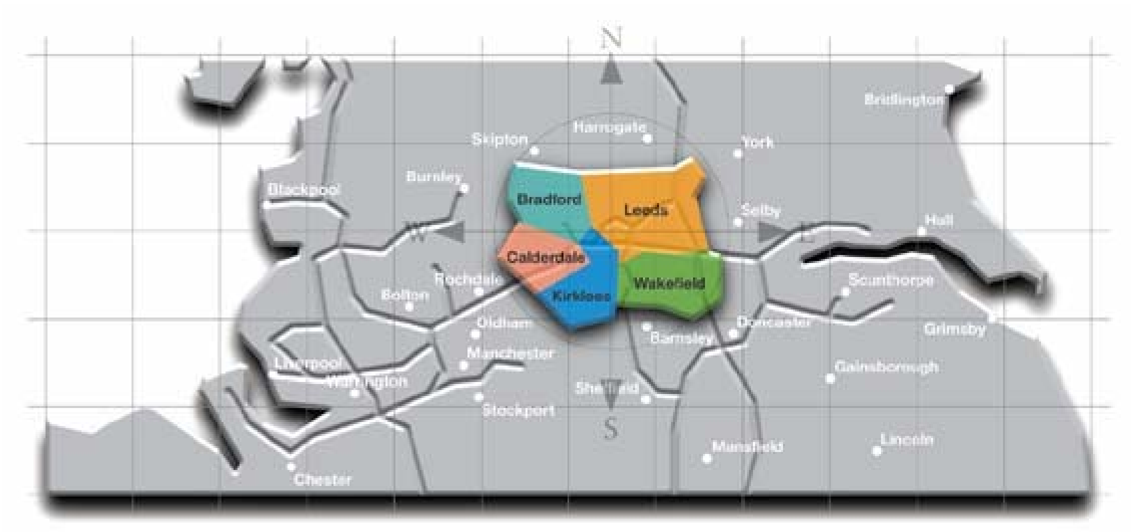
WEST YORKSHIRE ECONOMIC PARTNERSHIP

WEST YORKSHIRE INVESTMENT PLAN

STRATEGIC ECONOMIC ASSESSMENT 2005



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STRATEGIC ECONOMIC ASSESSMENT 2005
WEST YORKSHIRE

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WEST YORKSHIRE

PART ONE: Introduction and Sub-Regional Context

Introduction, Purpose and Structure

This Strategic Economic Assessment of West Yorkshire has been produced to support the Investment Planning process in the sub-region by providing analysis to inform the process of project prioritisation and commissioning. It provides a contextual analysis of the sub-region (Part 1) and details of how West Yorkshire, and the localities within it, fare on key indicators (Part 2) structured around the six objectives of the Regional Economic Strategy (RES). The RES is currently undergoing a review and consultation on the redrafted version will take place later in 2005. The outcomes of this review will influence the structure and focus of future sub-regional economic assessments.

Every endeavour has been made to utilise existing sources of data and to reflect valuable input from a range of West Yorkshire partners. The Progress in West Yorkshire report, which is structured around the six regional Advancing Together objectives, is frequently referred to in this assessment. Whilst the Advancing Together Themes are broader, there is some overlap with some of the objectives in this assessment and every effort has been made to ensure consistency between the two documents. The analysis here is not complete, nor does it seek to be. Its prime purpose is to provide an overview and some key pointers rather than to provide encyclopedic coverage of the sub-region. Cross-references to other documentation is included that allows further information to be utilised if that is required.

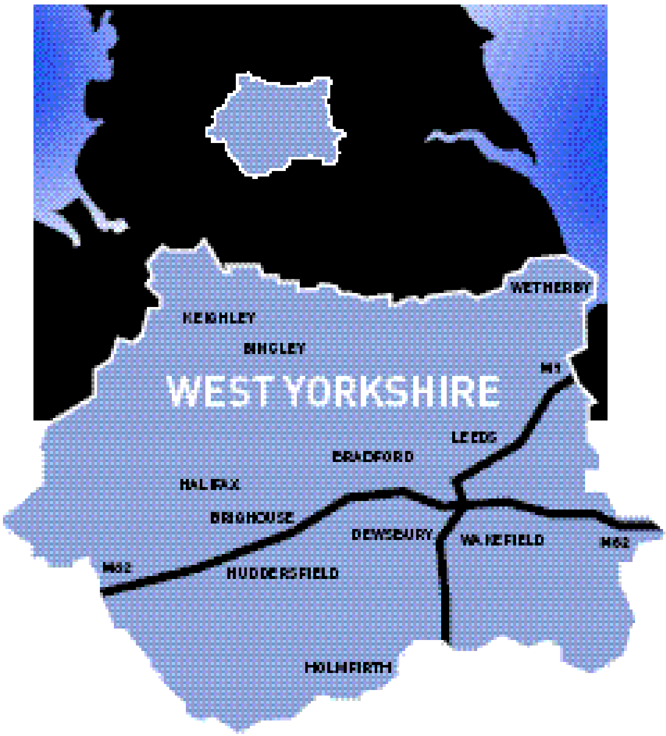
This analysis is inevitably limited by the data available within the time of its preparation, and much of that data is based on the local authority boundaries that are in place. However, West Yorkshire has functioned as an effective sub-region for many decades, with people crossing internal district boundaries within the sub-region for work or social purposes, and to utilise the diversity of towns, cities and countryside across West Yorkshire and the assets of each. Equally, divides between West Yorkshire and neighbouring sub-regions and counties are in most cases arbitrary and, whilst boundaries may remain, there will be benefits to look across them in terms of understanding how things are and how we can work together to make progress. In future years there will be scope to enhance the analysis as data gaps are closed (e.g. on cross boundary or more local area statistics) and work on evaluation and identification of good practice and 'what works' progresses.

This work is the fruits of collaboration between the West Yorkshire Research Group, Yorkshire Futures and Yorkshire Forward. It is based on objective analysis and partnership working and builds heavily on work partners in the sub-region have already undertaken. The West Yorkshire Research Group is now overseeing a three year Yorkshire Forward Research Programme, which will involve commissioning research to fill some of the information gaps highlighted in this assessment. We are keen to maximise the practical benefits of this document in informing decision-making and assisting partners to identify and prioritise the most cost effective interventions to achieve sustainable improvements in the West Yorkshire economy. Feedback is welcome on all aspects of the work and how it can be further improved to achieve its aim of providing relatively concise and accessible, yet thorough, analysis.

Historical Context

West Yorkshire covers an area of 2,034 sq km – 13.2% of the region and has a population of just over two million – 42% of the region's total. The West Yorkshire economy is the largest sub-regional economy in the region and houses 43% of the region's business base. This makes its success vital to the regional economy. Leeds in particular, the regional capital, has enjoyed fast growth and is firmly established as the leading financial and commercial centre outside London.

A compact and cosmopolitan area, the West Yorkshire conurbation is strategically placed at the centre of the UK with excellent access by motorway, air and rail. It straddles the Trans-Pennine M62 Corridor and the North/South M1/A1 routes. By rail the sub-region is only two hours from London and is served by Leeds-Bradford Airport for both domestic and international flights.



West Yorkshire is a vibrant, forward-looking sub-region with fine cities in Leeds, Bradford and Wakefield and proud towns with a successful commercial heritage. Manufacturing and textiles have been core drivers of the economy resulting in supply chains and centres of excellence for training, technology and design supported by further and higher education expertise.

There are parts of the sub-region that have experienced diverse modern industrial development with strengths in e-business, digital, print, bioscience and chemical clusters. The ICT infrastructure is well developed with and a considerable proportion of Yorkshire and Humber businesses and households already have, or will soon have access to broadband (Broadband Supply and Demand in Yorkshire and Humber 2004).

The surrounding landscape includes stunning Pennine valleys and both Peak District and Yorkshire Dales National Parks. West Yorkshire has impressive historical architecture and many cultural attractions, including the theatres and literary connections with the Brontes at Haworth.

Creative industries and tourism feature strongly in new business formation in the sub-region. Thriving retail, nightlife and leisure facilities attract visitors from a wide area.

Diversity is a strength of both the population, which is home to a wealth of minority ethnic communities and cultures, and the economy, which is broadly based and resilient to economic pressures.

Traditional labour market skills in manufacturing are supplemented by a pool of talented graduates emerging from the four universities in the sub-region, which have specialisms in engineering/textiles/ advanced manufacturing; digital (computing, multi-media and creative); healthcare and business/management. Skills in customer service, IT, finance and administration are also well represented in the many Head Offices of financial institutions and customer service centres based in West Yorkshire.

Bradford

By 1850 Bradford had become the wool capital of the world with a population of 100,000. Coal was also of significance and in 1866 almost 20% of the total West Riding output of 9.8 million tonnes came from Bradford. Iron mining and iron manufacturing were also important along with the associated engineering industries.

By the mid-1800s two migrant population groups were of particular influence to Bradford - affluent German merchants, a small group that left their mark in the architecture of many of the buildings of the city, and the large migrant Irish population that worked in the Mills. Bradford was granted City status on the 9th June 1897. The availability of work within the manufacturing industries, particularly textiles, continued to draw workers into the district. After 1945 many Eastern Europeans came to the district to work and by the 1960s Asian and African Caribbean immigrants were also attracted to the area.

Bradford and its surrounding area became a Metropolitan District Council in 1974 and its population has continued to grow. Although textiles have declined during recent years, the local economy has diversified and the area now has strengths in engineering, printing and packaging, chemicals, financial services, high technology and the media industries. Bradford has a well-established university with some strong links to industry and the community. Attractive towns amid Bradford’s rural hinterland such as Ilkley strengthen Bradford’s ability to attract visitors - as do its Bronte connections in Thornton and Haworth. More recently there have been moves to regenerate the majesty of landmark industrial buildings such as Manningham Mills and the Little Germany area and to utilise these in taking the City forward.

Leeds

In 1626 the Charter of Incorporation awarded by Charles I recognised Leeds' prosperity and fame in the making, selling and exporting of woollen cloth. At the end of the eighteenth century the arrival of the Leeds and Liverpool canal and the Aire and Calder Navigation were a big stimulus to trade by linking Leeds to the west and east coast ports respectively. Leeds' history is inter-twined with the Industrial Revolution: the world's first commercial railway opened at Middleton in 1758, the world's first woollen factory was built on Wellington Street in 1792 and Matthew Murray built in Hunslet the first successful steam engine in 1812. Enterprise and innovation have always been at the root of Leeds' economic success.

By the start of the twentieth century Leeds was one of the UK's foremost manufacturing locations and exporters. Tailoring, engineering and textiles accounted for 45% of the workforce. 30,000 alone were employed in the ready-to-wear clothing industry in 1911.

Since 1945 Leeds has developed into a regional centre for financial and business services, media, government, healthcare and higher education. It still has a strong manufacturing base, although with far fewer people employed (now accounting for 11% of all jobs). In 1974 the creation of Leeds Metropolitan District (MD) increased the city's population by 50% to over 700,000 and created the second largest MD in the country. Leeds was able to avoid the worst effects of deep economic recession in the early 1980s thanks to its highly diversified economy and its large base of small and medium size enterprises.

Over the period 1984-2003 the number of jobs in Leeds increased by over 90,000, a higher number than any other UK city outside London. The main driver behind this growth has been the financial and business services sector, which now employs around 100,000 or about a quarter of all jobs. Leeds' role as the regional centre has meant increasing numbers of in-commuters: over 107,000 a day in 2001.

Economic forecasts suggest that the number of jobs in Leeds may grow by around 32,000 over the next 10 years, compared with 38,000 in the rest of the Yorkshire and Humber region. To help realise this growth will require further investment in the city centre (which accommodates 116,000 jobs), the Aire Valley and in improved public transport, amongst other things.

Wakefield

The coal industry largely shaped Wakefield district's economy in recent times and the loss of twenty thousand mining jobs in the last two decades has had a profound effect. The district's location, at the intersection of the M1, M62 and A1M, has lent itself to a growth in warehousing and distribution since the decline of coal mining and other traditional industries. Wakefield is also home to the Europort terminal that provides a regional rail freight terminal for goods to be despatched to mainland Europe via the Channel Tunnel.

Major employment sectors in the district include public administration, education and health, and manufacturing employment, which at 15.5% of the workforce is still 2.1% above the national average, despite a recent decline. Wakefield district's economy tends to have a less skilled workforce than the national average with nearly 40% of the workforce having no qualifications compared to 29% nationally (Census 2001).

The coalfield closures in the eighties left parts of the district, especially the East and Southeast, with weak economies. The closure of the Prince of Wales colliery, Pontefract, in 2002 and the Selby coalfield closure of 2004 (which employed a large percentage of its workforce from the Wakefield area) indicate the continuing vulnerability of the local economy to decline in traditional industries.

The district's priorities in terms of growth sectors are logistics, food and drink, creative and digital industries and advanced manufacturing. Textiles, glass packaging and environmental industries are also significant employers and the district is home to the Chemical Industries Regional Centre of Excellence (CIRCE) at Castleford.

Flagship developments include the Xscape snowdome at Glasshoughton, and the development of Wakefield City Centre including the Waterfront and Castleford town centre under the urban renaissance programme.

Integrated action plans for the three key regeneration areas are being developed for the Wakefield inner city area, the Five Towns of Castleford, Pontefract, Normanton, Knottingley and Featherstone, and the South East Coalfield.

Calderdale

The Calderdale district was one of the first parts of the country to experience the industrial revolution with the move from an agrarian to an industrial society. In the 18th and early 19th centuries Halifax was one of the most important towns in the region with its wealth built on the cloth trade. The towns in the upper Calder Valley of Todmorden, Hebden Bridge, Mytholmroyd, Sowerby Bridge, Elland and Brighouse also became important centres of manufacturing industry and retain today a rich architectural heritage from this period. Although overtaken in size by Bradford and Leeds in the mid 19th century, Halifax and the valley towns remained significant manufacturing centres well into the 20th century with industrial diversification from textiles to general engineering, machine tools, wire making, quarrying, pottery, and confectionary.

In the latter part of the 20th century there was a decline in the manufacturing industry but this was, to a certain extent, compensated for by a strong growth in financial and business services – and illustrated by the imposing presence of HBOS. The desirability of many parts of Calderdale as a place to live has to a certain extent helped the area cope with some of the worst effects of economic change. However, the attraction of better off commuters has to some extent masked some of the problems of the loss of local employment and there is a growing concern that to rely on jobs in neighbouring areas will not provide Calderdale with a sustainable future. The district has a number of wards with a high level of deprivation which are not benefiting from economic growth elsewhere in West Yorkshire.

In recent years many old industrial premises, such as Dean Clough have been refurbished for offices, high-tech or start up companies, but many others have now been converted for residential use. The need to find suitable land and premises for new employment remains a key issue.

Much of the district is rural in character and the area has the highest proportion of people in West Yorkshire working in agriculture. Due partly to this attractive landscape, tourism also plays an important part in the Calderdale economy with attractions like the newly restored Rochdale Canal, Hardcastle Craggs and attractive towns like Hebden Bridge.

Kirklees

Kirklees has one of the oldest industrial heritages in the world, with a long history of skilled working in a limited number of trades that pre-dates the Industrial Revolution. The local economy of Kirklees has been based around high quality products in engineering, textiles, chemicals and foodstuffs, but more recently has diversified into a broader spread of manufacturing and service industries, whilst retaining a level of the original industries.

The gradual decline of its traditional manufacturing base has been a problem in Kirklees, especially in Huddersfield together with Dewsbury and Batley in the north of the district. However, there has been economic growth and acceptance of the value of service sector jobs. The presence of Huddersfield University has helped to bolster the pool of expertise and higher level skills in the areas and its infrastructure development has attracted some inward investment. Tourism has also become important to rural as well as urban parts of the area with the development of routes up the Colne and Holme Valleys.

The Metropolitan Council of Kirklees was created following local government re-organisation of the former West Riding of Yorkshire in 1974, and can be divided into three distinct zones:

- the “Heavy Woollen Area” of North Kirklees east and north of Mirfield, including Dewsbury, Batley and the Spen Valley;
- Huddersfield;
- The rural and semi-rural area south and west of Huddersfield in south Kirklees, including towns such as Holmfirth and Slaithwaite.

Although Kirklees has been less successful than other parts of the country in developing its business base, there was between 1991 and 1999 a 50% increase in the number of businesses in the area - with most of the growth amongst the smallest firms. In the late 1990s Huddersfield utilised European, and other funding, to launch its Creative Town project, and its emphasis on the creative industries (backed up by a strong reputation in fields such as poetry and music) is helping it to move forward with positive links to the digital industries as well as the arts.

