

Bradford District Local Economic Assessment

2010 (Draft: September)



City of Bradford MDC
www.bradford.gov.uk



What is the Bradford District Economic Assessment?

Key facts

Bradford district economic assessment comprises:

- 1 summary document
- 22 detailed thematic analytical reports
- 30 economic ward profiles
- Leeds city region assessment
- Base data

See back page for more detail and links to appendixes.

Quarterly updates will be produced which monitor progress and provide the opportunity to profile particular issues in more depth.

The economic assessment forms the first part of a Bradford economy triptych – which will also contain the Bradford district economic strategy and regeneration delivery plan.

Our approach

The economic assessment has been developed by Bradford Council working closely with partners to support the detailed analytical work and shape and inform the key messages. This helps ensure that the final assessment is relevant and recognisable to Bradford.

Consultation mechanisms have included:

- Prosperity and Regeneration Chair's group and supporting partnerships, including the Employment and Skills Board
- Cross partnership workshops
- Regeneration and Economy improvement committee
- Bradford Breakthrough
- Bradford Chamber local affairs committee



An evidence base for delivery

Bradford district's economy is part of a wider economy and it is important to make sure that our residents and businesses are well equipped to take up opportunities in the district and beyond.

For that reason I am pleased to be able to delivery quickly on my commitment to produce a full economic assessment of the area and its links to the wider regional economy in order to make sure our interventions are based on solid evidence.

My officers are now working to produce a revised strategy and delivery plan that clearly sets out the district's priorities and how they will be delivered.

Cllr David Green



Economic geography

Economic activity pays no heed to administrative boundaries. Consequently while the economic assessment for Bradford focuses on our district, it also considers:

- Functional economic areas within Bradford district.
- Functional economic areas that link Bradford with its neighbours.
- The district's role in Leeds city region.

Sustainability

The economic assessment recognises the importance of growth and wealth to the economic success of the district.

However it does not confine its consideration of growth to measures of productivity alone but draws together an analysis to help inform an approach to the sustainable growth of the district. Equally the assessment considers wealth in terms of wellbeing as well as income.

Core principles

The economic assessment has been produced at a critical point in time for the UK economy. Long term trends and shorter term impacts of the global recession have combined to create some serious challenges and some genuine opportunities. Bradford's economic assessment presents some deliberately hard reading – as the scale of opportunity and challenge is as significant as the scale of the district economy.

The urgent challenges facing Bradford economy go beyond responses to the recession and subsequent public sector funding cuts. These, and the distinctive assets of the district will be explored in more detail in the work to follow.

This document does not set out the district's priorities for the delivery of sustainable economic growth. The Bradford district economic strategy will identify priorities for action, and the detail of regeneration delivery will be set out in Bradford's economic delivery plan.

The economic assessment focuses on three key lines of enquiry:

- Who is Bradford?
- How does Bradford earn its living?
- What is Bradford?

It encompasses a broad understanding of the elements that make up Bradford district's economy. This includes economic, social and environmental factors that impact on economic wellbeing and growth, such as population growth, health, participation and the challenges of climate change.

Summary

A sound analysis and understanding of local economic conditions and the economic geography of Bradford is essential when developing and prioritising locally appropriate delivery that will have a real impact on the district, its businesses and people.

The Bradford district economic assessment provides a shared understanding of local economic conditions in order to act as an evidence base for future strategy and delivery. This summary document focuses on the key economic issues that are important for or distinctive to Bradford district.



Draft

September 2010

Bradford economy – in summary

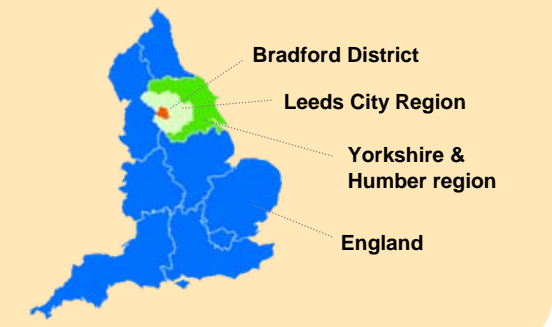
Bradford is BIG

Bradford is a big city and district and an important economic player within the wider functional economy.

Bradford's population is big – at 506,800. And unlike most other places our population is growing – with the 4th largest projected growth in the UK.

Bradford's economy is big too - the 3rd largest economy in the region producing nearly 10% of the region's total wealth, through 15,720 business units and 192,700 employees.

Bradford is big spatially. Spanning 143 square miles and home to 207,578 dwellings the district is two thirds rural, with 664 miles of public rights of way, and 23 woodlands.



Our strengths...

Large and fast growing working age population / improvements in education attainment / rapid growth in numbers of people in employment / strong further and higher education offer / language skills for global trading / volunteering / £7.6 billion economy / strong forecasts for economic growth / recognised brands and world class businesses / high business start up rates and self employment – an established enterprise culture / a diverse business base / significant cultural assets / distinctive architecture and an accessible and attractive natural environment / central UK location close to Leeds and Manchester / distinctive retail offers in places like Leeds Road, Saltaire and Ilkley

Key facts: Bradford District

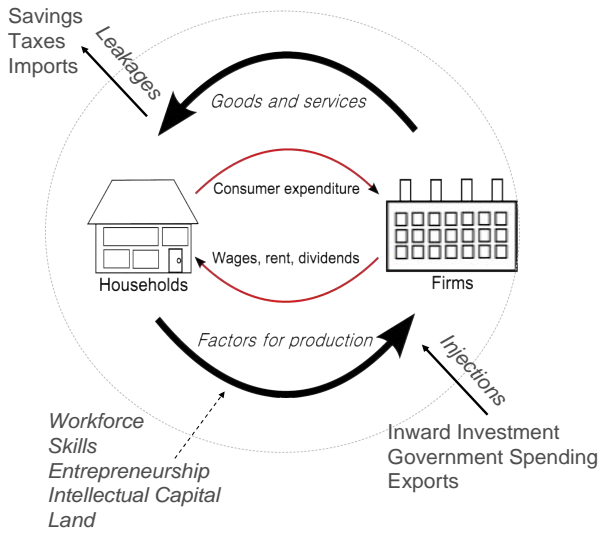
15,700 businesses	506,800 people
192,700 employees	203,000 households
30,100 self-employed	208,900 in employment
£7.6 billion GVA	20,300 unemployed
	£6.8 billion household income

... and weaknesses

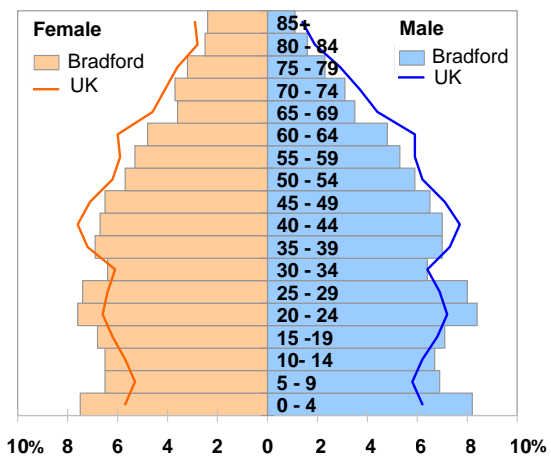
Low skills levels / high levels of people out of work / high levels of deprivation / income inequality / slow growth in productivity / over reliance on public sector employment / persistent low rates of pay / limited opportunities for work in the knowledge economy or other high quality and graduate jobs / poor local and external perceptions of the city / limited suitable retail and office space / inadequate transport links / weak city centre evening economy

Economic model

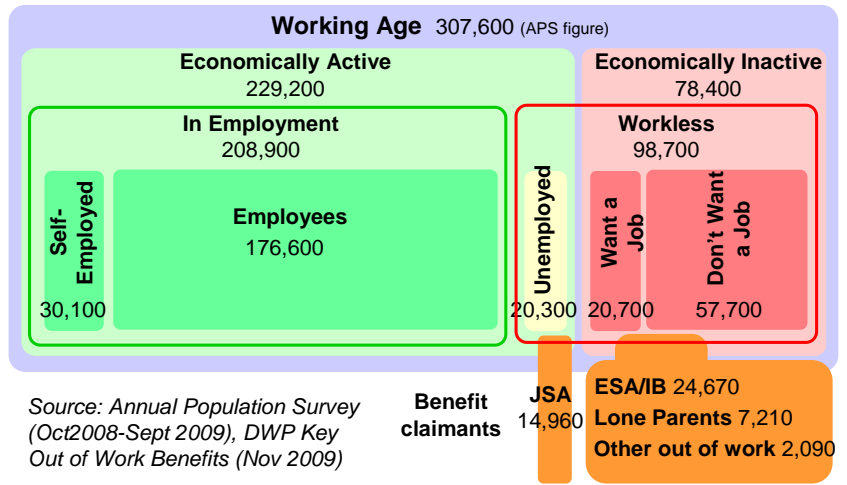
The model to the right provides a simplified summary of the district's economy which focuses on the role of enterprise.



Population pyramid



Labour supply



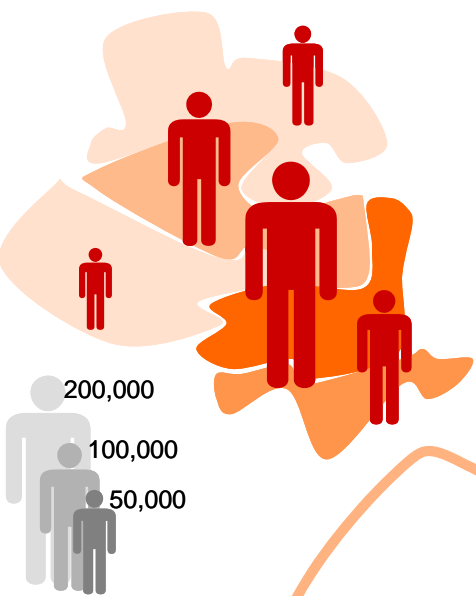
Source: Annual Population Survey (Oct2008-Sept 2009), DWP Key Out of Work Benefits (Nov 2009)

Internal economic areas

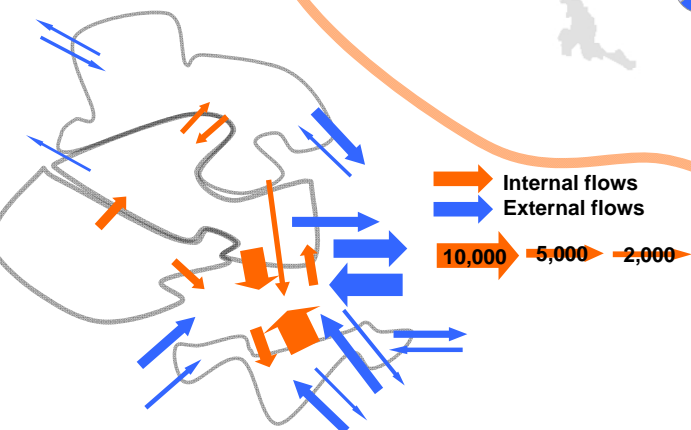
Based on an analysis of labour market flows and industry make-up, as well as work carried out for the Local Development Framework, five functional economic areas have been identified within Bradford district. Each of these areas makes up a distinctive economic space, with different characteristics, influences and flows. The information on this page draws together some of the key data to summarise these functional economic areas and they are used as a unit of reference throughout the economic assessment.

Wharfedale covers Ilkley, Burley and Menston. Airedale encompasses the towns of Keighley, Bingley and Shipley. Pennine Hills is largely rural and includes Haworth and Oakworth. South Bradford covers Queensbury, Wyke, Holme Wood and Tong. Bradford City is made up of the city centre and a large part of Bradford's urban area.

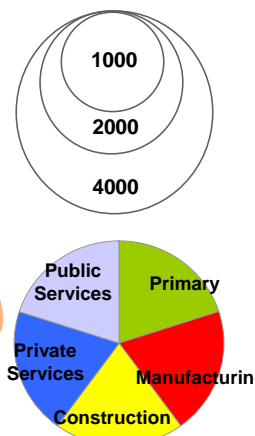
Population



Key Commuter flows



Number of jobs by Sector



Wharfedale	
Population	45,700
Unemployment claimant rate	1.8%
Average household income	£42,800
Housholds in deprived areas	0
Jobs	16,000
Businesses	2,200
Key Sectors: Health, Financial & Business Services	

Airedale	
Population	108,700
Unemployment claimant rate	5.0%
Average household income	£32,600
Housholds in deprived areas	32%
Jobs	38,200
Businesses	3,800
Key Sectors: Manufacturing, Retail/Wholesale	

Bradford City	
Population	233,900
Unemployment claimant rate	6.0%
Average household income	£29,400
Housholds in deprived areas	63%
Jobs	110,200
Businesses	6,700
Key Sectors: Retail, Financial & Business Services, Public	

Pennine Hills	
Population	30,500
Unemployment claimant rate	2.7%
Average household income	£37,100
Housholds in deprived areas	0
Jobs	5,800
Businesses	1,000
Key Sectors: Education, Hotels/Restaurants	

South Bradford	
Population	82,900
Unemployment claimant rate	5.5%
Average household income	£31,700
Housholds in deprived areas	38%
Jobs	22,400
Businesses	1,900
Key Sectors: Manufacturing, Distribution	

Data sources Population - Mid-2008 Population Estimates, ONS; Unemployment claimant rates - JSA claimant rates, May 2010, Jobcentre Plus; Household income - Mean gross household income, Paycheck 2009, CACI Ltd; Population in deprived areas - % of population living within the 20% most deprived SOAs, IMD 2007; Jobs, Businesses and Key Sectors - Annual Business Inquiry 2008. Commuter flows - 2001 Census.

