

Morley Towns Fund

Socio-economic baseline

October 2020

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1 Introduction

This report provides a comprehensive socio-economic assessment of Morley and the wider area to assist and support Leeds City Council with the development of a Town Investment Plan and subsequent business case development. The purpose is to provide a robust evidence base that can be used to underpin subsequent project development and prioritisation for the town centre, with a view to the upcoming Morley Towns Fund submission and applications for other co-funding opportunities.

1.1 Appointment and purpose

Mott MacDonald was appointed by Leeds City Council (LCC) in August 2020 to undertake a socio-economic baseline assessment of the town of Morley. This report provides a socio-economic assessment to assist and support Leeds City Council with the development of a Town Investment Plan for Morley and subsequent business case development. The purpose is to provide a robust evidence base that can be used to underpin subsequent project development and prioritisation for the town centre with a view to the upcoming Morley Towns Fund submission.

This baseline provides a detailed overview of the socio-economic characteristics, constraints and opportunities of the town, set within the wider functional economic geography. Understanding the current role and economic performance of the town and its wider catchment area, and how it forms part of the wider Leeds and West Yorkshire economy, is critical for developing ways to address key growth constraints and deliver sustainable long-term economic regeneration.

1.2 Morley Towns Investment Plan

1.3 Study area

Morley is a medium sized town¹, located less than 5 miles south-west of Leeds within the metropolitan borough of the City of Leeds (see Map 1.1 below). The metropolitan district is comprised of the administrative centre and city of Leeds, alongside smaller towns and villages, including Morley. Morley is one of eight major settlements² within Leeds alongside Garforth, Guiseley, Otley, Pudsey, Rothwell, Wetherby and Yeadon. The city centre of Leeds is the economic and administrative hub of West Yorkshire³ and the Leeds City Region⁴.

Map 1.1 and Map 1.2 below display the Towns Fund boundary and Lower Super Output Areas (LSOA) defined boundary that has been used for data analysis purposes throughout the report. The Towns Fund boundary does not align exactly with LSOA boundaries, particularly to the north and south, and therefore 20 LSOAs which best fit the boundary and best represent the population have been selected. Further information on the LSOAs which were selected is presented in Appendix A. Where data allows, this definition of Morley has been used throughout

¹ ONS classifies a small town in England and Wales as 5,000 to 20,000 inhabitants with a medium town being 20,000 to 75,000 and large towns having between 75,000 and 225,000 inhabitants. See Understanding towns in England and Wales: an introduction, ONS, July 2019 - <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/articles/understandingtownsinenglandandwales/anintroduction>

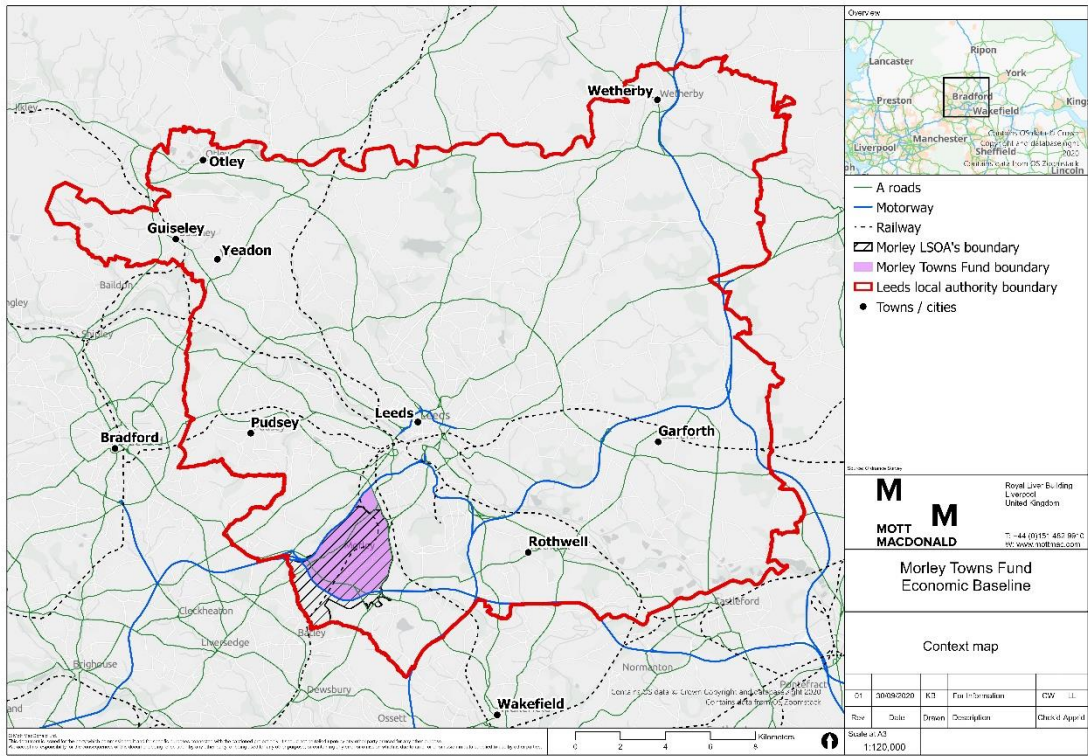
² As defined by the Core Strategy (as amended by the Core Strategy Selective Review 2019) Leeds Local Plan

³ The five districts of Bradford, Calderdale, Kirklees, Leeds and Wakefield.

⁴ The ten districts of Barnsley, Bradford, Calderdale, Craven, Harrogate, Kirklees, Leeds, Selby, Wakefield and York.

with the exception of Health and Wellbeing data which considers the Morley North and Morley South wards.