(Source: predominantly the West Yorkshire LSC Local Authority 'In Depth’ reports 2002 and 2003)

PART TWO: Analysis of Key Indicators for Delivery of RES Objectives

OBJECTIVE 1 – GROW THE REGION'S BUSINESSES

Objective 1 - Overview and Key Points

- There is likely to be continued overall decline in manufacturing, although at a slower rate, especially in employment terms. However, within this general trend, there are historic areas of concentration, such as textiles, in which innovation opportunities arise, such as the Textile Centre of Excellence in Huddersfield. There are prospects to exploit growth in niche areas, such as environmental industries as well as in the public service sector areas such as health. Cluster development activity within manufacturing should lessen the extent of decline and generate new prospects (although this does not cover all sectors).
- West Yorkshire has a strong financial and professional services sector.
- Despite above average levels of productivity in Leeds, West Yorkshire's overall productivity levels remain significantly lower than the UK average. This threatens long-term business competitiveness. There is, therefore, a need to focus on productivity improvements (e.g. based on new market niches and resource efficiency) that minimise potential negative impacts on jobs in areas where there remains relatively high rates of unemployment. The remit of RDA's is extending into rural areas and will be working to raise productivity in rural areas. Work is ongoing to develop the data required to measure this at a small area level.
- West Yorkshire's performance on innovation, a major driver of economic success, could be improved. Despite having a strong base of four universities, fewer links appear to be made between HE and business R&D relative to the region as a whole. Membership of industrial networks is below the regional average and application of ICT to transform business processes is the lowest in Yorkshire and Humber.
- Data from 2002 shows that West Yorkshire is under-represented in terms of exports compared to its size in terms of production and workforce.

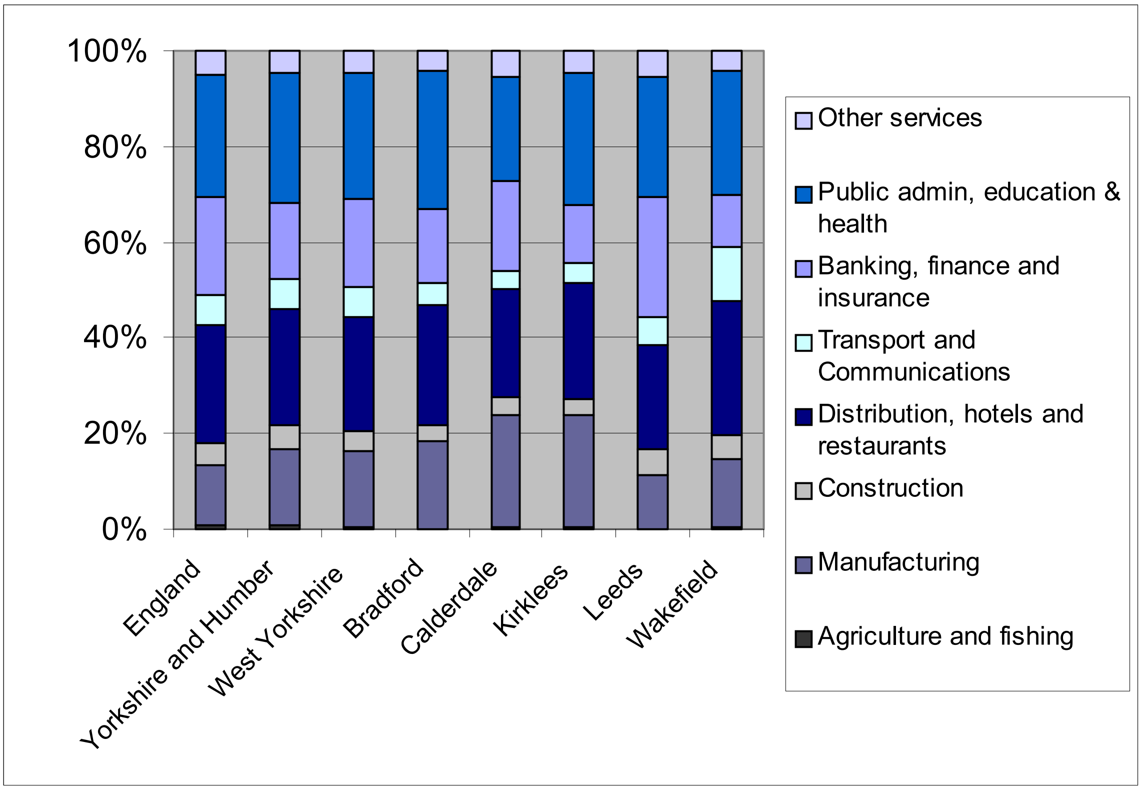
Business Structure

Employment Structure of West Yorkshire, 2003 (actual figures)

	England	Y&H	West Yorkshire	Bradford	Calderdale	Kirklees	Leeds	Wakefield
Agriculture and fishing	177,301	16,185	2,230	322	270	476	808	354
Manufacturing	2,813,793	345,118	152,279	35,794	17,938	35,698	44,518	18,331
Construction	971,859	107,845	41,348	6,449	2,948	5,423	19,998	6,530
Distribution, hotels and restaurants	5,542,345	534,030	225,462	48,520	17,206	37,149	86,170	36,417
Transport and Communications	1,367,286	133,830	56,632	9,143	3,052	6,570	23,348	14,519
Banking, finance and insurance	4,549,003	344,259	176,128	30,266	14,332	18,439	99,457	13,634
Public admin, education & health	5,609,611	591,304	248,048	55,886	16,621	42,074	99,865	33,602
Other services	1,143,287	100,018	45,454	7,964	4,188	7,179	20,741	5,382

Source: Office for National Statistics, Annual Business Inquiry, 2003. Note Energy is not included due to confidentiality issues of the data.

Employment Structure of West Yorkshire 2003 (% employed by sector)



Source: Office for National Statistics, Annual Business Inquiry, 2003. Note Energy is not included due to confidentiality issues of the data.

Overview

- Those sectors where the percentage of employment is higher in West Yorkshire than the regional average include manufacturing and banking, finance and insurance.
- There is evidence that the West Yorkshire rural economy is significant in its dependence on 'non rural' industries such as manufacturing in Calderdale and Kirklees in particular. The West Yokrshire Rural Scoping Study and further work by the GOYH show that the rural economy has a similar structure to the urban economy.
- Small employers with less than ten employees account for 81% of businesses in West Yorkshire but only account for 18% of employment whereas large organisations which employ over 200 people account for 1% of businesses but 33% of employment (see Table 2.3, West Yorkshire in Focus). Research by the Countryside Agency found that micro-businesses with less than 10 employees dominate the rural economy (State of the Countryside 2004).
- Social Enterprise support networks in West Yorkshire have established that, to date, there are 739 organisations with social objectives working towards developing sustainable trading activities. This includes well established social enterprises and community and voluntary sector organisations who have been able to make the move from grant dependency to income generation (Progress in West Yorkshire 2005). It is understood that there are some 5,000 social enterprises operating in the UK.
- West Yorkshire provides over 950,000 jobs - 44% of the Yorkshire and Humber region's workforce (ABI 2003).

Local Variations

- Manufacturing continues to be a large sector in terms of employment in Calderdale, Bradford and Kirklees, which are all significantly above the average for the region, and there is a risk of overdependence on traditional manufacturing areas such as textiles in some of these areas. The importance of the banking, finance and insurance sector in Leeds is also highlighted, accounting for over a fifth of total employment (23.9% compared to 15.3% for the region as a whole), and much closer to the England average of 20.2%.

- Leeds accounts for 46% of large businesses in the region while Bradford, Calderdale and Kirklees have a greater proportion of small businesses (See Table 2.3, West Yorkshire in Focus 2003).
- A recent report by Experian for Yorkshire Forward and the Leeds Financial Services Initiative highlights the growing importance of the knowledge based sector in the city-region and forecasts very high growth in the financial and related services sector in Leeds with employment growth of 9% up to 2014 compared to 6% growth of the total workforce.

Employment Forecasts

Employment Forecasts for West Yorkshire and Annual Growth Rates

	Level ('000s)	% Growth					
	2002	2004	2005	2006	2007	2008	2009
Industry Total	1,047.98	1.86	1.09	0.86	0.72	0.77	0.64
Agriculture, Forestry and Fishing	4.62	-2.50	0.71	-1.79	-1.87	-1.73	-1.88
Mining & Utilities	9.50	-3.70	-2.11	-3.22	-3.64	-3.97	-4.35
Metals, Minerals & Chemicals	36.28	-0.90	-0.18	-0.56	-1.35	-1.62	-1.59
Engineering	40.68	-2.48	-2.42	-1.41	-0.42	-0.24	-0.40
Other Manufacturing	97.41	-3.53	-4.15	-3.13	-1.95	-1.19	-0.88
Construction	65.79	4.11	3.12	-0.41	-0.69	0.12	0.28
Distribution, Hotels & Catering	240.10	1.29	1.39	1.17	0.66	0.52	0.19
Transport & Communications	59.58	0.07	1.92	2.42	2.04	2.00	1.71
Financial & Business Services	193.90	3.20	1.86	2.56	2.24	2.16	1.73
Other (mainly public) Services	300.11	3.79	1.70	1.05	0.96	0.89	0.93

Source: Experian Business Strategies/Yorkshire Forward Econometric Model, December 2004

Employment Change Across West Yorkshire 2003 – 2009

Positive change		Negative change	
Industry	**Change ('000)**	**Industry**	**Change ('000)**
Business Services	22.13	Textiles & Clothing	-7.35
Health	17.42	Public Admin & Defence	-3.15
Education	8.35	Paper, Printing & Publishing	-2.24
Retailing	7.45	Electrical & Optical Equipment	-1.55
Other Services	7.22	Gas, Electricity & Water	-1.17
Communications	5.17	Machinery & Equipment	-1.04
Construction	4.98	Metals	-0.97
Banking & Insurance	4.19	Food, Drink & Tobacco	-0.88
Wholesaling	3.23	Chemicals	-0.83
Other Financial & Business Services	2.95	Wood & Wood Products	-0.77

Source: Experian Business Strategies/Yorkshire Forward Econometric Model, December 2004

Overview

- The table above illustrates the major changes in employment forecasted up to 2009 based on smaller industry definitions rather than sectors. The employment forecasts show how the West Yorkshire economy is changing with the services sector creating the most employment, whilst manufacturing is the sector most associated with job losses. However, replacement demand within the manufacturing industry supports its continuing position as a fundamental component of the local economy.
- The main employment growth in West Yorkshire between 2004 and 2009 is forecast to be with large employers such as in the transport and communications and financial services sectors.

The largest declines are in the smallest industries making for a small net positive effect throughout the sub-region over this period.

- The decline in manufacturing employment is forecast to slow down after 2005, although the general trend is still downward.
- Changing employment patterns will have implications for skills development.
- West Yorkshire in Focus 2003 identifies that there will be five times as many jobs available through replacement demand as are newly created. This means that it is not only the overall number of jobs available within an occupation that will count but the need to constantly replace workers who change jobs or retire, for example. Some occupations, such as elementary clerical and service related, which shows a projected decline in the actual number of jobs, will actually have many more vacancies available due to high turnover, and therefore will still need a high number of workers with the relevant skills. The replacement demand may be quantitatively more significant than any expansion demand. It is important, therefore, for advisers and those planning training provision to take this factor into account.

Clusters

Yorkshire Forward has defined key clusters for the region and aims to develop existing strengths in these areas. In 2004, two new clusters were added and the structure of these six clusters is shown below.

West Yorkshire Clusters Employment and Output Forecasts

	FTE Employment ('000s)			Output (£m)		
	1998	2003	2008	1998	2003	2008
Chemicals/Bioscience	13.16	12.50	13.09	611.46	694.27	894.33
Digital	43.05	44.71	50.15	1,540.30	1,709.29	2,270.35
AEM	53.91	43.14	41.29	1,731.22	1,536.05	1,615.71
Food	19.24	18.31	18.45	721.48	690.95	763.93
Environmental Technologies	20.17	16.21	15.95	1,079.09	1,133.45	1,244.73
Healthcare Technologies	2.01	2.57	2.61	65.73	149.16	201.32
Total	151.55	137.45	141.54	5,749.28	5,913.18	6,990.38

Source: Experian Business Strategies/Yorkshire Forward Econometric Model, December 2004. Please note that totals may not sum exactly due to rounding.

Overview

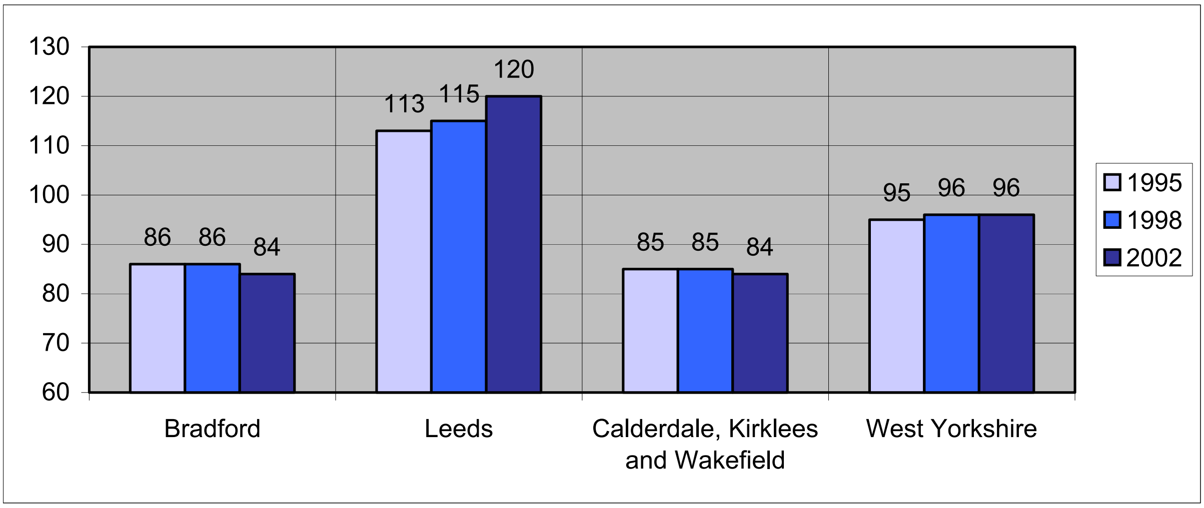
- Output in all clusters will increase in the period between 2003 and 2008, although between 1998 and 2008, Advanced Engineering and Metals (AEM) and the Food and Drink clusters showed a minor overall decline.
- Total full-time equivalent (FTE) employment in clusters is forecast to increase by 3% from 2003 to 2008, although this figure is lower than in 1998. Only the AEM and Environmental Technologies clusters will see a decline between 2003 and 2008.
- There are other sectors that have a focused presence in West Yorkshire, such as textiles in much of the sub-region, and financial and professional services in and around Leeds in particular.
- A recent research project under the West Yorkshire Research Programme reported on the business development needs of cluster businesses in West Yorkshire, focusing on those businesses that are located in deprived parts (Objective Two areas) of the sub-region. The work demonstrated that there is diversity across the six clusters in terms of aspirations, barriers to growth and business support needs.
- The WY Business Needs Research also found that concerns about access to funding were paramount – finances were seen to be a key factor in limiting growth. In terms of skills, within the clusters certain technical skills were seen to be missing and difficult to recruit, but retention was not flagged up as a major problem. Looking to the future, key priorities for cluster

businesses were ensuring the supply of finances for business growth and this was seen as a key area for support agencies, particularly through directing companies to grants and business loans.

- Although there is awareness of the regional industrial clusters as identified in the Regional Economic Strategy, the LSC for West Yorkshire has identified its own key sectors, these being Adult and Child Care, Construction, Manufacturing, Transport and Distribution, Travel and Tourism and the Voluntary and Community Sector. Research into skill needs in some of these priority sectors has been carried out recently and findings are reported in Objective Four – Improve Education, Learning and Skills.

Productivity

Productivity Ranked Against UK = 100



Source: Office for National Statistics, Regional Gross Value Added, December 2004

Productivity £000's per Full-Time Equivalent

	2003	2004	2005
Yorkshire and Humber	32.55	33.46	33.95
West Yorkshire	33.57	34.49	35.09
Bradford	33.64	34.62	35.26
Calderdale	33.07	34.09	34.71
Kirklees	33.09	33.93	34.59
Leeds	33.80	34.72	35.32
Wakefield	33.61	34.50	34.97

Source: Yorkshire Forward/Experian Business Strategies Ltd, Regional Econometric Model, December 2004

Overview

- Updated figures from National Statistics show GVA per head in West Yorkshire to be below the UK average and, following a slight increase from 1995, remained constant between 1998 and 2002. This risks undermining long-term business competitiveness.
- The latest 2002 GVA figures show that West Yorkshire has a GVA (in millions) of £30,767 – 46% of the region's total. Headline GVA per head is currently £14,716 in West Yorkshire compared to a Yorkshire and Humber total of £13,508 and a UK average of £15,614. At current basic prices this gives an index score of 96 for West Yorkshire (using the UK as the baseline figure of 100). This compares to a figure of 88 for the Yorkshire and Humber.
- West Yorkshire is forecast to be a driving force in regional productivity between 2003 and 2005.
- The remit of RDA's is extending into rural areas and part of the work towards the DEFRA Public Service Agreement 4 will involve working to reduce the gap in productivity between the least well performing rural areas and the England average. Some analysis of income and settlement size across West Yorkshire is included in Objective 5, although further data on productivity at a

small area level is necessary to identify those rural parts of West Yorkshire that do not perform as well.

Local Variations

- Leeds is the only area in West Yorkshire that has a productivity rate above the UK average, and this gap has increased between 1995 and 2002. The other areas are significantly below the UK average and fell slightly between 1998 and 2002.
- Whilst forecast increases in productivity are broadly similar and positive across West Yorkshire, the fact that Leeds has a higher base level to start with means it pushes up West Yorkshire's overall productivity performance (See Table 2.10, West Yorkshire in Focus 2003).
- GVA per head for 2002 for the NUTS 3 areas was: Bradford - £12,832; Leeds - £18,305 and Calderdale, Kirklees and Wakefield - £12,853, showing that productivity is high in Leeds, but is a matter of concern in other parts of the sub-region where the figures fall below regional and national averages.