Key messages

The analysis completed in developing Bradford's economic assessment led to the identification of a series of key messages. These key messages provide an economic narrative on issues that are important or distinctive to Bradford district. They offer a summary and overview of the district economy.

The key messages presented in this document are structured and colour coded for ease of reference against the three key lines of enquiry. The in depth and comprehensive analysis can be found in a series of themed analytical reports that provide an annex to this document.

Bradford's population is youthful, big and growing



Worklessness and economic inactivity remains an issue

Nearly 1 in 3 people of working age are out of work

Youth unemployment has grown rapidly during the recession



Educational attainment is improving but Bradford has a low skilled legacy

63% of people with no qualifications are out of work

Child poverty reflects clusters of deprivation in the district

Nearly 1 in 3 children live in low income families

Economic wellbeing goes beyond jobs and growth



Ongoing low wage levels have not shown improvement

21% of households have less than £15k income a year

Enterprise culture is driving employment growth



Bradford has some competitive strengths but productivity lags national rates



Manufacturing remains a significant sector for Bradford and the region

There are 29,000 Manufacturing jobs in the district

The service sector is over reliant on public sector and retail employment



Bradford city centre offers real potential as an engine for growth

1 in 5 jobs in Bradford district are in the city centre

Bradford and Leeds' labour markets show strong interdependency

37,000 people travel between Leeds and Bradford daily

Bradford is an essential ingredient in the success of Leeds city region



The district is constrained by a lack of quality premises and employment sites

Bradford has 5,600 listed buildings

Environmental challenges present economic opportunity for Bradford district



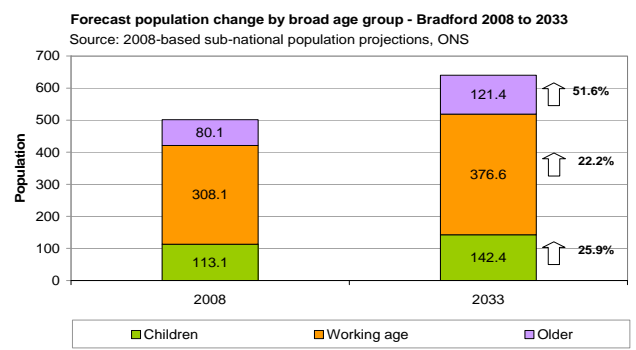
Bradford's population is youthful, big and growing

Key facts

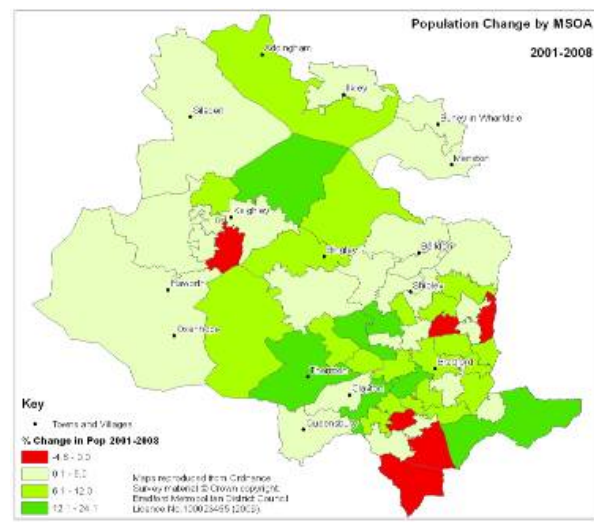
- 506,800 people live in Bradford making it the fourth largest district in England after Birmingham, Leeds and Sheffield
- The working age population is 308,500.
- 22.5% of the population are under 16 years compared with 19% nationally.
- 142,700 people are from Black and Minority Ethnic communities – 28.7% of the district's population, and the third highest proportion of ethnic minority people (of districts outside London).
- Bradford is forecast to have the fourth largest increase (in terms of absolute numbers) of all English districts to 2033 after Leeds, Birmingham and Bristol.

Bradford district has a population of 506,800

Bradford's older age group is predicted to undergo the most rapid rate of growth

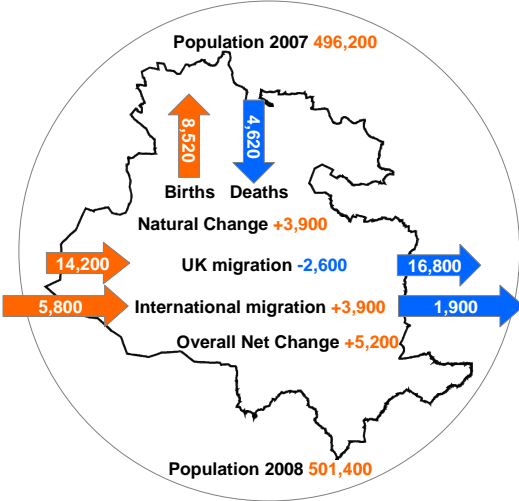


Population growth is not evenly distributed across the district



Fertility rates are relatively high and natural change is driving Bradford's population growth

At 81 live births per 1,000 women aged 15 to 44 years, Bradford has a relatively high birth rate - the highest in Leeds city region and Yorkshire and the Humber. Overall natural growth (more births than deaths) in Bradford accounts for three quarters of total population growth and net inward migration a quarter of total growth.



Spatial analysis

Dissimilar patterns of population movement and differences in fertility rates within Bradford means that population growth is not evenly distributed across the district.

The population in the inner parts of **Bradford city** is growing. Although these areas have more people moving out than moving in, natural growth (more births than deaths) outweighs this net outward movement. Relatively high fertility rates are responsible for strong natural growth.

Generally there are more people moving into than moving out of: **Wharfedale, Airedale** (with the exception of parts of Keighley) and also the **Pennine Hills** areas of Cullingworth, Denholme, Wilsden, Cottingley and Oakworth. Overall these areas are experiencing net gains in population. Riddlesden stands out as having a particularly large growth in population.

A few parts of Bradford have experienced net losses in population. The local areas undergoing net population losses are: Woodhouse in Keighley; Bolton; Wyke; Fagley/Ravenscliffe; and Low Moor/Odsal.

Migration

Bradford had a net gain of 3,900 people through international migration and a net loss of 2,600 people through internal (within the UK) migration over the year to mid-2008. It is expected that net inward international migration into the district will decrease significantly over coming years (part of a decreasing national trend in economic migration) while net internal outward migration is expected to continue to increase.

Summary

Bradford has a relatively young population and a growing number of working age people. Due to its existing scale, the size of population growth forecast is of national significance, and is driven by natural growth (more births than deaths), with current levels of international migration forecast to decrease.

However in common with other areas, over the coming years there will be a shift towards a greater proportion of older people in the population. The distribution of population growth and change in composition has implications for Bradford's economy, housing and infrastructure.



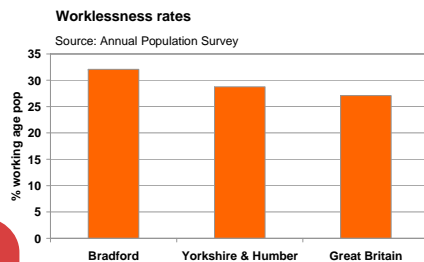
Worklessness and economic inactivity remains an issue

Key facts

- 208,900 people of working age in Bradford are in employment – an employment rate of 67.9%.
- 20,300 are unemployed (out of work and seeking work).
- Another 78,400 people are classified as economically inactive (not seeking work). Of this number, 57,700 do not want a job, most of whom are looking after a family.
- The workless total is therefore 98,700, a rate of 32.1%.
- Worklessness is highest among women, young people, disabled people and ethnic minority groups.
- 63% of people without a qualification are workless.

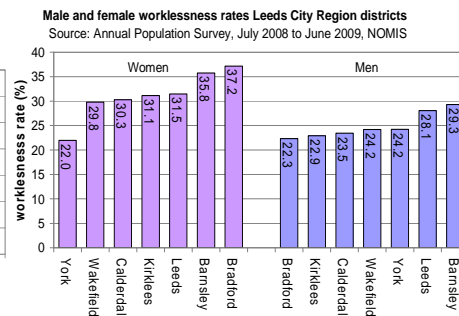
Nearly
1 in 3
people of
working age are
out of work

Worklessness in Bradford is high



At 32.1% Bradford's workless rate is above the regional (28.8%) and national average (27.1%) and is the third highest in the region after Leeds and Barnsley.

Female worklessness is particularly high



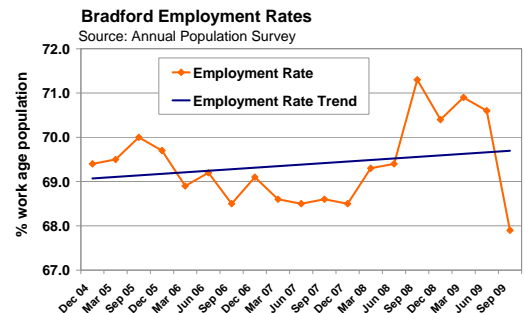
Bradford's has the lowest male worklessness rate in the Leeds city region but the highest rate for female worklessness.

Employment levels have increased and inactivity has fallen

While unemployment has increased over the last five years in Bradford district, so too has employment. Between 2004 and 2009 numbers of working age people in employment increased by 5.6%. This is compared to a national increase of 2.1%.

Despite growth in the working age population of nearly 8% since 2004, rates of employment have been maintained, with a linear trend showing a slight overall increase over this period. At the same time the level of economic inactivity has reduced.

The recession has had an impact on these longer term trends with a significant drop in employment numbers.



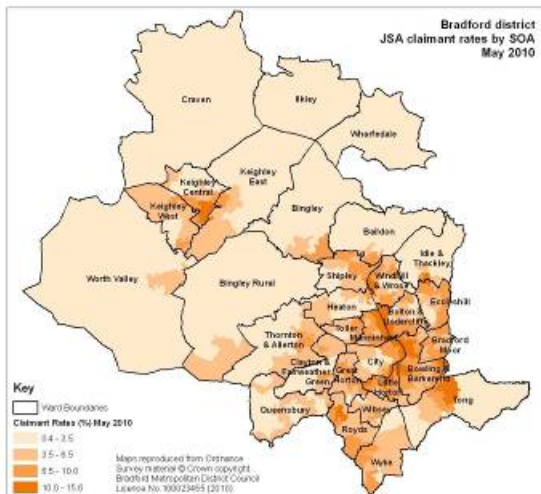
Family commitments and low skills prevent many from working

Economic inactivity is divided into two broad groups, those who want a job and those who do not. Those who do not want a job are furthest from the labour market and are least likely to become economically active.

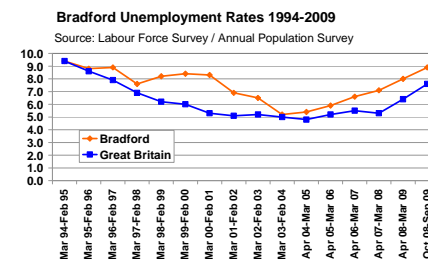
The majority (59% or 57,700) of workless people in Bradford do not want a job, of which 67% of these are women. The main reason for women not wanting a job is commitments to family or home but there are also significant numbers of students, and long-term sick people. Around 31,000 families in the district have no adult in employment.

Geographical patterns of unemployment across the district remain unchanged

The highest concentrations of unemployment occur in Bradford city and in the outlying social housing estates such as Holme Wood, Buttershaw, Allerton and Windhill. Unemployment is lowest in Wharfedale and the Pennine Hills. This pattern of worklessness reflects a consistent pattern of deprivation across a range of indicators that has not altered radically over the last decade.



Unemployment has been rising since 2004



Unemployment in Bradford fell after the recession of the early nineties to reach its lowest point in 2004, with 11,000 working age people unemployed at a rate of 5.2%. Since then unemployment has risen steadily reflecting national trends. The unemployment rate has now reached 8.9%, the highest rate since 1997.

Summary

Bradford's growing working age population creates a challenge and an opportunity, in that it means the district requires a growth in jobs to match the growth in population, but also that we have a growing workforce for business in the district and city region. Employment levels in Bradford have risen over the last five years at a speed of over twice the national average.

Nevertheless worklessness remains a significant issue for Bradford. Female worklessness is particularly high, with two thirds of workless women not wanting a job and therefore furthest from the labour market. The economy must address challenges that have developed over the long term as well as the shorter term impacts of the recession. 41,000 of those who are currently workless (20,700 economically inactive and 20,300 unemployed) do want to work.



