

Sectors of the Economy

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Introduction

The methodology behind the government employment statistics has been revamped, with the Annual Business Inquiry replacing the Annual Employment Survey. The old AES covers 1991-1998, while the ABI provides revised data from 1995-2004. The analysis below presents data for 1998-2004.

This chapter provides a profile of the key sectors in Leeds. Information on company developments and general sector news is available from the Leeds Economy Bulletin, with the last six issues available in the Economic Information section at www.leeds.gov.uk/planning.

Output

See Table 9.1

Manufacturing in Leeds

- Output is expected to increase from £1.9bn to £2.2bn by 2016
- Output increased by 6% in the last decade and is expected to increase by 13% in the next (current prices).

Service sector in Leeds

- Output is expected to increase from £11.1bn to £15.4bn by 2016
- Output increased by 56% over the last decade and is expected to increase by 39% in the next (current prices)

Table 9.1 Output estimates and forecasts					
	Leeds MD	West Yorkshire	City Region	Y & H	UK
MANUFACTURING					
Output (£m)					
1996	1,794	6,450	7,950	14,416	147,484
2006	1,898	6,443	8,023	14,554	149,394
2016	2,151	7,361	9,170	16,504	174,629
SERVICE SECTOR					
Output (£m)					
1996	7,099	16,346	21,234	35,998	512,924
2006	11,077	24,547	31,875	53,710	748,541
2016	15,438	34,013	44,073	73,150	1,034,579
Source: Experian Business Strategies/ Yorkshire Futures, Autumn 2006					

Sector Output and Employment in Leeds

Table 9.2 shows the relative strengths of various sectors of the Leeds economy.

- Although manufacturing employs 9% of people, it accounts for 13% of output. Within this sector, engineering, printing and food are the major subsectors.
- Distribution employs 20% of the people, but only 15% of the output.
- The service sector dominates both in terms of employment (56% of the total) and output (55%). Within this sector, business services employs 45% and public services 45% of the people. In terms of output, business services dominates.

Table 9.2 Leeds' GVA and Employment by Sector, Spring 2006					
Sector	% of total		Subsector	% of sector	
	Output	Employ		Output	Employ
Manufacturing	13	9	Engineering	21	22
			Printing	21	23
			Food	11	10
			Electrical & optical	8	9
			Other	39	36
Construction	7	8			
Distribution	15	20	Retail	35	44
			Hotels & Catering	20	27
			Wholesale	45	29
Transport & Communications	9	6	Transport	37	51
			Communications	63	49
Other services	55	56	Business Services	58	45
			Public Services	35	45
			Personal Services	8	10
Other	1	1			
Source: Experian Business Strategies/ Yorkshire Futures, Autumn 2006					

Table 9.3 Sector rankings and share of regional employment in 2005

For each sector, local authorities are ranked by number of employees in 2005. Also included is the share of regional employment for the sector.

Manufacturing

Birmingham	61,500	
Leeds	39,000	12%

Engineering

Birmingham	38,900	
Sheffield	20,500	
Derby	17,700	
Walsall	16,500	
Sandwell	16,400	
S.Gloucs	15,400	
Leeds	13,600	12%

Printing

Leeds	8,000	21%
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Construction

Leeds	22,500	20%
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Total Service Sector

Birmingham	412,900	
Glasgow	367,400	
Leeds	352,300	19%

All Distribution

Birmingham	103,800	
Leeds	87,900	16%

Motor Vehicles

Birmingham	9,000	
Leeds	7,300	14%

Wholesale

Birmingham	20,400	
Leeds	19,200	21%

Retail

Birmingham	47,000	
Leeds	40,700	16%

Transport & Telecomms

Manchester	30,000	
Birmingham	25,000	
Crawley	23,900	
Glasgow	23,300	
Leeds	20,700	15%

Banking, finance, insurance & business services

Leeds	109,100	28%
Birmingham	106,000	
Glasgow	106,000	

Legal

Manchester	9,300	
Birmingham	8,200	
Leeds	8,100	37%

All Public Services

Birmingham	152,800	
Glasgow	130,400	
Leeds	112,200	18%

Education

Birmingham	55,200	
Leeds	43,400	18%

Health & social work

Birmingham	63,200	
Glasgow	62,700	
Leeds	47,900	17%

Personal Services

Birmingham	25,000	
Leeds	22,500	21%

Media

Glasgow	14,000	
Birmingham	12,600	
Leeds	12,500	23%

Source: ABI 2005

Engineering

Leeds has been an important engineering centre since the nineteenth century when companies such as Yorkshire Copper Works, the Hunslet Engineering Company and Thackray gained a world-wide reputation for their goods. In 2006 engineering contributed output of £402m (21% of manufacturing output).

Today Leeds engineering firms continue to be successful especially where they are involved in research and development work. DePuy International for example, which took over Thackray Medical Care in the early 1990s have recently opened a new European head office in Leeds to support their orthopaedic implants manufacturing operations in Holbeck. Another Leeds company, electrical engineering firm RF Winder Electrical, has won a £1.2m contract on the Channel Tunnel rail link.

Employment

Engineering is the largest manufacturing sector in Leeds with approximately 13,600 employees in 750 companies. In 2005 Leeds was the 8th largest engineering centre outside London. The three biggest centres were Birmingham employing 38,900, Sheffield 20,500 and Derby with 17,700.

Tables 9.4 and 9.5 show employment change between 2000 and 2005.

	2000	2005	Change	% change
Leeds	18,600	13,600	-5,000	-27
West Yorkshire	57,800	42,600	-15,200	-26
City Region	69,100	53,500	-15,600	-23
Core Cities	142,000	95,400	-46,600	-33
Yorks & Humber	143,200	116,900	-26,300	-18
GB	1,702,300	1,282,300	-420,000	-25

Source: ABI

	2000	2005	% change
Manufacture of basic metals	1,100	200	-82
Fabrication of metal products	3,900	3,700	-5
Machinery/equipment	5,700	4,100	-28
Other machine components	50	100	...
Electrical machinery	2,600	1,600	-38
Radio/communications equipment	200	200
Medical/precision	2,200	1,600	-27
Motor vehicles & other transport	2,900	2,000	-31
Total	18,650	13,500	-28

Source: ABI

Many of the job losses in the 1980s and 1990s were associated with restructuring that resulted from the continuing trend towards the contracting out of non-core activities: a number of previously in-house jobs were transferred to the service sector. Many job losses are therefore related to companies' drive towards higher productivity.

13 companies employed over 200 people (33% of total employees), while 72% of the companies employed fewer than 10 employees and accounted for 12% of the workforce.

Table 9.6 Major engineering companies in Leeds	
Company	Activity
A E T C	Aircraft turbine blade mfrs
Airedale Int'l Air Conditioning	Close control air conditioning
Alumax Ellbee	Aluminium doors & windows
Cameron	Valves & pipelines - oil industry
Denso Marston	Vehicle radiators & oil coolers
DePuy International	Surgical/orthopaedic equipment
Optare Group	Passenger service vehicles
Schneider Electric	High voltage switchgear
Sulzer (UK) Pumps	Centrifugal pumps, engineering
Wabco Automotive UK	Hydraulic valves, fuel injection
Yorkshire Fittings	Copper, copper alloys
Source: Development Department, Leeds City Council	

The Keyworth Institute at the University of Leeds

The Faculty of Engineering at the University of Leeds is one of the top engineering faculties in the UK and also has an international reputation for both the quality of its research and its graduates.

The Keyworth Institute's role within the faculty is to form links and partnerships with companies for *mutual benefit* through 'knowledge transfer'.

If you think there are opportunities for your company to work with us for *mutual benefit* we would like to hear from you.

Paper, printing and publishing

Leeds is the country's major centre after London for paper, printing and publishing, with almost 430 companies employing over 8,000 people, and output of £395m (21% of manufacturing output) in 2006.

In the Leeds District, there are 426 businesses engaged in the sector, which is dominated by a large number of SMEs which tend to specialise in certain fields or cater for a local market.