Innovation

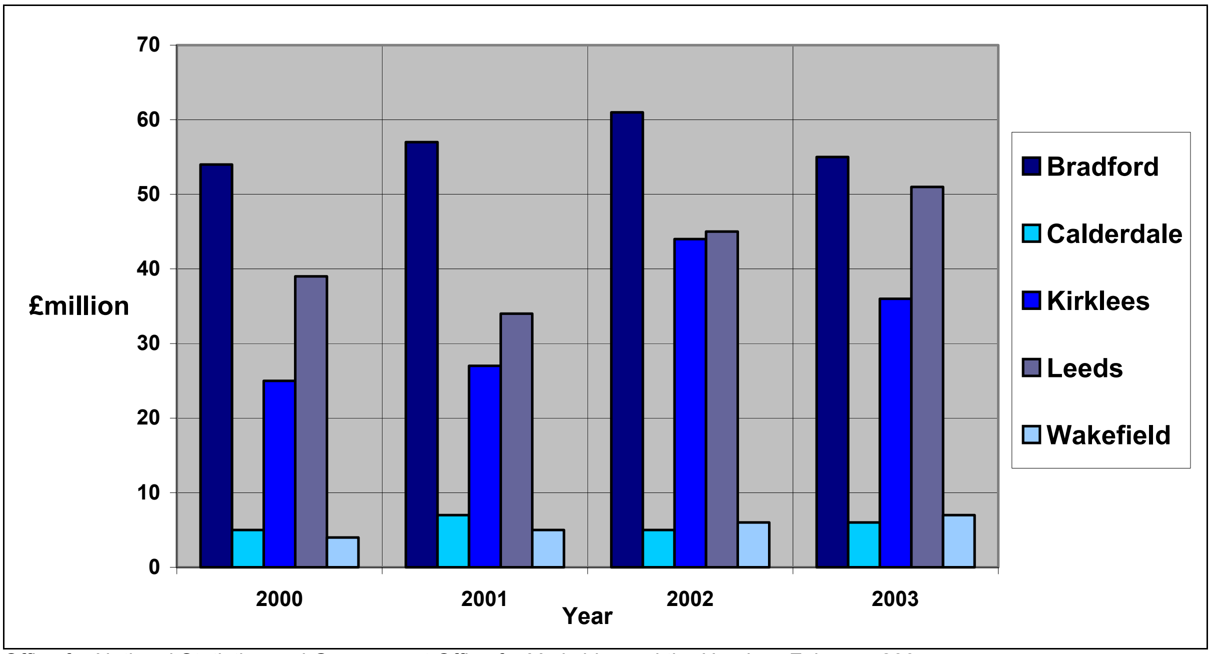
Innovation Across West Yorkshire, November 2004

	R&D links to universities (%)	Membership of special industrial networks (%)
Yorkshire and Humber	6	32
West Yorkshire	5	30
Bradford	4	23
Calderdale	3	39
Kirklees	7	33
Leeds	8	36
Wakefield	6	25

Source: CBI/Yorkshire Forward Survey of Regional Economic Trends, 2004

The CBI/Yorkshire Forward Survey of Regional Economic Trends is a postal survey sent to 15,000 businesses in the region. Responses are weighted to reflect the business structure in the region and to allow for statistically reliable results at local authority level.

Business Expenditure on R&D by LAD 2000-2003



Office for National Statistics and Government Office for Yorkshire and the Humber, February 2005

Overview

- According to the Survey of Regional Economic Trends, only 5% of firms in West Yorkshire have R&D links with universities, which is below the regional average of 6% and the second lowest of any sub-region. This is a particular issue given that West Yorkshire has the highest concentration of universities within any part of Yorkshire and Humber. Whilst 30% of businesses are members of a special industrial network, this is also below the regional average and along with South Yorkshire is lowest in the region.
- Leeds and Wakefield saw an increase in the percentage of businesses with R&D link to universities between 2003 and 2004. This could be due to the creation of Centres for Industrial Collaboration that provide a shop window from which to exploit and push Knowledge Transfer activities and services. These centres are a valuable base on which to build higher visibility for university-business collaboration (Knowledge Transfer for Competitiveness, 2004).
- The number of high tech patent applications capture new knowledge created anywhere within a firm and not just within a formal R&D laboratory. Within West Yorkshire the levels are similar to the regional average but these are lagging behind regions in the South East and London (see Figure 15 pg 27, Progress in the Region 2003).
- Expenditure on R&D by businesses in West Yorkshire in 2002 was £161 million, which is equal to 0.52% of sub-regional GVA in that year. This is broadly in line with the regional average although masks significant district variations.
- A new report involving the four West Yorkshire universities showed that 18% of Collaborative Awards in Science and Engineering (CASE) Awards take place in the Yorkshire and Humber region with Leeds University being the largest provider (Knowledge Transfer for Competitiveness, 2004).

Local Variations

- Calderdale, Kirklees and Leeds are the three local authority areas where membership of a special industrial network is above the regional average. Membership is lower in Bradford and Wakefield, which have figures of 23% and 25% compared to the regional figure of 32%.
- R&D links to universities are low in Bradford and Calderdale. Kirklees, Leeds and Wakefield all have rates equal to or slightly above the regional average of 6%.
- The disproportionate presence of universities within West Yorkshire appears to be influencing direct linkage to HE for some businesses, more than in previous surveys. Whilst the figures for West Yorkshire have not shown much actual improvement, they are better relative to the regional average than in earlier years.
- Bradford businesses spent the most on R&D in 2003 at £55 million closely followed by Leeds at £51 million. Kirklees businesses spent £36 million on R&D and Wakefield and Calderdale were the lowest at £7 million and £6 million respectively, possibly due to the lower stock of businesses in these areas. Expenditure on R&D by businesses as a proportion of GVA in 2002 was higher in Bradford at 1.00% and lowest in Leeds at just 0.34%. The figure for Calderdale, Kirklees and Wakefield combined was 0.48%, close to the regional average.

ICT

Overview

- In 2003 57% of the firms in West Yorkshire use external email frequently in their business and 31% use internal email frequently. In line with the region as a whole, firms are more likely to have external email rather than internal. 78% of West Yorkshire firms use the Internet to gather information and 50% use it frequently. The use of the Internet to place and receive orders online and advertise products and services is less common (Source: CBI/Yorkshire Forward Survey of Regional Economic Trends, 2003).
- In 2004 over half (55%) of West Yorkshire firms currently have websites, this is in line with the regional average. In the same year, in the region as a whole, 36% of all businesses reported

that set-up costs were the main barriers to implementing technology and 23% cited running costs as the main barrier (International Benchmarking Study UK 2004).

- 42% of West Yorkshire companies were found to have at least three quarters of employees able to access the internet. This was one of the highest proportions in the region. Only 21% of firms in West Yorkshire interviewed about their use of ICT/e-commerce reported using e-technology to transform their business processes. This is the lowest of all sub-regions (see Business Use of ICT/E-Commerce 2003 see Yorkshire Futures website, Table 24 pg36).
- In the latest West Yorkshire Skills Survey 2003, of those companies who have offered training to their employees, over a quarter have been involved in IT skills learning. In 2004, 14% of Yorkshire and Humber businesses with technology reported that current IT skills in their business met their needs and 60% reported that current IT skills mostly met their needs (International Benchmarking Study UK 2004).

International Trade

Exports of Goods in £'000s

	2000	2001	2002
Yorkshire and Humber	8,798,947	8,900,540	9,077,431
West Yorkshire	2,868,572	2,937,071	3,322,746
Bradford	726,457	778,969	666,642
Calderdale	286,410	224,380	236,350
Kirklees	491,370	497,039	779,232
Leeds	940,166	923,786	993,852
Wakefield	424,169	512,896	646,670

Source: HM Customs 2003

Overview

- In 2002 exports from West Yorkshire were valued at £3.3 billion accounting for over a third of exports from the region (36.6%), which is the highest of any sub-region although lower than the sub-region's share of regional output in that year (46%). Care should be taken when interpreting export statistics below the Government Office Region level as the data is incomplete.
- Exports have increased by 16% since 2000, which is well ahead of the regional increase of 3.2% over the same period.
- The most recent Yorkshire Forward/CBI Survey of Regional Economic Trends (November 2004) found that, on balance, companies in West Yorkshire report that they have seen an increase in export orders (positive balance of 6%) in the past twelve months. A balance of 11% are expecting an increase in export orders in the coming year, in line with the regional average.
- Regionally, the three major exporting sectors are the Chemicals, Metals and Minerals and Engineering sectors jointly accounting for 47% of the value of exports in 2003 (Draft Strategic Framework for International Trade Yorkshire and Humber, 2004).

Local Variations

- Leeds accounts for 30% of exports from West Yorkshire, which is the largest of any local authority in the sub-region.
- The increase in exports in West Yorkshire has not been spread evenly across the sub-region since 2000. While the value of exports has increased in Kirklees, Leeds and Wakefield it has decreased in Bradford and Calderdale. Without further research, the reasons for this are unclear.

OBJECTIVE 2 – HIGHER BUSINESS BIRTH AND SURVIVAL RATES

Objective 2 - Overview and Key Points

- Levels of new business formation have shown improvements in the past two years but remain below the national average. Increasing the level of start-ups is important in terms of addressing low aspirations and creating a strong enterprise culture and presents a tough challenge.
- The rural economy is experiencing considerable changes as a result of the contraction of employment in agriculture and associated businesses and the growth, in some areas, of new businesses utilizing the new technologies. Attention needs to be given to supporting the development of suitable businesses in rural areas and the market towns. Evidence suggests that there are still significant numbers of agricultural businesses within West Yorkshire (2,123 – Agriculture Census 2002) and attention needs to be given in supporting these businesses and harnessing the entrepreneurial activity of migrants in rural areas.
- Survival rates for new businesses have improved since 1993 but are the lowest in the region. There is evidence that levels of self-employment are lower in areas of relative economic success - notably in Leeds.
- Levels of self-employment/business ownership are particularly low for the vast majority of the 20% most deprived wards.
- Three year business survival rates are low and national data suggests that rates are far higher in a business incubator environment and there is now a developing support infrastructure for both business incubation and social enterprises in West Yorkshire.

Enterprise

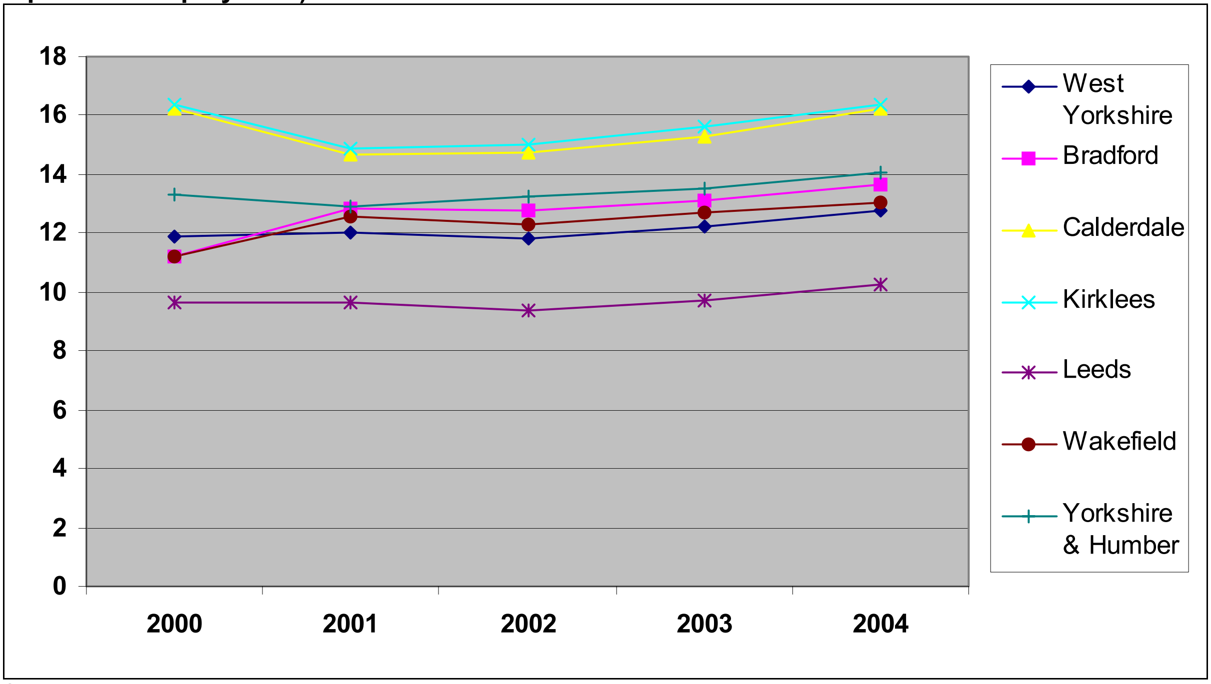
Percentage of Residents that are Self-Employed (as a percentage of resident full-time equivalent employment)

	Yorkshire & Humber	West Yorkshire	Bradford	Calderdale	Kirklees	Leeds	Wakefield
2000	13.34	11.90	11.21	16.25	16.34	9.67	11.21
2001	12.93	12.00	12.86	14.70	14.89	9.64	12.59
2002	13.24	11.84	12.79	14.76	15.01	9.37	12.29
2003	13.49	12.22	13.10	15.27	15.63	9.71	12.69
2004	14.06	12.80	13.62	16.25	16.39	10.24	13.07
% change 2000 - 2004	5.42	7.54	21.51	0.03	0.29	5.87	16.57
Forecast to 2009	14.33	13.05	13.83	16.23	16.77	10.56	13.37

Source: Experian Business Strategies Ltd/Yorkshire Forward Regional Econometric Model, December 2004

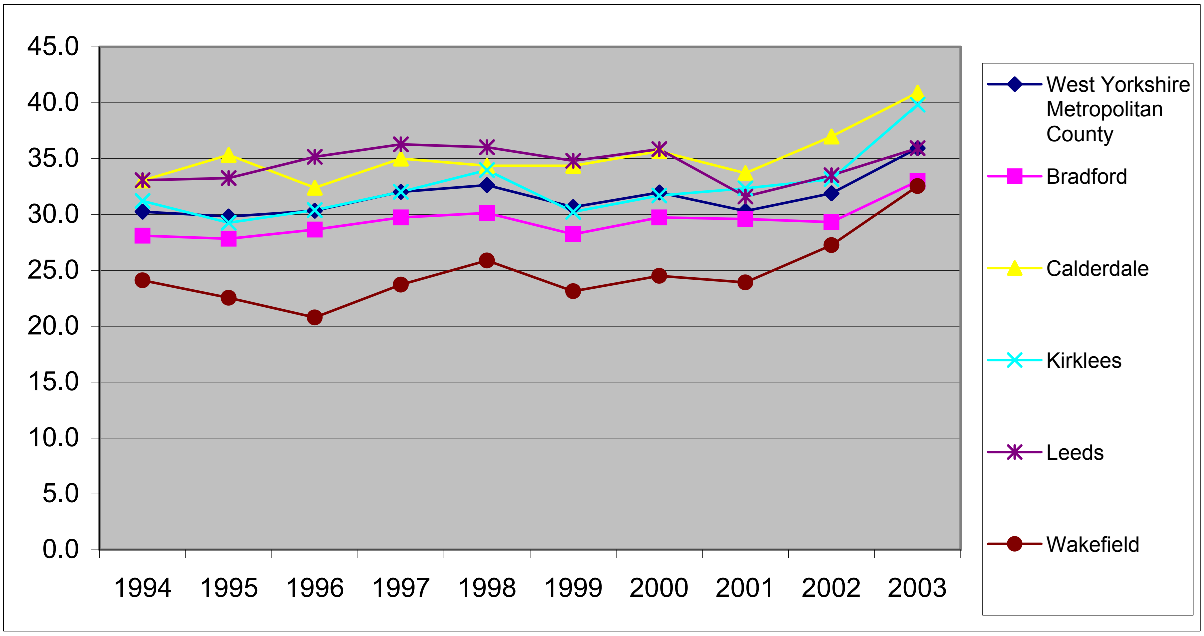
The graph overleaf shows visually the data in the table, so trends are easier to establish.

Percentage of Residents that are Self-Employed (as a percentage of resident full-time equivalent employment)



Source: Yorkshire Forward Regional Econometric Model, December 2004

VAT Registrations per 10,000 Adult Population, 1994 - 2003



Source: Small Business Service, VAT Registrations 2003

Overview

- Whilst there are some limitations to data based on VAT registrations, it remains a comparable indicator of business start-ups. In West Yorkshire, start-up rates in 2003 were 35.9 per 10,000 resident adults compared to a regional average of 34.1 and an England average of 41.8 (these figures have been calculated using the Small Business Service (SBS) mid-year 2003 population age 16+).
- The SBS produces regional level stats for business start-up registrations in the most and least deprived wards. For Yorkshire and Humber in 2002, the 20% most deprived wards had a start-up rate of 26 per 10,000 resident adults, compared to 37 in the 20% least deprived wards of the region (using SBS measurement of populations age 16+).