Youth unemployment has grown rapidly during the recession

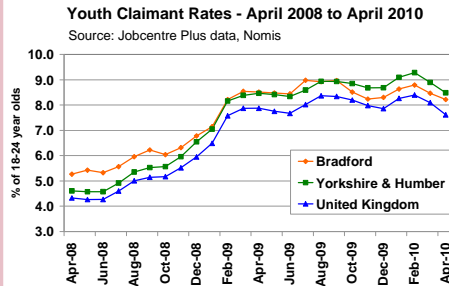
Key facts

- Youth claimant unemployment was 8.2% in April 2010.
- Bradford has the 5th highest youth claimant rates across the Leeds city region.
- 9,700 young people aged 16-24 were claiming a DWP benefit in November 2009. Of these, 4,310 were claiming JSA, 1,980 were claiming benefits as a lone parent and 1,550 were claiming incapacity benefit or ESA.
- 28% of JSA claimants are aged 18-24.
- A total of 26,000 (42%) 16-24 year olds are classed as workless – either unemployed or economically inactive.
- 1,192 16-18 year olds are NEET (not in employment, education or training) at an adjusted rate of 8.7%.

1 in 7
young people
are claiming a
benefit

Most unemployed young people are seeking work but a significant number are claiming other out of work benefits

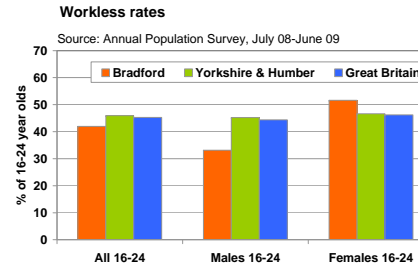
Youth claimant rates are lower than regional levels



The youth JSA claimant rate for Bradford is just below the Yorkshire & Humber regional rate (8.6%) and just above the national rate (7.7%).

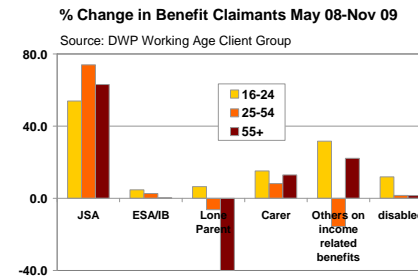
Since the start of the recession (June 2008) youth claimants rose significantly (but slower than regionally and nationally), increasing by 60% to April 2009. Over the last 12 months the rise in claimants has slowed and numbers have started to decline.

Worklessness is highest among young women



At 52%, worklessness among young women is much higher than regional and national levels.

Certain benefits have seen significant increases in young claimants



With the exception of jobseekers, all other claimant groups such as ESA, Lone Parents, Carers and others on income related benefits are rising fastest among 16-24 year olds.

NEETs

A young person is categorised as NEET if they are not in employment, education or training. At the end of February 2010, 1,192 young people aged 16-18 were NEET. This equates to an adjusted NEET rate of 8.7%, compared to 6.2% in England.

Between February 2009 and February 2010, the number of NEET individuals in Bradford had fallen by 6.5%. However, it is clear the recession has had a significant impact on the NEET figures, with a much sharper rise in NEET rates at the end of the 2008/09 academic year than has been seen over the previous two years, reflecting a lack of job opportunities for young people.

The majority (86%) of NEETs are actively seeking employment or training, but in February 2010 169 young people were not active. The most significant reason was being a parent or pregnancy, accounting for over 70% of those classed as not active.

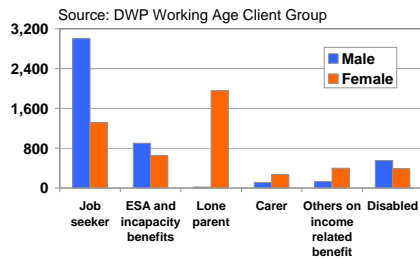
Youth unemployment is highest in deprived areas

Youth unemployment tends to be highest in areas with high overall unemployment, and therefore within the most deprived parts of the district.

Youth claimant rates are highest in Tong, where more than 1 in 4 16-24 year olds is claiming a DWP benefit. In Bowling, Undercliffe, Shipley East, Little Horton and Keighley South, more than 1 in 5 young people are on benefits.

Generational unemployment will be a significant factor in these areas where high levels of worklessness persists.

Number of benefit claimants 16-24



14% of 16-24 year olds are unemployed and claiming a DWP benefit, higher than the regional (13.8%) and national (13.1%) rates.

The largest group of claimants are jobseekers claiming JSA (4,310). The next biggest group (1,980) are claiming benefits as a lone parent. A further 1,550 are out of work for ill health reasons and are claiming incapacity benefit or ESA.

Summary

Youth claimant unemployment has risen sharply since the start of the recession, and there are now more than 9,500 young people out of work. Despite this Bradford performs better than the regional and national averages. However, underneath this headline figure lies high levels of worklessness among young women, who are much more likely to be economically inactive than young men.

Data on the reasons for economic inactivity among young people is limited. A large proportion of economically inactive young women will be looking after family, particularly as the district has higher than average teenage pregnancy rates and home-making among young Asian women has traditionally been high.



Educational attainment is improving but Bradford has a low skilled legacy

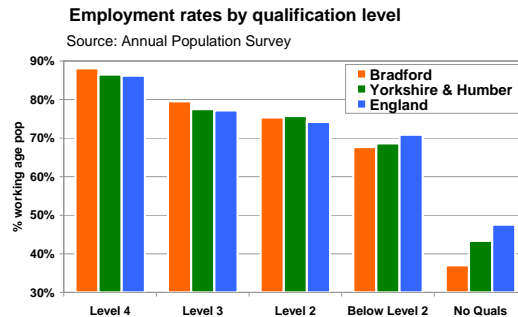
Key facts

- 180,000 adults are qualified to at least NVQ level 2 (62.5%).
- 66,000 are qualified to at least NVQ level 4 (degree level or above) (23%).
- 52,000 are without any qualifications (18%).
- 42% of Bradford pupils achieved five A*-C grades including English and Maths in 2008/09.
- 77.9% of Year 11 pupils stayed on in full-time education, and 52.4% of Year 13 pupils moved into higher education in 2008.
- Adult participation in learning is lower than average.
- 15,200 learners are on Skills for Life courses. Of these 45% were on entry level courses (compared to 35% nationally), and 23% were studying ESOL (compared to 16% nationally).

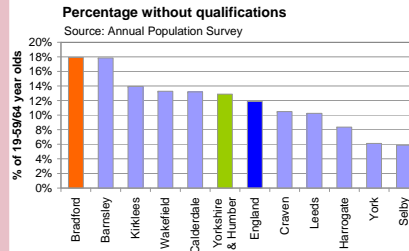
63%
of working age people without a qualification are workless

Low qualifications are a significant barrier to employment

Employment rates for those qualified to at least Level 4 in Bradford are 88%, and this is currently better than regional and national averages. However, for those adults without any qualification, employment rates drop to 37% - much lower than the England average of 48%. Of those who are qualified to level 2 qualification, 76% are in employment. 63% of those without any qualifications in Bradford are not in employment.

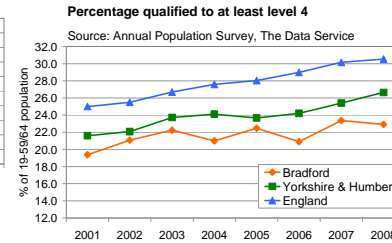


Bradford's population is low skilled



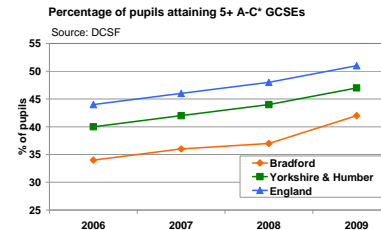
Nearly 18% of Bradford's working age population do not have any qualifications, compared to 13% for Yorkshire & Humber and 12% for England. Level 2 is considered the entry level for employment, and 56,000 adults in Bradford have not reached this level of qualification.

Higher-level skills have improved but remain below regional and national averages



22.9% of adults aged 19 to retirement are highly qualified (level 4 and above). Despite significant increases in the number of people qualified to at least degree level, rates remain well below regional (26.6%) and national (30.5%) averages.

Bradford is closing the gap on educational attainment



42% of Bradford pupils achieved five A*-C grades including English and Maths in 2008/09, which is below the regional and national averages although the gap is reducing.

Graduate retention and employment

In 2007/08 around 53% of the student population were from an ethnic minority group, and a significant number come from Bradford. Retention of graduates within the district is relatively high with 41% of employed graduates living in the Bradford area. 89.2% of graduates are employed or in education 6 months after finishing their studies (compared to 91.0% nationally).

Growth of graduate-level jobs both locally and within the Leeds city region needs to keep pace with the number of graduates in order to retain and grow higher level skills in the district.

Ethnicity & language

The 2001 Census showed that approximately 30% of the working age population in the district had no qualifications at that time, but this increased to around 50% for those of Pakistani and Bangladeshi origin.

Almost 47% of Bradford's school pupils are from black and ethnic minority groups compared to 16% across the region and 19% for England. GCSE attainment varies between ethnic groups, with 43% of white and mixed ethnic groups gaining 5+ A*-Cs (including English & Maths) compared to only 39% for those of Asian origin. Local data highlights differences between Asian groups, with GCSE attainment rates of only 30% for pupils of Pakistani origin compared to 52% for those of Indian origin.

Bradford is ranked the third highest Local Authority in England for the number of pupils who have a first language other than English (27,582 pupils) behind Birmingham and Newham in Inner London.

43% of primary pupils and 30% at secondary schools do not have English as their first language - more than three times the regional average. In Bradford, GCSE attainment for pupils whose first language is not English is 38%, compared to 43% for those whose first language is English.

Summary

Recent years have seen significant improvements in educational attainment among children, but a lower proportion of Bradford's adults than average have the minimum qualifications deemed necessary for employment.

Low qualifications are a significant barrier to employment and 63% of people with no qualifications are out of work. Future job growth in the region is predicted to be most significant within high and medium skilled occupations, which will pose an increasing challenge for Bradford's workforce given its current low skill levels.



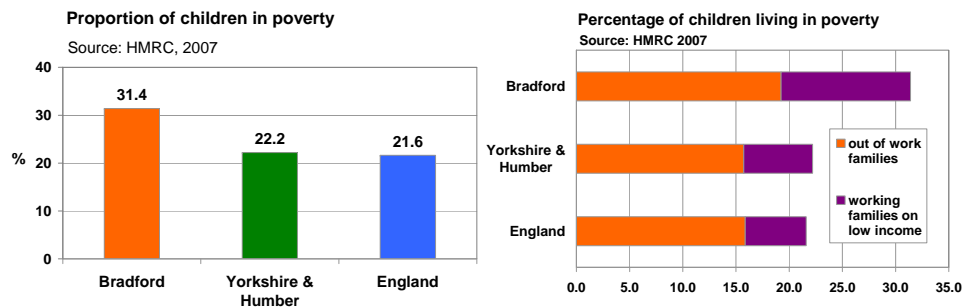
Child poverty reflects clusters of deprivation in the district

Key facts

- Bradford is the 32nd most deprived local authority district in England (out of 354 districts).
- 40,840 children in Bradford live in poverty.
- This accounts for 31.4% of children in Bradford, compared to 22.2% in the region and 21.6% in England.
- 19% of children in Bradford live in families in receipt of an out of work benefit. A further 12% live in families who are working but have a low income (less than 60% of median income) and are in receipt of tax credits.
- Bradford has the 20th lowest level of child well-being out of 354 English local authorities in the CLG Child Wellbeing Index.

**Nearly
1 in 3
children in
Bradford live
in poverty**

Bradford has a high level of child poverty



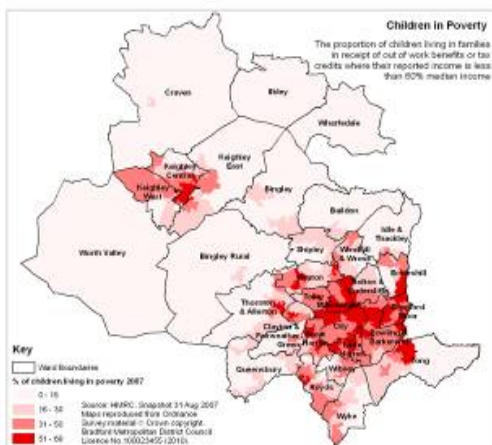
At a local level child poverty is measured as the proportion of children living in families in receipt of out of work benefits, or working tax credits where reported income is less than 60% of median income.

Nearly a third of children in Bradford live in such low income families. This is significantly higher than the regional and national average and is the highest within the Leeds city region.

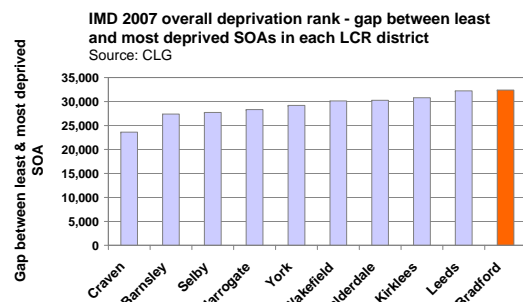
Poverty is spatially concentrated

Child poverty is spatially concentrated in parts of Bradford City, in Airedale within Keighley's inner urban areas, and in outlying social housing estates such as Buttershaw and Holme Wood in South Bradford.

The map of child poverty reflects the pattern of other deprivation indicators.



Bradford has the greatest level of inequality of all districts in England



According to the IMD 2007 overall ranking the gap between the most and least deprived areas in Bradford is the largest in the country. Such inequality has been shown to have significant impacts on economic wellbeing.