- 318 businesses employ 1-10 people and account for 12% of employees;
- 19 employ 200+ people and account for 40% of total employees.

The sector is essential to the economy, with local companies having strong markets throughout the UK. Companies in the **paper industry** are more likely to supply customers in the UK that are outside Leeds, and are more likely to export than those in publishing and printing. The industry serves all sectors of the economy and the structure of the industry in Leeds reflects this fragmented market. Demand for the products of this industry is very dependent on the state of the economy and consumer expenditure.

The UK **printing industry** is currently undergoing a period of major change. One of the reasons is the onset of digital technology. Digital presses are revolutionising many printing processes and eliminating many pre-press functions. Technical advances have also had the effect of replacing many tasks previously completed by hand. It is thought that the future of many printing companies will depend on their ability to embrace new technology and working practices. UK print and packaging companies could provide faster turnaround of goods than overseas competitors due to the shorter distances involved.

Employment

Between 2000 and 2005, employment in the sector decreased by 22% in Leeds, compared with a 4% increase in West Yorkshire, a 2% fall in the region and a 14% fall nationally.

	2000	2005	Change	% change
Leeds	10,300	8,000	-2,300	-22
West Yorkshire	24,500	23,400	+1,100	+4
City Region	28,300	28,000	-300	-1
Core Cities	33,400	28,100	-5,300	-16
Yorks & Humber	40,000	39,100	-900	-2
GB	448,200	387,000	-61,200	-14

Source: ABI

Within Leeds in 2005, the sector accounted for 1.9% of total employment and 21% of manufacturing employment. It is the second largest manufacturing industry in Leeds.

- 5,700 (71%) are male; 2,400 (29%) are female.
- 7,300 (90%) are employed full-time and 800 (10%) are employed part-time.

Within the sector, 1,700 people are employed in the manufacture of pulp, paper and paper products and 6,400 people in publishing & printing.

Company	Activity
Agfa Gevaert	Litho plate makers
John Blackburn	Commercial & direct mail print
Communisichorleys	Direct mail & communications
Kodak Polychrome Graphics	Litho plate makers
The Lettershop Group	Direct mail
Nampak Cartons	Carton Printers
Polestar Petty	Web offset colour printers
Safepack	Corrugated cases
Scientific Games International	Lottery and games tickets
Scorpio Print Finishers	Print finishing
William Sinclair & Sons	Writing pads, school supplies
Yorkshire Post Newspapers	Newspapers & publications

Source: Development Department, Leeds City Council

Leeds College of Technology

The Leeds College of Technology houses the Print College, the UK's Centre of Vocational Excellence for Print. It is dedicated to providing print courses and quality training to both companies and individuals. As well as a portfolio of in college courses the college has developed a range of award winning online learning packages – enabling trainees to access their print work from work and at home.

The Print College has also developed a partnership with the University of Leeds and together they deliver a unique part-time BSc (Hons) degree in Communication, Print and Packaging.

CiC Digital Printing

The UK's first Centre for Industrial collaboration (CIC) in Digital Printing has been established at the University of Leeds. The aim of the CIC is to help businesses improve profitability and enhance performance, whilst giving them the tools to flourish with digital technology. The Digital CIC will deliver a whole spectrum of services from trouble-shooting consultancy and training to technology transfer for the print and print related sector.

The food and drink industry

The food industry is of growing importance, in terms of employment in the region and sub-region. It is also significant in Leeds in providing a high level of output. At £201m in 2006 the industry contributed 11% to the output of the Leeds manufacturing sector.

Leeds is the eighth largest centre outside London for food and drink. In Leeds there are 74 firms, including 8 employing more than 200 employees. These include national companies such as Britvic but also many Leeds based companies. Richmond Foods is one example of an indigenous firm, which started in 1985 with 4 employees. It has grown considerably in recent years and is now the country's biggest supplier of "own brand" (supermarket) ice cream and related products supplying an estimated 60% of total national sales. Following a successful stock market floatation ten years ago, which valued the company at £19.5m, in 2006 the company was bought by an American organisation Oaktree Capital Management in a deal thought to be worth £182m.

Employment

The majority of firms (61%) are small and employ less than 10 employees. 75% of employees are male and 95% full-time workers.

Between 2000 and 2005, employment in the food industry in Leeds increased marginally to 4,700. This compares with a fall of 6% in West Yorkshire and 18% in the region and nationally.

	2000	2005	Change	% change
Leeds	4,600	4,700	+100	+2
West Yorkshire	18,000	17,000	-1,000	-6
City Region	28,100	25,600	-2,500	-9
Core Cities	27,900	24,200	-3,700	-13
Yorks & Humber	68,000	55,500	-12,500	-18
GB	476,500	406,800	-69,700	-15

Source: ABI

Table 9.10 Major food and drink companies in Leeds

Company	Activity
Ainsleys of Leeds	Bread and confectionery
Arla Foods	Milk & dairy products
Britvic Soft Drinks	Soft drinks
Carlsberg UK	Brewers
Country Style Foods	Frozen foods
Greggs Plc	Bakers
Daniel's Chilled Foods	Prepared fresh fruit
Roberts Group Ltd	Yorkshire Puddings
Northern Foods	Corporate HQ biscuit, chilled and frozen foods divisions
Richmond Foods plc	Ice cream & related products

Source: Development Department, Leeds City Council

Ethnic Food Action Group Ltd

Ethnic foods have been identified as an important and emerging sector in the Yorkshire and Humber region. The Ethnic Food sector can be defined as "World inspired foods including traditional South and East Asian cuisines, Mediterranean cuisines, Tex Mex as well as emerging sub-sectors such as Thai, Japanese, and the Caribbean etc."

Ethnic Food Action Group Ltd. was established to represent and assist the cluster), within the Yorkshire and Humber region. Its purpose is to develop and implement strategies to maximise economic activity within the sector, improve company competitiveness and promote the region as a centre of ethnic food industry excellence and as a location for inward investment.

Recent investments

Food and drink is one of the seven industrial clusters identified by Yorkshire Forward and a specialist team has been set up to enhance the development of the estimated 3,500 firms in the region. As part of its work in this area Yorkshire Forward has supported several Leeds based developments

The Academy of Culinary Arts

Based at Thomas Danby College in Leeds the academy provides facilities for food processing companies to train staff and test products and equipment. Backed by the Learning and Skills Council, the centrepiece is a state-of-the-art-teaching auditorium for trainee chefs in international cuisine. The Academy offers first class training in: Chinese, Thai, Japanese, Caribbean, Mediterranean, Asian and South Asian, Italian and Mexican cuisines. The Academy will eventually cover all aspects of international cuisine.

The Food Chain Centre of Industrial Collaboration

The Food Chain CIC at the Universities of Leeds and York and the Central Science Laboratory will allow the region's food businesses to exploit university research to maximise food quality and find lasting technical solutions. The CIC builds on the long history of food research and development at the University of Leeds which has the highest national rating (5 star) for its food science department. The centre will provide businesses with:

- access to a hygienically designed food pilot plant laboratory
- state of the art imaging facilities and microscopes
- controlled environment room for food storage studies
- specialist facilities for cryogenic treatment of foods

- instrumentation for monitoring chilling and freezing processes

Food Research Group at Leeds Metropolitan University

A newly equipped microbiology laboratory which is dedicated to providing high level consultancy services to the region's food and drink sector. Supported by grant funding from the European Regional Development Fund, the Leeds Met Food Research Group, is collaborating with Yorkshire Forward's Food Technology Advisory Service to provide consultancy services to the industry.

Other Manufacturing

Employment

As well as engineering, print and publishing and food, Leeds has a range of other manufacturing companies. In 2005 these industries employed 12,700. Between 2000 and 2005 there was a decrease of 3,900 jobs or 23%. Employment in the clothing and textiles sector fell 39%, while furniture manufacture fell 20% and chemicals 16%.