- National research into regional disparities found that there is a relatively low level of SME start-ups in high-value, high skill service sectors in the Northern regions (Regional Growth 2004).
- The stock of VAT registered businesses across West Yorkshire at the start of 2004 was 313 per 10,000 resident adults, compared to 323 for the region and 386 for England.
- Three-year survival rates in West Yorkshire were 63.4% for businesses registering in 1999, lower than the regional rate of 66.1% and the England rate of 66.4% (see also Progress in West Yorkshire 2005, Figure 2.17). However, research by UKBI (2002) quoted that tenant companies in UK incubators had an average 3-year survival rate of 84.4%.
- The support infrastructure for business incubation is now developing in West Yorkshire with the launch of the West Yorkshire Incubation Network in 2004, aiming to improve access for incubatees to existing business support services and delivering added value network services including support and networking activities.
- Social Enterprise Support Networks in West Yorkshire have established that there are around 739 organisations with social objectives working towards developing sustainable trading activities. This includes well established social enterprises and community and voluntary sector organisations who have been able to make the move from grant dependency to income generation.
- In 2003 National Lifestyle data from Acxiom found that 10.2% of households across England had at least one adult member who was self-employed/business owner, whilst the figure for Yorkshire and Humber was 8.3% and West Yorkshire was also 8.3%. For West Yorkshire, there has been no change in business ownership since 2002 according to this source whereas the Yorkshire and Humber business ownership has fallen from 8.7%. Lifestyle data is taken from the annual National Shoppers Survey of over one million returns across Great Britain. This does not compare exactly with the Regional Econometric Model (see above self employment table), which is based on the Annual Business Inquiry findings, then forecasts forwards.
- Self-employment across West Yorkshire is forecast to rise to 13.05% of the resident full-time equivalent employment rates by 2009, after first suffering a slight reduction between 2002 and 2003. It is also important to look at the business areas in which entrepreneurs are operating in. At a regional level, in 2003 5.7% of those who were self-employed in their main job were in the agriculture and fishing sector; 5.3% in manufacturing; 24.2% in construction and 64.8% in the service sector (Regional Trends 38). Rural areas have a higher proportion of self-employed.
- There are historically low aspirations and role models for entrepreneurship in some parts of West Yorkshire, particularly those affected by major structural changes in manufacturing and coal mining.
- The 2004 Enterprise Show programme aimed at developing the enterprise culture in the sub-region, consisted of a number of highly successful events with more than double the attendance at previous shows and further shows will be held through 2005.
- There is evidence of a net migration into rural areas across the region in all age bands except 16-24 age bands The UK Global Entrepreneurship Monitor 2003 found that people aged between 25 and 34 were more likely to be entrepreneurs than their counterparts in other age groups. Research by the Countryside Agency showed how incomers to rural areas are a source of growth and business start-ups and estimated that across rural England on average each self-employed person moving to rural areas generates an additional 1.7 jobs, largely in manufacturing and services, thus raising economic opportunity for rural residents. However, the study also reported that many in-migrants had moved to rural areas with no intention of starting a business, but had later moved into self-employment.
- The 2004 UK report for the Global Entrepreneurship Monitor found that Ethnic Minority businesses are key drivers of entrepreneurship in the UK with a generally positive attitude towards entrepreneurship and higher levels of involvement in business start up activity.
- The Davies Review of Enterprise and the Economy in Education recommended that efforts to build a deeper and wider entrepreneurial culture must begin in schools and the links between

the education system and business must be strengthened in order to build a more enterprising society across the country. Studies indicate that enterprise activities in schools can provide the means by which young people gain an awareness of the opportunities available to them in business, and develop skills and confidence that can help them to start up in business later in life. Enterprise activities also strengthen the relevance and understanding of pupils' mainstream work in school.

- Strong infrastructure is now being developed to support enterprise in statutory education. An Enterprise Adviser Service is in place advising schools' senior management on the development of enterprise learning in schools by strong Education Business Partnerships and direct funding to schools for enterprise education.

Local Variations

- The business stock situation in West Yorkshire has climbed gradually from 1999 to 2004 with a 3.2% increase over this period. There are, however, some interesting variations, and a reduction of –1.2% of stock in Leeds can be contrasted against an increase of 10.4% in stock in Wakefield, although the latter is starting from a notably lower base number of businesses.
- It is possible that self-employment levels may grow faster in areas with less buoyant economies as costs of premises for starting up may be lower, and employment and income prospects more limited as an employee.
- Self-employment levels, as a percentage of full-time equivalent employment across Bradford, are forecast the highest percentage growth in the sub-region between 2000 and 2004 but will remain slightly lower than the regional average in 2009. Wakefield is forecast to have a similar trajectory to Bradford, with rates leveling off at just below the regional average in 2009. Rates in Calderdale (16.2%) and Kirklees (16.7%) will both be higher than the regional average (14.3%) by 2009. However, Leeds is forecast to fall way behind the rest of the sub-region, with a rate of 10.6% in 2009.
- National Lifestyle data on self-employment/business ownership at household level shows that in 2003 the lowest levels of self-employment across the sub-region are in Wakefield. Calderdale (9.9%) and Kirklees (9.6%) have higher rates than the regional average of 8.3% and West Yorkshire as a whole has closed the gap with the regional average and is now level at 8.3%.
- Access to finance – a key factor in starting up a business – is generally lower across West Yorkshire than the regional average, and is a particular problem across Bradford and Wakefield. A survey about financial exclusion in the most deprived wards in Leeds found that one fifth of the respondents were interested in accessing loans for self-employment (Exclusion to Inclusion 2004). A new loan fund was launched in 2004 by the Partnership Investment Fund aimed at micro and small business entrepreneurs in Yorkshire and Humber.
- Research by Leeds Metropolitan University in 2004 of their undergraduate students found that of the 4,125 surveys completed, 28.5% have parents who run their own business. This figure was higher for the 4% of respondents who were already self-employed, suggesting possible intergenerational effects. Over a third (39%) of those respondents that were already self-employed indicated that they did something in school or college that developed their interest in starting their own business. This compares to 37% of males and 25% of females across the sample as a whole. 46% of respondents felt that they definitely/probably intended to be self-employed.

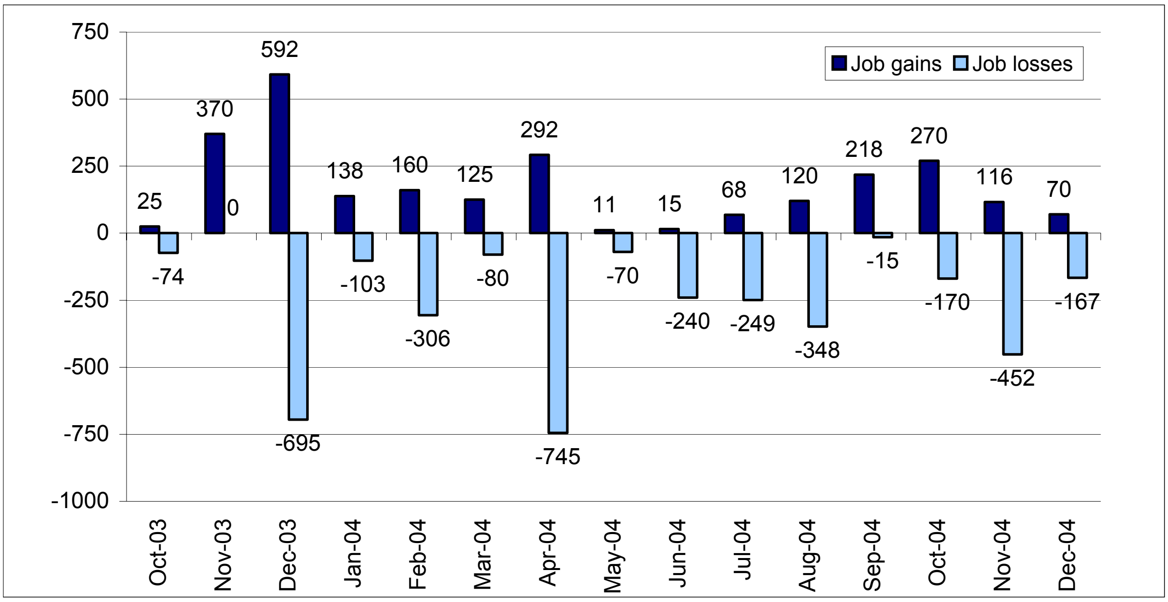
OBJECTIVE 3 – MORE PUBLIC AND PRIVATE INVESTMENT

Objective 3 - Overview and Key Points

- There would appear to have been notable inward investment successes in most of West Yorkshire, especially in Leeds. However, the global market to attract Foreign Direct Investment (FDI) is currently challenging and uncertain. This may suggest a focus on embedding investments, for instance, through aftercare, skills development, and linkages to clusters or key industrial growth sectors.
- The sub-region has many attracting features for inward investors – particularly development land in some parts of the sub-region and the link to national transport networks.
- Housing is relatively affordable in most of the region, although there are notable hotspots (e.g. north Leeds and some rural areas) as well as inevitable areas of low demand. Key worker housing will be particularly important for the growing health sector, or to satisfy the need generated by public sector relocations. High density and poor quality stock will act as a permanent brake in some areas.
- Levels of crime are above average for the region. Crime is consistently highlighted in business surveys as a major issue affecting firms in the sub-region and has a significant impact on its quality of life offer. The reality and, just as importantly, the perception of crime has a major impact on the perception of an area as somewhere to invest – or not.
- Levels of health and limiting illness are poorer than average and may contribute to low productivity. Projected new health expenditure is potentially a significant driver of future activity.
- West Yorkshire's rich heritage and cultural diversity contribute significantly to the attractiveness of the sub-region as a place to both work and live, as well as accounting for around a quarter of tourism in the region. The challenge of modernising and refreshing the current cultural assets is important to the wider growth of the sub-region.
- The sub-region has a positive legacy of attractive architecture which gives the area a unique identity (e.g. Piece Hall & Dean Clough in Halifax and Saltaire in Bradford). These assets have a role in attracting new investment in the region. The environment of West Yorkshire is a key asset as it provides a focus for tourism, investment, social well being and attracts people to live and work in the sub-region.

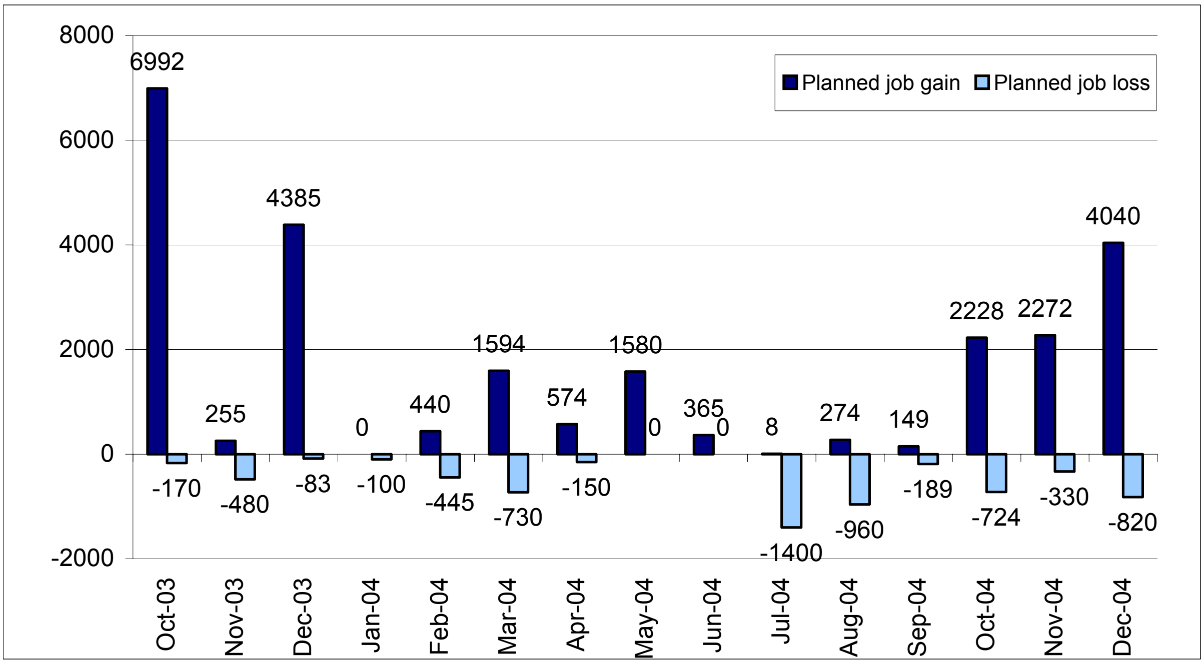
Inward Investment

Job gains and losses in West Yorkshire October 2003 – December 2004



Source: Yorkshire Forward, Experian Business Strategies Ltd Jobs Briefings.

Planned job gains and losses in West Yorkshire October 2003 – December 2004



Source: Yorkshire Forward, Experian Business Strategies Ltd Jobs Briefings.

Investment Projects in West Yorkshire, 1998-2003

	1998	1999	2000	2001	2002	2003
West Yorkshire	21	4	9	4	4	8
Yorkshire and Humber	55	18	27	21	15	25
England & Wales	640	508	575	308	359	340
West Yorkshire share of regional investment	38%	22%	33%	19%	27%	32%

Source: Ernst and Young, European Investment Monitor Database, 2004

Overview

- Data on inward investments is limited, and estimates of jobs should be treated with some caution. This reflects the fact that some data highlights announcements and not necessarily subsequent reality; companies may be more likely to announce plans for new jobs than to shed them, and that definition of 'safeguarded jobs' is not always straightforward and could be overstated.

- There has been a downward trend in merger and acquisition activity as firms consolidate in worsening economic conditions and upturns in conditions or confidence has yet to be reflected in investment. Over the past three years 45% of Merger and Acquisition investment has been coming into the region and 55% going out (Progress in the Region 2004, Figure 3.7).
- Across West Yorkshire since October 2003 – December 2004, there has been a net loss of 1,124 announced actual jobs (i.e. announced in the press). However, new jobs planned for the near future would indicate a net gain of 18,575 jobs (see charts).
- According to the Ernst and Young European Investment Monitor Database, the most common sector for inward investment in West Yorkshire from 1998 to 2003 was chemicals and pharmaceuticals at 18% of all projects. West Yorkshire's share of regional inward investment has dropped from 38% to 32% between 1998 and 2003, although has been rising steadily for the past two years. Yorkshire and Humber's national share of inward investment is on the increase (Progress in West Yorkshire 2005).
- Progress in York and North Yorkshire 2002, identified West Yorkshire as achieving the lion's share of inward investment for the region (43%) (see page 14 para 4.25). Across the period 1994 – January 1999 at least 22,788 jobs were created/safeguarded through FDI activity across West Yorkshire – the highest of all the sub-regions, with much of this due to the 'Leeds factor'.
- There is a scarcity of large-scale prime development land for inward investment in some parts of the sub-region, where legacy industrial buildings and brownfield sites require investment, whilst the popular M62/M1 corridor becomes increasingly congested.

Local Variations

- Between 1994 and January 1999 research by Newcastle University and YHDA showed that Wakefield attracted at least 14 Foreign Direct Investments (FDIs) creating/safeguarding 3,322 jobs.
- 7,559 jobs in total, of which 1,940 were new, were secured for Bradford through at least 19 FDIs into the area from companies such as German-based Grattan, and Yorkshire Cable.
- Leeds attracted the most FDI activity with at least 46 new investments between 1994 and January 1999, creating/safeguarding over 17,000 jobs and representing around 47% of all FDI activity across the sub-region, compared to the lowest – Calderdale which represented only 4% of recorded FDI activity in the area. This may partly reflect limited sites available in Calderdale.
- Based on press reports, Wakefield has announced publicly the greatest net gain in jobs (543) between October 2003 and December 2004 and Leeds has announced the least net gain (-846).

Public Investment

Average House Price Increases, 2003 - 2004

Area	April – June 2004	April – June 2003	% increase
England and Wales	£175,401	£149,935	16.98
Yorkshire and Humber	£126,720	£99,739	27.05
West Yorkshire	£123,567	£97,435	26.82
Calderdale	£113,861	£87,146	30.66
Bradford	£109,455	£82,563	32.57
Kirklees	£117,050	£92,563	26.54
Leeds	£142,288	£116,788	21.83
Wakefield	£116,477	£93,209	24.96

Source: HM Land Registry, Property Prices

Overview

- Utilisation of public investment for economic benefit is a difficult area to catch in statistical terms, with limited data available. This analysis looks at some of the areas in which issues related to social well-being and public investment might impact on economic success through their influence on the ability of areas to attract and retain businesses and skilled workers.