Infant mortality rates are high

The district's infant mortality rate of 8.2 per 1,000 live births is one of the highest in the country and higher than other areas with similar levels of deprivation. Rates in the most deprived fifth of the district's population are three times higher than in the least deprived areas. Deprivation is one of the key factors associated with infant mortality (as well as low birth weight, and the age and ethnicity of the mother). A partnership approach to reducing infant mortality is being overseen by the Every Baby Matters implementation group.

Child poverty is associated with particular population groups

Research at a national level shows high levels of child poverty are associated with: single parents; some ethnic minorities; families with a disabled adult; those renting their home; families with four or more children; mothers with educational levels below tertiary level and mothers aged under 20 years at the birth of their child.

Children living in poverty are more likely to be poor as adults than children from more affluent homes.

Poverty is a barrier to educational success. National research has shown that by the age of three, children from poorer homes are typically about nine months behind children from more affluent backgrounds – a gap that widens throughout their schooling to around 5 terms at Key Stage 3.

With low or no qualifications, children are more likely to enter low skilled, low paid employment and remain in poverty as adults.

Summary

With close to one in three children in Bradford living in low income families, Bradford has particularly high levels of poverty and child poverty. The district ranks 32nd in the country for overall deprivation. Employment lifts some families and children out of poverty but low skills and low income work means this is not a guarantee, and over half of children in low income families have at least one parent in employment.

The district has the greatest gap between the most deprived and most affluent areas of any local authority district in England. Recent research has shown that such inequality has impacts that go beyond economic wellbeing to affect levels of health, trust and happiness.



Economic wellbeing goes beyond jobs and growth

Key facts

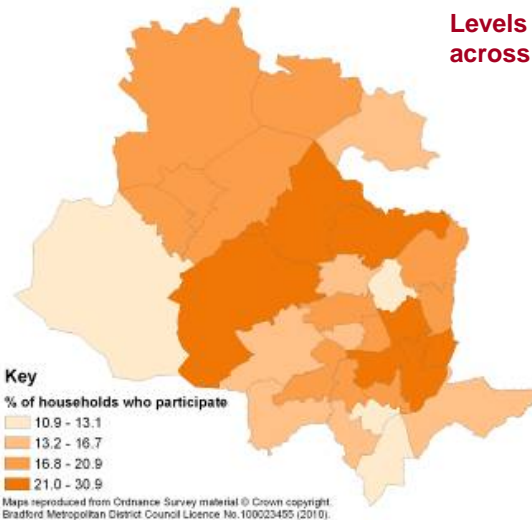
- Bradford has a relatively high level of self-reported wellbeing and health.
- Volunteering and civic participation levels are high in Bradford compared to levels in similar districts.
- Around 100,000 Bradford residents are engaged in active citizenship such as volunteering, being part of a community group or undertaking civic roles.
- Bradford residents generally have worse health than England average levels.
- Mortality rates are high in the district.
- Men in Bradford's most deprived areas have nine years shorter life expectancy than in the least deprived areas.

76%
of residents
report good or
better health &
wellbeing

Levels of civic participation vary across the district

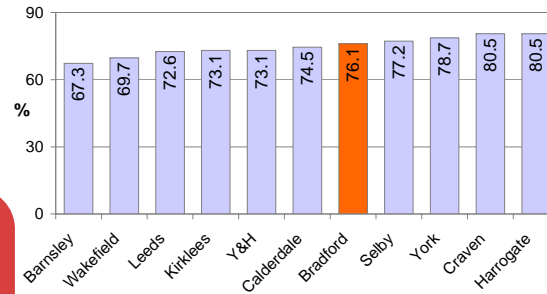
The map shows the percentage of households in each ward who say they regularly participate in community regeneration, charity or voluntary work, or improving their local environment.

Levels of participation are highest in the inner city wards and in Bingley and Idle. Participation is lowest in south Bradford, Windhill & Wrose ward and Worth Valley.



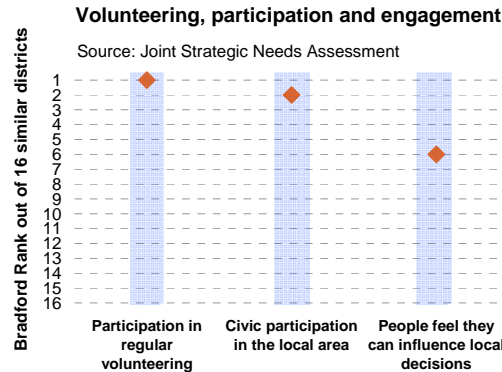
Bradford residents report high levels of wellbeing

% of Bradford residents reporting "very good" / "good" health & well-being
Source: CLG Place Survey 2008, Floor Targets Interactive



A subjective measure of well-being and health is provided by the CLG Place Survey which shows Bradford has relatively high levels of wellbeing and health - above the regional average.

Bradford has high levels of volunteering and civic participation



Levels of engagement and volunteering have positive impacts on overall wellbeing as well as producing benefits which can support economic wellbeing, giving people a route into employment or providing services for which payment would otherwise be required.

Bradford ranked 1st out of a group of 16 similar districts for volunteering, 2nd for civic participation and 6th for "people who feel they can influence decisions in their locality".

Child wellbeing levels are low

The CLG Child Well-being Index 2009 looked at various factors relating to child wellbeing: housing; education; health and disability; material wellbeing; crime; environment; education; and children in need. Out of a total of 354 districts Bradford's overall wellbeing ranking was 335th, making it the lowest placed district in Leeds city region and signifying a low level of child wellbeing in the district. On material wellbeing Bradford is ranked 321st - the lowest in Leeds city region.

Health, wellbeing & employment

Health problems may lead to worklessness. Within Bradford district 8% of the working age population (24,670 people) are claiming Incapacity Benefits (IB) or Employment Support Allowance (ESA); the national average rate is 7.1%. Of these claimants approaching half (44.2%) are not working due to mental or behavioural problems.

Getting more people into work is at the heart of local and national strategies to reduce poverty and improve economic performance. According to Bradford's Joint Needs Strategic Assessment there is strong evidence showing that work is generally good for physical and mental wellbeing.

However, the district may be faced with greater future health needs as the number of older people in the population is increasing and the number of children and young people is also growing - which will require successful interventions to address relatively high levels of infant mortality, childhood obesity and teenage pregnancy.

Summary

Self-reported measures show that Bradford has relatively high levels of well-

being with 76% of residents report "very good" or "good" health and wellbeing. This is in contrast to Bradford's relatively high levels of deprivation concentrated in certain parts of the district, and associated with poor health and shorter life expectancy.

The district has high levels of volunteering and civic participation, which have positive impacts on overall wellbeing as well as producing benefits which can support economic wellbeing, giving people a route into employment or a means of accessing services.



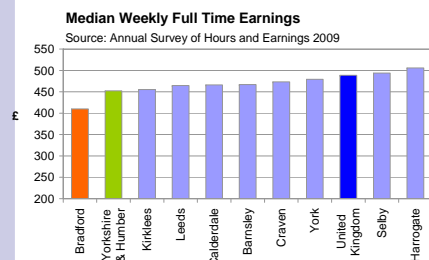
Ongoing low wage levels have not shown improvement

Key facts

- Average full-time weekly earnings for Bradford residents were £409.90 in 2009.
- This is 9% below regional and 16% below national earnings levels.
- Earnings have increased from £366.30 in 2005, but the gap with regional and national earnings is widening.
- At £423.30, earnings for those working in Bradford are around £13 a week higher than for residents.
- Average gross household income (including benefits and savings) is £31,700 in Bradford, compared to £32,500 for Yorkshire & Humber and £35,000 for Great Britain.
- 41,500 or 21% of households in the district have incomes under £15,000 per year.

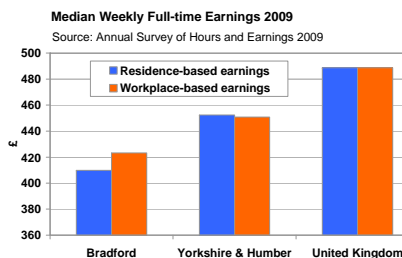
1 in 5 households have incomes less than £15,000 a year

Bradford residents earn less on average than elsewhere in the city region



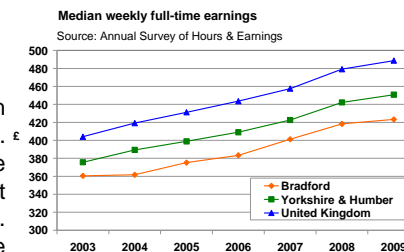
Despite a significant improvement between 2008 and 2009, Bradford has the lowest average earnings within the Leeds city region. Within the Yorkshire & Humber region only Kingston upon Hull has lower earnings. Bradford has the 16th lowest earnings of all UK districts.

Residents earnings are lower than workplace earnings



The earnings of people working in the district are 3.4% higher than earnings of people living in the district. However, workplace-based earnings are still well below regional and national levels.

The gap between Bradford's earnings and the national average has widened



Workplace-based earnings have risen by 17% since 2003, but regionally and nationally the rises were greater than 20%.

Part-time earnings

Part-time earnings in Bradford are on average higher than the regional and national averages, and the 4th highest within the Leeds city region.

However, this only applies to females (male part-time earnings are much lower). This could in part be due to better wages for women working part-time within the public sector. A higher proportion of the jobs within the public sector in Bradford are part-time compared to regionally and nationally.

It should be noted that the latest figures (which refer to April 2009) will not reflect subsequent pay freezes within the public sector as a result public sector cuts.

Low wages linked to low skills

National analysis shows that people with higher qualifications tend to earn more and are less likely to be unemployed. For example, people with degree or higher level qualifications earn, on average, about twice as much as those with no qualifications.

The earning potential of Bradford's residents reflects the skills profile and the types of jobs that they do. The occupational profile of residents is lower than the occupational profile of jobs in the district. Analysis of commuter movements show that higher level jobs (and therefore higher paid jobs) in Bradford are more likely to be taken by people commuting in from outside the district. There is also a net movement of people working in lower skilled occupations outside the district. This explains the difference between residents earnings and workplace earnings in the district.

Levels of wealth vary markedly across the district

Key
Average Household Income by ward

- £21,398 - £25,000
- £25,001 - £32,000
- £32,001 - £39,000
- £39,001 - £45,000

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16% of households in Bradford have an average income of £50,000 or more. Wharfedale and Ilkley wards have the highest average household incomes at £44,700 and £42,300 respectively. Conversely, Manningham ward has the lowest average household income at £21,400 and 35% of households in Manningham have incomes less than £15,000 a year. Such inequalities in wealth across the district do not appear to be reducing.

Summary

High levels of worklessness and lower earnings for those in work reflect the low skills profile of Bradford residents. Even the lowest 10% of earners in Bradford earn less than regionally and nationally. On the IMD measure of income deprivation, Bradford was ranked 4th most deprived in the country.

Levels of wealth vary markedly across the district with 21% of households having incomes less than £15,000 a year and 16% of households in Bradford having an average income of £50,000 or more. These variations in earnings also reflect patterns of commuting, with a significant number of Bradford's higher earners commuting from Wharfedale and Ilkley to jobs outside the district – mainly in Leeds.



Enterprise culture is driving employment growth

Key facts

- At the beginning of 2009 there were 15,720 active VAT and/or PAYE enterprises in Bradford district.
- During 2008 there were 1,765 enterprise start-ups, a start up rate of 12.1% compared to 11.8% nationally.
- 96% of new business survive for at least one year. The three year survival rate is 62% compared to 65% nationally.
- There are 30,100 people of working age who are self-employed - 14.4% of all work aged people in employment.
- Self employment has increased by 10,800 between 2005 and 2009. Employee employment fell by 3,900 in the same period.
- Male self-employment was 24,100 in September 2009.
- Female self-employment has grown 66% between 2005 and 2009 to 6,000.
- Self-employed vacancies at Bradford job centres account for 10% of all unfilled vacancies.

1 in 7
people who work
in Bradford
district are self
employed

The number of enterprises is growing

	2005	2009	Change 2005-09	
			Number	%
England	2,106,660	2,237,555	130,895	6.2
Yorkshire & Humber	184,635	191,875	7,240	3.9
Bradford	15,160	15,720	560	3.7
Calderdale	7,970	8,045	75	0.9
Kirklees	13,860	14,210	350	2.5
Leeds	26,175	27,615	1,440	5.5
Wakefield	10,365	10,185	-180	-1.7

Source: Inter Departmental Business Register (IDBR) 2009

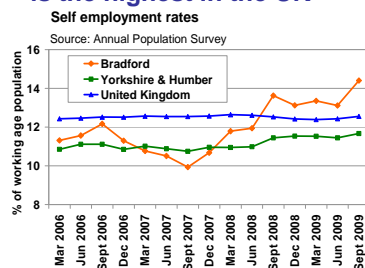
The number of enterprises grew by 560 between 2005 and 2009, an increase of 3.7%. This compares to a 3.9% increase in Yorkshire and the Humber and a 6.2% increase in England. During 2008, Bradford had the second highest number of new start ups within the Leeds city region.

Summary

Bradford has a high self-employment rate above regional and UK averages. Self-employment has grown by more than 50% over the last five years, the biggest increase of any local authority in the UK. Increases in self-employment has accounted for all employment growth over the last five years mitigating falls in employee based employment.

