to promote “local” access. As a primary means of raising awareness, the existing Business Navigator website will be upgraded to include more effective information and diagnostic tools.

LOCAL SUPPORT SERVICES FOR START-UP AND NEWLY ESTABLISHED BUSINESSES

Analysis of the business stock in B&NES indicates that the area has an above average number of small (less than 10 employees) businesses. The large majority of these businesses (80%+) are locally owned and many are run by “sole proprietors”. Employment in locally owned businesses was responsible for offsetting wider job losses in the area during the recession, limiting the overall reduction in employment in B&NES to 2% compared with 4% in the sub-region. There is strong representation in the priority sectors including tourism, creative and information and communication. Maintaining the existing locally accessed support services, currently commissioned by the Council for all local businesses is therefore particularly important in B&NES.
INTRODUCTION
The Place theme of the Economic Strategy seeks to articulate and support the contributions of the City of Bath and the surrounding market towns of Keynsham and the Somer Valley to the local economy, recognises the key role that housing plays in supporting economic growth and promotes the opportunities offered by building a low carbon economy and delivering improved connectivity. By ensuring that these factors are supported and addressed it will be possible to develop a sustainable economy for the whole of Bath & North East Somerset that can provide a strong quality of life and high standards of living and working.

SUCCESSFUL CITY
Bath is a World Heritage Site, an international tourism destination and a regional shopping centre. The city has an envious reputation for its quality of life and plays a crucial role in the B&NES economy. It provides nearly 70% of the area’s employment and economic output (GVA) and is home to over 50% of B&NES businesses. More importantly, 75% of knowledge based and priority sector employment is based in the city.

In contrast five local areas (Local Super Output Areas – LSOA’s) within the city fall within the top 20% most deprived areas in the country. It is critical to the future economic well-being of the area that:

KEY PRIORITIES FOR ACTION
SUCCESSFUL CITY
VIBRANT MARKET TOWNS
SUSTAINABLE CONNECTED COMMUNITIES
HOUSING

Bath will remain a visitor friendly city with an international reputation for world class heritage and as a centre for innovation, enterprise and high quality education.
OPPORTUNITIES

To deliver a successful and sustainable visitor economy on-going investment in the “place” and in place marketing will be required.

Develop, manage and promote a sustainable visitor economy

Raising productivity by addressing seasonality issues, focusing on high value markets and prioritising staying visitors, linked to improved use of information technology will help to develop a more sustainable tourism sector.

Bath is recognised as one of the premier visitor destinations by Visit England and Visit Britain. This provides opportunities to engage in national & international marketing initiatives and help shape strategic thinking with national agencies and government.

To maintain this relationship will require continued support for a public/private sector destination marketing organisation and the development of an up to date Destination Management Plan providing a joined-up approach to destination marketing, place management and events programming.

Maintain and enhance the city centre as a regional retail, leisure, cultural and sporting destination

The quality of the city centre is a key element in the visitor destination offer. It is central to the continuing success of a broad and diverse retail sector; it underpins the city’s rich cultural offer and has a significant role to play in attracting broader investment.

Employment in the visitor economy has increased by 3.2% over the last five years and is forecast to continue to grow by circa 3,500 jobs. This focus should be on building a more sustainable higher value added product which will benefit both Bath and the wider area. Currently there are over 5.6m visitors each year to the city but only 16% are staying visitors, who on average spend five times more per head than day visitors.

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Opportunities are numerous including the Friends of Bath who are a key strategic partnership with Visit England and help to promote the city.

To maintain this relationship will require continued support for a public/private sector destination marketing organisation and the development of an up to date Destination Management Plan providing a joined-up approach to destination marketing, place management and events programming.

Utilise the city’s World Heritage Site, Cultural, Spa and independent shopping credentials as key elements of the visitor destination offer

A refreshed and updated version of the existing co-ordinated Visitor Marketing Strategy is required to maximise the potential for development of the visitor economy.

The Strategy will ensure that growing and high value markets continue to be targeted, include the development of a year round Festivals and Events programme and offer opportunities to spread the benefits of tourism to surrounding rural areas.

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The Economic Strategy for Bath and North East Somerset (update 2014):

Place Theme

ISSUES & CHALLENGES

Given the focus of priority sectors in Bath it is unsurprising that growth in employment in Bath is high. Growth in employment in the knowledge economy in Bath, which increased by 7% between 2009–2012, has outstripped increases in the wider B&NES area (5%), the West of England (4%) and nationally (2%).

Nearly 60% of employees in the city are in higher skilled jobs with over 40% of residents possessing NVQ level 4 or above qualifications compared with 36% in the sub-region and 30% nationally.

Bath’s two universities are key to the supply of highly qualified workers and are also a source for entrepreneurialism and local economic growth with several significant companies in the city having spun out of or benefitted from links with the Higher Education (H.E.) sector.

A recent Centre for Cities report highlighted the Bristol and Bath region as “having an internationally significant and fast growing high tech cluster” and Set Squared, an innovation centre collaboration between Bristol, Bath, Exeter, Southampton and Surrey Universities, has been named as Europe’s top university Business Incubator in 2013 and 2014.

The main constraint to further future growth in Bath is the lack of appropriate business space of the right type and right quality.

There are high levels of self-employment, freelancing and new entrepreneurial ventures across the creative and digital sectors which is fuelling the demand for flexible workspace such as co-working and other ‘drop-in’ facilities.

There are a number of successful instances of the co-location of creative and digital businesses in Bath. However, there is recognition among many more established firms that there is a lack of suitable workspace to facilitate such clustering on a greater scale, this in turn is constraining opportunities for growth.

Improving the profile for the sector is paramount to its continued performance. This is central to the successful delivery of a hub which needs visibility to enhance perceptions of creative and digital activity in Bath.

OPPORTUNITIES

Investment in the implementation of the Bath City Riverside Enterprise Area is the key opportunity for the delivery of high value added knowledge driven growth in the city.

New commercial and business quarters developed in & on the edge of the city centre.

Build on the city’s strengths in innovation & research linked to the H.E. Sector.

The Bath University Innovation Centre at Carpenter House is part of the highly regarded Set Squared facilities. It is at capacity and has a waiting list for desk space. There’s an urgent need to expand the facilities to double as a first phase expansion project which can be linked to incubation or ‘move-on’ facilities.