- Average house prices increased by 56.56% across West Yorkshire between 1999 and 2003 - just below the regional average of 57.96%, and the England and Wales average of 66.47%. Between 2003 and 2004, prices rose again by 26.82% across West Yorkshire, only just behind the regional average and higher than the England increase of 16.98%.
- Investment in social housing stock in West Yorkshire is due to receive a significant increase with £860m being projected to be spent on improvements by the ALMO and LVST housing organisations over the next three years within the sub-region. A key issue is the capacity of the construction industry and supply chain to deliver this level of investment. Private sector housing has also received a boost with £24m being allocated by the Government to support housing renewal schemes in low demand areas of West Yorkshire. Regeneration schemes of this type aim to make communities sustainable to support economic activity.
- Rural house prices have seen dramatic increases in recent years and this causes major affordability problems for young people (16-24) who are forced to migrate out of rural areas, adversely affecting rural demographics.
- Progress in West Yorkshire 2005 (Figure 6.11, First Class Quality of Life) highlights recorded crime for West Yorkshire. In 2003/04 across West Yorkshire as a whole, there were 156 recorded crimes per 1,000 population compared to the regional average of 137. There has been an improvement in levels of recorded robberies and burglaries in West Yorkshire as a whole between 2001/02 and 2003/04.
- Progress in West Yorkshire 2005 found that West Yorkshire as a whole has a lower life expectancy than the regional and national average. There are some linkages between poor health, long-term illness, economic activity and productivity.
- Community cohesion is high on the political agenda in West Yorkshire, following localised disturbances in 2001 and related tensions between a number of communities. Unacceptable levels of crime and drug problems affect numerous areas and may impact adversely on economic and social prosperity.

Local Variations

- House price increases between April 2003 and April 2004 have been greatest in Bradford (32.57%), followed by Calderdale (30.66%), both higher than the West Yorkshire average. The lowest increases across the sub-region were in Leeds (21.83%). Progress in West Yorkshire 2005 (Figure 3.4, Excellent Infrastructure) identifies that the highest proportion of properties deemed unfit for habitation in 2003 are in Leeds (10.6%). Kirklees comes out top with only 4.4% of housing deemed unfit for living in. Wakefield has reduced its percentage of unfit housing from 10.8%, the highest of the sub-region in 2002 to 5.3% in 2003.
- Crime rates are generally highest in Bradford and Leeds with burglary and robbery in particular much higher in Leeds, although these had fallen since the previous year.
- Life expectancy varies from the lowest average rate for males of 74.2 years in Bradford up to 74.1 years in Leeds compared to 74 years in West Yorkshire as a whole. This compares to the regional average of 75.4 years and the England average of 76.0 years. For females, the lowest average rates are in Bradford at 78.9 years, and the highest in Leeds at 80.6 years compared to 79.8 years in West Yorkshire as a whole. The regional and national comparisons are 80.2 and 80.6 years respectively (ONS 2004).

Tourism, Sport and Culture

The Benefits of Tourism to the Region 1998 – 2003 (in millions)

		1998	1999	2000	2001	2002	2003
Trips (mn)	**Y&H**	10.22	11.27	13.1	11	12.2	13.1
	West Yorkshire	2.42	2.74	3.8	3.2	3.4	3.6
	England	101.9	123.3	140.4	131.9	134.9	121.3

Nights (mn)	**Y&H**	38.4	38.2	42.2	30.8	36.3	35.8
	West Yorkshire	8.5	7.7	12.1	8.1	8.6	9.8
	England	548.1	582.6	439.2	409.2	415.8	371.9
Spend (mn)	**Y&H**	1,247	1,359	1,691	1,452	1,595	1,930
	West Yorkshire	298	273	455	395	424	532
	England	22,244	23,945	19,890	20,278	20,788	20,560

Source: Yorkshire Tourist Board

Overview

- Since 1998 Yorkshire and Humber's share of the total number of trips taken within England has increased slightly from 10.0% to 10.8%.
- Tourism in West Yorkshire appears to be on the up - at least as a proportion of visitors to the region. From a share of 23.7% of the region's tourism trips in 1998, West Yorkshire had increased this to 28-29% of trips in 2001 and 2002 representing a solid recovery in the wake of Foot and Mouth Disease. The share dropped slightly in 2003 to 27.5%.
- In 2003, 27.3% of the region's tourism nights were spent in West Yorkshire, down from a high of 28.7% in 2000, but up on the 1998 baseline of 22.1%. West Yorkshire falls into second place behind North Yorkshire for the percentage of the region's tourism spend in its area. In 2003 this was 27.6% - which correlated closely to the share of visits to the sub-region.
- The West Yorkshire Tourism Officer's Group identified 401 accommodation providers in West Yorkshire collectively providing 17,404 bed spaces. The Group identified low membership by providers to the regional tourism body.
- Progress in the Region 2003, page 56, para g states the decline in serviced accommodation occupancy rates in West Yorkshire between 2000 and 2002 – in contradiction to the positive trend across the rest of the region.
- The majority of tourism related employment in West Yorkshire is in catering (39%), followed by Retailing (23%) then Accommodation (15%) (West Yorkshire Tourism Officers Group 2004).
- Sport employs approximately 41,700 people in Yorkshire and Humber – equating to 2% of all employment in the region. (Source: The Value of the Sports Economy in the English Regions; Yorkshire and the Humber, June 2003, Cambridge Econometrics).
- Sport related activities are estimated to contribute £940 million to value added in the region – just over 1.5% of the total. (Source: The Value of the Sports Economy in the English Regions; Yorkshire and the Humber, June 2003, Cambridge Econometrics).
- Progress in West Yorkshire 2005 estimates that sport related activities generate £1.125 billion in annual turnover and £423 million in annual added value to West Yorkshire. In 2001/02 there were over eight million visits to Local Authority Sports centres and pools. A more detailed sport and active recreation participation survey is due to report soon, which will give comparable information across the five West Yorkshire districts.
- There are 10,892 listed buildings in West Yorkshire (Heritage Counts 2004). Over a five year period listed office buildings achieved annualised rates of total return of 15.1% - 1.5 percentage points better than unlisted ones. Over a 21 year period they have achieved a return of 9.7% per annum compared with 9.4% for unlisted buildings. (Source: State of the Historic Environment Report 2002, English Heritage).
- Public Investment by the Arts Council in West Yorkshire amounted to £7,890,712 in 2002/3, compared to £2,959,434 in South Yorkshire. This equates to 32.7% of the total of investment made by the Arts Council in the region. (Source: Geographical Analysis of Expenditure in Yorkshire & Humber 2002/3, Arts Council England, Yorkshire).
- The estimated combined turnover of all cultural enterprises in the region (excluding education and training) is £3.8 billion, 3.3% of the combined turnover of all enterprises in the region (figures not available sub-regionally). (Source: Cultural Industries Key Data, Bretton Hall, 2000).

Local Variations

- Leeds is home to 16.1% of the region's cultural industries enterprises, with Kirklees and Bradford also having a significant share (10.1% and 8.8% respectively). (Source: Cultural Industries Key Data, Bretton Hall, 2000).
- It is estimated that Leeds-based Yorkshire Television makes a direct contribution of £55 million to the Yorkshire and Humber regional economy, and employs over 1,000 people. (Source: The Regional Impact of Yorkshire Television, University of Leeds for YTV, May 2002).
- Leeds has a planned programme of £120 million worth of cultural projects over the next few years including a new city museum, Civic theatre, international swimming pool and restoration of Roundhay Park and Kirkstall Abbey.
- The Piece Hall is central to the regeneration of Halifax and, with its galleries and calendar of events, is the focus of the town's cultural quarter. Ambitious plans are in development as part of the Halifax urban renaissance masterplanning. A £6 million regeneration program for Shibden Park is also planned as part of a wider recognition of the value of open spaces for both social and economic change.
- Wakefield district has strong sporting and cultural traditions and is home to national attractions, such as the Yorkshire Sculpture Park and the National Coal Mining Museum for England. With the help of the Urban Renaissance programme a number of cultural schemes are being undertaken for Wakefield City, including a new Waterfront Gallery and Centre for Creative Arts, and Castleford is to be the site for a new Heritage Centre.
- Bradford have a number of capital projects with a cultural focus in various stages of development, including the restoration of Roberts Park in Saltaire, the Manningham Mills redevelopment, Corridors and Gateways and the Lighting the City Projects. The URC Masterplan for the City centre has a cultural focus and includes, potentially, Lightwave (a learning and media experience), swimming pool, concert hall and gallery. The creative economy is a major theme in the area, investing over £20 million in cultural projects, such as Creative Town 2 and Creative Training Centres.
- One of Kirklees Council's Economic Development Service's strategic objectives is to market the District as a quality visitor destination. Kirklees works with Calderdale and Barnsley Councils in joint activities to promote the "Pennine Yorkshire" tourism brand. The tourism sector represents 6-7% of the total value of all goods and services in Kirklees. A new four year Visitor Strategy for Kirklees was launched in 2004 aimed at increasing the value and volume of tourism to Kirklees.

OBJECTIVE 4 – IMPROVE EDUCATION, LEARNING AND SKILLS

Objective 4 - Overview and Key Points

- Learning performance in early years forms the foundation on which future learning can be built. If we are to avoid secondary and further education being remedial it is important that young people achieve this good learning base. The LSC WY is working with partners to improve key stage 4 attainment.
- Over a number of years it has become apparent that a sizeable mismatch occurs between what potential employers require and the perceived/expected future job opportunities. Therefore, through the Strategic Area Review process, we need to ensure learning opportunities meet the needs and aspirations of individuals and employers.
- Choice of career made by young people leaves much to be desired as individuals make decisions based on inadequate or poor advice. Individuals must all be able to confidently make an informed choice of learning at each stage.
- Levels of poor literacy and numeracy in West Yorkshire are higher than the regional and England average, so we must raise the basic skills of individuals.
- West Yorkshire has lower GCSE attainment (five or more passes at grades A* - C) than the England average, and a similar level to the regional average. There was a significant gap between Bradford (39.6%) and Calderdale (52.7%) in 2003/04. Indeed, there is a general need to increase the attainment of level 2 qualifications across the sub-region. The LSC WY is working with partners to increase level 2 attainment.
- In terms of NVQ Levels 3 and 4, the sub-region's overall performance is just above the regional average and below the England average. Leeds performs the best within West Yorkshire, being consistently above the regional average. It is striking that whilst the best performer at NVQ Level 4+ in the sub-region Leeds' achievement takes it little higher than national average, whilst Bradford, Kirklees and Wakefield fall notably below it. Given that NVQ Level 4+ is linked to success in attracting and retaining graduates, the sub-region's performance is disappointing given it has four universities. A combination of the right job opportunities and quality of place offer – and awareness of both of these – will be required to improve performance.
- Levels of workforce development are above both the regional average and the England average. Calderdale and Leeds have the highest levels of the working age population receiving job related training in West Yorkshire. Higher skills have the potential to increase the productivity of the firms that employ them. We must continue to promote the competitive advantages of learning and skills to employers in order to stimulate informed demand.
- Regeneration of individuals and communities remains a vital element within the West Yorkshire Investment Plan. We must ensure that learning supports any planned regeneration of communities.
- We need to increase levels of participation in learning, with particular emphasis on specific disadvantaged/disaffected groups. These efforts will be enhanced if local learning provision is regarded as both excellent and relevant.
- Education Business Partnership links need to be strengthened to increase both young peoples' understanding of the world of work and their future ability to secure employment.

The detail below summarises performance on key skills indicators in West Yorkshire. A fuller exposition and exploration of skills issues in the sub-region is included in Progress in West Yorkshire 2005, from which the detail included here borrows notably.

GCSE Attainment:

5+ GCSE Passes at Grades A* - C

	1998/99	2003/04	% change
Bradford	32.1	39.6	23.4
Calderdale	41.9	52.7	25.8
Kirklees	41.3	47.3	14.5
Leeds	39.4	45.2	14.7
Wakefield	41.7	50.0	19.9
West Yorkshire	38.6	45.8	18.6
Yorkshire and Humber	40.5	47.1	16.3
England	45.7	52.0	13.8

Source: DfES and Statistical First Release 01/2005 - 'GCSE and Equivalent Results and Associated Value Added Measures for Young People in England 2003/04'

Overview

- The percentage of pupils achieving 5 or more A*-C GCSEs across all the West Yorkshire local authority district areas in 2003/04 (45.8%) is behind the England average (52.0%), although the gap has closed since 1998/99. There is notable variation across the sub-region, with Calderdale (52.7%) above the England average, whilst Bradford still has one of the lowest proportions of 5+ GCSE Grade A*-C passes in the region despite showing one of the greatest percentage improvements over the past five years.
- Figures from the 2001 Census give a picture for the whole population aged 16-74 years and reveal a starker picture, with over 33% of the West Yorkshire population having no qualifications.
- 63 wards out of 126 in West Yorkshire rank in the poorest 25% nationally for education deprivation.
- Demographic shifts are resulting in fewer young people and a reliance on an older workforce.

Basic Skills:

Proportion of Working Age Population (aged 16-60) with Poor Levels of Literacy and Numeracy in 2001

	England	Yorkshire & Humber	West Yorkshire	Bradford	Calderdale	Kirklees	Leeds	Wakefield
Literacy	24	26.0	26.39	27.7	26.3	26.8	25.1	27
Numeracy	24	26.6	27.17	28.8	27.6	27.8	25.8	28.6

Source: Basic Skills Agency 2001 (Progress in the Sub-Region. Also features in Progress in the Region 2003, page 43)

- Whilst the above data is now somewhat out of date, is does make comparisons with the region and England possible. Overall, West Yorkshire has a higher proportion of people with poor basic skills compared to the national average. There are an estimated 136,000 people between the ages of 16-60 who have either lower or very low literacy skills and 182,000 people who have lower or very low numeracy skills.
- According to the West Yorkshire Household Survey 2002, nearly 6% of the employed workforce in West Yorkshire feel they need to improve their reading, 12% their spelling, 10% their writing ability and 12% feel a need to improve their basic maths. All these figures show a marked reduction from the previous year and early findings from the West Yorkshire Household Survey 2005 indicate further reductions in these figures.
- Younger workers are much more likely to feel that they need to improve their Basic Skills, particularly in terms of writing and maths. Men are more likely than women to feel they need to

improve their reading, spelling and writing ability, whilst women are more likely to feel they needed to improve basic maths.

- Bradford has the highest percentage of very low literacy levels, and the Basic Skills Agency survey does not take into account those who were not educated, or were part-educated, in Britain, or those who could not speak fluent English. Therefore, due to Bradford's high minority ethnic population, these figures could be an underestimate.
- Occupational deficiencies are most likely to occur in skilled trades and semi and unskilled occupations. Employees working in small organisations are also more likely to feel that they needed to improve their basic skills. According to the West Yorkshire Skills Survey 2003, basic skills needs are not widely identified by employers, with the best recognition of needs coming from the largest companies.

Qualifications:

Percentage of Economically Active Adults (18-59/64) Qualified to at Least NVQ Level 3 (or equivalent), 2001/02-2002/03

	2001/02	2002/03
Bradford	45	46
Calderdale	47	47
Kirklees	45	45
Leeds	49	49
Wakefield	39	39
West Yorkshire	46	46
Yorkshire & Humber	45	46
England	47	48

Source: Department for Education and Skills, analyses of the Local Labour Force Survey Spring 2003.
It should be noted that when extracting data from the Labour Force Survey, the use of slightly different variables may produce different figures, particularly at local authority level. These figures were calculated by DfES to report against national targets.

Percentage of Economically Active Adults (18-59/64) Qualified to NVQ Level 4 (or equivalent), 2001/02-2002/03

	2001/02	2002/03
Bradford	23	24
Calderdale	26	26
Kirklees	24	24
Leeds	28	28
Wakefield	20	21
West Yorkshire	25	25
Yorkshire & Humber	24	25
England	28	28

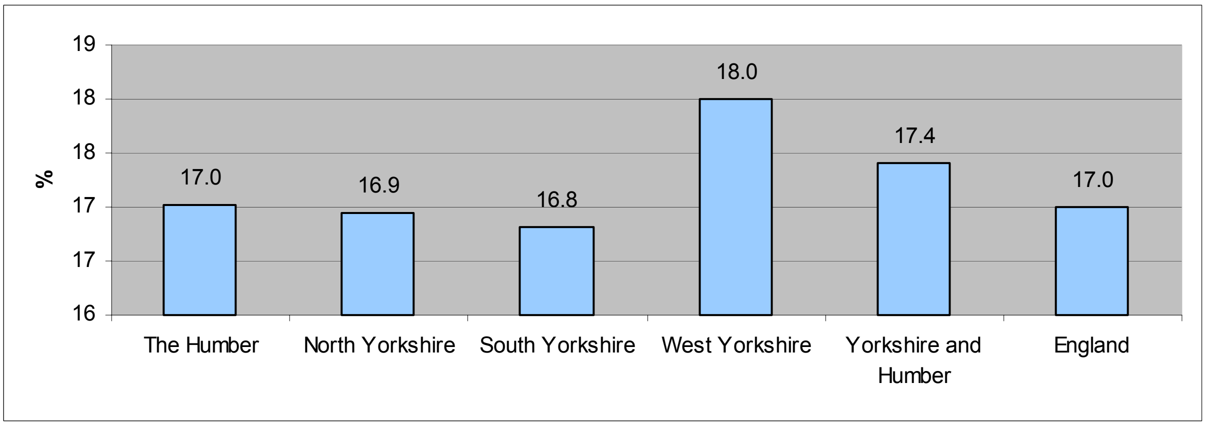
Source: Department for Education and Skills, analysis of the Local Labour Force Survey Spring 2003.
It should be noted that when extracting data from the Labour Force Survey, the use of slightly different variables may produce different figures, particularly at local authority level. These figures were calculated by DfES to report against national targets.