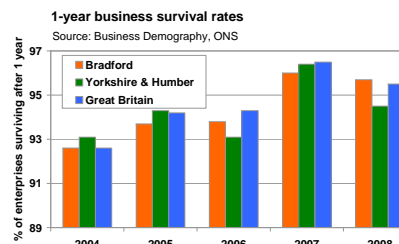
Long term enterprise growth rates have lagged behind regional and national growth but have shown great improvement in recent years. Business survival rates have shown some improvement with 1 year survival rates higher than regional and national rates.

Growth in self employment is the highest in the UK



At 14.4%, the rate of self-employment in Bradford is higher than regional or national averages. Self-employment rose from 19,300 in September 2005 to 30,100 in 2009. This equates to growth of 56%, the highest of any UK local authority district and compared to regional growth of 12.5% and UK growth of only 3.2%.

Survival rates have risen



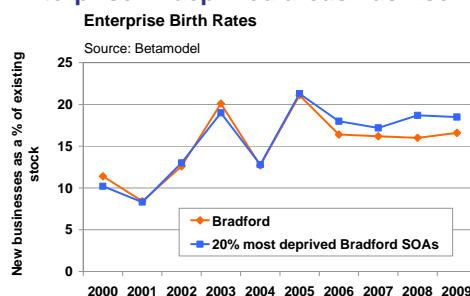
Business survival rates in Bradford over one year are higher than regional and national rates while two and three year survival rates are lower. The one year rate improved from 93% in 2004 to 96% in 2008.

Men are more likely to be self employed



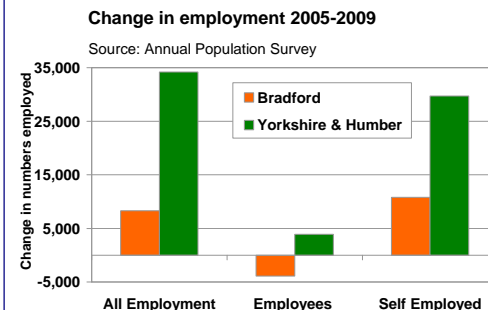
In September 2009 there were 24,100 working age men who were self-employed, a rate of 15%. By comparison there were 6,000 self-employed women, a rate of 4%. Male self employment increased from 15,700 in 2005 to 24,100 in 2009 – an increase of 54%. Female self-employment grew 66% from 3,600 in 2005 to 6,000 in 2009.

Enterprise in deprived areas has risen



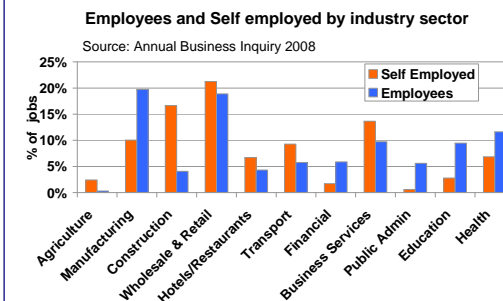
Start ups rates in the 20% most deprived Super Output Areas have risen above district, regional and national rates.

Self employment accounts for all recent employment growth



Over the five years to September 2009, self-employment rose by 10,800 countering a fall in employee employment of 3,900. This means that all employment growth in recent years has been due to the increase in self-employment.

Self employment by sector



Self-employment in the construction industry is high providing 17% of all self-employment compared to just 4% of employees.

Self-employment is high in agriculture, retail, hotels, catering, transport and business services. Self-employment is particularly low in financial services at 2% compared to 6% of employees.



Bradford has some competitive strengths but productivity lags national rates

Key facts

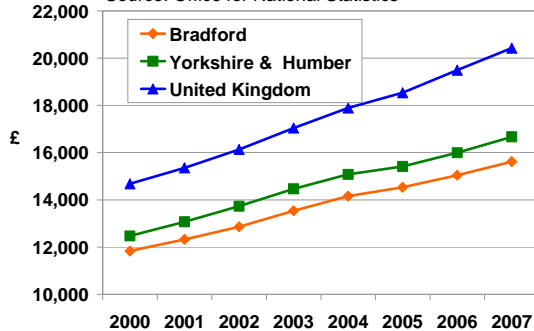
- Bradford GVA per resident adult was £15,249 in 2007. This was lower than the regional figure of £16,670 and a UK figure of £20,430.
- GVA grew by 69% between 1995 and 2007 compared to UK growth of 90%.
- GVA per employee was £38,526 in 2007.
- GVA per employee is highest in business services and finance at £61,926.
- Knowledge based business account for 17.7% of all businesses compared to 21.8% nationally.
- Creative industries employ 3,022 people accounting for 1.6% of all employees.
- Bradford ranks 309th of 379 localities in the UK Competitiveness index.

Bradford is a
£7.6 billion economy

Economic output growth has lagged behind regional and national growth

GVA Per Head

Source: Office for National Statistics



Total GVA rose from £4,488 million in 1995 to £7,585 million in 2007, an increase of 69% which compared to regional growth of 76% and UK growth of 90%. Bradford's GVA is the third highest in Yorkshire & Humber and represents 8.8% of the regional total of £86,307 million. This has fallen from 9.2% in 1995.

Annual GVA growth rates have increased in recent years averaging 3.6% since 2005 compared to 2.4% between 2000 and 2005.

Summary

Bradford's economy is a low value economy when compared to regional and national output figures. Bradford's share of the regional economic output has fallen consistently since 1995 although growth rates have improved since 2005. Productivity levels are on a par with regional levels but are low against comparable cities.

Knowledge based sectors such as financial and professional services are the most productive and will drive future productivity growth. Bradford's small creative sector will be a key future growth sector along with environmental technologies, manufacturing and network services.

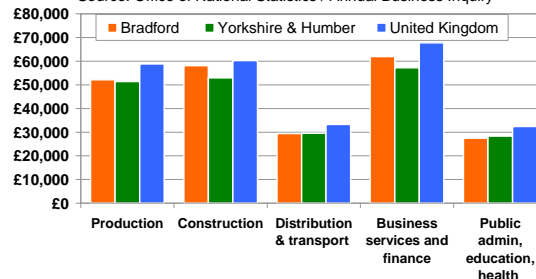
Bradford's overall competitiveness performance within the UK is weak reflecting low skills, mixed productivity levels and low business densities that is amplified by the North/South economic divide.



Employee productivity varies according to industry sector

GVA per employee

Source: Office of National Statistics / Annual Business Inquiry

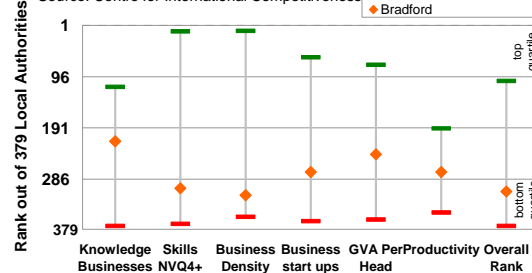


Bradford GVA per employee was £38,526 in 2007. This was on a par with a regional figure of £38,526 but lower than the UK figure of £44,682. Construction and financial services productivity are higher than regional averages and compare favourably with national levels. Productivity in manufacturing and other production industries is slightly higher than the regional average but lower than the national figure.

UK Competitiveness Index

UK Competitiveness Index 2010

Source: Centre for International Competitiveness

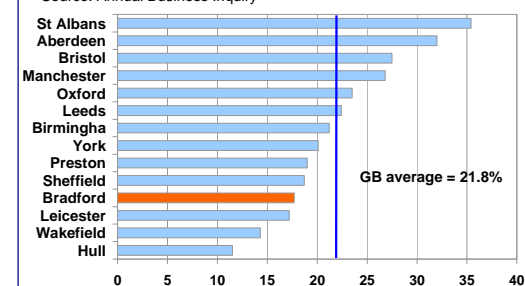


Bradford ranks 309th out of 379 localities in the UK Competitiveness Index 2010 and ranks 37th of the UK's 43 largest cities. Across a range of indicators such as productivity, skills and business levels Bradford ranks consistently in the lower quartiles. The highest rank is 216th for the proportion of knowledge businesses.

Knowledge based businesses

Knowledge Based Businesses (% of all businesses)

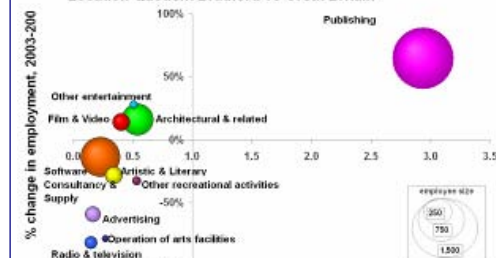
Source: Annual Business Inquiry



Knowledge based businesses such as financial and professional services account for 17.7% of all businesses in the district. This compares to 21.8% nationally. Bradford ranks 31st of the UK's 43 largest cities on this measure in the UK Competitive Index.

Creative industries

Location Quotient Bradford vs Great Britain



Creative industries have been identified by The Work Foundation as one of four key sectors that will drive future growth. Bradford's creative sector is small accounting for 1.6% of all employee jobs compared to 3.1% nationally and 1.8% regionally. Publishing accounts for almost half of all creative sector employment in Bradford and has grown in recent years while radio and television, advertising and artistic creation have declined.

Manufacturing remains a significant sector for Bradford and the region

Key facts

- There are 1,400 manufacturing business units employing 29,100 people in the district.
- Manufacturing accounts for 13.4% of all employees compared to 9.5% in Great Britain as a whole.
- 15,000 manufacturing jobs were lost between 1998 and 2008.
- There are 10,900 engineering employees in the district.
- Other key manufacturing sectors are printing and packaging with 2,500 employees, food and drink with 2,300 employees and chemicals with 2,100 employees.
- Textiles employs 1,700 people compared to 73,000 in 1961.
- Manufacturing employment is forecast to fall by around 10% over the next fifteen years.
- In 2007 the value of manufacturing output was £1.6 billion, which was 22% of the district's total GVA.

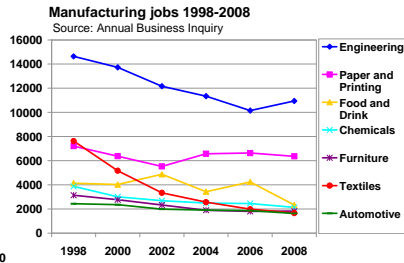
1 in 7
of all employees
in Bradford
district work in
manufacturing

Bradford has significant manufacturing employment



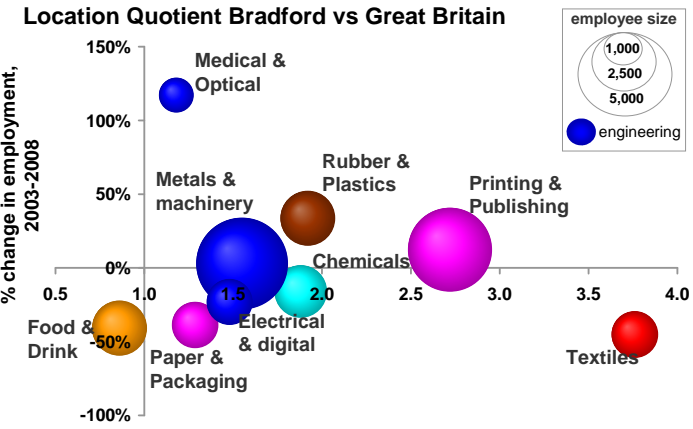
Bradford has a higher proportion manufacturing jobs than national and regional averages. Within West Yorkshire, Calderdale and Kirklees are more reliant on manufacturing jobs while Leeds has the lowest proportion of manufacturing. Bradford is the seventh largest manufacturing location in Great Britain.

Manufacturing decline has slowed in recent years



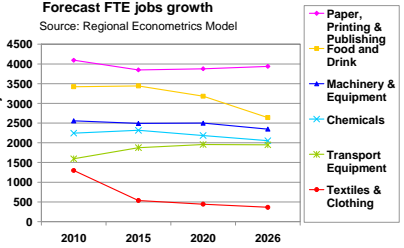
Manufacturing employment in Bradford fell by 15,000 between 1998 and 2008, a fall of 35%. The textiles industry was most affected with the loss of 6,000 jobs, a fall of 78%. Engineering felt a 25% fall with the loss of 3,700 jobs. There were some growth sectors with plastics gaining 800 jobs.

Bradford district has a diverse manufacturing sector with engineering prominent



Engineering, with 10,900 jobs, accounts for 38% of all manufacturing jobs in the district. Metal fabrications and machinery employs 6,500 employees and has seen a slight increase between 2003 and 2008. Electrical and digital employment fell while medical and optical grew by 117% and now employs almost 1,000 people. Textiles remains a locally significant sector but continues to decline. Printing and publishing is a large sector locally with 5,400 employees and grew by 12% in 2003-2008. Rubber and plastics also grew.

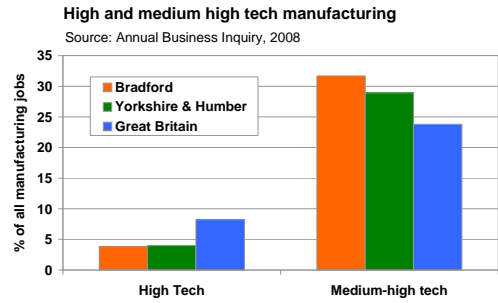
Manufacturing jobs set to stabilise going forward



After some short term job losses, particularly in paper, printing, publishing and textiles, manufacturing employment is forecast to remain relatively stable.