Support the small business & creative sectors through the delivery of new workspace.

The city is under-provided with managed business space but operators have not been able to identify any specific development opportunities.

Support the small business & creative sectors through the delivery of new workspace.

The creative business & talent sector is growing and requiring new space.

There is also a need for “Landing Pads”, small flexible business spaces which can accommodate newly re-located or expanding small businesses with tailored business support packages available.
The Economic Strategy for Bath and North East Somerset (update 2014): Place Theme

ISSUES & CHALLENGES

The city is home to nearly 89,000 residents and 4,500 businesses employing 56,000 people. A recent survey of office occupiers in the city centre found that the top priority in relation to any office space needs was access to broadband connectivity. This is particularly important for the city where over 14,200 people are employed in key sectors such as Information & Communications and Creative & Digital where access to sufficient bandwidth is vital for ongoing business operations.

Increasingly residents also require access to broadband to enable access to information and services and to facilitate flexible and home working. However 7,400 city residents live within the 20% most deprived local areas (LSOA’s) in the country where it is less likely that they will have access to adequate broadband facilities.

Bath is well provided by fibre enabled telecoms cabinets but broadband speeds can be limited, depending on the physical distance to the cabinet, by the use of copper wire between the cabinet and the premises. Generally speaking the existing network offers a minimum of 2Mb/sec up 25Mb/sec classed as superfast broadband. However this limited service does not always meet the needs of businesses who seek access to ultrafast 100Mb/sec bandwidth which requires fibre to be provided to the premises. This can be achieved but can prove too costly for small businesses. 82% of businesses in the city employ less than 10 people.

OPPORTUNITIES

A strategic Digital B&NES response is being developed to address the above issues, to establish Bath as a Connected City and to facilitate digital access for businesses and residents in Bath.

Ultra-fast Broadband in the Enterprise Area & City Centre

Working with a commercial provider we will seek to make the Bath City Riverside Enterprise Area a national exemplar project for the delivery of ultra-fast broadband utilising B&NES Council’s extensive network of ducts across the city. In conjunction with the Local Enterprise Partnership we will seek to develop a “voucher” system to encourage SME’s to connect to broadband services.

Wireless Connectivity in the City Centre

Being able to access digital information wirelessly across the whole of the city centre would be of benefit to businesses, particularly those in the retail and tourism sectors, and to residents seeking information on goods and services.

The network of publicly owned street furniture provides an opportunity to work with a commercial provider to utilise selected furniture to deliver a wireless network across the city centre. This would provide a base for the development of a multi-platform information system available to residents, visitors and businesses in Bath.

Terabit West

Terabit West is a project to deliver a high capacity closed broadband network which can be used for research and product development. Connecting the Bath City Riverside Enterprise Area into the Terabit West network would enable high-tech companies to innovate and commercialise new ideas with less risk.

CONNECTED CITY

Promoting Access for the Digitally Excluded

Recycling redundant PCs to families in deprived wards in the city to facilitate their digital connectivity will enable them to better utilise the increasing amount of on-line information and access the range of goods and services available in the city.

Connecting New Development

Working with the WofE LEP we will research “best practice” in using the planning system to ensure new development sites in the sub-region’s Enterprise Zone and Enterprise Areas are fibre enabled.
VIBRANT MARKET TOWNS

Whilst Bath is the economic driver for the B&NES area, the market towns of Keynsham and the Somer Valley provide over a third of the employment outside the city with a total of 18,600 jobs, just over 20% of the total jobs in B&NES.

The market town areas also provide nearly 25% of the area’s GVA output and 24% of the total stock of businesses, although only 14% are in the priority business sectors. They are home to 28% of the area’s population, an indication that both areas suffer from high levels of out-commuting which is in excess of 60%.

This situation has been exacerbated by major factory closures including Caclbury in Keynsham and Polieaster, Alcan and Welton Bibby Baron in the Somer Valley. Keynsham has been particularly affected by the closure of Cadbury which has seen the town’s relatively small employment base reduced by 11% and a 5% reduction in the total number of retail units, although only 14% are in the priority business sectors. However the area remains relatively heavy on manufacturing which accounts for 20% of total employment compared with just 5% overall in B&NES.

The recovery in the Somer Valley is largely as a result of the availability and development of employment land at Westfarm Industrial Estate and the Bath Business Park at Peasedown St John. Both these employment sites are now almost fully built out and with vacancy rates for employment space at 3% or below across N.E. Somerset.

An overall co-ordinated approach to market town connectivity, access and traffic management is central to their continued vitality in order to reduce congestion, improve the environment and offer and ensure shoppers and businesses can access a supply of competitively priced, conveniently located car parking.

The Market Towns will retain their role as sustainable local service and employment centres for their local population and rural hinterland.
The Economic Strategy for Bath and North East Somerset (update 2014): Place Theme

New employment sites have ownership
In Keynsham and the Somer Valley the bring forward up to 1,800 jobs.
In the Somer Valley the expansion of employment land site at Old Mills could is proposed for employment use.
Together these developments could deliver up to 2,000 new jobs.
In the Somer Valley the expansion of the Midsomer Norton Business Centre, together with the development of the former Poolek factory and the 13.9ha employment land at Old Mills could bring forward up to 1,800 jobs.
In Keynsham and the Somer Valley the new employment sites have ownership and infrastructure constraints which need to be addressed.

SUSTAINABLE CONNECTED COMMUNITIES

ISSUES AND CHALLENGES

Connected Communities
The provision of an affordable, low carbon, accessible, integrated and reliable transport network which allows people to get around is essential to support economic growth in BANES.
Investment through the £80m Greater Bristol Bus Network programme and Better Bus Area 2013 funding has improved public transport services between the cities and market towns in the WofE.
In addition the Local Cycle Ambition Fund have provided facilities, including provision for cycle parking at major intersections.

Revitalising the town centres
An overall strategic approach to public realm improvements and traffic management is required in both town centres to improve their attractiveness and reduce congestion.
In Keynsham the potential future redevelopment of the Riverside and Fire Station sites, including the provision of the Leisure Centre, will need to contribute to local employment and strengthen the town’s overall offer.
In Midsomer Norton the development of the South Road car park site for food retail will bring local employment and reinforce the town’s overall retail offer. It also has the potential to act as the catalyst for the redevelopment of under-used and vacant buildings on the Churchills to provide a supply of larger retail units and contribute to building a “new heart” for the town centre.