- West Yorkshire's overall performance at NVQ Level 3 and 4+ is close to the regional average but below the England average.
- As with GCSE passes, there is considerable variation across the local authority district areas within the sub-region at NVQ Level 3+. Most districts stayed constant between 2001/02 and 2002/03. Wakefield still retains the poorest performance in the sub-region. Performance on this indicator in Kirklees is also of concern as the figure has not shown improvement in the past year and remains slightly lower than the regional average. Bradford and Calderdale are now both in line with the regional average (but below the national average) whilst Leeds has the healthiest level of NVQ performance. This is notably higher than its performance at GCSE level.
- Leeds also has a relatively strong performance at NVQ Level 4 and above compared to both regional and national averages – suggesting it does better at attracting and retaining graduates than the rest of the sub-region. This is likely to be linked to the presence of two universities and a substantial student population, a proportion of whom will go on to live or work locally. This

said, NVQ Level 4+ performance in Kirklees (which includes Huddersfield University) has fallen further behind the regional average. Wakefield performs least well on this indicator, which is in contrast to its relatively strong performance at GCSE.

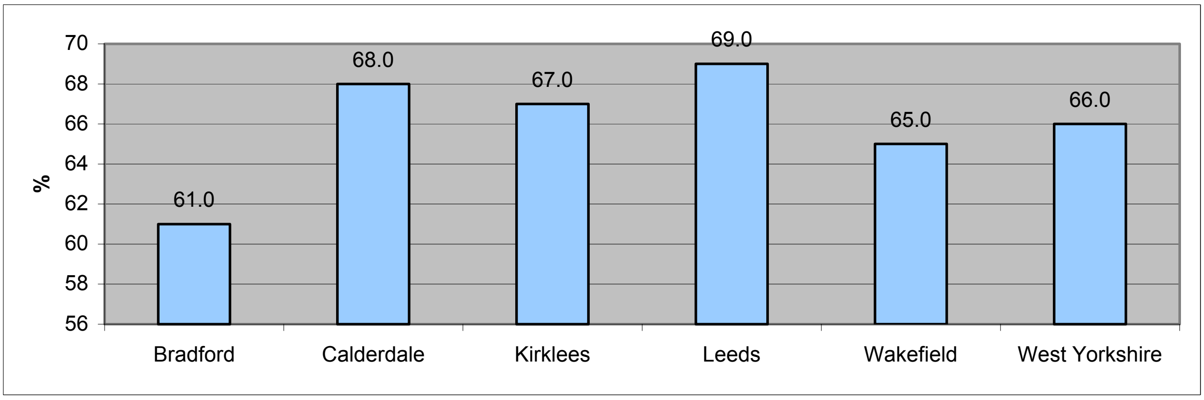
Workforce Development:

Percentage of Working Age Employees Receiving Job-Related Training in the Past Four Weeks



Source: DfES analyses of the Local Labour Force Survey, 2004

Proportion of organisations that have trained any of their staff in the past 12 months (by district)



Source: West Yorkshire Skills Survey 2003

Distribution of NVQ Equivalents for the Employed Workforce in West Yorkshire

		NVQ 0	NVQ 1	NVQ 2	NVQ 3	NVQ 4+
West Yorkshire	(2002)	13.7	8.6	24.6	25.0	28.0
	(2001)	15.7	11.6	20.0	22.4	30.3
Occupation	Managers	5.0	6.5	19.7	23.4	45.4
	Professional	0.3	0.8	3.8	6.5	88.6
	Ass. Prof.	2.4	3.1	14.0	17.4	63.1
	Admin/Sec'l.	5.1	8.7	28.0	36.2	22.0
	Skilled Trades	13.2	7.6	32.2	37.0	10.0
	Persnl Servs.	13.4	9.7	31.3	25.7	19.9
	Sales	17.9	15.3	33.9	24.1	8.7
	Semi-skilled	32.9	12.3	27.9	18.5	8.4
	Unskilled	38.2	14.9	23.6	18.3	5.0
Industry	*Agr. Fsh.	25.1	9.6	28.9	29.0	7.3
	*Energy	15.7	4.1	35.6	21.6	23.0
	Manuf.	18.8	9.6	25.0	27.8	18.8
	Const.	15.9	8.1	28.3	35.5	12.2
	Dist/Hot/Cat	16.2	13.0	30.8	27.3	12.7

	Trans/Comms	20.0	11.0	33.4	22.7	12.8
	Bank/Ins/Fin	4.7	6.5	22.4	25.0	41.4
	Pub.ad./Ed./Hlth.	9.9	6.6	17.3	20.9	45.3
	Other	9.1	6.1	27.8	19.7	37.3

Source: West Yorkshire Household Survey, 2002 - * indicates small size of data sub-cell

- Levels of workforce development (in the past four weeks) are high in West Yorkshire relative to the other sub-regions and, at 18.0%, are higher than the regional and England average in 2002/03, which may in part help compensate for lower levels of academic qualifications. Whilst this is the case, those parts of the sub-region that have the highest achievement at GCSE and NVQ levels 3+ and 4+ (Calderdale and Leeds) also appear to do most in terms of job related training (in the past 12 months). Levels of workforce development in the 2003 Skills Survey were lowest in Bradford and in Wakefield.
- Additional data comes from the West Yorkshire Household Survey 2002. This showed that 45% of West Yorkshire people in work have participated in study or training over the past 12 months, an increase of around four percentage points since 2001. Participation in learning was higher amongst the unemployed workforce (i.e. those available to work, but not currently in employment) at 58% but the figure was only 34% for the economically inactive (i.e. those not actively seeking work or unable to work through illness/caring responsibilities).
- A third of employers across West Yorkshire do not undertake any form of training - of these, 77% do not train because they say their workforce has all the skills required. This will be an issue as technology advances and competition intensifies - employers will need to respond to emerging and anticipated future needs. We need to stimulate an informed demand from employers.
- The Further Education (FE) sector in West Yorkshire is the 'sleeping giant' of workforce development (LSC WY Skills Strategy 2003/5) but very few employers utilise FE to meet the needs of their workforce. A key priority for the Learning and Skills Council West Yorkshire (LSC WY) is to increase the engagement of employers with FE and make FE more responsive to the needs of employers.
- The following occupations were regarded as areas with skill shortages in the West Yorkshire Skills Survey 2003: road transport operatives, sales and checkout operatives, hairdressers and related occupations, vehicle trades, construction trades, catering occupations, childcare and health and associated occupations.
- These occupations cover both high and low level skills and the reasons for shortages at these various levels can be very different. The survey found that generally, it was difficult to find unskilled, manual staff due to the increase in the number of people gaining qualifications and those with higher career expectations. It was also clear that technology has had an impact in the retail sector where shop floor workers tend to be low paid and lower qualified, but are increasingly required to operate sophisticated computers and machinery. The health sector is also becoming more technology-based and specialist workers are in short supply possibly due to poor perceptions of pay and conditions in that sector.
- The transport sector is an area where particular skills shortages exist affecting both project delivery and transport service reliability. Research commissioned by Business Link West Yorkshire into the Skill Needs of the Transport and Distribution sector in West Yorkshire found that driving skills were identified as the main key skills, followed by people skills and knowledge or experience of the industry. A fifth of businesses in this sector did not identify staff training and development needs.
- In 2003 the West Yorkshire Transport Education and Skills Alliance (WY TESA) was formed with representatives from Metro, educational bodies and transport providers and consultants. Activities planned include awareness raising campaigns, materials and work experience programmes. Funding will be required to co-ordinate and manage these activities.

- 79% of businesses in the Travel and Tourism sectors consider training in their company to be very/quite important. Businesses in this sector identified People Skills as the key skills required of the workforce. IT and computer literacy were also seen as important (Skill Needs of the Travel and Tourism Sector 2004)
- Rural areas are becoming more and more similar to urban areas in employment terms although knowledge-intensive sectors and occupations remain under-represented in rural areas compared to the national average. Rural areas may be at risk from the emergence of a 'low-skill equilibrium': a situation in which employers compete in low value added markets and demand relatively low skills from employees, which is then reflected in the supply of skills (Rural Labour Markets, Skills and Training 2003).
- Information will soon be available to update data in this section from the West Yorkshire Household Survey 2005, which has been partly supported by the West Yorkshire Research Programme and will enable some useful trend analyses to be undertaken.

The following are the key priorities for the Learning and Skills Council for West Yorkshire:

1. Work with partners to improve key stage 4 attainment
2. Ensure learning opportunities meet the needs and aspirations of individuals and employers
3. Informed choice of learning for every individual at each stage
4. Raise the basic skills of individuals
5. Work with partners to increase level 2 attainment
6. Promote the competitive advantages of learning and skills to employers
7. Ensure learning supports the regeneration of communities
8. Develop excellence in all our learning provision

OBJECTIVE 5 – CONNECT PEOPLE TO ECONOMIC OPPORTUNITY

Objective 5 - Overview and Key Points

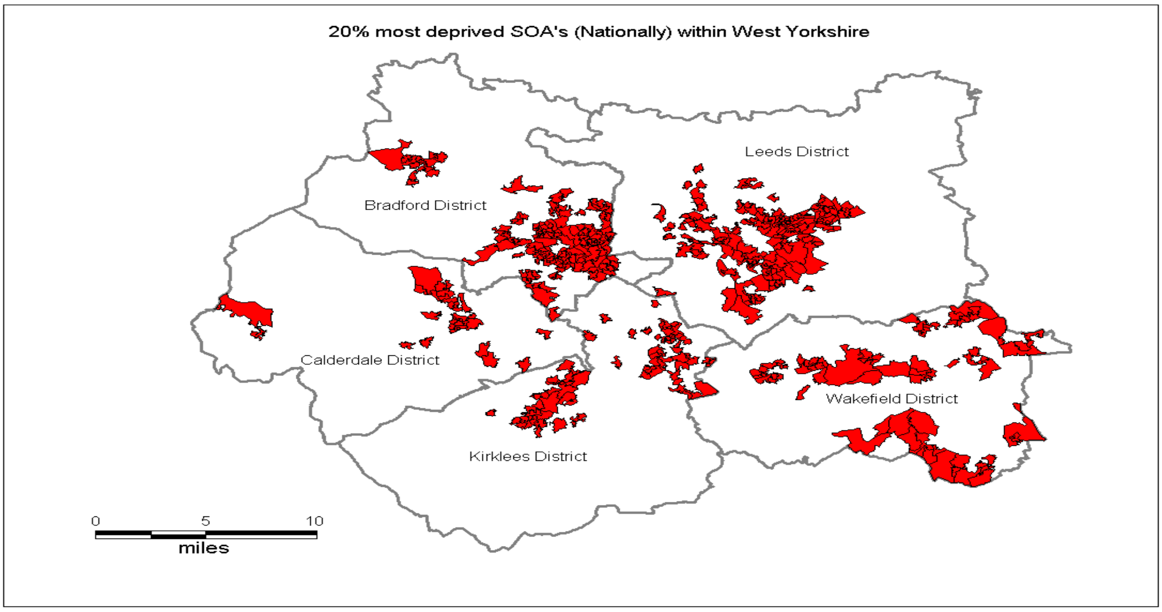
- There is a high level of deprivation within West Yorkshire. Whilst the sub-region does contain some relatively affluent areas, there are nearly a third of its Super Output Areas that fall within the 20% most deprived in England. Deprivation is most extensive in parts of the Wakefield district, and is especially prolific in Bradford, however, hotspots also exist elsewhere, such as in the City of Leeds and in parts of Calderdale and Kirklees.
- There is a tendency for deprivation to be concentrated in smaller communities within rural areas. More of a focus needs to be given to pockets of deprivation in rural areas as opposed to ward level approaches.
- Deprivation occurs in themed areas e.g. BME communities, women, low income groups who are not confined to particular geographical areas.
- Leeds and Bradford stand out as the largest two cities in the sub-region and between them their local authority districts account for over a fifth of the population in Yorkshire and the Humber. Below that, Huddersfield is the largest town in the region. Wakefield and Halifax are smaller, but still sizeable. The urban renaissance/masterplanning approach in these areas has merits in terms of the population reached and there is a need to demonstrate how this will help to address deprivation and decline and enable the engagement of people in the labour market. Assets and heritage provide an important platform to build on moving forward
- West Yorkshire's large population and central position in some ways make it the heart of the wider region. It has strong connectivity with other towns and cities beyond – for instance to York, Harrogate, Selby, Barnsley, Sheffield and Manchester.
- West Yorkshire has a wide spread of towns, some of which are urban in character, others of which are based in a more rural hinterland. It would be difficult to adopt a renaissance approach in all these settlements within a short time period so there would be merits in prioritisation, for instance based on criteria such as population reached, level of need and market failure as well as looking at the opportunities for creating added value and achieving inspirational impact.

Regeneration and Inclusion

In May 2004, The Office of the Deputy Prime Minister (ODPM) released the updated Indices of Multiple Deprivation (IMD). The IMD 2004 measures multiple deprivation at the small area or Super Output Area (SOA) level. The model combines indicators for seven main domains including employment, education, health, etc and gives a weighting to each domain.

In terms of the geographical distribution of SOAs, there are 32,482 SOAs in England, of which 3,293 are in Yorkshire and Humber. West Yorkshire contains 1,381 SOAs, 41.9% of the regional total.

20% Most Deprived Areas (Nationally) Within West Yorkshire

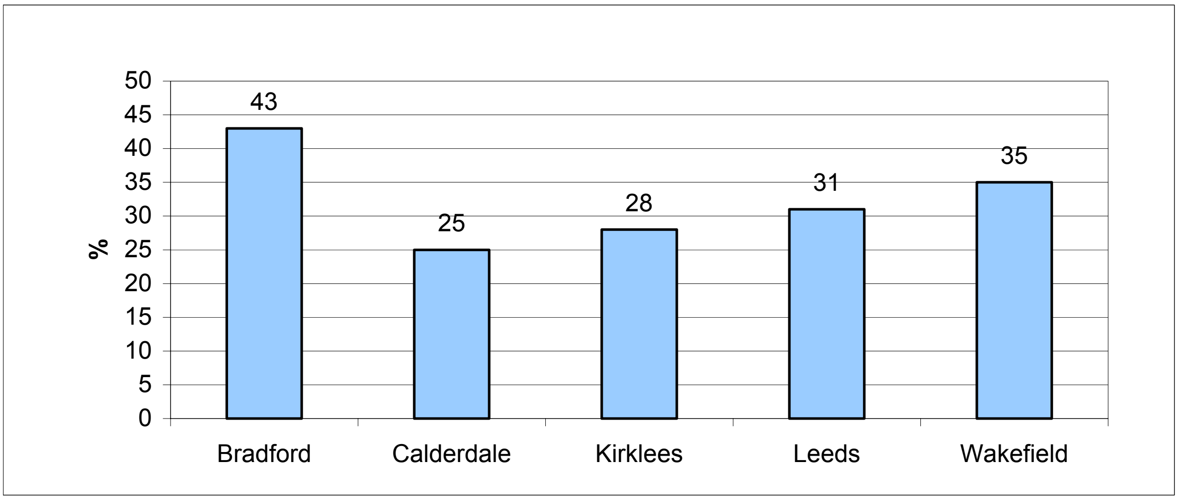


Source: Index of Multiple Deprivation 2004, Office of the Deputy Prime Minister

Districts are complex to describe as a whole or to compare because of variations in population size, diverse populations and concentrations of deprivation. For this reason district level summary measures have been produced to focus on different aspects of multiple deprivation.

One useful measure is to look at the proportion of a district's population living in the most deprived SOAs in the country. This measure is known as the 'extent' measure and shows how widespread high levels of deprivation are in a district (see the Technical Appendix of Progress in West Yorkshire 2005 for more information about the Extent measure).

% of Population Living in the Most Deprived SOAs in England



Source: Index of Multiple Deprivation 2004, Office of the Deputy Prime Minister
Note: These figures are taken from the 'Extent' measure of deprivation

Overview

- 31.4% of West Yorkshire's SOAs fall into the 20% most deprived in England compared to 29.6% of Yorkshire and Humber SOAs and 20% nationally. These averages mask some wide variations at the local level. The above map shows how these most deprived SOAs are distributed across the sub-region, with particular concentrations of severe deprivation in Bradford, Leeds and the former coalfields of Wakefield.
- Effective transport networks are necessary to connect people to economic opportunity and to underpin the sub-regional labour market. Barriers can include road congestion and inadequate public transport.

- 38% of jobseekers say that transport issues are a key barrier to getting a job according to Social Exclusion Unit (SEU) research.
- Access to jobs can be a particular difficulty for households without a car and the percentage of households without a car in West Yorkshire is lower than the national average at 32% versus 27% respectively. Many households and people without access to a car have lower incomes.
- Research by Metro shows that problems for non-car owners reaching employment include travel costs, lack of public transport information, and the limited availability of off-peak services. SEU research shows that whilst the cost of motoring has remained steady the cost of bus fares has risen by over 30% since 1985.