Advanced manufacturing

Only 4% of manufacturing jobs in Bradford are in high tech sectors, such as pharmaceuticals and digital industries, compared to 8% nationally. However Bradford has a high proportion of medium-high tech jobs which account for 32% of all manufacturing jobs compared to 24% nationally.



Sub district picture

Bradford city has 12,700 manufacturing jobs accounting for 44% of the district total. Airedale is the second largest manufacturing location with 8,100 jobs and accounting for 21% of all jobs in Airedale compared to only 12% in Bradford city and 14% across the district as a whole. Engineering is a strong sector in Airedale with 4,800 jobs out of a district total of 10,900.

Area	Number of jobs	% of jobs	Change 2003-08	
			Number	%
Bradford City	12,700	12	-1,400	-10
Airedale	8,100	21	-1,600	-16
Bingley & Shipley	4,500	21	-1,000	-19
Keighley	3,600	21	-500	-13
Bradford South	6,100	27	-2,900	-32
Wharfedale	1,400	9	-100	-2
Pennine Hills	800	13	-800	-49
Bradford District	29,100	14	-6,701	-19

Source: Annual Business Inquiry 2008

Between 2003 and 2008, South Bradford lost 2,900 manufacturing jobs, a fall of 32%. The majority of jobs lost were in printing, reflecting the relocation of a single key firm within the district. Airedale saw the loss of 1,600 jobs, mainly in engineering, textiles and printing.

Summary

Manufacturing remains a higher than average value sector producing more GVA per worker than most other industries in the district. Bradford has a higher proportion of manufacturing employment than the regional and national average and ranks as the seventh largest manufacturing location in Great Britain.

Significant sectors within manufacturing are engineering, printing, food and drink, chemicals, rubber and plastics, engineering, automotive and furniture. Textiles remain a locally important sector despite major job losses in recent decades. The decline in manufacturing employment has slowed in recent years and is forecast to stabilise at around 22,000 jobs over the next fifteen years.



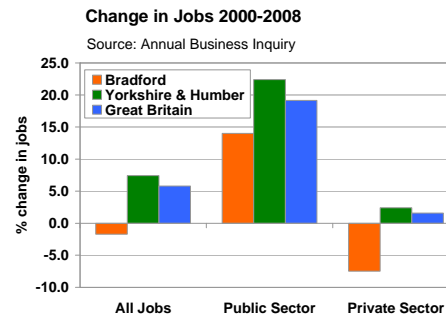
The service sector is over reliant on public sector and retail employment

Key facts

- The service sector has 12,700 business units employing 155,400 employees.
- Services account for 82% of all workplaces and 81% of all employees in the district.
- The public sector employs 60,300 people - 31% of employees compared to 27% nationally.
- Health is the district's largest overall sector with 27,000 employees.
- Education has 22,900 employees and public administration employs 10,600 people.
- Public sector take up accounted for 25% of all office occupation over the 5 years to 2007.

1 in 3 employees in Bradford district work in the public sector

Public sector jobs growth has not mitigated the decline in private sector jobs across the district



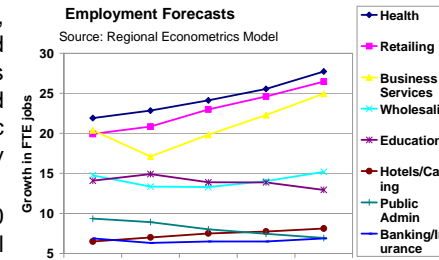
Between 2000 and 2008 the number of public sector jobs in the district increased by 7,400 to 60,300, an increase of 14%. This was lower than both regional and national increases.

During the same period private sector jobs fell by 10,700.

Falls in private sector jobs and weaker than average public jobs growth meant that the overall number of jobs fell in contrast to small increases regionally and nationally.

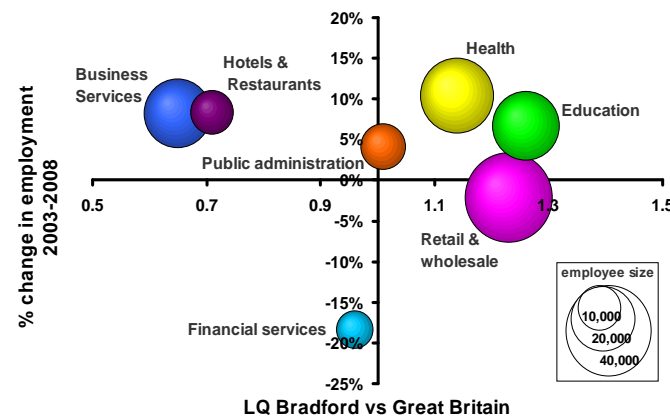
The increase in public sector employees was due to an additional 5,200 jobs in health and 3,330 more jobs in education and some small decline in public administration.

Growth in some service sectors could offset falls in others



Spring 2010 projections forecast employment growth in retail, health and business services. Public spending cuts will amplify projected falls in public administration and education.

Health, education and retail/wholesale are overly represented



The public sector includes health, education and public administration and accounts for 31% of all employees compared to 27% nationally. Bradford has the 46th highest proportion of public sector employment of all 380 unitary authorities in Great Britain.

Retail and wholesale, with 32,400 employees, accounts for 20% of all employee jobs compared to 16% nationally. Business services with 22,700 jobs is under-represented compared to regional and national averages. Financial services employment has seen an 18% fall between 2003 to 2008.

Retail in detail

Bradford city has 17,100 retail sector jobs which accounts for 67% of the district total. Retail employment in Bradford city grew by 16% in the five years to 2008. Airedale is the second largest retail location with 4,500 jobs, falling 14% in the last five years. Wharfedale experienced a 38% fall in the number of retail jobs between 2003 to 2008.

Employee jobs in the retail sector, 2008				
Area	Number	%	Change 2003-08	
			Number	%
Bradford City	17,100	16	2,400	16
Airedale	4,500	12	-700	-14
Bingley & Shipley	2,100	10	-50	-2
Keighley	2,400	14	-700	-23
Bradford South	1,700	8	-700	-30
Wharfedale	1,700	11	-1,100	-38
Pennine Hills	400	8	100	25
Bradford District	25,400	13	-100	0

Source: Annual Business Inquiry, 2008

Public sector in detail

Bradford city has 37,700 public sector jobs which accounts for 62% of the district total. Airedale is the second largest public sector location with 10,100 jobs accounting for 26% of all jobs. Bradford South has the lowest proportion of public sector jobs at just 22% although this increased by 18% to 4,900 over the five years to 2008.

Employee jobs in public services 2008				
Area	Number	%	Change 2003-08	
			Number	%
Bradford City	37,200	34	2,700	8
Airedale	10,100	26	-500	-4
Bingley & Shipley	6,200	21	-100	-2
Keighley	3,900	21	-400	-8
Bradford South	4,900	22	700	18
Wharfedale	6,100	38	1,100	22
Pennine Hills	2,100	35	400	21
Bradford District	60,300	31	4,400	8

Source: Annual Business Inquiry, 2008

Public sector jobs increased by 4,400 over the five years to 2008, with most of this growth occurring in Bradford city which gained 2,700 jobs. Airedale lost 500 public sector jobs over the period while Wharfedale gained 1,100 jobs.

Summary

Public sector employment accounts for 31% of all employment compared to 27% nationally due to higher than average employment in health and education which together account for one in four of all jobs in the district. Growth in health and education jobs has masked a significant fall in private sector employment in recent years as Bradford has become increasingly dependent on public sector employment.

The majority of public sector jobs are located in Bradford city with Airedale and South Bradford less reliant on the public sector. Public sector employment is set to reduce in the near future as public sector finances are subject to government spending cuts.



Bradford city centre offers real potential as an engine for growth

Key facts

- There are 36,000 jobs located in Bradford city centre with 12,000 in financial and business services, 11,000 in the public sector, 3,600 in retail and 1,700 in hotels and catering.
- Retail expenditure in Bradford city centre was estimated at £410 million in 2009, the seventh highest in the region.
- Pedestrian footfall in Bradford city centre fell by 6.8% between 2008 and 2009. Since 1999 pedestrian footfall has fallen by 29%.
- There are 1,788 businesses located in Bradford city centre accounting for almost one in nine businesses in the district.
- There are 483 retail units in the city centre. Retail vacancy rates are currently around 19%.
- The city centre resident population grew from 3,000 in 2003 to 8,000 in 2007.
- City centre crime fell 44% from 8,780 offences in 2004 to 4,940 in 2009.
- The Media Museum, Alhambra and St George's Hall had 1.1 million visitors in the year to March 2009.

**1 in 5
Jobs in
Bradford
district are in
the city centre**

Bradford city centre retail expenditure has held up in the face of the recession

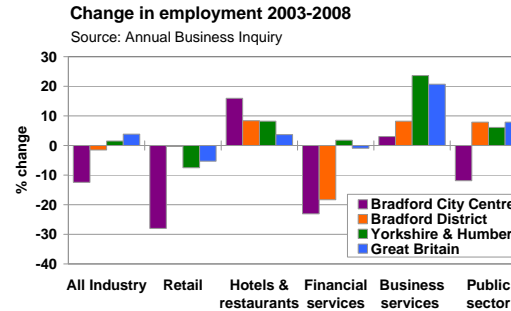
Location	Expenditure £m		Change 2008-09	
	2008	2009	£m	%
Leeds	£1,866	£1,710	-£156	-8.4
Meadowhall	£1,208	£1,070	-£138	-11.4
Sheffield	£825	£690	-£135	-16.4
Hull	£752	£700	-£52	-6.9
York	£625	£600	-£25	-4
Doncaster	£461	£430	-£31	-6.7
Huddersfield	£447	£410	-£37	-8.3
Bradford	£412	£410	-£2	-0.5
Harrogate	£357	£360	£3	0.8
Grimsby	£358	£340	-£18	-5

Source: CACI Ltd Retail Footprint, 2009

Retail expenditure in Bradford city centre fell by £2 million between 2008 and 2009. This was the second lowest fall among the top ten retail centres across Yorkshire and the Humber suggesting the city centre retail trade has been more resilient in the face of the current recession, albeit from a comparatively low starting point.

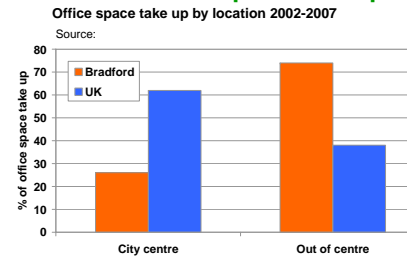
Retail expenditure in Bradford city centre fell by 0.5% which was much better than other major city centre across the region with Leeds experiencing a 8.4% fall.

City centre employment has declined in recent years



Bradford city centre accounts for 20% of all jobs in Bradford district. The city centre saw the loss of 5,000 jobs between 2003 to 2008, a fall of 12% that compared to a district fall of 1%. Retail jobs fell 28% from 5,000 to 3,600. Financial services jobs fell by 23% to 3,600 jobs while public sector employment also fell by 12% to 11,000 despite increasing district wide, regionally and nationally. Hotels and catering jobs increased 16% to 1,700. Business services saw limited growth of 3%, lower than district, regional and national growth.

City centre is behind national trends in office space take up



Office space take up in Bradford between 2002 and 2007 was 26% in the city centre and 74% out of town. This compares to the national average ratio of 62:38 in favour of city centre take up.

Pedestrian flows

Pedestrian footfall in the city centre fell between 2008 and 2009. The estimated total number of pedestrian movements over the three day survey period in 2009 was 398,227 and represents a 6.8% decrease from 2008. Both Kirkgate and Oastler centres saw falls but Kirkgate Market had a slight increase.

Change in City Centre footfall 2008 to 2009		
Location	Change in Footfall	% Change
City Centre	-28,888	-6.8%
Kirkgate Centre	-133,141	-1.1%
Kirkgate Market	4,876	0.3%
Oastler Centre	-87,928	-2.8%

Source: Bradford City Centre Pedestrian Footfall Survey 2009, CBMDC

39% of the pedestrian movements occurred on Saturdays, 31% on Tuesdays and 31% on Thursdays. Comparing figures for 2009 with those taken in 1999 shows that footfall in the city centre has fallen by 29%.

District urban centres

Outside the city centre the district has a number of significant retail and service centres:

Keighley is the second largest settlement in the district and its town centre is a main retail and service centre serving the town, surrounding settlements and rural hinterlands.

Ilkley is the largest town in Wharfedale and the district's third largest retail centre. It has developed from a spa town into a strong residential and tourist centre.

Shipley is predominantly a destination for convenience shopping dominated by a supermarket store.

Bingley is generally a healthy centre performing a role as a service centre with a retail offer that has recently been enhanced by the redevelopment of Myrtle Walk.

Summary

The city centre is a major location for employment in the district and the main location of office based employment with 1 in 5 jobs in Bradford district located in the city centre. Although city centre employment has declined in recent years recent developments such as Southgate suggest there is latent demand for Grade A office accommodation.

The city centre provides the district's retail and cultural centre with an offer loosely spread between Westgate and the Forster Retail Park. Retail expenditure shows some signs of holding up in the face of the recession, and as the city centre resident population grows, albeit from low bases.