OPPORTUNITIES

There are identified employment sites, development opportunities and vacancies of work which if progressed can address the issues identified above.

Bringing forward new strategic employment locations
In Keynsham the redevelopment of the Somerdale site includes the provision of 12,000sqm of new office space and reinforces the town’s overall retail offer.
In Midsomer Norton the development of the former Poolek factory and the 13.9ha employment land at Old Mills could bring forward up to 1,800 jobs.
In Keynsham and the Somer Valley the new employment sites have ownership and infrastructure constraints which need to be addressed.

Improving connectivity
In conjunction with the Connecting Devon & Somerset Partnership the roll out of superfast broadband to 100% of rural communities surrounding the market towns is being progressed with a view to completion by 2020.
The town centres’ roles as service and employment centres will be supported by the improved wireless connectivity which is planned to deliver in conjunction with a selected service provider.

However there are further challenges, especially given the important role Bath plays in the economy of the wider area and the planned level of overall employment growth in the Enterprise Area:
• There will be a need to further expand Park & Ride (P&R) facilities, including provision of the access for Bath, to address parking pressure and improve the connectivity between Bath and the city centre.
• The frequency of and accessibility to rail services is limited leading to congestion at peak times.
• The A3 and A4 routes in the city and along the corridor to Bristol suffer from congestion at major intersections.

The most commonly accepted definition of a ‘green’ job is one created within the range of businesses included in the low carbon-environmental goods and services sector (LCEGS). This includes environmental remediation, water supply, waste treatment, energy efficiency and low carbon energy. LCEGS is the most productive sector in BANES, with an average GVA of £183,000/ job (ref).

However, it is now becoming more widely understood that the term ‘green’ is limited to business and environmental sustainability and there are many other economic opportunities arising from the shift to a low carbon and environmental sustainable economy, especially given the increasing challenges of rising resource and energy costs and climatic disruption.

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The development of Sustainable Connected Communities has four key components:

1. Accessibility to major employment locations is improved allowing businesses to draw from a wider labour catchment area and residents to exercise sustainable transport options.

   Improvements to rail based travel will provide employers with access to a larger pool of skilled workers and help attract new business investment. The implementation of Metro West Phase 1 will allow additional train services to be provided between North Somerset, Bristol and Bath. Alongside Metro West, future investment in a possible new stations package, in particular Saltford and Corsham in Wiltshire, could improve accessibility for commuters and visitors.

   The introduction of smart ticketing, using the Sustainable Transport Fund and the electrification of the Great Western main line will also enhance services and improve accessibility.

   Further investment in road based transportation, potentially through the sub-regional City Deal, will facilitate the next phase of P&R provision, the delivery of a new P&R east of Bath and the implementation of dedicated bus lanes along the A4 and A37 to speed access into the city centre.

2. Existing businesses and residents are enabled to reduce their energy and resource use and adapt to the future climate:

   Local businesses are supported to reduce resource use and adapt to climate change by signposting to assistance and resources available through the LEP’s Growth Hub. Existing and emerging policy frameworks encourage high energy standards in new commercial buildings and the retrofitting of commercial buildings is supported through the LEP and sub-regional partners. Waste is used as a resource through a thriving LCEGs sector and an emerging “circular economy”.

   The “Energy@Home” project encourages residents to reduce their domestic energy consumption and supports the retrofitting of existing domestic properties. Innovative ways will be explored to ensure new buildings are built to a high standard of energy performance.

3. Sustainable businesses and the Low Carbon & Environmental Goods & Services (LCEGS) sector are supported to grow

   Energy retrofitting for existing buildings supports local providers and builds local supply chains. Jobs within local businesses are created and safeguarded by the increase in retrofitting. Local renewable energy projects are implemented using social and community enterprise models which retain revenue and jobs in the local area.

   Local food production and supply is increased, enhancing the local multiplier effect, creating income & job growth and improving the quality of life and cultural offering

   Local businesses are encouraged and supported to purchase and sell more locally produced food & energy. This increases the attractiveness of the area as an employment location, creates work for local environmental businesses and attracts new business investment.

   Retaining economic activity in the local economy encourages the growth of the LCEGS sector and the high value jobs it provides.

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HOUSING

ISSUES AND CHALLENGES

Bath and North East Somerset is a great place to live and demand for housing is projected to increase. Housing development has been constrained by the economic situation and restricted land supply. The housing shortage pushes up prices and rents, making affordability more challenging for people on low or middle incomes. Home ownership has decreased and house prices are higher than the South West and national averages.

Social rented housing is still the most affordable tenure and demand for housing is projected to increase. Neighbouring local authorities. Homelessness can be prevented by timely advice and intervention and the provision of suitable alternative housing. There are fewer households in temporary accommodation than in neighbouring local authorities. The above issues need to be addressed in a co-ordinated way to try and ensure that in the future:

What needs to happen:

• facilitating the delivery of new homes including affordable homes;
• making the best use of available land supply and funding opportunities;
• building more new homes;
• supporting mixed tenure developments of new market and affordable housing options including specialist and supported housing;
• helping residents to thrive by incorporating good community infrastructure on new housing developments;
• commissioning adaptable and sustainable homes for independent living.

OPPORTUNITIES

Build more new homes

A balanced housing market requires an increased supply of new homes. New homes must be built in the right place and be the right specification to meet changing housing needs. For every £1 spent on housing £2.41 is generated in the wider community. Developing new homes will create employment, provide homes for people that want to live and work in B&NES and have a positive impact on the economic growth of the area.

Improve existing homes

A choice of high quality homes requires improvements to the existing housing stock. Improved homes will help businesses attract and retain the staff they need enabling economic growth and the creation of local employment opportunities. Providing a good range of housing for people that want to live and work in B&NES will require partnership working to:

• Enable financial assistance to vulnerable owner occupiers for home improvements;
• Enforce minimum standards in rented housing and offer guidance;
• Support adaptations and better energy efficiency.

Preventing homelessness and tackling the main causes of homelessness

Building and improving homes will help to ensure that everyone is better housed. The Council runs Homesearch to enable best use of affordable housing for those in housing need and works in partnership with landlords and the voluntary and community sector to provide support and advice to facilitate access to housing in order to:

• Continue to prevent homelessness and protect vulnerable homeless people;
• Support the Homelessness Partnership to help homeless people into meaningful employment;
• Contribute to public services and other community activity to reduce the numbers of people in need of help and support;
• Contribute to public services, reduce council tax, reduce crime and support the local economy.