Local Variations

- Bradford shows the most widespread deprivation with over 40% of the population living in the most deprived SOAs in England, followed by Wakefield (35%), Leeds (31%), Kirklees (28%) and Calderdale (25%).
- 25.3% of SOAs in West Yorkshire have more than one third of under 16s living in income-deprived families. Again this masks significant variation at the local level with 35.8% of SOAs in Bradford having more than one third of children in income deprived families compared to 16.9% in Kirklees. In Leeds, one SOA displayed extreme child poverty with 98% of under 16s living in income deprived families.
- 'Two speed economies' within major towns and cities are particularly noticeable in Leeds, but examples in Huddersfield, Halifax and other settlements are apparent too. A new report entitled "Exclusion to Inclusion" highlights the extent of financial exclusion suffered by residents living in the seven most disadvantaged wards in Leeds. There is also evidence to suggest that individuals that suffer to a greater extent from problems such as credit constraints or difficulties getting finance may be less likely to acquire skills (Regional Growth 2004). The Leeds report estimates that the use of door step lenders with high APR rates costs the Leeds economy between £3 to 9.5 million per annum. Extrapolating this figure to the West Yorkshire level based on 2002 GVA levels gives an estimated range of £7 to 22 million potentially being lost to the sub-regional economy as a result of financial exclusion.
- Calderdale and Kirklees have the lowest proportion of people living in the SOAs that rank within the 20% most deprived in England. Both Leeds and Bradford have SOAs that fall into the most deprived 100 SOAs in England indicating 'hotspots' of deprivation.
- A disproportionate percentage of SOAs in Bradford, Calderdale and Leeds fall into the most deprived 10% in England on the Child Poverty measure, which measures the percentage of under 16s living in low income families.

Unemployment

Claimant Count (as a percentage of resident working age population) 2002 – 2004

	October 2004			October 2002		
	Males	**Females**	**Total**	**Males**	**Females**	**Total**
England	3.0	1.2	2.1	3.4	1.3	2.4
Yorkshire and Humber	3.2	1.2	2.2	4.0	1.4	2.8
West Yorkshire	**3.3**	**1.1**	**2.2**	**4.2**	**1.4**	**2.8**
Bradford	4.0	1.3	2.7	5.6	1.7	3.7
Calderdale	2.9	0.9	1.9	4.0	1.4	2.7
Kirklees	2.6	1.0	1.8	3.4	1.2	2.4
Leeds	3.6	1.2	2.4	4.2	1.4	2.8
Wakefield	2.5	0.9	1.8	3.2	1.1	2.2

Source: Office of National Statistics, Claimant Count (proportion of resident working age population)

Unemployment Rates (as a percentage of economically active) 2003/04

	Male	Female	Total
West Yorkshire	5.7	3.9	4.9
Bradford	6.8	3.3	5.2
Calderdale	5.0	3.9	4.5
Kirklees	4.5	5.1	4.8
Leeds	5.9	2.4	4.3
Wakefield	5.8	6.5	6.1
Yorkshire and Humber	5.6	4.4	5.1
Great Britain	5.4	4.5	5.0

Source: Local Area Labour Force Survey 2003/04.

Employment and Economic Inactivity – 2001

	Proportion of population aged 16 to 74 yrs %	Average proportions (%)			Y&H Rank /21 (proportion)
		E & W	Y&H	WY	
Employed[1]		60.6%	58.9%	59.1%	
Bradford	56.5%				17
Calderdale	62.7%				7
Kirklees	60.3%				10
Leeds	58.9%				12
Wakefield	58.9%				
Eco inactive (EI)		33.5%	34.8%	34.5%	
Bradford	36.6%				5
Calderdale	31.6%				16
Kirklees	33.5%				12
Leeds	34.2%				11
Wakefield	35.7%				8
EI perm sick or disabled (incl above)		5.5%	6.1%	6.0%	
Bradford	6.1%				7
Calderdale	5.7%				9
Kirklees	5.6%				11
Leeds	5.3%				13
Wakefield	8.3%				3

Source: Census 2001

1. Census definition used i.e. all in employment except full-time students who are economically active.

Overview

- Unemployment in West Yorkshire has been falling since at least the mid-1990’s and this trend is continuing with levels now comparable to the regional average. There are strong links between employment and skills; for instance decline in demand for unskilled and low skilled workers is likely to have employment consequences for these groups.
- In October 2003, the claimant count rate for males across West Yorkshire was 3.8%, whilst for females it was 1.3% - on a par with the regional averages, but for males it is higher than the national averages.
- ILO unemployment rates remain on a par with the GB and regional averages, with the exception of Bradford where rates are higher.
- With unemployment rates at historically low levels it is the high levels of economic inactivity and of worklessness – particularly the number of workless households in some areas that are of concern. Bradford and Wakefield have some of the highest levels of economic inactivity in the region.
- Local Area Labour Force Survey data for 2003/04 shows the working age employment rate for West Yorkshire to be equal to the regional average of 73.9%. Bradford had the lowest rate of 71.1%. Only Kirklees (75.5%) and Wakefield (75.3%) had higher rates than the Great Britain average of 74.3%.
- Incapacity benefit claims have remained high, however, and this is being increasingly recognized as hiding true unemployment levels.

- West Yorkshire is home to 77% of the region's black and minority ethnic population of working age, who experience much lower economic activity rates than the total population in spite of having broadly comparable qualification levels. Over 11% of the total West Yorkshire population is of non-white origin; in Bradford over 21%; both of which are growing trends. The employment rate for ethnic minorities in West Yorkshire is lower than the white population and levels of self-employment for ethnic minority groups in West Yorkshire were higher than those for the region and the UK (Taylor Associates, 2004).
- Low levels of economic activity, linked to levels of poor health and limiting illness, may contribute to low productivity in some areas. In Wakefield, 8.3% of the population aged 16-74 are inactive due to permanent illness or disability compared to West Yorkshire average of 6.0%.
- The average income for all households across West Yorkshire in 2002 was £20,743, compared to the regional figure of £20,302 and the GB average of £23,042 (Acxiom - National Lifestyle Survey).

Local Variations

- All local authorities have seen a decrease in unemployment over the past two years.
- Pockets of severe unemployment are evident in a number of wards in the sub-region, particularly in Bradford, where Little Horton (13.4%), Bradford Moor (12.6%) and University (14.9%) wards all have high rates. Districts that are generally less deprived than the sub-regional average also contain localities with high unemployment, such as St. John's ward in Halifax (Source: Taylor Associates).
- The percentage of claimants classed as long-term unemployed is more of a sub-regional wide issue, although rates in Bradford are again higher than the sub-regional and regional average.
- Many areas have over a third of unemployment claimants under the age of 25. This is the case for nine wards in Bradford, two in Calderdale, seven in Kirklees, seven in Leeds and eight in Wakefield (Source: Taylor Associates).
- Economic activity rates for ethnic minorities are available for Bradford (54.1%), Leeds (67%) and Kirklees (58%) from the June – August 2002 Quarterly Labour Force Survey. These compare badly to the economic activity rates for all people of working age: 73.9%, 80.8% and 80.9% respectively.
- Average incomes across West Yorkshire range from £19,823 in Wakefield up to £21,334 in Kirklees. The average for Leeds is £21,036 (note these figures include retired households as well as those in work). Further research is currently commissioned to identify average income by working age (Acxiom - National Lifestyle Survey).

Urban and Rural Renaissance

Urban and rural renaissance is a difficult issue to pin down in quantitative terms, relating as it does to both the process of engaging with communities to generate long term vision, the shape of a centre and quality of the physical environment, and wider links with issues including the business base, social regeneration, skills, investment and culture. This analysis is based largely on mapping the spread of (larger) settlements within the sub-region based on their levels of population, and roughly gauging economic success within these based on factors such as overall population shifts and income levels. This is by no means intended to fully map all the factors that should be taken into account in planning renaissance programmes. Rather it is intended to provide basic information which can *assist* in selecting and assessing the spread of current and future renaissance activities – based upon the impact of programmes (i.e. the size of community that benefits) and the need for economic transformation (based on income levels).

Population Trends (with annual percentage growth rates in brackets)

	Y&H		WY		Bradford		Halifax		Huddersfield		Leeds		Wakefield	
2002	*4,975,698*	*(0.2)*	*2,085,457*	*(0.2)*	286,991	(0.7)	80,641	(0.7)	102,223	(1.9)	422,208	(0.2)	74,910	(1.1)
2001	*4,966,685*	*(0.3)*	*2,080,435*	*(0.4)*	284,861	(0.7)	80,082	(-0.2)	100,292	(-0.2)	421,538	(0.2)	74,070	(0.8)
2000	4,952,166	(0.1)	2,071,589	(0.2)	282,907	(-0.6)	80,254	(-0.8)	100,477	(-1.0)	420,667	(-1.2)	74,692	(-0.5)
1999	4,946,955		2,067,897		284,734		80,930		101,468		425,833		75,086	

Italics indicate population estimates taken from the Yorkshire Forward Regional Econometric Model
Source: REM (regional and sub-regional data), Claritas Ltd for Bradford, Halifax, Huddersfield, Leeds and Wakefield data.

Number of Households (with annual percentage growth rates in brackets)

	Bradford		Halifax		Huddersfield		Leeds		Wakefield	
2002	117,513	(1.3)	35,091	(1.0)	45,257	(2.4)	191,496	(0.4)	32,813	(1.5)
2001	116,046	(1.1)	34,744	(0.5)	44,216	(0.6)	190,672	(1.1)	32,321	(0)
2000	114,818	(-0.3)	34,574	(-0.1)	43,960	(-0.2)	188,623	(-0.4)	32,334	(0.3)
1999	115,108		34,620		44,062		189,285		32,233	

Source: © Claritas UK Ltd.

Overview

- As a sub-region, West Yorkshire has seen similar population growth rates to the region (0.2%, 2001-2002).

Local Variations

- Between 1999-2002 Bradford had a growth rate of +0.79%, whereas Halifax had a population growth rate of –0.36%. Huddersfield had a growth rate of +0.74%, Leeds had a growth rate of –0.85% and Wakefield had a growth rate of –0.23%.
- In terms of the number of households, between 1999-2002 Bradford had a growth rate of +2.09% and Halifax had a growth rate of +1.36%. Huddersfield had a growth rate of +2.71%, Leeds had a growth rate of +1.17% and Wakefield had a growth rate of +1.80%.
- The 2001 Census reveals that 414,137 people in West Yorkshire aged 14 years or under accounted for 20% of the population. The combined age group of 15-64 (15-59 for women) that makes up the potential and existing workforce accounts for 63% of the population (or 1,302,840 people). Those considered to be post retirement age accounted for 17% of the population (or 362,234 people). (Page 35 of West Yorkshire in Focus 2003.)
- Figures from the 2001 Census of Population find that the White population constituted 89% of the West Yorkshire residents (including *White Irish and White Other*), whereas 11% were from other ethnic minority groups. (Page 37 of West Yorkshire in Focus 2003.)
- Since 1991, the proportion of ethnic minorities, as a proportion of the total population, has increased from 8% in 1991 to 11% in 2001. Similarly, the White population has decreased from 92% in 1991 to 89% in 2001. This increase in the proportion of the ethnic minority population is more significant in West Yorkshire (3% points) than the increase for the region (2% points), but is similar to the average increase for England (3% points). This is partly explained by the new mixed race categories in the census. (Pages 37-8 of West Yorkshire in Focus 2003.)
- The West Yorkshire Strategic Economic Assessment will inform and provide the basis for the Leeds Spatial Study.

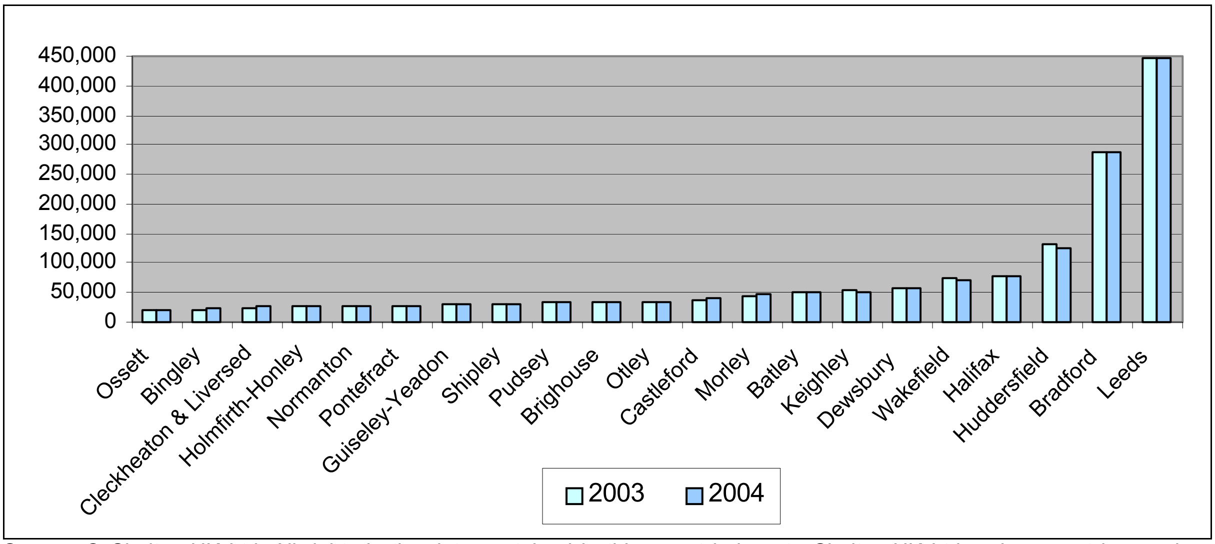
Spread of Settlements and Population

West Yorkshire is a populous conurbation which contains the major cities of Leeds and Bradford as well as the other major centres of Huddersfield, Wakefield and Halifax. Between these main centres there are also a wide range of towns of varying size and character, including those in or close to the main built up areas of West Yorkshire (e.g. Dewsbury, Batley, Morley), as well as those within a rural or semi-rural catchment area. The analysis below provides population data on these settlements based on those above and below 20,000 population.

It is also important to note that there are strong interlinkages between communities within West Yorkshire and those beyond. These are hard to depict in merely statistical terms but travel to work patterns provide an indication of the extent to which there is movement across local, sub-regional and indeed regional boundaries.

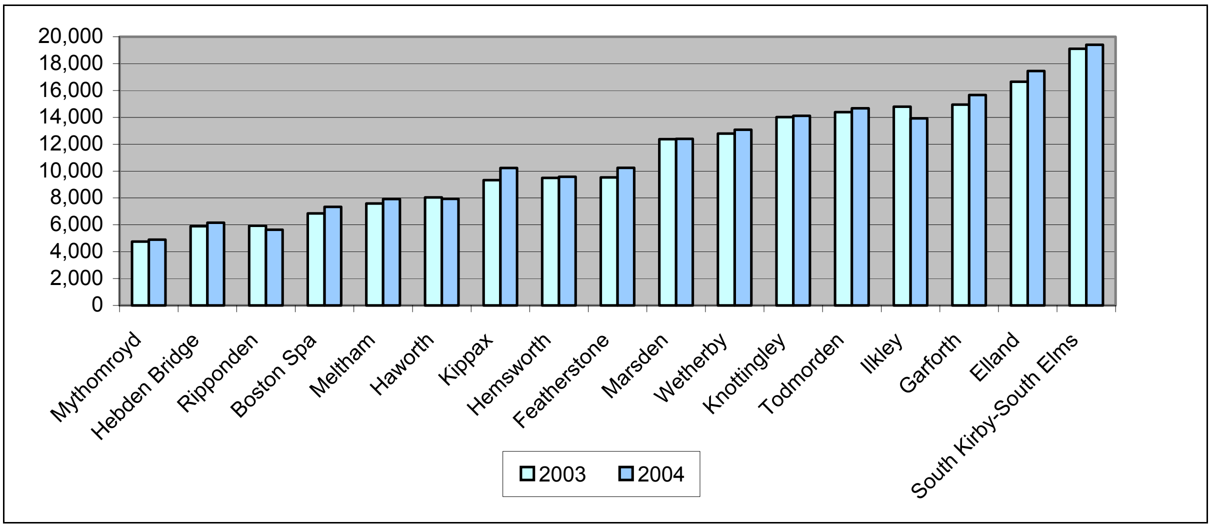
Leeds exerts an obvious influence within West Yorkshire as the largest single driver of the regional economy, but it also has linkages to parts of North and South Yorkshire, as illustrated by its work on the Leeds 'city-region' in the Leeds Core City prospectus. Equally, significant numbers of people within the West Yorkshire districts travel elsewhere for work. This is most pronounced in Kirklees, where only 45% of residents both live and work in the district (Household Survey 2002). West Yorkshire also has linkages beyond the Yorkshire and Humber region, such as to Lancashire, Manchester and Liverpool along the Transpennine corridor.

West Yorkshire Settlements with a Population over 20,000



- In 2004, West Yorkshire had 21 towns/cities with a population over 20,000 people. Leeds (447,813), Bradford (287,731) and Huddersfield (123,986) are the largest three, with Halifax and Wakefield somewhat smaller but still sizeable and a step above any other settlement in terms of population. Huddersfield is notable as one of the largest towns in England that does not have City status, and is similar in scale to York. Below the five main cities and towns, the largest settlements are the neighbouring areas of Dewsbury and Batley (combined population of around 100,000), Keighley, Morley and Castleford.