	2000	2005	Change	% change
Textiles & clothing	3,100	1,900	-1,200	-39
Tanning/dressing leather	500	100	-450	-90
Wooden products	600	750	+150	+25
Refineries	1,400	150	-1,250	-89
Chemicals	3,100	2,600	-500	-16
Rubber & plastics	1,500	1,600	+100	+7
Other non-metal	1,500	1,700	+200	+13
Furniture manufacture etc	4,400	3,500	-900	-20
Recycling	400	300	-100	-25
Total	16,600	12,700	-3,900	-23

Source: ABI

Company	Activity
Abbeycrest	Jewellery
Allied Glass Containers	Glass bottles Manufacturer
B O C	Gases
Clariant UK	Dyestuffs, pigments & chemicals
Danoptra	Amusement & gaming machine mfr
A W Hainsworth & Sons	Industrial fabrics, uniform
Lever Faberge	Toiletries preparations mfrs
Moores Furniture Group	Kitchen & bedroom furniture
Thomas Ramsden & Co	Hand knitting yarn spinners
Rocol	Lubricants, greases
The Symphony Group Plc	Furniture manufacture

Source: Development Department, Leeds City Council

LEEDS MANUFACTURING

Leeds is the third largest manufacturing centre in Britain and its varied and diverse industry mix supports over 39,000 jobs. Leeds is a major centre for engineering, chemicals, toiletries, textiles, glass, furniture, food processing and is the largest printing centre outside London.

Leeds Manufacturing (LM) has joined forces with Leeds Chamber of Commerce and Industry to support manufacturing companies in the city.

Complementing the work of Leeds Chamber, LM provides a unified voice for manufacturers within the Leeds Metropolitan District.

The main focus of Leeds Manufacturing's current activities is to raise the profile of manufacturing in the city. A number of case studies have been, or are being, developed which show the diversity and richness of manufacturing in Leeds. These studies are being used in the local, regional and national media and at events.

Construction

Research conducted as part of the **Leeds City Growth** initiative found that the strong local economy is driving construction sector growth. Public sector investment in construction projects over the next 5-10 years is estimated to total £3bn, including;

£600m investment in new schools

£400m health sector investment including a new cancer centre and community facilities

£290m investment in refurbishment and development by the University of Leeds and Leeds Metropolitan University

£280m transport investments including Inner Ring Road and East Leeds Link road

£1.1bn investment in housing projects

Private sector investment (in schemes worth more than £1m) in the last 10 years has totalled £2.9bn. Schemes have included mixed use, office, residential, retail and leisure, manufacturing and other commercial property. At the end of 2005 £4.4bn of private sector investment was proposed.

Recent research

In 2005 the **Leeds City Growth** initiative commissioned research into the construction businesses in Leeds. Some of the key findings were:

The industry in Leeds is characterised by many small traders (over 85% employ fewer than 10 people)

Leeds has greater than national average employment in many of the internal trades. Particularly strong areas are plumbing (non-domestic sector) and construction of roads and highways

The market is controlled by national contractors who can meet public sector demands on cost

There is no lack of people wanting to enter the industry with Leeds College of Building courses oversubscribed. Employers were concerned by the lack of experience of new entrants to the industry. Colleges experience great difficulty in finding employers willing to take on student placements

There is an opportunity to better co-ordinate information on future supply of construction projects and contracts to give confidence to construction businesses (particularly SMEs) to give them the confidence to invest in new skills and personnel

Employment

In 2005 there were over 22,500 employees in the construction industry, making up 5.4% of all Leeds employees. Over half of the workforce is skilled manual (mainly electricians, painters and carpenters).

Sub-contracting and self-employment are highly important to the sector. According to Yorkshire Futures/ Experian Business Strategies people working on a self-employed basis account for almost 30% of the workforce and 27% of all self-employment in Leeds.

According to the ABI, employment in construction between 2000 and 2005 increased by 18% in Leeds. This compares with an increase of 16% in West Yorkshire, 16% increase in the region and 8% nationally.

Construction Leeds – generating jobs regenerating Leeds

Construction Leeds (CL) is a new partnership organisation developing a strategic approach to link construction activity to local employment opportunities. Construction Leeds will contribute to reducing unemployment by securing sustainable employment in the construction sector for local unemployed and underemployed people. It will also influence and synchronize construction training.

Leeds is a dynamic city with a considerable regeneration agenda that requires an equally dynamic, well co-ordinated construction industry. Leeds Initiative, the partnership, includes statutory organisations, training organisations, community regeneration bodies, employment support agencies and construction employers.

Construction Leeds objectives are to:

- assist the regeneration of local communities
- work with private and public sector businesses to assist in the regeneration of the city
- coordinate a partnership approach to influence related policies and procedures for the city
- to successfully manage all projects within Construction Leeds in an open and transparent way

Table 9.13 Major construction employers in Leeds	
Employer	Activity
Carillion	All forms of building & civil engineering
George Wimpy City Ltd	Building contractor
A D T Security Systems	Intruder, fire alarms, cctv
Vallelectric	Electrical installation
Shepherd Construction	Construction, design & build
A Andrews & Sons	Contractors, ceramics, marbles
Mowlem Facilities Management	Property management
Source: Development Department, Leeds City Council	

Wholesale distribution and transport

The combined wholesale and transport sector employs over 30,500 people in Leeds in 3,200 organisations.

Wholesale Distribution

Leeds is an important location for distributors because of its proximity to the M62 and M1 interchange, which allows easy access to UK markets. Road improvements such as the M621/M1 link and the M1/A1 link have enhanced accessibility.

The distribution industry has taken up development opportunities near the motorway junctions of the M1 and M62 in the south and west of the City. Leeds has a large stock of local distribution facilities serving the whole of West Yorkshire on estates in Morley and Gildersome, at junction 27 and 28 of the M62. Recent proposals for warehousing and distribution south east of the city centre are taking advantage of the recent M1/M621/A1 improvements.

Leeds is the third largest employment centre for both wholesale distribution, after London and Birmingham. In 2005, 19,200 people worked in wholesale distribution activities in Leeds, a decrease of 4% since 2000. There are 1,600 employers in the sector of which 77% employ fewer than 10 people.

Transport

The transport sector employs around 11,300 people in Leeds. Employment declined by 7% between 2000 and 2005. Around 5,100 are employed in land transport and 5,700 in supporting and auxiliary transport activities (such as cargo handling, operation of terminal facilities, airports etc) and the activities of travel agencies. Air transport and water transport are the smallest industries within the sector. There are 424 employers in the sector.

Table 9.14 Major wholesale distribution and transport companies in Leeds	
Company	Activity
A A H Pharmaceuticals	Pharmaceuticals
Royal Mail Group Plc	Postal services
Clipper Logistics	Clothing Distributor
Cypher Group	Booksellers, library suppliers
Elite Forwarders Ltd	Freight Forwarders
Makro Self Service Wholesalers	Wholesale cash & carry
Menzies Distribution	Newspapers, Magazine Distributor
Mercado	Carpets & floor coverings
Premier Farnell	Electronic components
Ring Ltd	Automobile lighting
Rocom Group Ltd	Telecommunications equipment
W W Group Ltd	Ladies & men's clothing
Winerite	Alcoholic drinks
Source: Development Department, Leeds City Council	

Retail

With over 1,000 shops and a total shopping catchment area of an estimated 3.2m people, Leeds is one of the largest retail centres in the UK. The major focus for retail activity in Leeds is the city centre. This section gives an overview of the city centre and out-of-town developments.

Employment

Employment in retailing across the Metropolitan District (excluding motor sales and distribution) rose by 8% between 2000 and 2005, from 37,600 to 40,700. This represents 10% of total employment in Leeds. Retailing is increasingly characterised by part time and short contract or zero hours contract work. 64% of employees are women and 62% part-time.

Outside the city centre

Leeds has a wide range of town and district centres (28 in all) and a number of out of centre developments. Out of Centre Retail locations include White Rose Centre in south Leeds, Owlcotes Centre at Pudsey, Killingbeck Retail Park in east Leeds and Junction 1 Retail Park in south Leeds.

