

# Leeds - A Summary

## Location Leeds

- Covers 552 sq km, and is the second largest Metropolitan District in England with a population of 798,800 (mid-2010 population estimates).
- Located near the geographical centre of the UK at the end of the M1
- 2 hours from London by train on the electrified East Coast Main Line
- The region's major airport, Leeds Bradford International Airport, handled 2.8m in 2008 and is predicted to rise to over 5m by 2016.

## Leeds and the Region

### Leeds is .....

- the regional capital of Yorkshire and the Humber
- the location of the region's integrated government office and Regional Development Agency, Yorkshire Forward
- the largest employment centre with 427,800 people working in Leeds
- expected to provide 30% of the region's additional 131,000 jobs between 2011 and 2021
- the regional centre for finance and business services
- the region's main centre for knowledge-based industries

### Leeds has .....

- 17% of the region's employment and 14% of its businesses
- 27% of the region's finance and business services employment
- 36% of employment in legal services
- 11% of manufacturing employment
- 18% of print and publishing employment
- The region's largest retail centre

## The Economy

- In 2009 GVA was £17.9bn, growing by almost a half in the last decade.
- Over the decade to 2009, there was a 10% increase in FBS share, with a 7% decline in the production sector.
- In terms of employment structure, Leeds is the second most diverse of any major GB city
- The city is not dependent on a limited number of companies or sectors
- In 2010 there were 24,130 active businesses (VAT/PAYE) – second only to Birmingham
- There were over 27,500 business units in Leeds in 2008 (VAT registered)
- There are 36 plcs in Leeds and with over 50 elsewhere in the region

### Employment

- Outside of London, over the last 10 years employee jobs in Leeds remained static at 388,700. Employee jobs grew 2% in Leeds City Region, almost 4% in Y&H and over 2% in GB.
- Between the recession years 2008 and 2010 employee jobs fell by almost 30,000 – Birmingham and Glasgow had higher losses
- Total employment is 427,800 in 2011, with 389,400 employees and 38,300 self employed (Yorkshire Forward/Experian Business Strategies, Spring 2011)

- These forecasts suggest 39,500 jobs will be created over the next decade

#### **Sectors** (employees only - excludes the self-employed)

- Over 180,000 people work in knowledge intensive activities, second only to Birmingham
- Second largest employer outside London for finance & business services
- Employees in finance and business services fell by 13% between 2008 and 2010 to 101,000
- Finance and business services account for 26% of employee jobs
- 5,900 people employed in legal services: 5th largest centre outside London
- Call centres in Leeds employ around 18,000 people
- Leeds is a major creative industries centre with 31,900 people - the 2<sup>nd</sup> largest centre outside London
- Second largest employer outside London for manufacturing
- 39,900 people employed in manufacturing: 10% of total employment in Leeds
- 9,500 people in engineering - the 12<sup>th</sup> largest centre outside London
- 6,200 people in printing and publishing – largest centre outside London
- The service sector employs 334,800 people – 86% of total employees
- Only Birmingham and Glasgow have higher employment in the service sector
- 109,000 people work in the public sector – 28% of total employment
- The tourism industry generated an estimated £1bn in 2007, supporting 19,000 full-time equivalent jobs.

## **The Labour Market**

### **The Labour Force**

- Around 2m people live within 30 minutes driving time of Leeds City Centre
- Population of working age forecast to rise from 543,000 to 592,700 in the decade to 2021 (Source: ONS 2008-based projections)
- The corresponding Leeds labour force will rise by 19,000 over the next decade to 427,000 (Source YF/EBS forecasting model)

### **Job Growth**

- Between 2011 and 2010 employee jobs remained unchanged in Leeds
- YF/EBS (Spring 2011) suggest that 29,500 jobs (a 9% increase) will be created in the next decade.
- Full-time employees will increase by 20,800, part-time by 14,400 and self-employment by 4,300
- Finance & business services are projected to account for over 47% of the growth, while the public sector is expected to show a decline
- 43% of the growth are expected to be accounted for by managerial and professional occupations, with sales and customer services accounting for 15%

### **Unemployment and worklessness**

- In December 2011, the number of claimants was 24,200 compared with total unemployment estimated at around 37,000 in June.
- In June 2011, for the largest 14 employment centres outside London the claimant proportion at 4.0% was the 3<sup>rd</sup> lowest, while the unemployment rate at 8.8% was the 4<sup>th</sup> lowest.
- Five locations had over 50,000 people claiming workless related benefits in May 2011, with Leeds the 4<sup>th</sup> highest with over 64,000 people.