The local housing market is balanced and integrates a choice of high quality homes including affordable homes in thriving vibrant, sustainable communities.

Listed and historic buildings are an asset but can be problematic and costly to improve. The district housing stock is older than the national average. One in three (31%) private sector properties was built more than 100 years ago and a quarter of housing in the private rented sector fails to meet minimum expected standards. It is estimated that preventing ill health caused by poor housing conditions such as cold, damp, house fire or accidental falls could save local health services £5m each year and as the older population increases this situation could get worse.

Most residents enjoy good health and a good standard of living but in more deprived areas, communities experience high rates of unemployment, ill health, low income and difficulty accessing housing. These issues can lead to a high rate of becoming homeless and leaving home, tenancy termination and violence are the most common triggers. Homelessness can be prevented by timely advice and intervention and the provision of suitable alternative housing. There are fewer households in temporary accommodation than in neighbouring local authorities. The above issues need to be addressed in a co-ordinated way to try and ensure that in the future:

• Work to reduce the incidence of homelessness and prevent re-offending;
• Facilitate access to housing in order to;
• Continue to prevent homelessness and protect vulnerable homeless people;
• Support the Homelessness Partnership to help homeless people into meaningful employment;
• Contribute to public services and other community activity to reduce the numbers of people in need of help and support;
• Improve and develop new homes in the right place.

The local housing market is balanced and integrates a choice of high quality homes including affordable homes in thriving vibrant, sustainable communities.
For B&NES to have an economy with sufficient quality, sustainable jobs at all levels and for local residents to have the skills to enable them to progress through the labour market and earn incomes, which will enable them to achieve their economic potential and competitiveness.

**INTRODUCTION**

The residents and work force of B&NES play a crucial role in enabling our growth aims and objectives. So far the Strategy has set out how we intend to support the development of the local economy and infrastructure, but it is also necessary to ensure that every resident is supported in achieving a healthy and sustainable working life.

To deliver the aim of the People theme, there needs to be a concerted effort in engaging all members of the community to ensure that a reasonable level of equity and issues of health & wellbeing are addressed.

Further to this if the outcome of the B&NES Health and Wellbeing strategy to...

"Reduce Health inequality and improve health & wellbeing in Bath & North East Somerset by helping people to stay healthy, improving the quality of people’s lives and creating fairer life chances."

...are to be achieved then support must be given not only to encourage business and employment growth, but also issue of worklessness and its impact on health and wellbeing need to be addressed.

**2 KEY STRATEGIC PRIORITIES**
ISSUES AND CHALLENGES

Bath and North East Somerset has managed to weather the storm of the economic crisis of 2008 and the subsequent recession. Unemployment has remained below the national average and standards of living compared to the rest of the country are relatively high. However, there are still issues to be addressed. The B&NES labour market grew by 9.1% between 2001 and 2011 compared to the higher growth of the respective working age populations of the West of England (9.5%) and England (9.3%) respectively.

Residents in B&NES in 2013 earned £411.50 per week (gross) compared to £420.30 across the West of England and £421.60 nationally, which is especially concerning when contrasted with house prices being over 40% higher than the national average. Also there are unacceptable levels of deprivation in B&NES, with 20% of families not earning a living wage and 67% of people at risk of eviction from their homes being in work.

Skills

In relation to skills, B&NES outperforms the West of England sub-region and England, with 36% of residents having NVQ4+ qualifications, compared to 33.4% across the West of England and 29.8% nationally.

A total of 57.1% of B&NES employees in employment are in ‘higher skilled occupations’ compared to 54.4% in the West of England and 52.5% nationally.

Worklessness

Closely related to low skills levels, worklessness is often characterised by multiple disadvantage. Some individuals face a number of barriers to participation in the labour market and are at a higher risk of being workless.

For employers there is a need to improve the understanding of Universal Credit provision and ensure their workforce requirements are reflected in the training and skills opportunities, and in-work support services that are offered.

Unemployment rates

The low rates of unemployment in B&NES are not an initial area of concern, however when the age of claimants and duration of claims is explored a number of issues arise.

Just under one quarter (23.0%) of claimants are classified as ‘youth unemployed’ aged 18 to 24. Broadly similar rates are found across the West of England, but B&NES has seen a 9.4% fall in the share of youth unemployed compared to a 3.8% fall across the West of England and a 6.4% fall in the share nationally.

Analysis of the share of claimants who have been claiming for more than 12 months shows that the share is lower in B&NES than across the West of England and nationally, but that it has risen at a comparatively higher rate than across the benchmark areas; 24.6% of B&NES’ claimants have been unemployed for more than 12 months compared to 26.2% across the LEP area and 29.6% nationally however, this share grew by 164.2% across B&NES compared to 147.5% growth across the West of England and 93.5% growth across England.
The Economic Strategy for Bath and North East Somerset (update 2014): People Theme

People and their skills are a major factor in achieving local economic growth, and are therefore also a major determinant of the future prosperity, resilience and wellbeing of the local area.

The Employment & Skills Plan seeks to meet the needs of local residents and support areas of strength in the labour market to help fulfill the economic growth aims of the B&NES Economic Strategy. The local area needs to maintain and increase its levels of economic growth at a time when even more local jobs are needed as a result of the raising of the participation age (RPA) for young people, the raising of the retirement age and the resulting effects on health and wellbeing need to be addressed with a focus on enabling residents to improve their financial and employment mobility.

Successful interventions will be dependent on close joint working between a range of organisations, agencies and partners. Central to this will be coordinating priorities and actions with DWP, Council Services, Third Sector organisations and workforce support providers locally.

There are three key strategic areas for action: Social Mobility, Business Growth and Increasing the Return on Investment and local benefits accruing from new developments in the area.

Social Mobility
To tackle the issues of unemployment and in work poverty within B&NES, a range of interventions are required to meet a range of needs. If future issues with the labour market are to be avoided, interventions aimed at the prevention of unemployment and low skills should also be developed.

OPPORTUNITIES

- Providing information advice & guidance
- Delivering employability & vocational skills
- Encouraging work experience in Secondary and Further Education
- Increasing residents participation in FE/HE
- Promoting entrepreneurship and self-employment

Tackling Unemployment

Unemployment and worklessness in B&NES is of a comparatively low level, however in ensuring the economic and social sustainability of the present and future labour market this issue still needs to be addressed.