Traditional market town centres include, Wetherby, Morley, Rothwell, Garforth and Otley and there are numerous district centres based on old village centres in the urban areas of Leeds such as Headingley, Armley and Chapel Allerton.

Leeds Retail Association

The Leeds Retail Association is a partnership between Leeds retailers, shopping centres, the Council's City Centre Management team. It has four aims;

- To build relations between retailers
- To have a regular forum, enabling each retailer to discuss all aspects of Leeds city centre
- To increase footfall and increase revenue in the city centre
- To create awareness of the city centre's facilities

The Association was the driving force behind the Leeds Shopping Week held in May 2006. A series of events over the week was designed to showcase the best of Leeds' retail offer both in the city centre and out of town. Members of the public were invited to participate in nominating retailers for several awards including "Best customer service", "Best Shopping Centre" and "Best womens/mens/childrenswear store". Other activities involved in-store promotions, fashion shows and parties.

As well as planning future shopping weeks the Association will focus on promoting late night Thursday shopping in the city centre both by working on events and promotions with existing participating retailers and by encouraging others to join the initiative.

Tourism, culture and leisure

Tourism

Leeds is an important destination for both business and leisure tourism. The tourism industry in Leeds has developed rapidly and substantially in recent years. The Yorkshire Tourist Board recently commissioned consultants to examine the economic impacts of tourism in the city. It was found that in 2006 the overall value of tourism in Leeds was an estimated £639m, supporting in excess of 13,000 full-time equivalent jobs (Cambridge Econometric Impact Model, 2006). It was further estimated that:

- In 2006 there were 10.26m tourist day visits to Leeds, generating an estimated £308m
- The staying visitor market in 2006 generated an estimated expenditure of £288m

The city has a vibrant nightlife and cultural scene bringing visitors from across the UK and Europe. It also has both national and regional attractions such as the Royal Armouries, West Yorkshire Playhouse, Harewood House and the Thackray Museum.

The partnership is supported by the work of the Leeds Tourism Forum, which was set up at the beginning of 2003 to oversee delivery of the city's new tourism strategy.

Conference Leeds

The city has an excellent range of venues for conferences, meetings, training and corporate hospitality events. These include city centre hotels such as The Queen's, Marriott and Park Plaza, country house hotels and spas including DeVere Oulton Hall and Thorpe Park Hotel and Spa and more unusual venues including Leeds United and the Royal Armouries. Conference Leeds, the council's venue finding service, represents over 100 different venues and in 2005 directly secured 172 events worth over £727,000. Events brought to the city include the International Association of

Women Police Conference, the first national convention of the Chartered Management Institute and the Association of Women in Property National Conference.

Gateway Yorkshire

The Tourist Information Centre, Gateway Yorkshire, has seen an increasing number of visitors over recent years. In 2006, nearly 447,000 customers used Gateway Yorkshire, which is one of the busiest tourist information centres in the country. The introduction of the Ticketmaster service (a nationwide booking service for concerts and events) has seen Gateway handling around £8,000-10,000 worth of business per month through this service. The accommodation booking service took £100,000 worth of bookings through Gateway Yorkshire in 2006. Sales as a whole were up 13.7%, exceeding £500,000 for the first time ever at Gateway. The big sales rises were in Ticketmaster, Metro, Gifts and Vouchers Sales.

Gateway were nominees for the White Rose awards for excellence in customer service in 2006.

Hotel developments

2005 saw major refurbishments of two of Leeds' city centre hotels

- The four star Queen's Hotel has undergone a £9m refurbishment. The 219 bedroom hotel has 16 conference and meeting rooms and is one of Leeds' premier conferencing venues.
- The Met, formerly the Metropole Hotel, underwent a £4m refurbishment during 2005. A grade II listed building, the hotel can cater for conferences of up to 250 delegates.

Most recently, in March 2007, the 218 bedroom Etap Hotel at the Gateway development on East Street opened.

See also City Centre chapter.

Culture

Since 2002 well over £180m has been invested in the cultural infrastructure of the city. Leeds possesses a variety of cultural resources and experiences, and continues to develop a critical mass of organisations of national renown. The city has seen the continued success of flagship organisations including: Leeds Art Gallery, Henry Moore Institute, Leeds International Piano Competition, Northern Ballet Theatre, Opera North, Central Library, Temple Newsam, West Yorkshire Playhouse and Yorkshire Dance. These have helped to attract other major investments, including the Royal Armouries and the Thackray Medical Museum.

Using culture as a tool for learning and regeneration

The Council's Arts & Regeneration Unit manages the city's strategic programme, "arts@leeds", working in partnership with arts organisations of all sizes around the city. The Unit also leads a number of projects aimed at broadening participation in the arts (Bright Young Things, Urban Fusion, Get Creative, Light Night). It has attracted major external revenue funding in support of new initiatives and organises a large-scale youth arts programme including the annual Breeze International Youth Festival. It is also an advocate for the creative arts sector and for the sector's role in using the arts to energise city growth. Currently, major initiatives include Gallery 37 Plus (a youth arts summer school forming part of a national programme), Routemap (an Objective 2 funded regeneration initiative), and Celebrate Leeds 2007, a programme to mark the 800th anniversary of Leeds' original charter.

New dedicated and equipped learning spaces have been created in Leeds Art Gallery, the Industrial Museum Armley Mills, and Temple Newsam. The Central Library has created a Youth space which will encourage young people to study, relax and develop skills such as film, DJ techniques and writing music.

The huge learning potential of the city's heritage treasures is being exploited through a developing programme called 'A Culture of Learning'. This has seen the development of Backstage Past, a theatre learning programme for the City Varieties, The Grand Theatre and the Carriageworks and Crime and Punishment, a citizenship module at Leeds Town Hall.

Investment in cultural facilities

Leeds Museum Discovery Centre is opening in 2007, providing an accessible store for the massive museum collection as well as educational, conservation and technical facilities. Leeds City Museum, which will tell the story of Leeds, will be opening in 2008 in the restored and refurbished Leeds Institute on Millennium Square.

Phase 1 of the Art Gallery and Central Library refurbishment will re-open late June 2007. This project has restored the tiled hall at the front of the building and created a new exhibition space and learning area in the Gallery. Work has started on the Heritage Lottery Bid of the major refurbishment that this building needs

The new theatre and conference venue in Millennium Square, the **Carriageworks**, has become a high quality city centre hub for local arts development (small scale, amateur and professional).

Phase 1 of a £28.5m development for The **Grand Theatre** has been completed. This has refurbished part of the auditorium, improved access and modernised the backstage and rehearsal areas. The bulk of the funding for the first phase came from a £13.5m grant from Arts Council England, with a £5m Leeds City Council grant, £1.5m from Opera North, £500,000 from Leeds Grand Theatre, and £500,000 from Yorkshire Forward. A second phase is now at the design stage, as is a significant project to revitalise the **City Varieties**. Heritage Lottery Bids have been submitted for both.

The University of Leeds has completed a £1.8m upgrade of the performance facilities in the historic **Clothworkers' Centenary Hall centre**, one of the region's best chamber music venues.

A procurement process is underway for an arena for Leeds, including a concert venue and exhibition facilities.

Two new libraries have been built at Horsforth and Otley, with further developments at Holt Park and Beeston planned.

Heritage Lottery Funding for Cultural Infrastructure

Many major developments have received or are seeking support from National Lottery generated funding. See Table 9.15

Project	Cost £m	Grant Value £m	Details
Temple Newsam	2.6	1.3	Renovation
Roundhay Park and Kirkstall Abbey	13.7	10.6	Renovation of park and Abbey
Leeds Museum and Discovery Centre	26.9	19.5	Bid successful and work in progress
Grand Theatre	1	Awaited	Bid to be decided June 07
City Varieties	3	Awaited	Stage 1 bid decision September 07

Museums and Galleries

Leeds City Council operates seven museums and galleries which hold a number of important designated collections of national/international importance covering natural history, industrial history and the fine and decorative arts, and attracting 420,000 visitors each year.