- 12% of Leeds households were workless – the 2<sup>nd</sup> lowest of the 14 largest centres.
- 23% of children were in workless households – the 4<sup>th</sup> lowest.

## Earnings

- The median gross weekly earnings of Leeds residents was £406 in 2011, with £476 for males and £344 for females
- 10% of full-time workers earned less than £275, while for part-time workers it was £49.

# Inclusion

## Deprivation

- For the four ratio measures of deprivation, Leeds ranked between 44<sup>th</sup> and 97<sup>th</sup> most deprived out of the 354 local authorities in England.
- For the two scale measures of income and work, Leeds ranked 4<sup>th</sup> most deprived - the larger the local authority, the higher the rank
- For the eight core cities, Leeds had similar rankings to Bristol and Sheffield
- Five wards in Leeds had more than half their Super Output Areas (subdivisions of wards) in the 10% most deprived SOAs in England: Burmantofts & Richmond Hill, City & Holbeck, Gipton & Harehills, Killingbeck & Seacroft and Middleton Park
- These wards, plus Armley and Chapel Allerton, had more than half their SOAs in the 20% most deprived nationally
- These five wards tend to have the highest levels of deprivation, unemployment benefit proportions and proportion of households in receipt of council benefits
- Eight wards had over 1,000 unemployment benefit claimants during 2011. They tended to have the largest increases in claimant proportions over the last year; and the largest difference between claimant proportions and claimant rates.

# Learning and Skills Development

## Primary and Secondary Education

- There are 109,000 school children in 262 schools
- Attainment at Key Stage 2 was improving in line with the national average
- GCSE attainment rising, but still some way behind the national average

## School Leavers

- 44% of Year 11 choose to stay on at school and 40% enter further education.
- Compared to 2000 this figure has increased by 18 percentage points

## Post-16 learning

- Leeds is the 2<sup>nd</sup> largest provider of education for young people in England
- There are five Further Education Colleges, with almost 80,000 students

## University of Leeds

- Ranked among the world's top 100 universities
- It is the city's third largest employer and contributes some £860m to the local economy
- Has 8,800 staff and over 30,000 students from 130 countries
- More than 61% of its research is rated 'world leading' or 'internationally excellent'

## Leeds Metropolitan University

- Has almost 30,000 students and 300,000 associate students through its network of 24 partner colleges
- One of the largest providers of foundation degrees in the country

- Operates a Business Incubator, encouraging entrepreneurs to grow their ideas
- A lead partner for the West Yorkshire New Technology Institute

### **Leeds Trinity University**

- Independent higher education institution with just under 3,000 students
- Operates a professional placement programme

## **Funding Programmes and Business Support**

### **Business Support**

- Enterprise Leeds has established a single gateway to business support services in Leeds
- The Leeds LEGI programme, 'Sharing the Success', has helped to develop enterprise and create new jobs in the most deprived communities
- Business Link West Yorkshire provides business support
- ABDN assists and promotes the development of minority ethnic owned businesses
- The Business Enterprise Fund provides assistance to businesses seeking to access finance

## **Property Market**

### **Major Property Investments: 2002-2011**

- For schemes valued at over £1m: £4.4bn were completed, £492m under construction and £5.4bn proposed or on hold; a total of £10.3bn
- In the City Centre, almost £2.9bn completed, £439m under construction and £3.7bn proposed or on hold – a total of £7.0bn.

### **Office**

- Over last 10 years, city wide office space on the market increased from 2.5m sq ft to 4.1m sq ft
- Out-of-town take-up in 2010 was 250,000 sq ft (380,000 sq ft average)
- City centre take-up in 2010 was 280,000 sq ft (515,000 sq ft average)
- Currently 650,000 sq ft Grade A accommodation available in city centre
- Five developments over 50,000 sq ft available in City Centre, with none under construction
- Over 500,000 sq ft of named occupier enquiries for City Centre premises

### **Industrial**

- Over last 10 years marketed space has increased from 4.5m sq ft to 7.7m sq ft
- There is a shortage of prime industrial and warehousing properties
- Key industrial proposals will be enhanced by the new East Leeds Link road