There are a number of groups of people who require specific interventions in B&NES including:
- Thosie not in education, employment or training (NEET) & Younger Claimants
- Young People Leaving Care (16-21)
- Older long term unemployed
- Those suffering from physical and mental health issues
- Single Parents

Each group has complex needs but there are some generic areas of support that will benefit these residents, which include:
- Tackling barriers to work
- Improving basic skills and employability
- Encouraging local recruitment and development opportunities
- Promoting apprenticeships
- Raising educational attainment/ workforce development

Employment Sectors

Employment in B&NES has a much higher proportion of public sector jobs than found across either of the benchmark areas and a much smaller proportion of private sector employment; just 63.6% of employment in B&NES workplaces is in the private sector compared to 64.6% across the rest of England and 67.4% nationally.

This is a relatively serious competitive issue, likely to drive down B&NES’ GVA per worker (as public sector GVA per worker is generally much lower than a private sector equivalent). Growth in self-employment in the private sector; just 63.8% of workplace earnings in B&NES grew by just 4.7% compared to 17.9% across the West of England and national growth; self-employment much smaller proportion of private sector employment in B&NES workplaces is in the private sector compared to 64.6% across the West of England and 67.4% nationally.

Growth in self-employment in B&NES between 2001 and 2011, at 14.2%, was impressive but lagged considerably behind the West of England and national growth; self-employment grew by 23.2% across England and national growth; self-employment considerably behind the West of England and national growth; self-employment. A key driver of this lower growth is likely to include the rise of part-time employment in B&NES.

In order for B&NES to survive and prosper into the future, the local area needs to maintain and increase its levels of economic growth which will enable it to support its population. In addition issues of social mobility need to be addressed with a focus on enabling residents to improve their financial and employment mobility.

The local area needs to maintain and increase its levels of economic growth at a time when even more local jobs are needed as a result of the raising of the participation age (RPA) for young people, the raising of the state retirement age and changes to the welfare system.

... (Continued from previous page)
The Economic Strategy for Bath and North East Somerset (update 2014): People Theme

To ensure that the B&NES economy grows sufficiently to support the needs of the labour market, it is necessary to ensure that businesses have the opportunity to increase their productivity through well skilled employees. UK Commission for Employment & Skills labour market forecasts suggest that by 2022 nearly half of all employment will be for skilled roles. Managerial, professional and associate professional occupations are projected to grow three times faster than the average for UK employment as a whole.

There is also a need to maximise the support available to people wishing to start their own business, which will if successful help to provide a diverse labour market. Support for new business start-ups, the development of social enterprises and delivering new business investment into the area will be important elements in this. There is also a need to engage more businesses in training and skills development through:

- Focussing on employment and training development in the Core Sectors
- Improving the links between businesses and education
- Improving graduate retention levels
- Support to promote employment growth in the Key Sectors

Engagement with the Local Enterprise Partnership will be essential in delivering the area’s aspirations on business growth & employment. The LEP Strategic Economic Plan recognises People and Skills as one of the levers for growth.

We will develop a well-motivated, educated workforce with the right skills to meet local business needs. Business-led skills development will address the current and future skills needs of business whilst meeting our aspirations for growth, sustainability and inclusiveness. All education and training activity will have line of sight to employment.

Utilising funding from the government’s Local Growth Fund there will be investment in the Employability Chartermark, which brings business and education together.

The West of England Skills Plan sets out the People & Skills objectives that will be delivered and promotes a co-ordinated approach to Labour Market intelligence which will help to inform B&NES priorities and actions.

Engagement with the Local Enterprise Partnership will be essential in delivering the area’s aspirations on business growth & employment. The LEP Strategic Economic Plan recognises People and Skills as one of the levers for growth.

To date TR&T provisions have been incorporated into developments at BWR, Polestar Paulton and Somerdale Keynsham and included in the procurement process for the Keynsham Town Hall redevelopment, Grand Parade Undercroft and Leisure Services contract.

BUSINESS GROWTH

Support for new business start-ups, the development of social enterprises and delivering new business investment into the area will be important elements in this. There is also a need to engage more businesses in training and skills development through:

- Focussing on employment and training development in the Core Sectors
- Improving the links between businesses and education
- Improving graduate retention levels
- Support to promote employment growth in the Key Sectors

In its role as a planning and regulatory authority B&NES Council can play a strong influencing role in the wider business community and provide direct support for a range of projects and programmes to address worklessness and lower levels of employability. In particular the Council can ensure that as the economy recovers and new developments come forward they contribute to local employment and training provision through:

- Targeted Recruitment & Training (TR&T) outcomes embedded into S106 planning agreements
- TR&T outcomes contributing to the social value toolkit within the “Think Local” procurement Strategy
- Support for apprenticeships, traineeships and work experience placements

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- Targeted Recruitment & Training (TR&T) outcomes embedded into S106 planning agreements
- TR&T outcomes contributing to the social value toolkit within the “Think Local” procurement Strategy
- Support for apprenticeships, traineeships and work experience placements
Leisure and culture help to make Bath and North East Somerset a ‘beautifully inventive’ dynamic place, attracting residents to settle here to live and work and drawing visitors from the UK and abroad to experience the area. The area is a unique tourist destination, combining a rich heritage experience with a wholly contemporary range of cultural and leisure attractions for visitors and residents alike.

It is estimated that 80% of B&NES residents engage in arts, cultural or sporting activity at least once a month and in 2013/14 over 500,000 people attended outdoor events. High profile leisure, sports and cultural events and attractions add to the national and international reputation of Bath and North East Somerset.

Participation in physical and sporting activity and in culture and the arts is acknowledged to be beneficial both to the individual and the wider community. It can reduce social isolation; improve personal health & wellbeing and build capacity and sustainability in communities. Having a healthier workforce can also benefit local businesses.

New businesses are attracted to locate to a place that offers so much variety of culture and leisure opportunities for their employees.

However there are a number of challenges to overcome:

- Over 70% of adults are not active enough to benefit their health: the health cost of this inactivity is estimated at £33m annually
- Local sports and cultural venues are in a poor condition and in need of investment which hampers participation
- There is a lack of engagement from specific communities in arts and cultural activity
- Many leisure and cultural businesses are small and reliant on volunteer help

Issues and Challenges

Leisure and Culture

Opportunities

Enabling investment in new facilities, developing a strategic approach to events and promoting employer engagement will address a number of the above issues.