Events

Each year Leeds hosts one of the largest programmes of free concerts and events in the UK including: Breeze International Youth Festival, Opera and Party in the Park, Classical Fantasia, Leeds Mela, West Indian Carnival and Reggae Concert, Irish Festival and St Patrick's Day parade and Leeds Lights Switch On.

City Centre attractions include 15 miles of Christmas lights and the Leeds Half Marathon which starts and finishes in Millennium Square.

In addition Leeds is recognised for hosting a series of prestigious international festivals including: Leeds International Film Festival, Leeds International Concert Season, the triennial Leeds International Pianoforte Competition, and the Carling Leeds Festival (sister event to the Reading Festival). Celebrate Leeds 2007 marks the 800th anniversary of the foundation of the borough of Leeds.

Other important events taking place in the city include Leeds Young People's Film Festival and the FuseLeeds festival, a vibrant celebration of live music and highlight of Leeds' cultural calendar, which took place in 2004 and 2006.

Leeds Cultural Partnership and cultural facilities

The Leeds Cultural Partnership was established by the Leeds Initiative to implement the city's first Local Cultural Strategy and to promote the value of culture and cultural tourism.

The Vision for Leeds 2004 – 2020 identified a major project to improve the cultural life of the city including developing a new, large-scale international cultural facility such as a concert hall, arena, exhibition or conference facility. Leeds Cultural Partnership set up a Cultural Facilities Task Group to oversee this project. Yorkshire Forward and Leeds City Council commissioned a comprehensive feasibility study in September 2004 on behalf of this group.

The conclusions of this feasibility study, published in August 2005, were that an arena development to seat approximately 13,000 people is commercially viable with significant demand plus developer and promoter interest. Of all the options examined in the 10 month study, the arena is the option considered to have the maximum positive impact for the city. In addition, the consultants' report stated that with substantial further investment of between £10m and £20m the Town Hall provides the best, most appropriate and affordable classical music facility for the city, as a new concert hall would cost at least £75m and is difficult to achieve without a major source of funding which they say is currently not available.

The Cultural Facilities Task Group has recommended that the City Council, in conjunction with private sector partners, should facilitate the development and funding of an arena with associated conference and exhibition facilities, and seek substantial further investment to upgrade Leeds Town Hall to a first class music venue of international standing.

The City Council has now appointed PMP consultants to advise the Council on the procurement of a 12,500 seat multi purpose arena. PMP will oversee a two stage procurement process for an arena operator and developer, including the evaluation of a number of potential sites across the city. The procurement of an operator partner is scheduled to commence in late spring 2007, with a developer partner subsequently being brought on board post operator appointment early in 2008.

Leisure

Sport, health and fitness

Sport in Leeds is a key aspect of the city's education, leisure and tourist activity, with Sport Leeds, the city-wide partnership for sport and active recreation, providing a strategic steer.

4,000 people in Leeds obtain sports qualifications each year and sports related degree programmes are offered at the two universities and at Trinity and All Saints College. The regional training centre responsible for the Sports Coach UK programme and the Carnegie National Sports Development Centre are both housed at Leeds Metropolitan University, making Leeds a national as well as a regional centre for sports training and courses.

The city has a number of other high profile sports clubs and venues including Leeds United Football Club, Leeds Tykes Rugby Union Club, Leeds Rhinos Rugby League Club, Yorkshire County Cricket Club (all based at the world renowned Headingley Carnegie Stadium) and Wetherby racecourse.

Key sport, health and fitness developments

Leeds continues to share in the expansion of the health and fitness industry with continued growth in the number and variety of private clubs and in the extent of public provision. Leeds City Council aims to deliver more than £25m of investment into the city's sport facilities by 2010. Developments include:

- the ongoing redevelopment of Headingley to ensure the continuation of test match cricket in the city.
- a £16.6m, 50 metre swimming and diving facility will provide a landmark facility for the people of Leeds and further enhance the range of facilities available at the South Leeds Stadium.
- a major grant from the New Opportunities Lottery Fund, together with funding from Leeds City Council, will transform the site of John Smeaton Sports Centre into a first class £5m leisure centre, providing a wide range of opportunities for the adjacent school and the wider community.

Parks and open spaces

Leeds is one of the greenest cities in Europe, with green belt land covering over two-thirds of its total area.

Almost 4000 hectares of parks and greenspace is managed by the local authority, including:

- seven major parks and 73 community parks,
- 11 National Plant Collections®
- 727km of public rights of way,
- 156 nature conservation sites and approximately 170 woodlands and plantations,

There are around 60 million visits each year to its sites.

The local authority also manages a number of playgrounds and skateparks located predominantly in parks and recreation grounds (currently being enhanced to include several regional and intermediate standard BMX tracks through £470k PAYP funding) and is the main provider of sports pitches and bowling greens including changing and bowls pavilions.

There is a commitment by national government to increase the quality of parks and green spaces via the Public Service Agreement (PSA) process, including 'by the end of 2008, to increase to 60% the proportion of local authority districts with at least one park or green space that meets Green Flag Award standards.' In Leeds this target has already been surpassed; in 2006 there were Green Flag awards for Golden Acre Park, Lotherton Estate, Roundhay Park, Temple Newsam Estate and Pudsey Park. Each of these has been resubmitted for assessment in 2007, in addition to Kirkstall Abbey's grounds.

A Leeds Quality Parks Standard has also been introduced during 2006 to recognise those parks that meet the Green Flag standard, but which will not be put forward for the award itself. Currently 12 community parks have been assessed as meeting the Leeds Quality Parks Standard.

The City's parks provide ideal venues for major events, for example in 2006 Roundhay Park played host to two Robbie Williams concerts, attracting around 180,000 thousand visitors, and in this case both the venue and Leeds received many mentions, being picked up by 300 million TV viewers in 26 countries.

The City's exhibit at the 2006 Chelsea Flower show attracted more than £12.5million of free media coverage and publicity for the city and received a Bronze Floral Medal. The exhibit was visited by approximately 157,000 people and was made possible through a partnership between the local authority and a private sector sponsor. The City continues to explore partnerships with the private sector to enable a continued presence, showcasing the City and its capabilities, at this most prestigious horticultural event.

£5.5 million has been spent conserving Kirkstall Abbey and grounds for the future and making improvements to the visitor experience at the site, supported by grant aid from the Heritage Lottery Fund. An £8 million lottery funded programme has just been completed at Roundhay Park. Works have restored and repaired existing buildings and structures and enhanced and improved existing pathways and public facilities. New features of the restoration project include a fully accessible children's play area, newly designed and landscaped gardens, new street furniture and the future provision of a visitor and education centre. The following awards and accolades have been achieved for this work:

- The Green Apple Award for the Built Environment 2006:
 - National Gold Winner - Roundhay Park
 - National Gold Winner - Kirkstall Abbey
- The Leeds Architecture Awards for Conserved or altered Buildings 2006:
 - Kirkstall Abbey
 - Roundhay Park
- The Leeds Architecture Awards Landscape Commendation - Kirkstall Abbey

Major visitor attractions such as Kirkstall Abbey Estate and Roundhay Park, as well as Tropical World, Temple Newsam Estate and Home Farm, Lotherton Estate and the bird garden, and Otley Chevin Country Park, all add to the City's tourism offer and its visitors' experience, helping to bring inward investment to the city.

Improvements to community parks, through the £4.5 million Parks Urban Renaissance Programme¹, are also helping to bring new life to a range of town and district centres across the city (£500k community parks, £2.5m Parks Urban Renaissance 2006/7 – 2007/8, £175k PROW, £175k Allotments, £470k PAYP, and £750k Parks Urban Renaissance 2008/9 – 2010/11).

Entertainment, and the night-time economy

There has been a dramatic expansion of the city's entertainment and cultural scene during the last decade. The city's night life is one of the most vibrant in the country and offers a diverse and constantly evolving range of music venues, bars and clubs. There has been a similar growth in the number of restaurants, cafes, and bistros which offer a wide choice of dining experiences from around the world and reflect the sophisticated and cosmopolitan nature of the city centre. The city centre now has a brand new theatre, the Carriageworks and the Grand has been restored to its former glory and its facilities extended. A brand new Museum on Millennium Square.