Bradford and Leeds' labour markets show strong interdependency

Key facts

- 41,500 people commute out and 45,000 people commute into Bradford to work - a total of 86,500 commuter trips every day.
- 37,000 of these are made daily between Leeds and Bradford.
- 21,300 trips are from Bradford to Leeds and 15,300 are from Leeds to Bradford – a net outflow of around 6,000 commuters into Leeds.
- Average travel times between Bradford and Leeds are 19-25 minutes by train and 19 minutes by car.
- 63% of all trips to work made by Bradford's residents are by car. Train travel is more important for commuter trips out of the district than into the district.

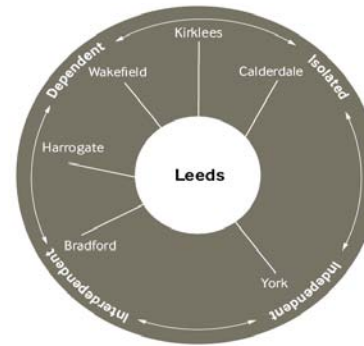
37,000
people travel
between Leeds
and Bradford
daily

Bradford receives a net inflow of commuters from all surrounding districts except Leeds



Bradford receives a significant net inflow of commuters from Kirklees, Calderdale and Craven, but 6,000 more people travel to Leeds from Bradford than in the other direction.

Bradford and Leeds are interdependent



Research into city relationships within the Leeds city region was carried out by the Work Foundation in 2009. Bradford's relationship with Leeds was defined as interdependent.

Commuting by industry and occupation

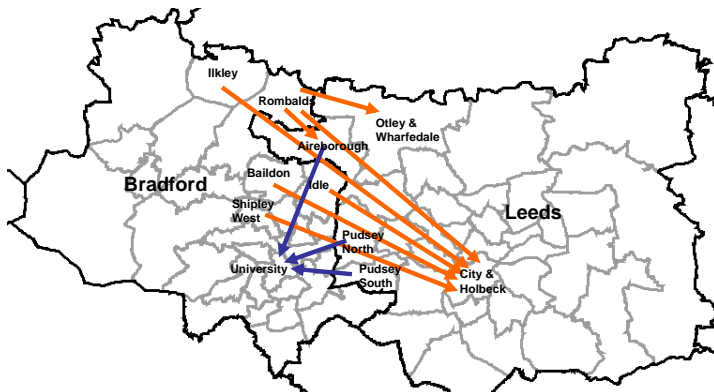
The majority of commuting trips in and out of the district are by workers in higher level occupations. Those people who are more highly skilled and working in higher level jobs are more likely to travel further for work. On balance, more high-level workers (managers and professionals) travel into Bradford to work than travel out. Additionally, there is a net export of lower level workers (semi-routine and routine workers) with more people in lower-level occupations travelling outside the district for work than travel in.

The flow of workers varies according to location of residence and destination. For example commuters from Wharfedale working in the centre of Leeds are more likely to work in managerial and professional occupations. Conversely, commuters making shorter journeys to work to and from wards close to the boundary are more likely to work in lower-skilled jobs.

The highest levels of commuting between Leeds and Bradford are by people working in manufacturing, retail, and business services.

There is a net flow from Bradford to Leeds of employees working in most industry sectors but particularly in business services, transport, retail and hotels & catering. The only sector which has a net flow into Bradford from Leeds is manufacturing.

Most commuters work in the city centres



The arrows on the map show the largest ward to ward trips made between Bradford and Leeds. The main destinations for commuters are the city centres, but significant numbers of commuters from Wharfedale work in north-west Leeds.

Leeds Bradford International Airport is a spatial priority



The Leeds city region transport strategy identifies Leeds Bradford International Airport as an important spatial priority. The airport services 70 destinations in 30 countries and is a significant employer within the city region.

Traffic and transport

Traffic monitoring figures across Bradford indicate reduced traffic levels by around 2% in the morning over the past year. The latest information in relation to peak period traffic flows shows a decline of 2.3% since 2004.

Over the past five years there has been a modal shift with a slight reduction in car and bus use and a corresponding increase in rail patronage.

However, car journeys in Bradford are predicted to increase by up to 15% by 2020 and this will put pressure on road networks and especially key routes between Bradford and Leeds. Rail routes between Bradford and Leeds are already affected by overcrowding at peak times.

Summary

37,000 people travel between Leeds and Bradford daily and with shared assets like Leeds Bradford International Airport the relationship between the two cities has been described as interdependent. Bradford provides a significant and growing supply of labour to Leeds, and Bradford residents may become more dependent on Leeds for employment opportunities in the future.

Over the past five years there has been a modal shift with a slight reduction in car and bus use and a corresponding increase in rail patronage. Rail routes between Bradford and Leeds are already affected by overcrowding at peak times.



Bradford is an essential ingredient in the success of Leeds City Region

Key facts

- Leeds city region comprises the cities and districts of Bradford, Calderdale, Kirklees, Leeds, Wakefield, Barnsley, York, Craven, Harrogate and Selby and includes part of North Yorkshire.
- It is home to nearly 3 million people (1.8 million of working age) and a workforce of 1.5 million.
- The city region economy is worth £50.6bn per year and home to approximately 100,000 businesses generating 5% of the UK economy.
- 57% of all the businesses in Yorkshire and Humber are based within the city region.
- 26% of the Leeds city region's working age population held NVQ4 level qualifications or above (against a UK average of 29)
- 41% of the city region population are engaged in high level occupations

15%
of businesses in
the city region
are based in
Bradford

The city region is a key contributor to the UK PLC economy

Yorkshire & Humber £86.3 billion

Leeds City Region £50.6 billion

Leeds £17 billion
Bradford £7.6 billion

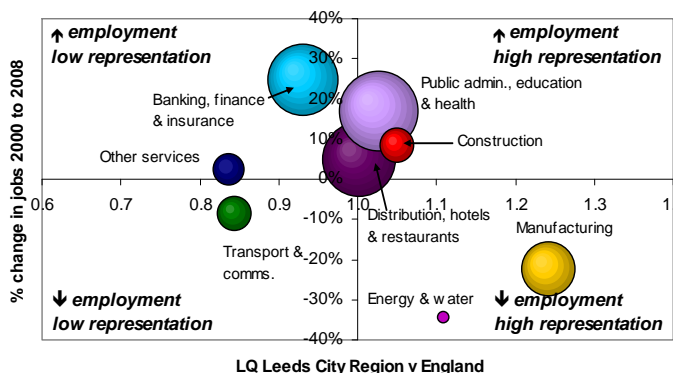
Bradford has the second highest GVA in the city region contributing 15% of the city region's economy.

The city region is made up of a set of functional relationships

The Leeds City Region Transport Strategy (October 2009) notes the daily one-way journey flows between the local authority districts in the Leeds city Region. It shows the busiest journey flows are from Bradford, Kirklees and Wakefield to Leeds (with trips between Leeds and Bradford the single largest two-way flow



The city region sector base reflects the economy of Bradford.



The sectoral make up of the city region is quite similar to that of Bradford. The city region has seen growth in several key areas including financial and business services and distribution, hotels and restaurants. However, since 2000 growth in GVA has not been as rapid as in other city regions.

Using travel to work data, a number of spatial linkages between parts of Bradford and surrounding districts have been identified:

- The Leeds Bradford corridor links Leeds and Bradford city centres.
- The M62 Corridor links south Bradford, north Kirklees and south Leeds.
- South Bradford and north Calderdale have significant commuter flows.
- Skipton and South Craven have a travel to work relationship with Airedale.
- Wharfedale, Harrogate and North Leeds share a common functional area.

Leeds city region economic inhibitors

The barriers to economic growth within the city region reflect those affecting Bradford district.

Employment - The Leeds city region has enjoyed relatively healthy rates of employment and low rates of unemployment, but there was a deterioration over the period 2000/01 to 2008/09, which worsened in the aftermath of the recession.

Worklessness - In 2009, the city region accounted for 58% of the total number of workless individuals residing in Yorkshire and Humber.

Transport - the city region has been under-invested in transport infrastructure, resulting in poor connectivity in some areas and increased journey times.

Opportunities for Bradford in the city region

Bradford is the second city within the city region with a clear contribution to the overall growth of Leeds city region.

The district has several areas prioritised within city region work, including improved transport investment, the development of an urban eco-settlement and the Leeds Bradford corridor.

Our growing population, if appropriately skilled and mobile could provide the future workforce for the city region.

The city region growth sectors align to those prioritised by Bradford. Strategies to support city region business growth will benefit the district.

Summary

Leeds city region is polycentric with a distinctive mix of urban and rural areas. It is a significant source of employment and output for the UK as a whole and the largest sub regional economy in Yorkshire and the Humber. Bradford has the second highest GVA in the city region, contributing 15% of the city region's economy and receiving a net inflow of commuters from all surrounding districts except Leeds.

With the right skills and transport links Bradford's growing population could provide a strong pool of labour for the other areas of the city region.



The district is constrained by a lack of quality premises and employment sites

Key facts

- In April 2009 a total of 150.5 hectares of allocated employment sites yet to be developed were identified – reduced to around 120 hectares following development at West Bowling.
- The majority of allocated employment sites are small with 28 sites under 1 ha, 24 between 1 and 5 ha and 7 over 5 ha.
- Data from the Council's Property Register indicates that during the year to April 2010 the amount of vacant industrial floor space on the market increased by 819,000 sq ft.
- The average rate of employment land take-up across the district over the last ten years has been 14.6ha per annum.
- Prime office rents are £15.25 per sq ft.
- Forecast employment growth will create demand for between 148 and 214 ha of additional employment land.

**Bradford has
5,600
listed
buildings**

Office rents have held steady but investment yields are low



Prime office rents have remained steady at around £15.25 per sq ft. This contrasts to falls in other second tier locations such as Sunderland and Wolverhampton. Office investment yields, at around 9%, compare unfavourably with other similar cities across the UK .

Retail yields at 7% are on a par with other secondary retail centres but compare poorly to primary centres such as Leeds where yields are around 6%. Industrial yields at 7.1% compare favourably with other industrial centres and are on a par with Leeds.

Bradford's Victorian legacy

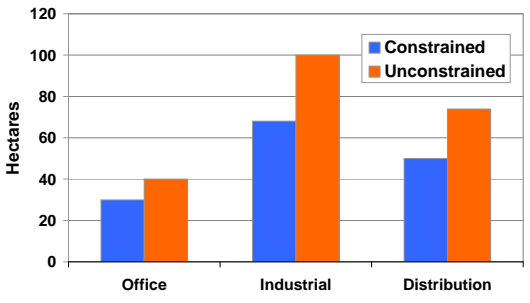
Bradford has been highlighted by English Heritage as one of England's greatest stone cities with Manningham described as one of England's greatest Victorian suburbs. Bradford has 59 conservation areas and 5,600 listed buildings. Little Germany has one of the highest densities of listed buildings in England.

However many of these buildings are now redundant and unsuited to modern commercial and industrial uses. Renovation costs are often too high to generate a commercial return. More recently some have been converted to residential use. Notable examples include Victoria Mills in Saltaire and Lister Mills in Manningham - one of the largest monuments to Britain's textile trade converted to flats and community uses.

Regeneration activity is forecast to generate increased demand for employment land

Future demand for employment land 2006-2021

Source: Bradford District Employment Land Review, Arup, Dec 07



The level of future demand for employment land is based on Regional Econometric Model (REM) forecasts of employment, economic output and population, together with analyses of historical trends and has been applied to typical job densities for different business uses to project the likely future demand levels.

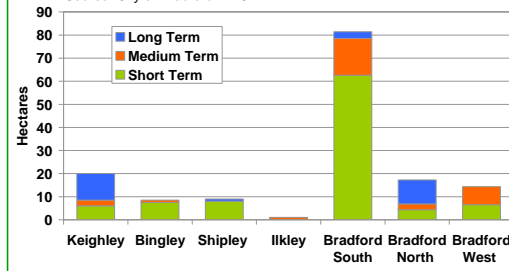
Two estimates of future demand for employment land were produced based on an unconstrained future growth forecast (which factored in employment growth from transformational projects) and a constrained growth forecast from the REM. These estimates range from 148 ha (constrained growth) to 214 ha (unconstrained growth – which is the preferred option). The chart breaks down these totals by employment land uses.

Employment land availability

The average rate of take-up across the district over the last ten years has been 14.6ha per annum with South Bradford having the highest rate of take-up.

Availability of UDP Supply 2007

Source: City of Bradford MDC



Summary

Bradford has a golden Victorian legacy, with 5,600 listed buildings and has been highlighted by English Heritage as one of England's greatest stone cities. This legacy has also left the district with some constraints, with a lack of variety of employment sites and a predominance of small sites under 5 ha with contamination and accessibility constraints.

Office stock in the district is largely outdated, in many cases refurbished accommodation, which does not meet the needs of the modern office occupier. Bradford has a lack of Grade A office accommodation, particularly in the city centre.



Currently there is approximately 120 ha of allocated employment land yet to be developed, most of which is located in South Bradford.