## **City Centre**

### **Employment**

- 133,000 employees work in city centre in 2008; 32% of all employees in Leeds
- Employment grew 13% between 2003 and 2008; compared with 3% for Metropolitan District as a whole
- Between 2003 and 2008, city centre jobs grew by 15,400 while total MD jobs rose by 12,600
- In 2001, 59% of city centre jobs were held by people living within 10 kms

### **Property**

- The stock of office floorspace is 11m sq ft

- Almost £3.0bn spent on major schemes in 2001-2010, with £515m under construction and £4.3bn proposed or on hold; a £7.7bn total
- Of this total, mixed-use schemes account for £4.6bn, offices £1.0bn and retail/leisure £1.1bn

### **Retail**

- 5 miles of shopping, with 970 shops
- 10,000 people work in retailing, with another 7,200 in bars and hotels
- UK's fifth largest shopping location by retail floorspace
- Two major developments: the proposed Eastgate Quarters (1m sq ft) and Trinity Leeds (1m sq ft) under construction.

### **Hotels**

- Pre-1990 there were only 850 hotel bedrooms in Leeds; increased to 3,864 by Autumn 2011
- Proposals for a further 2,032 bedrooms in 16 hotels

### **Residential**

- 20,800 people lived in the City Centre (late 2010).
- In August 2011, 75 dwellings under construction, 6,497 with planning permission, 1,135 in the planning process and 213 proposed.
- Between 2002 and 2011, estimated that £1.1bn of city centre apartments completed, £5m under construction and over £835m proposed

### **Culture and Leisure**

- New £23m City Museum opened September 2009
- £12m Northern Ballet Theatre Company headquarters completed at Quarry Hill
- £33m Grand Theatre transformation completed

## **Planning and Regeneration**

- The UDP was approved in 2001, with the UDP Review adopted in 2006
- Various development plans under the Local Development Framework have been adopted
- The major spatial regeneration programmes include: Aire Valley Leeds, East Leeds Regeneration, Leeds Bradford Corridor, Inner South Leeds, and Beeston Hill & Holbeck and Little London

## **Transport**

- Excellent road and rail links both north-south and east-west

### **Road**

- 2,965km of roads within MD; easy access to M1, M621 and M62 motorways
- Inbound road traffic in the morning peak grew 0.3% between 2000 and 2010
- New East Leeds Link to M1 opened access to employment land especially in the Aire Valley
- Upgrading of A1 between Bramham and Wetherby almost complete
- Leeds City Centre Loop provides an efficient inner circulatory route for essential traffic

### **Rail, Buses & NGT**

- £245m invested at Leeds City Station in 2002, including new track, platforms and station remodelling.
- Leeds is served by the electrified East Coast Main Line route.
- Over 900 trains and 90,000 passengers pass through Leeds City Station each day.
- Plans for an additional southern entrance to Leeds City Station
- Bus journeys account for 22% of all morning peak journeys into Leeds City Centre
- 3.5km of bus guideway in Leeds
- A second High Occupancy Vehicle lane built along Roundhay Road

- The Leeds City Bus has carried over 6m passengers since 2006
- The Leeds NGT trolleybus plans have received Programme Entry status with a £235m contribution from the Department for Transport

### **Air**

- Leeds Bradford International Airport 13km north west of City Centre
- Over 2.5m passengers used airport in 2009, with 5m expected by 2016
- bmi, Jet2, Ryanair, Flybe, Eastern Airways, Easyjet, KLM cityhopper, and Airsouthwest operate services
- 2,200 jobs created directly by the airport, with new developments creating a further 2,000 jobs

### **Sea & Waterways**

- Humber Estuary busiest and faster growing trading estuary in UK.
- Four Humber Ports at the Estuary are between 40 and 90 minutes away via M62, M18 and M180
- Leeds has access to a coast to coast network of waterways linking the Irish Sea to the North Sea.

## **Housing**

- Significant change in pattern of housing tenure over last 20 years
- Percentage in social rented housing decreased from 27% in 2001 to 22% in 2009
- Gross new homes stood at 1,800 in 2010-11 and 2,500 in 2009-10; down from an average 3,800 in the previous three years
- Average house price of £172,000 in 2011, with the inner area averaging below £100,000
- Average house price just over five times average earnings
- Leeds City Council seeks to encourage a mixed housing market within its communities