The City Council has been involved in a number of initiatives which highlight the variety of leisure and entertainment opportunities available across the city. The Breeze International Youth festival and the Bright Young Things competition, celebrate the diversity of talent in Leeds and showcases the variety

¹

of leisure venues available across the city, while international photographic exhibitions and the ever popular winter ice rink on Millennium Square help to ensure that there's something for everyone .

Banking, finance, insurance and business services

Overview

With over 109,000 employees in 2005, Leeds is the largest centre outside London for financial and business services. Birmingham has 106,000 employees and Glasgow 105,600. Jobs have grown by 18% in the last five years.

The sector's output in 2006 (Experian Business Strategies/ Yorkshire Futures, Spring 2006) was £4.4bn or 31% of the city's total output.

In the last three years over 30 financial services firms have set up new offices or relocated to the city. The city has 30 national and international banks, including headquarters of First Direct, the principal offices of Yorkshire Bank and UK operations of GE Consumer Finance. There are 8 UK banks with regional headquarters, 110 insurance companies, 200 accounting firms including the majority of the 20 largest UK practices, 180 law firms, around 10 stockbroking firms, 10 private equity specialists and over 30 financial call centres. The Bank of England, whose agency for Yorkshire and the Humber is based in Leeds, has had a presence here since 1827. Its role is to collect economic information from and represent the Bank in the region. The Bank also issues notes, a function which is undertaken only in London and Leeds.

Since the 1980s there has been a clustering of financial operations in Leeds serving the region and, in some cases, other parts of northern England. The growth in the number of companies has increased the depth of local expertise, which in turn has encouraged more customers to use Leeds companies rather than London. Companies provide a full range of services for the region's firms e.g. stockbroking, venture capital fund management, pension and independent financial advisers, and actuaries can all be found in the city, together with specialists in treasury management, trademarks and patents, wealth management, investor and financial public relations. Leeds has now attained a critical mass in certain areas of financial and business services, which has helped to draw in others. Leeds is one of the UK's leading provincial legal centres, with five of the top six regional law firms based here. Since 1990 Leeds has become one of the leading UK locations for telephone-based "call centre" operations, particularly for banking, insurance and other financial services.

Employment

Between 2000 and 2005 total employee jobs in Leeds grew by 27,600 with this sector alone accounting for 61% of the extra jobs.

In 2005 the sector accounted for 26% of employees in Leeds, compared with 20% in West Yorkshire, 17% in the Y&H region and 21% in GB.

Table 9.16 Banking, finance and business services employment				
	2000	2005	Change	% Change
Birmingham	102,000	106,300	+4,200	+4
Leeds	92,300	109,100	+16,800	+18
Edinburgh	86,100	104,700	+18,600	+22
Glasgow	87,100	105,600	+18,500	+21
Manchester	73,100	82,800	+9,700	+13
Bristol	65,700	71,300	+5,600	+9
West Yorkshire	176,500	198,400	+21,900	+12
Y & H	320,700	386,000	+65,300	+20
GB	4,945,800	5,496,000	+549,200	+11
City Region	218,200	249,500	+31,300	+14
Core Cities	475,900	554,000	+78,100	+16
Source: ABI				

Table 9.17 Banking, finance, insurance and business services employment, Leeds MD				
	2000	2005	Change	% change
Financial intermediation	14,400	18,100	+3,700	+26
Insurance	5,600	6,300	+700	+12
Auxiliary to financial intermediation	3,200	3,800	+600	+19
Real estate	5,100	8,200	+3,100	+61
Renting machinery & equipment	4,100	3,100	-1,000	-24
Computer & related	5,800	6,600	+800	+14
Research & development	700	500	-200	-29
Other business activities:				
Industrial cleaning	8,900	13,800	+4,900	+55
Labour recruitment	13,600	13,300	-300	-2
Legal	6,300	8,100	+1,800	+29
Architectural & engineering consultancy	5,500	6,200	+700	+13
Other	19,100	21,100	+2,000	+10
TOTAL	92,300	109,100	+16,800	+18
Source: ABI				

Projections by Experian Business Strategies/Yorkshire Futures (Spring 2005) suggest that between 2006 and 2016 total employment in finance and business services will grow from 112,000 to 119,000 (a 6% increase). Banking and insurance is expected to grow by 12%, business services (computing and other business services) by 5% and other services (real estates, renting and R&D) will remain unchanged.

Table 9.18 Major banking, finance, insurance and business services companies in Leeds

Company	Activity
Alliance & Leicester Giro AXA Barclays Bank CGNU	Telephone banking arm of Alliance & Leicester Insurance Banking Insurance
Deloitte & Touche Direct Line Group Ernst & Young First Direct G E Capital RFS	Accountants & management consultants Insurance and motoring assistance Chartered accountants & consultants Telephone banking In store credit card services
Halifax Halifax Direct HSBC HSBC Customer Service Centre KPMG	Banking & Financial Services Telephone banking Banking Banking Call Centre Management consultants
Leeds Building Society Lloyds TSB Group National Westminster Bank Norwich Union Insurance Group PricewaterhouseCoopers	Building Society Banking Banking Insurance Chartered Accountants & consultancy
T D Waterhouse UKI Partnerships Ventura Yorkshire Bank Zurich Insurance	Stockbrokers Insurance Customer Management services Banking & financial services Commercial insurance
Source: Development Department, Leeds City Council	

Leeds Financial Services Initiative (LFSI)

LFSI is a partnership organisation whose aims are to promote Leeds as the premier UK centre for financial and professional services outside London and to improve the cohesion of the financial services sector in the region.

LFSI has a membership of over 100 organisations including all the major national and international financial institutions and professional firms in the city. Membership is open to any financial or related business service organisation with an interest in the city.

Activities and services include:

- Promotion and lobbying regionally, nationally and internationally
- Forum for networking and the exchange of information
- Regular seminars and meetings with high profile speakers on topical issues
- Research into local trends and market developments
- Contributing to policy making on local and regional economic strategy issues
- Assisting inward investment projects

LFSI objectives over the next 3 years will focus on:

- Developing the profile of Leeds as the main financial and business services centre in the UK outside London.
- Promoting Leeds as a major financial and business services centre internationally.
- Attracting new business to the city and support new investment and businesses in the region.
- Being a strong voice for the financial and business services sector in Leeds.
- Working with partners, to ensure the sector and the city region continues to develop.
- Supporting the Vision for Leeds to bring the benefits of a thriving business and financial services sector to all Leeds residents.

Research

Further expansion for Leeds over the next ten years as a leading financial services centre is predicted according to a major report published in December 2004.

Commissioned by Yorkshire Forward and the LFSI, the report ***Financial and related Services in Leeds***, prepared by Experian's Business Strategies Division predicts:

- that Leeds can become the largest financial services centre outside London by 2020 - but this will require closer co-operation between the public and private sector.
- employment in Leeds in the sector grew by 22% between 1995/97 and 2000/02, well above the national rate and similar to the levels of growth experienced in Manchester and Edinburgh. Although the rate of job growth is expected to slow down over the next ten years, the sector is still set to expand significantly faster than the forecast growth of the UK economy as a whole and the rest of the city's economy.
- in the Leeds city region (West Yorkshire plus Harrogate, Selby and York) the financial services sector alone employs 81,000 people.
- more than one in ten people working in Leeds operate in the financial services sector.
- Leeds is the second largest employment centre outside London for non-life insurance,
- Leeds' expertise and reputation for high-quality legal work helps to attract business from other UK centres, including other parts of the north of England, Edinburgh and Birmingham.

Call centres

Leeds is one of the UK's largest centres for telephone-based customer services: "call centres". There are now around 18,000 people employed in the sector in Leeds. Growth started with the establishment of First Direct, Britain's first 24 hour telephone bank in 1989 and at least 30 call centres are now located in the city. These operate in several sectors, notably financial services, retail and customer services management, mobile telecommunications, breakdown services and utilities.