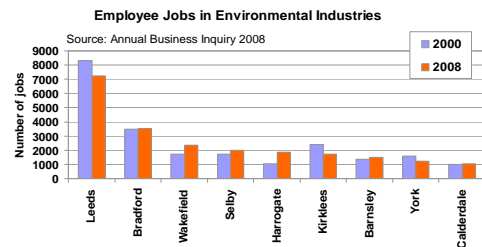
Environmental challenges present economic opportunity for Bradford

Key facts

- Environmental industries employ 3,500 people which is 1.8% of all jobs in the district.
- CO2 emissions (per capita) in Bradford are the lowest of all districts within the Leeds city region.
- Bradford is ranked 16th out of 20 cities on overall sustainability by the Forum for the Future.
- Bradford produces more residual household waste per household than the regional or England average and 76.5% of municipal waste in Bradford is sent to landfill which is higher than the regional average (55.7%) and national average (50.3%).

3,500
people work in
environmental
industries in
the district

Environmental Industries are small but growing



Environmental industries account for 1.8% of all jobs in the district compared to 1.9% nationally. There was modest growth of 1.9% in the district and region between 2000 and 2008 but a fall of 3.6% nationally.

Key local sectors are water and sewage services (given Yorkshire Water's HQ in the district), waste management and lighting manufacture.

The shift towards environmentally sustainable ways of working is increasingly associated with the creation of a broad range of new employment opportunities, and the sector is predicted to grow, in part due to strong government support.

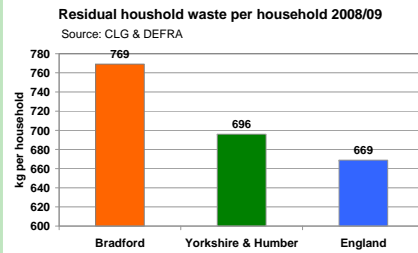
Summary

The district's environment provides a great natural asset and is of significant value to both Bradford's residents and the economy.

Although achievements have been made in Bradford across a range of environmental indicators, with the exception of CO2 emissions per capita, they do not compare favourably with regional and national averages and the rate of progress made at regional and national levels.

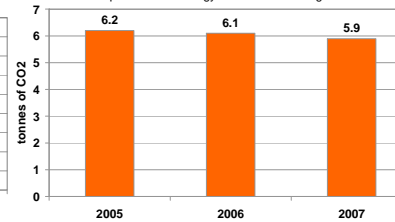
Bradford's strong manufacturing base puts the district in a strong position to move into advanced manufacturing within the green economy.

Household waste and carbon emissions are decreasing



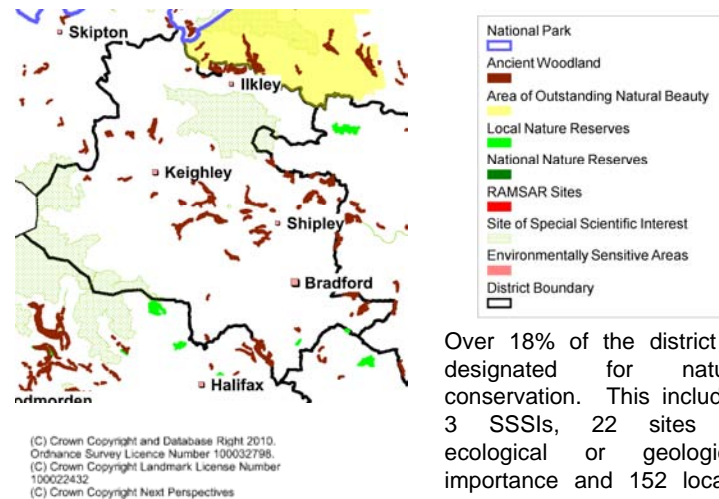
Bradford has more residual household waste than regional and national averages. The amount has decreased by 22% between 2002/03 and 2008/09. This was lower than regional and national decreases.

Bradford carbon dioxide emission (per capita)



Carbon emissions reductions have been achieved in industry, commerce and domestic sectors.

Bradford's environmental assets are also economic constraints



Over 18% of the district is designated for nature conservation. This includes 3 SSSIs, 22 sites of ecological or geological importance and 152 locally important wildlife sites.

Rural economy

Two thirds of Bradford is rural, which is an attraction for businesses locating in the district. Overall, rural areas have a higher proportion of sole traders and micro businesses (than urban areas) with home-based working continuing to grow and in-migrants being important in starting up new business. These business owners are often engaged in multiple activities with positive impacts on the economic and social vitality of local communities. The potential for new enterprise is also higher in rural Bradford, than other rural areas, due to the close proximity of infrastructure, urban supply chains and markets. In addition, the forthcoming introduction of super fast broadband in Worth Valley will potentially transform businesses utilising digital technology.

However, economic pressures on traditional activities undertaken by farmers and landowners may lead to increased diversification which will be a challenge that will have to be addressed if the current high quality of landscape is to be maintained.

Sustainability index

Forum for the Future's Sustainable Cities Index tracks progress on sustainability in Britain's 20 largest cities using 13 indicators divided into three "baskets". The district performed badly (ranked 17th out of the 20 cities) in respect of quality of life and also on "future proofing", ranked 18th. Bradford ranked 3rd in the environmental group due to improvements in household waste collection, air quality and ecological footprint but the district's overall rank remained low at 16th place.



Acronyms and terms

As with most disciplines economists use language that is often opaque to other readers. This page provides a glossary of some of the more common terms and concepts used throughout the document.

Acronyms

ABI – Annual Business Inquiry. A business survey conducted every year collecting data from a sample of businesses in order to generate estimates of businesses and employee jobs by industry and geography.

CLG – Department for Communities and Local Government. Responsible for regeneration, neighbourhoods, housing and local government.

DWP – Department for Work and Pensions. Responsible for welfare and employment issues.

ESA – Employment and Support Allowance. A replacement for Incapacity Benefit for new claimants from October 2008 onwards.

ESOL – English for Speakers of Other Languages. English courses for people whose main language is not English.

GVA – Gross Value Added. The sum of the differences between the value of goods and services produced and the cost of raw materials and other inputs involved and is used to indicate the value of business output in an area.

IMD 2007 – Index of Multiple Deprivation 2007. Assesses deprivation by seven different 'domains' to capture the level of deprivation in an area.

JSA – Job Seekers' Allowance. The main benefit for people of working age who are out of work or work less than 16 hours a week on average. It is only paid to adults actively seeking work - £51.85/ week for 16 to 24 year olds and £65.45 for 25 year olds and over.

LCR – Leeds City Region. A functional economic area made up of ten local authority areas (Leeds, Bradford, Wakefield, Kirklees, Calderdale, Barnsley, Selby, York, Craven and Harrogate).

MSOA – Middle layer Super Output Area. Bradford district is divided into 63 MSOAs which are built from groups of Lower Layer Super Output areas. MSOAs contain an average of 7,200 people

PAYE – Pay as You Earn. A method of paying income tax and national insurance contributions, and therefore businesses which employ staff are required to be PAYE registered.

SOA – Super Output Area. A geography designed for the collection and publication of small area statistics. Bradford district is divided into 307 SOAs, each one covering an average of 1,500 people.

SSSI – Site of Special Scientific Interest. Land protected under the Wildlife and Countryside Act 1981 (as amended) for its wildlife or geological importance.

VAT – Value Added Tax. Only businesses over £70k turnover need to register for VAT.

Definitions

Business units (also referred to as "local units" in the ABI source data) - An individual site (for example a factory or shop) within an enterprise. Most enterprises consist of one business unit but around ten per cent have more than one business units.

Child Well-being Index – encompasses a range of indicators (housing; education; health and disability; material well-being; crime; environment; education; and children in need), published by Communities and Local Government.

Children living in poverty – CLG currently use the proportion of children who live in families in receipt of out of work benefits as a proxy for child poverty. The definition for child poverty will be updated at some point when data becomes available at local authority level in the annual Family Resources Survey. Out of work benefits include: Job Seekers Allowance, Incapacity Benefit/Employment Support Allowance and Income Support.

Location Quotient (LQ) – a measure of the concentration of industrial sectors in an area relative to the size of the sector across Great Britain. A LQ above 1 means that it accounts for a greater proportion of employment than in GB (and therefore is relatively more important to the local economy) and below 1 means that it accounts for a smaller proportion of employment than in GB (and therefore is relatively less important to the local economy). The LQ measures only the relative size of a sector. Therefore, a sector with a low LQ could employ many more people than one with a high LQ.

Low income household - The most commonly used threshold of low income is a household income that is 60% or less of the average (median) household income. The latest year for which household income data is available is 2007/08. In that year, the 60% threshold was worth: £195 per week for a single adult with two dependent children under 14; and £279 per week for a couple with two dependent children under 14. These sums of money are measured after housing costs have been deducted. They therefore represent what the household has available to spend on everything else it needs, from food and heating to travel and entertainment.

NEET adjusted rate – figures for young people not in education, employment and training are adjusted to reflect the fact that a number of people whose status is not known will be NEET.

Skill levels – Skills levels referred to here are broadly equivalent to the following:

Level 1 = GCSEs grade D – G	Level 5 = Foundation degree
Level 2 = GCSEs grade A* - C	Level 6 = Bachelor degree
Level 3 = A Levels	Level 7 = Masters degree
Level 4 = Certificate of higher education	Level 8 = Doctorate

Yield – is used to assess the comparative attractiveness of different centres with regard to property development. Low yields are associated with low levels of investment risk and indicate places more likely to attract investment than those with high yields.

Review and reporting

This economic assessment was produced in September 2010 and will be updated in December 2010 in advance of wider dissemination.

The evidence and information that informs the analysis on which this assessment is based will be reviewed on an annual basis and any significant shifts and trends reported. The overall economic assessment will be fully reviewed and updated in 2013.

The Council will produce a quarterly report which will provide a regular update of the state of the district economy. As well as offering analysis of data that changes on a quarterly basis the quarterly report will also provide more in depth analysis of particular issues and information on progress with delivery programmes and key projects.

Web links

Bradford Economy

The latest facts and figures on the district economy, economic strategy and details of regeneration summits
www.bradfordeconomy.com

Bradford District Partnership

Updates from Bradford partners working together
www.bradford.gov.uk/bmdc/bdp

Bradford Observatory

One stop shop for information and intelligence
www.bradfordobservatory.com

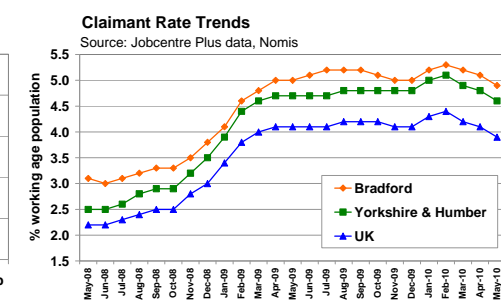
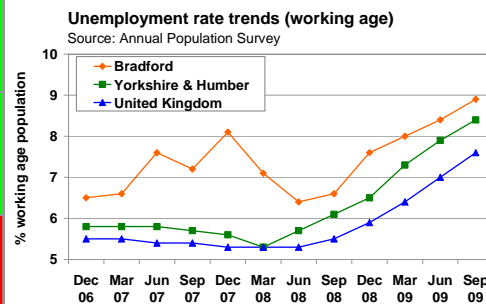
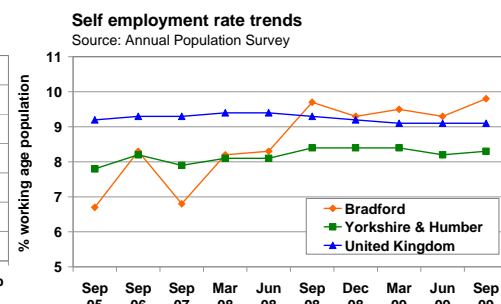
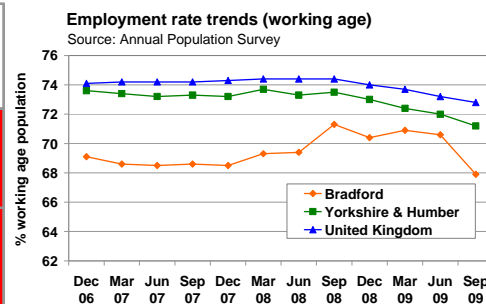


Leeds City Region

News, research and board papers from the city region
www.leedscityregion.gov.uk

Quarterly updates

Key Economic Indicators Quarter 3 July 2010	Bradford Latest Figure	Performance against region	Performance against GB	Change in rate since previous quarter
Employment rate % of working age people in employment Source: Annual Population Survey Period: Oct 2008 - Sept 2009 (Quarterly)	67.9	70	71.4	-2.4
Self employment rate % of working age people self employed Source: Annual Population Survey Period: Oct 2008 - Sept 2009 (Quarterly)	9.8	8.3	9.1	-0.5
Overall unemployment rate % of economically active who are unemployed Source: Annual Population Survey Period: Oct 2008 - Sept 2009 (Quarterly)	8.9	8.4	7.6	+0.5
JSA claimant rate % of working age people claiming JSA Source: Jobcentre Plus Period: May 2010 (Monthly)	4.9	4.6	3.9	-0.4
Out of work benefit claimant rate % of working age people claiming one or more out of work benefits Source: DWP WACG data Period: November 2009 (Quarterly)	15.9	14.1	13.4	-0.2
NEET rate % of 16-18 year olds who are NEET Source: Connexions Period: Feb 2010 (Monthly)	8.7		6.2	+0.3





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