West Yorkshire Settlements with a Population under 20,000



- There is a great range in the 17 West Yorkshire towns with a population under 20,000 ranging from South Kirby (19,408) to Mythomroyd (4,896) in 2004.
- The 21 West Yorkshire towns/cities with a population over 20,000 people have varying income levels. In 2004 these varied from the upper end, Holmfirth (£34,339) to South Kirby (£20,289) at the lower end.
- Income levels in the settlements with a population under 20,000 people vary even more significantly. In 2002 these varied from at the upper end, Ripponden (£38,124) to Featherstone (£19,679) at the lower end.
- Taken together, the income and population data for towns above and below 20,000 can be used to show potential for economic transformations for large numbers of people in settlements that are currently not especially prosperous and may be facing decline. Together with information about the assets and opportunities within settlements, this can be useful in prioritising where a renaissance approach may be of greatest value (although further information covering a wider spread of settlements will be required in a rural renaissance context). For example, the data shows how the rennaisance/masterplanning programmes, such as the Marsden and Slaithwaite Renaissance Market Town initiative in Huddersfield and in the other larger towns and cities of Halifax, Bradford, Leeds and Wakefield will impact on large populations.

Rural Areas:
A new national definition of rural and urban areas has been developed by a partnership of Government agencies at a national level to produce a single and consistent classification to act as a statistical tool. West Yorkshire has no remote rural areas of the kind common in North Yorkshire for example, although there are large areas of accessible rural towns and villages away from the urban centre towards the borders. According to the new definition the proportion of the population in West Yorkshire living in rural areas is lower at 12.1% than Yorkshire and Humber as a whole at 20.0%. This West Yorkshire figure masks significant variations at the district level, however, with both Calderdale and Wakefield having a higher proportion of people living in rural areas than the regional average at 23.5% and 21.1% respectively and Leeds having a much lower proportion at 6.3%.

Generally across West Yorkshire rural areas tend to have higher levels of economic activity than urban areas, although this trend is reversed in the coalfield economy of Wakefield where economic activity is lower in rural areas than in urban areas. Income levels are also higher on average in West Yorkshire rural areas than in urban areas.

A recent scoping study commissioned by the West Yorkshire Rural Partnership explains how one feature of ‘metropolitan rurality’ in West Yorkshire is the number of dispersed settlements that are urban industrial by design and culture but situated in a rural setting, sometimes isolated from services. Specific examples include the former mining towns and villages in Leeds and Wakefield, which are described as rural areas lagging behind other parts of the sub-region. The study highlighted the increasing convergence of rural and urban economies and concluded that West Yorkshire’s rurality provides material competitive advantage to its towns and cities (West Yorkshire Scoping Study 2004).

OBJECTIVE 6 – ENHANCED ENVIRONMENT AND INFRASTRUCTURE

Objective 6 - Overview and Key Points

- The sub-region's property market is split between rates (for office and retail in particular) that are close to the English average in Leeds – reflecting high demand - but substantially cheaper in the rest of the sub-region.
- Traffic levels are increasing with most journeys made by car. Use of trains and buses is more prevalent than in other parts of the region but limited by capacity issues. Congestion is especially obvious at peak hours around and within the cities of Leeds and Bradford and there will be a need to improve integration in the development of new transport links. Developments such as light rapid transport systems, greater rail capacity and improvements to conventional bus quality and provision are increasingly important. These measures will heighten access into town and city centres without adding to congestion.
- Transportation systems are essential to the development of a sub-regional labour market, particularly to support deprived communities in the sub-region facing social exclusion enabling people to access employment opportunities and, in doing so, making the labour market more efficient.
- West Yorkshire benefits from connectivity to Leeds/Bradford airport and to Manchester airport. Access to these hubs is important, with further scope for improving public transport access to Leeds/Bradford airport. The airport hinterland still has enormous potential for development, which should be considered as part of the Regional Spatial Strategy.
- There are likely to be further opportunities to assist business through waste minimisation recycling and energy efficiency, as well growing markets in the energy and environmental industries.
- Loss of Brownfield sites and buildings for housing purposes as a result of the strength of the housing market and corresponding reduction in investment opportunities for business development.
- There is a shortage of good quality readily developable land and suitable premises for new and expanding businesses, particularly in the western part of the region.
- The environment of West Yorkshire is a key asset that provides potential for tourism, investment, social wellbeing and attracts people to the sub-region. The utilisation of the environment and the release of its potential is an important economic opportunity for the sub-region.

Physical Infrastructure

Total Floorspace and Ratable Values

	Retail		Offices		Factories		Warehouses	
	RV - £/sqm	Area	RV - £/sqm	Area	RV - £/sqm	Area	RV - £/sqm	Area
England	98	105,714	111	94,194	25	211,627	32	144,453
Yorkshire and Humber	80	11,915	67	7,218	21	29,546	24	16,938
West Yorkshire	75	5,118	76	3,703	20	13,498	26	8,779
Bradford	65	1,198	53	832	21	3,390	23	1,837
Calderdale	59	460	50	344	18	1,732	20	863
Kirklees	67	995	53	387	15	3,424	20	1,273
Leeds	93	1,754	100	1,796	24	3,404	31	2,993
Wakefield	70	719	61	344	24	1,548	29	1,813

Source: Office of Deputy Prime Minister, 2003. Total Floorspace (000s m²) and Ratable Value (RV) per Square Metre of Hereditaments by Bulk Class: Districts

Overview

- West Yorkshire provides just under half of the region's 65.5 million square metres of commercial and industrial floor space. Factories (43.4%) and warehouses (28.2%) make up the two highest proportions of floorspace, whilst retail (16.5%) and office (11.9%) have relatively low proportions (Progress in West Yorkshire 2005, Excellent Infrastructure).
- West Yorkshire contains 43% of the region's retail floorspace capacity, 51% of Yorkshire and Humber's office floorspace capacity, 46% of the region's factory floorspace and 52% of Y&H warehouse floorspace capacity. This illustrates its central importance to the Yorkshire and Humber region in terms of business location.
- In each industrial land use category West Yorkshire's rateable values (£ per square metre) are lower than the England average. However, the level of rateable value in the sub-region is higher than the average across Yorkshire and the Humber in the warehouse category and especially the office category, where West Yorkshire office space is £9 per square metre higher than the regional average. This average figure is pushed up significantly by Leeds, however, as office rateable values in the other districts are lower than the regional average. In the retail and factory categories, properties in West Yorkshire have a marginally lower rateable value in comparison to those across Yorkshire and Humber. (Progress in West Yorkshire 2005, Excellent Infrastructure).
- In 2002/03 West Yorkshire averaged 69% of dwellings built on previously developed land, well above the regional average of 57%.
- Case studies indicate that high quality parts and green spaces contribute to the economic vitality of, and confidence in, a locality. Examples include attracting business location and investment through property developers. (Does Money grow on Trees? 2005).

Local Variations

- The picture appears to be split between relatively high costs in Leeds (in regional terms, if not national) and notably lower ones elsewhere.
- Severe but cyclical shortages of space in Leeds' prime central business district has put increasing pressure on rents and £248 per sqm has now been achieved on a 15-year institutional lease (GVA Grimley, Economic & Property Market Review 2002 – Y&H). Office rents are highest in Leeds where there has also been the greatest rent growth rate in the sub-region between 1999 and 2002. Rents in Bradford have stayed the same. (Progress in West Yorkshire 2005).
- There are a number of unsatisfied office requirements for larger space users. The majority of these requirements are likely to be settled in proposed new developments within the rapidly emerging Leeds 'West End', where some £455 million is currently committed for predominantly office/residential developments. Rents are expected to rise above the £248 per sqm level over the next 12 to 18 months (GVA Grimley).
- As a percentage of the total commercial and industrial floorspace, Leeds has the greatest proportion of retail and office floorspace, whilst Kirklees has relatively more floorspace occupied by factories and Wakefield has relatively more warehouses floorspace (Progress in West Yorkshire).
- Within West Yorkshire, Leeds has the highest proportion of previously developed land, with 86% of new homes built on such land. In 2002/03 only Bradford had a lower proportion than the regional average with just 44% of new homes built on previously developed land.
- ODPM has recently released the first statistics that provide vacancy rates for commercial and industrial properties in English local authorities and are released as 'experimental statistics'. The National Non Domestic Rates 3 (NNDR3) returns are used to estimate the value of empty property as a proportion of the total value of the property. It was felt that although these statistics would be invaluable for future use, the reliability of the figures is still to be verified.

Transport

Travel To Work Methods of all People aged 16-74 in Employment, 2001 (%)

	Work mainly at or from home	Underground; metro; light rail; Tram	Train	Bus; Mini Bus or coach	Moto-rcycle; Scooter; moped	Driving a car or van	Pass-enger in a car or van	Taxi or minicab	Bi-cycle	On Foot
England	9.16	3.16	4.23	7.51	1.11	54.92	6.11	0.52	2.83	9.99
Y&H	8.44	0.36	1.46	10.48	0.96	56.18	7.32	0.53	2.90	10.93
West Yorkshire	7.83	0.08	2.04	12.99	0.82	56.01	7.64	0.62	1.11	10.55
Bradford	8.20	0.10	3.18	11.59	0.69	55.40	8.08	0.78	0.77	10.82
Calderdale	8.75	0.06	2.06	11.25	0.88	57.27	7.36	0.40	0.81	10.78
Kirklees	8.44	0.06	1.82	10.30	0.98	58.98	7.52	0.46	1.01	10.10
Leeds	7.43	0.08	1.54	17.20	0.71	53.06	7.19	0.72	1.30	10.48
Wakefield	6.91	0.05	1.89	9.55	1.01	59.18	8.39	0.51	1.45	10.76

Source: Census 2001

Overview

- The Census figures show that the majority of travel to work, as in the rest of the UK outside London, is by private transport. Traffic growth in West Yorkshire has been lower than the national average, however, and public transport plays an important role in enabling those without private transport to get to work as well as providing an alternative to car use for many.
- The percentage of people who travel to work by bus is relatively high at nearly 13%, in comparison to the England average of 7.51% and the regional average of 10.48%. The West Yorkshire Local Transport Plan (LTP) 2002/03 Annual Progress Report (APR) indicates that 203 million bus journeys were made in 2002, a rise of 2.1% over the period of the LTP. The new West Yorkshire Local Transport Plan (LTP2) from 2006 to 2011 will be prepared jointly by Metro and the local authorities in Bradford, Calderdale, Kirklees, Leeds and Wakefield.
- The Census data shows that West Yorkshire has a low percentage of people who travel to work by bike in comparison to national averages and the majority still travel to work by private transport.
- Train usage in West Yorkshire is below the national average (which is heavily skewed by commuting to London in the South East) but higher than the regional average. However, study work (WYPTE) has shown that rail modal share is as high as 75% on key corridors into Leeds city centre with many using the train in preference to their own private transport – but could also be limited by capacity constraints on rail services, and congestion which affects bus services as well as private cars. Given the high level of commuting between districts, congestion levels, the importance of the Transpennine corridor, and Leeds' role as the regional capital, transport issues are likely to be especially pertinent in the sub-region.
- Rural areas face different transport issues to urban areas. Car ownership tends to be higher in rural areas where public transport links are less extensive. The new rural/urban definition explained in Objective 5 shows that generally West Yorkshire's rural areas are accessible relative to other rural areas in the region. However, Progress in West Yorkshire 2005 highlighted the fact that some rural areas in the sub-region rank poorly on the Index of Multiple Deprivation's Barriers to Services domain. The extended RDA responsibilities for rural areas will involve activity to support rural transport as part of the wider strategic transport agenda.
- Average inbound vehicle speeds in the AM peak in the main urban centres are between 30 and 35 km/hr. More localised data illustrates the problem of increasing congestion with the A660 in Leeds showing a 20% increase in journey times between 1995 and 2001.

Local Variations

- Leeds has the highest proportion of people using the bus as their main mode of transport to work within the sub-region, but all local authority areas have a higher level of usage of the bus as their main method of transport to work than the regional and national average.
- Leeds/Bradford airport is the only international airport in West Yorkshire and has a growing number of flights and destinations. It does however suffer access limitations, notably in terms of poor public transport links, which contribute to the fact that public transport accounts for only 4% of journeys to the airport (Regional Planning Guidance, Annual Monitoring Report 2002, Table 7.7 pg56). Many of the sub-region's air travel requirements are currently met from Manchester airport, so connectivity with Manchester is also important.
- Progress in West Yorkshire 2005 illustrates the extent of car usage in the sub-region, showing the rank of households in West Yorkshire that have first or second vehicles in the highest bracket of annual car mileage. Unsurprisingly, car ownership is higher in the more rural areas (e.g. Calderdale) where public transport links are less extensive.
- Although traffic growth has been contained below the national average and is within LTP targets (apart from peak hour traffic in Leeds and Wakefield), crowding on peak time rail services, particularly into Leeds, is now limiting the scope for further growth on rail at peak times. Through the Northern Franchise process Metro is seeking to ensure that more capacity is provided in the future. It is also essential that patronage growth on buses is maintained through the provision of bus priorities, quality infrastructure and operator investment. The Yorkshire Bus Initiative comprising of a partnership of Metro, West Yorkshire, South Yorkshire and City of York Council authorities and operators will be the mechanism by which the physical measures are delivered. Key issues for the next West Yorkshire LTP from 2006 to 2011 will be the future extent of Rapid Transit in West Yorkshire, building on the completion of Leeds Supertram and existing bus guideways, rail capacity, social inclusion, accessibility and the maintenance and management of the sub-regional road network. The South and West Yorkshire Multi Modal Study and outcomes of other study work will also need to be taken into account.
- Government research suggests that the M62 between junctions 24 to 27, which passes through Kirklees, is currently the ninth most congested stretch of road in the country.

Environmental Economy

Household Waste Management 2003/04

	% Recycled	% Composted	% of heat, power and other energy recovered	% Landfill
Bradford	8.0	5.1	0.0	86.9
Calderdale	8.6	5.0	2.5	83.7
Kirklees	10.3	4.0	66.8	19.0
Leeds	12.2	2.4	0.0	19.0
Wakefield	9.4	7.6	0.0	83.0
Yorkshire and Humber	10.3	4.3	8.7	77.1
All English Authorities	13.3	4.0	10.5	71.8

Source: ODPM, BVPIs 2003/04

Overview

- The quality of life in rural areas was found to be the single biggest attraction for people moving into rural areas. Income patterns suggest that household incomes are higher in rural areas, but many people commute into urban areas. Maintaining a high quality environment is crucial if the economic benefits of migrants to rural areas (see Objective 2) are to be harnessed (Stepping Stones to a Healthier Future, 2004).
- Statistically comparable data on the environmental economy is limited, however evidence from local and wider studies and 'green business' projects in the sub-region and beyond show

significant potential to increase resource efficiency in businesses (e.g. energy efficiency, waste minimisation) and to enhance competitiveness. This also links to regional and national targets on reducing greenhouse gas emissions, which are likely to act as a long-term driver of policy and potential new legislation and markets.

- Although households in the region have relatively low consumptions of electricity, water and generation of waste compared to other UK regions, levels of household waste continue to rise and recycling is low but improving. (Progress in West Yorkshire 2005, High Quality Environment).
- To meet regional targets for renewable energy West Yorkshire will need to generate 64 megawatts of renewable energy by 2010. These targets present considerable challenges, and to achieve them will require effort across many areas of economic activity including regeneration and transport (Progress in West Yorkshire 2005, High Quality Environment).
- Whilst landfill capacity is 'adequate' at 8 years, there are local shortages, particularly of licensed void-space for municipal wastes. This is most apparent in West Yorkshire where more than 40% of the municipal waste is transferred across regional and sub-regional boundaries for disposal or recovery (Regional Planning Guidance, Annual Monitoring Report, p.92). With the exception of Kirklees, West Yorkshire districts landfill more waste than the national rate of 71.8%, but marginally below the regional rate. Against the national rate the amount of waste recycled in West Yorkshire districts is also significantly lower.

Local Variations

- Bradford and Leeds are West Yorkshire's representational city centres in terms of air quality monitoring. In 1998/99 Leeds experienced a number of days with pollution ranked moderate or high that were above the England and Wales average for urban areas, whilst Bradford was around average for English city centres. The latest figures (2003) for Leeds show a large increase in the number of polluted days with 46 of moderate or higher pollution, whilst Bradford air quality also worsened but remains lower than Leeds at 34. This increase is most likely due to the hotter weather in that year and may occur more frequently as a result of climate change. However, both city centres have lower levels than the England city centre average (see Progress in West Yorkshire 2005, High Quality Environment).
- Recycling levels in West Yorkshire vary with Leeds recycling the most at 12.2% of its waste in 2003/04. Although Leeds was the only sub-regional district recycling above the regional average it has fallen behind the England average. However, Leeds does not perform so well in terms of the proportion of household waste composted. Wakefield leads the way in this field, with Bradford, Kirklees and Calderdale all having significantly higher levels than the English and regional averages.
- The proportion of heat, power and other energy recovered is generally poor with only Kirklees recording a figure (66.8%). All districts had a higher percentage of landfilling than the English average, except Kirklees. Bradford has the worst sub-regional land fill record with 86.9% of household waste going into the ground (Progress in West Yorkshire 2005, High Quality Environment).
- West Yorkshire contains 259.7km^2 (12.8%) of 'areas of special environmental designation', 4.4% of the region's total of 5852.7km^2, which in turn constitutes 37.6% of the region's total area. Calderdale contains the largest proportion with 104.67km^2, 92% of this is SSSI designated land. Kirklees also contributes substantially to this with 26.1% (106.7km^2) of its land a special environmental area, made up of 50km^2 SSSI and 45.63km^2 National Park.