The reasons for the growth are a combination of high quality telecommunications, local skills based on Leeds' office sector, and suitable office accommodation.

Call centre employment has enabled many part-time workers, including parents with young children or semi-retired professionals, to access labour market opportunities and contribute to economic activity in the city.

Table 9.19 Major call centres in Leeds			
Centre	Total Jobs	Call Centre	
Alliance and Leicester	305	252	Leeds is the regional office of Alliance and Leicester Giro, which provides a 24-hour telephone banking service
Carlsberg Tetley	384	85	Sales support and order processing
Centrica	1,250	1,100	Formerly British Gas Trading, deals with installation servicing and billing enquiries
Direct Line Group	2,632	1,930	Insurance and motoring assistance (Direct Line, Privilege and Green Flag)
First Direct	2,620	1,948	The UK's first telephone banking service opened in 1989 in Leeds
GE Consumer Finance	2,500	1,700	A division of US multi-national GE group, Leeds is the hub of the UK operation which provides retailer financial services
Halifax Direct	1,275	1,109	Since 1995 Halifax has been operating a round-the-clock bank service from Leeds
HSBC Customer Services Centre	770	537	Leeds is the base for one of its five divisional management centres, providing telephone support for over 400 outlets
Loop Customer Management	550	450	Handles Kelda's customer liaison, billing etc
Hitachi Capital Consumer Finance	176	68	Offers retail credit. Based in Leeds since 1985
O2	1,200	1,200	BT relocated the enquiry service function of its cellphone subsidiary from Slough to Leeds. BTCellnet and BT Mobile now O2
Ventura	1,326	966	Outsourced customer service management subsidiary of the Next Group.
T D Waterhouse	390	130	Share dealing
William Hill	900	250	National centre for telephone betting
Universatile Net Centres	210	210	Call centre operation at Leeds Innovation Centre
Source: Development Department, Leeds City Council			

The UK call centre industry has grown by almost 250% since 1995. Reports in 2002/3 by GVA Grimley and Mital warned of severe job losses in UK call centres by 2005. However, research carried out in 2004 by the DTI indicates that the sector is healthy and is set to employ over 1m people by 2007 - four times more than in India.

Almost all call centre operations invest heavily in training. Some of this is job-specific, but much also develops generic and transferable skills, especially confidence, presentation, customer orientation and ICT skills. This represents a significant input to the skill levels of the city's workforce and that of

the surrounding area. The larger employers support large teams of ICT specialists, and provide training and experience which contribute to the pool of high-tech skills in Leeds.

Leeds has a dedicated call centre training initiative - the Call Centre Gateway - which can be accessed from both North Leeds and South Leeds Family Learning Centres. It is designed to enable unemployed Leeds residents to enter or re-enter the labour market and gain sought after customer service skills. A number of the large call centres work with the Family Learning Centres, Jobcentre plus and the West Yorkshire Employer Coalition to design the most appropriate courses. Those who complete the four week training course are guaranteed an interview with the all the companies involved.

The Legal sector

Leeds is one of the UK's main legal centres outside London and in recent years has seen a spate of expansions and mergers, often resulting in re-locations within Leeds city centre to new and larger offices. Employment (excluding the self-employed) in the sector grew from 6,300 in 2000 to 8,100 in 2005.

	2005	% change on 2000
Manchester	9,300	+14
Birmingham	8,200	+11
Leeds	8,100	+29
Edinburgh	5,800	+7
Bristol	5,800	+60
Glasgow	5,500	+20

Source: ABI

As the range, expertise and competitiveness of local law firms has grown, several of them now rank among the top ten firms in the UK, having expanded nationally and internationally, with offices in Europe and Asia. These are Addleshaw Goddard, Cobbetts, DLA, Eversheds, Gordons, Hammonds, Irwin Mitchell, Lupton Fawcett, Pinsents, Walker Morris.

Leeds Legal

Leeds Legal is a unique alliance of the city's legal profession. It is dedicated to promoting the world-class legal sector in Leeds and bringing more national and international corporate clients to the city.

Launched in April 2006, it is first ever city-based legal marketing campaign of its kind in the UK. It is backed by the Leeds Law Society and regional office of The Law Society of England and Wales along with UK Trade & Investment (UKTI), the campaign's main sponsor. It is also funded by a number of key sponsors including three of the leading Leeds-based corporate legal practices; DLA Piper, Lupton Fawcett and Pinsent Masons, as well as several commercial sponsors.

Leeds Legal's year one campaign activities and objectives include:

- Developing the profile of Leeds as the UK's largest legal centre outside London.
- Attracting regional, national and international clients to the city's legal market.
- Hosting a programme of business briefings and events in cities across Europe to forge new client relationships.
- Promoting the high levels of service, expertise, no-nonsense advice and value-for-money service provided by the city's law firms.
- Raising the profile of Leeds Legal and its members in the media.

As part of Leeds Legal's drive to create international business for the city's legal profession, it has forged strong partnerships with Hangzhou (China), Belgium and Dusseldorf (Germany).

Public sector

In 2005, over 112,000 people worked within the public sector in Leeds accounting for 36% of total employment. This includes, health, education, national and local government administration including social services, judicial services, law enforcement and fire services.

The number of public sector jobs in Leeds increased by 20,500 between 2000 and 2005 - an increase of 22%. In 2005, females accounted for 70% of employees, while part time employment accounted for 43%. In 2005, 38% of public sector workers were based in the city centre, compared with 32% in 2000.

	2000	2005	Change	% change
Leeds	91,700	112,200	+20,500	+22
West Yorkshire	230,600	272,000	41,400	+18
City Region	298,200	351,900	+53,700	+18
Core Cities	594,000	713,200	+119,200	+20
Yorks & Humber	520,700	637,100	+116,400	+22
GB	6,050,200	7,127,000	+1,076,800	+18

Source: ABI

Within the sector, the largest employers are Leeds City Council and the Leeds Teaching Hospitals NHS Trust. The Trust is the largest single hospital trust in the country and is one of the biggest hospital complexes under one management in Europe.

Outside of London:

- Leeds ranked the third largest location behind Birmingham and Glasgow
- Second largest behind Birmingham for education and third behind Birmingham and Glasgow for health & social work

	2000	2005	Change	% change
General Administration	8,900	14,100	+5,300	+60
Community services provision	4,400	5,800	+1,400	+31
Social security activities	3,000	900	-2,000	-68
Primary education	13,200	14,700	+1,200	+11
Secondary education	9,200	12,900	+3,000	+40
Higher education	10,100	13,000	+2,900	+29
Adult and other education	1,900	2,800	+900	+47
Human health activities	29,100	30,600	+1,500	+5
Social work activities	11,700	16,600	+4,900	+42
Veterinary activities	300	600	+300	+100
Total	91,800	112,000	+20,200	+22

Source: ABI

Healthcare

In 2004 over 30,000 people were employed in the Healthcare and Medical sector in Leeds. The sector is important not simply because of the numbers employed but also because of its links with higher education and innovation.

Employment is dominated by the Leeds Teaching Hospitals NHS Trust, the largest healthcare provider in Europe. It provides acute services for the population of Leeds and is a regional centre for the treatment of diseases such as cancer and heart disease. The Trust employs approximately 15,000 staff across eight sites, has 3,000 hospital beds and an annual budget of around £600m.

Significant investment by the trust includes a new £220m Oncology centre at St James's Hospital. This development will significantly expand the facilities currently available for the clinical services involved and will provide 314 inpatient beds, 100 day case beds and 12 linear accelerator chambers.

Another large investor in healthcare research is the University of Leeds. Over the last three years a total of £60m has been spent on improvements to its health related infrastructure to encourage research excellence. Over the same period it has attracted up to £40m worth of research contracts each academic year. Over the last four years it has filed eight patents and generated five spin-out companies in the health sector.