Enabling investment

Negotiations on the contract for the delivery of leisure services in B&NES provide the opportunity to secure investment in new leisure facilities and deliver an increase in the numbers of local residents using local leisure centres.

Maintaining the area’s profile as a centre for major events and sport

The development of a co-ordinated year round calendar of events and activities, including the attraction of further major national events, would provide a significant boost to the visitor economy and help to engage individuals and local communities.

Tailored business support

Providing tailored advice and support on issues such as business planning, procurement and contracting and employment / volunteering issues as part of the delivery of a wider package of business support in B&NES will assist the sector’s smallest businesses. Small-scale cultural organisations in particular can benefit from this type of targeted support.

Employer engagement

Improving employee health & wellbeing is likely to lead to improved productivity. More employers need to be encouraged to develop ‘Active Workplace’ schemes.

This approach is embedded in the Health & Wellbeing and ‘Fit for Life’ Leisure strategies as follows:

Helping people to stay healthy

- Work with local employers to create healthy, active workplaces which improve the health of the working age population.
- Create opportunities for volunteering to successfully increase people’s physical activity and promote good mental health and well-being as well as increasing the potential for employment.

Widening participation

There has historically been a lack of engagement in leisure and culture activities from certain communities in B&NES. In its role as a commissioner of services the Council can seek to address this issue through targeting activities and resources.

A Strategic Plan for Events

The development of a co-ordinated year round calendar of events and activities, including the attraction of further major national events, would provide a significant boost to the visitor economy and help to engage individuals and local communities.

Leisure and Culture
## APPENDIX 2

### ECONOMIC STRATEGY REVIEW: ACTION PLAN 2014–2020

<table>
<thead>
<tr>
<th>Economic Strategy Theme</th>
<th>Rationale</th>
<th>Action</th>
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<th>Outcome</th>
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<tbody>
<tr>
<td><strong>BUSINESS - PROMOTING APPROPRIATE BUSINESS GROWTH AND INVESTMENT</strong></td>
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<tr>
<td>1. Ensure opportunities from being part of a successful West of England economy are maximised</td>
<td>Workplace and resident employment growth in the West of England has outperformed the national economy</td>
<td>Resource and enhanced engagement with and influence on the West of England Local Enterprise Partnership</td>
<td>Investment secured in enabling infrastructure for key development projects and skills initiatives</td>
<td>Target 15% of LEP funds</td>
<td>Council Support: LEP &amp; BPA</td>
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<td>Liaise with Wiltshire &amp; Somerset to ensure cross boundary co-ordination on economic issues</td>
<td>Labour market issues addressed</td>
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<td>Resource our continued engagement with and influence on the West of England Local Enterprise Partnership</td>
<td>New development sites brought forward in the Bath City Riverside EA</td>
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<td>2. Promote B&amp;NES as a location for inward investment to assist in achieving future employment growth targets</td>
<td>To achieve our Growth Ambition will require 15,600 gross new jobs to be created by 2030</td>
<td>Agree our economic story and vision as the basis of demonstrating our competitive identity</td>
<td>Increasing numbers of businesses are attracted to the area</td>
<td>Target 1,930 new jobs by 2020</td>
<td>IBB Support: Council &amp; BPA</td>
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<td>Establish a marketing brand for the Bath City Riverside EA</td>
<td>More modern office space is built</td>
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<td>Develop specific investment propositions as the basis for proactive engagement with the BIBB team</td>
<td>An increase in the number of higher waged, higher skilled knowledge based jobs available locally</td>
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<td>3. Facilitate the growth of key knowledge-based sectors locally</td>
<td>32% of employment in B&amp;NES is in the knowledge economy</td>
<td>Establish a relationship with key companies in the knowledge economy to understand their issues and priorities</td>
<td>Proactive business engagement programme 500 companies actively engaged by 2025</td>
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<td>Council Support: LEP &amp; key partners</td>
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<td>Maintain and develop key sector business networks and strengthen links with the H.E. sector</td>
<td>Business support policies are informed and help businesses in these key sectors develop and offer more employment opportunities</td>
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<td>Actively promote business development services to key sector companies</td>
<td>Business relocations are prevented</td>
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5. Facilitate access to high growth and specialist support services for B&NES businesses

BANES has above average representation and growth in the Knowledge Economy sectors. Work with the LEP B&NES Support Group, Business West and private sector partners to ensure referrals and local access to new and existing businesses receiving support.

PROVIDING A COMPREHENSIVE BUSINESS SUPPORT SERVICE FOR SMEs

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<th>Economic Strategy Theme</th>
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<tr>
<td>PLACE - SUCCESSFUL CITY</td>
<td>To maintain Bath’s role as a successful and sustainable international visitor destination</td>
<td>The city attracts over 5.6m visitors annually spending £374m, supporting 15,500 jobs and generates £315m GVA annually. The wider visitor economy yields £374m visitor spend. The city attracts over 5.6m visitors annually spending £374m, supporting 15,500 jobs and generates £315m GVA annually. The wider visitor economy yields £374m visitor spend.</td>
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<td>Council Support: LEP / BPA</td>
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6. Maintain the delivery of local commissioned and tailored support services for new and existing companies in BANES

The Economic Strategy for Bath and North East Somerset (update 2014): Appendix 2

6. Ensure the business support services for new and existing companies are addressed

New and established businesses receiving support.

New businesses start.

Businesses are supported, business success rates are improved and jobs are better protected locally.

Council Support: LEP and providers

7. Reaffirm the working relationship between the Council and the business community

To achieve our Growth Ambition we will require 11,800 new homes to be created by 2030.

Establish the Bath and North East Somerset Economic Partnership as the major employment centre and economic driver for the BANES area

The city attracts over 5.6m visitors annually spending £374m, supporting 15,500 jobs and generates £315m GVA annually. The wider visitor economy yields £374m visitor spend.

The city attracts over 5.6m visitors annually spending £374m, supporting 15,500 jobs and generates £315m GVA annually. The wider visitor economy yields £374m visitor spend.

To maintain Bath’s role as the major employment centre and economic driver for the BANES area

Bath provides 75% of the areas employment and 49% output and is home to 55% of the areas businesses.