In addition to public sector employment and investment, there is also significant private sector activity within the sector. The new £41m Nuffield Hospital in Leeds city centre is one of the most technically advanced private hospital in Europe with 80 beds and six major operating theatres. There are also number of Leeds companies involved in the field of medical technology and engineering (see Engineering sector entry).

Increasing innovation in healthcare

A 2006 research study, "Research into increasing innovation in healthcare" by Medilink (Yorkshire & Humber) Ltd for the West Yorkshire Economic Partnership showed that Leeds, West Yorkshire and the wider region have significant technological and research strengths with excellent collaboration between universities and the NHS. Specifically it says that the relationship between the Leeds Teaching Hospitals NHS Trust (LTHT) and the University of Leeds (UL) provides the region with a national power house for clinical research.

The study found there are 125 West Yorkshire healthcare technology companies. Most are small and the sector's products and services are diverse. Some companies have emerged from the NHS and universities and have high growth potential.

The LTHT, with the support of the UL, leads on 14 NHS research programmes. There are three peaks of excellence: oncology, musculoskeletal disease, and cardiology. Companies can engage with the research and development in several ways. For example, via Yorkshire Forward funded Centres of industrial Collaboration (CiCs).

One set of recommendations relates to company support issues such as early stage financing and support, easing the way companies connect with universities and the NHS, and targeting of high growth companies. Another set aims to build on the sub-region's strengths by exploring the feasibility of a flagship medical device innovation/trials centre, bidding for NHS Technology Centres of Excellence in orthopaedics and woundcare, and improved marketing to attract inward investment around cardiology, diagnostics and orthopaedics.

Media and communications

Leeds is the third largest media location outside London after Birmingham and Glasgow.

The city has a broad range of media and communications related businesses. Companies in Leeds include 450 in software and IT consultancy, 162 in advertising and PR, over 70 graphic design businesses, eight news agencies and 24 companies associated with TV production. PR Week's official league table for 2004 established Leeds as the biggest PR centre outside London.

Much of the sector's growth and success has been driven by the Internet and new media, and the city now enjoys an international reputation in this field. The portfolio of clients for new media services based in the city encompasses many well known global brands. Nationally renowned providers of web-based services with a presence in the city include Pipex Communications and Cable & Wireless. On-line information provision is also a major sector where, amongst others, leading companies such

as Orange Multimedia Operations (Ananova), Ukbetting's TEAMtalk.com and William Hill's telephone and on-line betting operations are based.

The largest Internet server farm in Europe is located in the city. This hosts more than 33,000 commercial sites and processes one million transactions simultaneously.

Leeds is home to the region's leading companies in the traditional media sector: these include Yorkshire Post Newspapers, BBC, ITV Yorkshire, Radio Aire/Magic 828, Galaxy 105 and Real Radio. Although there are a number of businesses in the sector employing over 100 people, companies with fewer than 25 employees form the majority of the sector. Self-employment is also a significant feature of this sector.

The city's large, skilled media sector workforce has responded positively to the organisational and structural changes that have taken place and there is a culture receptive to technological change. This pool of skilled labour is complemented by the University of Leeds, Leeds Metropolitan University, Leeds College of Art and Design and Leeds College of Technology, all of which have a wide range of media, new media and related courses.

Employment

In 2005, the sector employed 12,500 people - around 4% of total employees in Leeds. Between 2000 and 2005, employment in Leeds fell by 4%, compared with a 20% increase in the region.

Table 9.23 Media and communications employment				
	2000	2005	Change	% change
Birmingham	14,300	12,600	-1,700	-12
Glasgow	13,800	14,000	+200	+1
Leeds	13,000	12,500	-500	-4
Manchester	11,300	10,000	-1,300	-12
Edinburgh	11,600	10,300	-1,300	-11
Wycombe	8,400	11,600	+3,200	+38
Bristol	11,400	9,600	-1,800	-16
West Yorkshire	25,500	28,500	+3,000	+12
City Region	31,700	36,200	+4,500	+14
Core Cities	71,100	67,300	-3,800	-5
Yorkshire & Humber	44,800	53,700	+8,900	+20
GB	947,500	938,700	-8,800	+1
Source: ABI				

Table 9.24 Major media and communications companies in Leeds	
Company	Activity
BBC	TV/radio broadcasting
Brahm	Communications and Public Relations
Brilliant	Media planners and buyers
BT	Telecoms
Cable & Wireless Communications	Telecoms
Corporate Document Services (CDS)	Marketing communications agency
Elmwood Design	Design Agency
Galaxy 105	Radio broadcasting
ITV Yorkshire	Television broadcaster
Ntl	Cable franchise holder
Orange Multimedia Operations	On-line information
Pipex Communications	Web hosting and related services
Poulter Partners	Marketing communications agency
Principles Agency	Marketing communications agency
Radio Aire/Magic 828	Radio broadcasting
Real Radio	Radio broadcasting
Sinclair Mason	Public relations, marketing and events
TEAMtalk.com	Online sports information
Yorkshire Post Newspapers	Newspaper publishers
Source: Development Department, Leeds City Council	

Leeds Media

Leeds Media develops and promote the city's media and communications sector. Its vision is to inspire and lead its member companies to be the best in the UK, and to help them connect to the very best clients and customers. It covers the fields of television, film, radio, newspapers and magazines, new media/new technologies, graphic design, public relations, advertising, marketing and other related fields.

Activities

Leeds Media offers services, including:

- events to help companies stay informed and keep abreast of developments
- networking sessions to build local partnerships and supply chains
- a newsletter and web-delivered news and information service tailored to the needs of media companies
- a database of Leeds-based media companies available to firms wanting to buy media services
- information on training, property, grants etc
- lobbying on behalf of the media sector
- promoting the city's media industries in the press

Membership

Leeds Media's membership scheme presently has over 260 members.

All members receive a range of benefits including priority booking and discounts for events and a promotional entry on the Leeds Media website. Leeds Media also brings new business opportunities for its members through its Find a Supplier service.

Cultural and creative industries

An important area for policy development identified within the Cultural Strategy for Leeds is support for the cultural and creative industries. The sector encompasses a broader range of industries than

the traditional media and communications sector and includes the activities of visual arts, architecture, crafts, design, designer fashion, music and the performing arts as well as film and video production, TV and radio and publishing,

According to research conducted on behalf of **Leeds City Growth** and Leeds Cultural Partnership, Leeds is home to almost 2,000 businesses in this cluster. With over 12,000 employees and a further 2,000 self employed Leeds is the sub-regional and regional centre for creative industries employment. Within the cluster as a whole, audio-visual businesses employ approximately 45%. 32% are employed in the books and press sector, 6% in the performing arts and 17% in the visual art sector.

Creative Industries Research

Two pieces of research into the creative industries in Leeds have recently been undertaken by the University of Leeds. ***The Creative Industries in Leeds: An Initial Economic Impact Assessment*** in October 2004 established a baseline which illustrated the importance of the sector to the local economy.

In 2005 a follow up report was commissioned by **Leeds City Growth** and Leeds Cultural Partnership which aimed to build on the baseline study and explore the issues for Leeds as a location for businesses in this cluster. The more recent study found a number of key strengths in Leeds including;

- A substantial business base, particularly in creative services such as advertising, interactive media, PR/marketing and design
- A strong entrepreneurial approach with little evidence of 'dependency culture' in contrast to areas where there has been a lot of public funding
- The presence of a strong financial and business services sector supports the creative and digital industries, both as a provider of services and as a client base in itself
- The universities and colleges in the city offer a broad pool of talent and students are also an important source of demand.

The report also identified weaknesses in the sector in Leeds. These include;

- A sense that the city has not fully understood or capitalised on the diversity of the Creative and Digital industries and the role of these industries in enhancing the profile of Leeds
- Areas such as music, fashion and visual arts remain relatively underdeveloped in comparison with the performing arts sector
- Geographical dispersal of businesses across the city led some respondents to note a sense of isolation with no distinctive cultural or creative quarter in the city providing a natural focus for networking