Complete and publish a Masterplan and Delivery Plan for the Bath City Riverside Enterprise Area. Business plans developed for enabling infrastructure for Innovation and Bath Wester Riverside

New commercial quarters developed in and around the edge of the city centre. New Central Business District created.

New development of 1,000+ homes created.
### Economic Strategy Theme: VIBRANT MARKET TOWNS

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<tr>
<td>Ensure the Market Towns retain their role as sustainable local service and employment centres</td>
<td>The market towns provide two thirds of the employment in B&amp;NES outside the city</td>
<td>Facilitate the development of new strategic employment locations</td>
<td>Delivered the agreed regeneration scheme for Radstock Centre</td>
<td>H&amp;I sector Support: Council, LEP operators</td>
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<td></td>
<td>Work with developers and operators to bring forward a new Creative Hub</td>
<td>Prepare Action Plans for Keynsham and Midsomer Norton Town Centres including a strategy for attracting new business investment.</td>
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<td>Prepare a Workspace Strategy for Keynsham and the Somer Valley</td>
<td>Deliver the agreed regeneration scheme for Radstock Centre</td>
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<td>Promote the development of key housing sites</td>
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### Economic Strategy Theme: IMPACT MARKET TOWNS

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<tbody>
<tr>
<td>Provide up to 3,500 gross new jobs by 2030</td>
<td>This market town provides the third of the employment in B&amp;NES outside the city</td>
<td>Facilitate the development of new strategic employment locations</td>
<td>Potential for up to 3,500 gross new jobs by 2030</td>
<td>Council Support: local partners</td>
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<td></td>
<td>Prepare a Workforce Strategy for Keynsham and the Somer Valley</td>
<td>Prepare Action Plans for Keynsham and Midsomer Norton Town Centres including a strategy for attracting new business investment</td>
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<td>Deliver the agreed-regeneration scheme for Radstock Centre</td>
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<td>Promote the development of key housing sites</td>
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### Economic Strategy Theme: 11. Develop Bath’s role as a centre for Enterprise, Innovation & the Knowledge Economy

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<tbody>
<tr>
<td>75% of knowledge based and priority sector employment is based in the city</td>
<td>In conjunction with Bath University facilitate the expansion of the Set Squared Innovation Centre at Carpenter House</td>
<td>Significant expanded innovation facilities with industrial innovation space; “Landing Pad” facility established in city centre New Creative Hub established</td>
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<td>H&amp;I sector Support: Council, LEP operators</td>
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<td>Promote the development of additional incubation space for newly relocated or expanding small businesses</td>
<td>Work with developers and operators to bring forward a new Creative Hub</td>
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### Economic Strategy Theme: 12. Ensure businesses and residents have access to appropriate broadband and digital services

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<tbody>
<tr>
<td>Access to broadband identified as the top priority for businesses</td>
<td>Implement Digital BANES initiatives in Bath</td>
<td>CD&amp;S role out completed in BANES by 2018</td>
<td>CD&amp;S programmes delivered to 100% rural properties</td>
<td>CD&amp;S, providers</td>
</tr>
<tr>
<td></td>
<td>Establish Bath City Riverside E.A. as a national exemplar ultra-fast broadband project</td>
<td>Bath City Riverside E.A. connected to Terabit West high capacity broadband network</td>
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<td>Wireless connectivity enabled in Bath city centre and the Enterprise Area</td>
<td>99% of rural properties have access to minimum 2Mbps broadband</td>
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<td>CD&amp;S role out completed in BANES by 2018</td>
<td>More business investment attracted</td>
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<td>Improved accessibility to and attractiveness of city centres</td>
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</table>

### Economic Strategy Theme: 13. Ensure the River Avon river quality and quantity meet modern standards

<table>
<thead>
<tr>
<th>Rationale</th>
<th>Action</th>
<th>Output</th>
<th>Outcome</th>
<th>Lead</th>
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</thead>
<tbody>
<tr>
<td>Maintain and improve River Avon river quality and quantity</td>
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14. Improve access to new and existing employment centres

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</tr>
</thead>
<tbody>
<tr>
<td>Sustainable Communities</td>
<td>Contribute to the delivery of a Sustainable Economy</td>
<td>Energy costs result in £157m by 2020</td>
<td>Up to 2,500 jobs enabled by 2020</td>
<td>Council Support: LEP / DfT</td>
<td>Council Support: LEP / DfT</td>
</tr>
</tbody>
</table>

15. Promote Sustainable Local Economic Growth, Making the Development of a Sustainable Economy Sustainable Connect - Communities

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</tr>
</thead>
<tbody>
<tr>
<td>Sustainable Communities</td>
<td>Contribute to the delivery of a Sustainable Economy</td>
<td>Average house prices up £100m per annum</td>
<td>Pal service improved on the Stato / Keynsham / Bath</td>
<td>Council Support: LEP / DfT</td>
<td>Council Support: LEP / DfT</td>
</tr>
</tbody>
</table>

16. Develop a “balanced” local housing market that integrates a choice of high-quality homes including affordable homes in thriving vibrant communities

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<tbody>
<tr>
<td>Sustainable Communities</td>
<td>Contribute to the delivery of a Sustainable Economy</td>
<td>Average house prices £110m per annum</td>
<td>Deliver an effective Homelessness Service</td>
<td>Council Support: LEP / DfT</td>
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17. Preventing low skills and unemployment in young people

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18. Young People Leaving Care 16-21

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<tbody>
<tr>
<td>People - Employment &amp; Skills - Social Mobility</td>
<td>Contribute to the delivery of a Sustainable Economy</td>
<td>Workforce Programme: providing effective pathway and training opportunity</td>
<td>Workforce Programme: providing effective pathway and training opportunity</td>
<td>Council Support: LEP / DfT</td>
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19. MEETS

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<tr>
<td>People - Employment &amp; Skills - Social Mobility</td>
<td>Contribute to the delivery of a Sustainable Economy</td>
<td>B&amp;NES MEETS to be engaged in education, training or employment, with an overall 10% reduction in those not engaged</td>
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<td>Council Support: LEP / DfT</td>
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20. Young People with Physical & Mental Health Learning Difficulties & Disabilities:

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<tr>
<th>Economic Strategy Theme</th>
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<tbody>
<tr>
<td>People - Employment &amp; Skills - Social Mobility</td>
<td>Contribute to the delivery of a Sustainable Economy</td>
<td>Issues of long term worklessness for young people with physical or mental disability, and learning difficulties.</td>
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<td>Council Support: LEP / DfT</td>
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22. Promote Sustainable Local Economic Growth, Making the Development of a Sustainable Economy Sustainable Connect - Communities

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<tr>
<td>Sustainable Communities</td>
<td>Contribute to the delivery of a Sustainable Economy</td>
<td>Reduce costs to rise</td>
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<td>People - Employment &amp; Skills - Social Mobility</td>
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<td>B&amp;NES MEETS to be engaged in education, training or employment, with an overall 10% reduction in those not engaged</td>
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<tr>
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Appendix 2
### The Economic Strategy for Bath and North East Somerset (update 2014):

**Appendix 2**

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>21. Long term ESA claimants &amp; Other Claimants</strong></td>
<td>Over 4% of working age population claiming IB &amp; ESA and approximately 60% claiming over 2 years.</td>
<td>Develop engagement and support programmes to enable former IB and existing ESA clients to enter training and employment.</td>
<td>10% increase in the numbers of ESA claimants and other claimants progressing to employment</td>
<td>Reduction in the level of ESA claimants</td>
<td>DWP Support: Council &amp; Sirona, VCSO</td>
</tr>
<tr>
<td><strong>22. Young parents 16-19 &amp; Lone parents 19+</strong></td>
<td>More single parents to enter labour market due to Universal Credit change.</td>
<td>Develop package of engagement and support to enable young parents &amp; lone parents to enter the labour market.</td>
<td>Increased numbers of young and lone parents progressing to training and gaining employment</td>
<td>Reduction in the level of Lone Parent Income Support and ESA claimants</td>
<td>DWP Support: Council, VCSO</td>
</tr>
<tr>
<td><strong>23. Business growth</strong></td>
<td>Value of social enterprise to the local community and wider economy.</td>
<td>Targeted social enterprise start up and support service.</td>
<td>Specific business support and start up IAG skills and set up of a small loans fund.</td>
<td>Increased social enterprise start up</td>
<td>Council Support: L&amp;TI, Cool Ventures, Bristol &amp; B&amp;NES social enterprise networks</td>
</tr>
<tr>
<td><strong>Growth of employment opportunities through inward investment</strong></td>
<td>Low growth of new start Indigenous business</td>
<td>Develop a soft landing skills and employment package, delivering recruitment and training services for inward investors in partnership with DWP, LEP and training providers.</td>
<td>Information available for inward investors on the local labour market and the soft landing packages available, including supported recruitment events and sector based work academies.</td>
<td>Increased in the number of inward investors engaging with the inward investment package and increases in local residents employed through these opportunities</td>
<td>Council Support: L&amp;TI, Cool Ventures, Bristol &amp; B&amp;NES social enterprise networks</td>
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<tr>
<td><strong>24. Core Business Job related Training/ work based learning/ Recruitment support</strong></td>
<td>Low productivity of B&amp;NES work force</td>
<td>Engage businesses and employees to participate in work based learning opportunities through a coordinated business visit and events programme. Coordination of employment opportunities especially in Health &amp; Wellbeing, Tourism/ Leisure and Retail</td>
<td>Increased in participation of business and employees in work based learning opportunities. Promotion of employment opportunities to priority residents.</td>
<td>Supported by at least one event per sector per year and ongoing business visit and engagement programme.</td>
<td>Learning P’ship Support: LEP Council</td>
</tr>
<tr>
<td><strong>25. Improving links between business &amp; education</strong></td>
<td>Reported issues in employability skills of young people and business struggling to recruit.</td>
<td>Develop network of business willing to link with schools, FE &amp; HE by working with business support organisations including the FSB.</td>
<td>Coordinated access to work experience and employment opportunities. More local business engaged with education provider</td>
<td>Increased levels of employment growth</td>
<td>Learning P’ship Support: LEP, B&amp;NES, Schools, business support networks</td>
</tr>
<tr>
<td><strong>26. Key Growth Sectors</strong></td>
<td>Need to generate 10,000 new jobs.</td>
<td>Promote sector based skills and employment activities through visit and events programme. Promotion of employment opportunities through sector support organisations.</td>
<td>Priority sectors benefiting from enhanced interactions with FE/HE; support through LEP skills teams; support in advertising employment opportunities; access to skills funding for their work force. Supported by at least one event per sector per year and ongoing business visit and engagement programme.</td>
<td>Increased levels of employment growth</td>
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### Economic Strategy Theme: TACKLING UNEMPLOYMENT AND PRIORITY RESIDENTS GROUPS

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<tr>
<td>27. Securing a local Return on Investment</td>
<td>Council as significant employer, planning authority and procurer of goods works and services</td>
<td>Ensure Targeted Recruitment &amp; Training (TR&amp;T) contribute to the social value tool kit within the “Think Local” procurement strategy. Include TR&amp;T outcomes in Planning Contributions Strategic Planning Document(SPD) Support the recruitment of apprenticeships and provision of work experience, internships and work placements.</td>
<td>10% increase in the number of apprenticeships, work experience and training opportunities available through the procurement process Number of apprenticeships, work experience and training opportunities available on development sites. Number of apprenticeships, work experience and training opportunities offered by the Council.</td>
<td>Reduced levels of unemployment in labour market deprived areas and priority residents.</td>
<td>Council Support : LEP Skills Team</td>
</tr>
<tr>
<td>28. Developing engagement in leisure &amp; culture</td>
<td>Lack of engagement from specific communities Over 70% of adults not active enough</td>
<td>Deliver a programme of investment in leisure facilities in B&amp;NES Develop a proposal for a new cultural/performing arts venue in Bath Maintain the area’s profile as a centre for major events and sport &amp; promote increased community engagement through the development of a year round programme of events and festivals Work with local employers to promote engagement in “active workplace” schemes and volunteering programmes Provide tailored support to small business and VCS providers in the leisure and cultural sectors</td>
<td>More local residents and workers participating in physical and cultural activity 20% increase in local residents attending events More sustainable local leisure and cultural businesses</td>
<td>Improved health &amp; wellbeing for local residents and workers</td>
<td>Council Support : Creative &amp; Cultural Forum, sector networks</td>
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