Map 1.1: Morley study area within Leeds district



Source: Mott MacDonald

As displayed in Map 1.2, Morley is bounded by the M62 to the south, the M621 to the west and the A6110 to the east, giving strong east-west connectivity. Additionally, it is well served by a rail station in the town centre to towns and cities such as Leeds, Huddersfield, Bradford, and Manchester.

Figure 1.1: Socio-economic framework – assessing current and future performance



Source: Mott MacDonald

Where available, data for Morley is presented by considering best fit LSOA or wards. A full definition and further details are provided in Appendix A. The town’s economic characteristics and performance is compared to Leeds District, West Yorkshire County, Yorkshire & the Humber Government Office Region (GOR) and nationally⁵ throughout. This helps to understand whether Morley is over/under performing comparator areas. For some data indicators it is not possible to collect recent Morley data and, in these instances, either 2011 Census data is examined (which is available at lower geographies) or Leeds data only is referenced. Care and judgement should be used in interpreting all data provided in this report.

1.4.1 COVID-19 impacts

Importantly, the assessment across the key topic areas is based on the latest annual data (in most cases 2011, 2018 or 2019) and does not reflect the impact of COVID-19. Clearly,

⁵ Depending on data availability this is presented as England, England and Wales, Great Britain or United Kingdom.

understanding the potential impacts of COVID-19 for the Town Investment Plan will be very important but the situation is changing rapidly as the crisis and recovery evolves. Given this, Section 7 provides a broad overview of the potential long-term implications of the crisis and how these may affect Morley.

1.5 Report structure

The rest of this report is structured as follows:

- **Section 2: Population** - outlines key population and demographic characteristics.
- **Section 3: Employment and business base** - examines the overall employment structure and business base.
- **Section 4: Labour market characteristics** - provides a detailed overview of labour market indicators and trends.
- **Section 5: Housing, health and quality of life** - provides an overview of the property market (based on available information), overall accessibility of the town, and the provision of healthcare in Morley.
- **Section 6: Visitor economy, arts and heritage** – provides an overview of the tourism, arts and culture offer in the town.
- **Section 7: COVID-19 and potential impacts** - provides a high-level review of the potential impacts for Leeds and Morley.
- **Section 8: Conclusions and recommendations** - using the preceding evidence base summarises the findings of this socio-economic assessment of Morley and emerging recommendations to guide the Towns Fund process and wider economic development efforts.
- **Appendix A: Geography definitions** - outlines the statistical definition of Morley.
- **Appendix B: Supplementary data** - provides additional data analysis that has informed Sections 2 to 7.

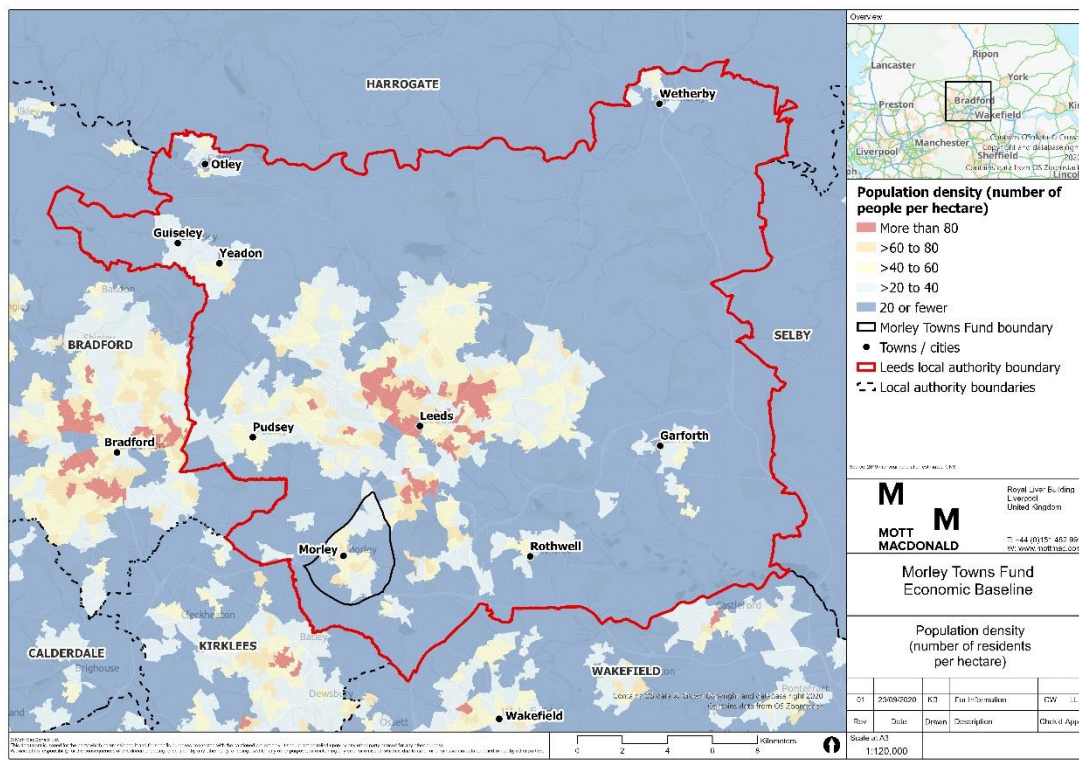
2 Population

This section examines population trends in Morley, Leeds and wider comparator areas in Yorkshire, including overall growth, age profile of residents and population projections.

2.1 Population overview

Morley had a population of approximately 31,600 in 2019, and accounts for approximately 4.0% of Leeds' population, shown in Table 2.1. The town is located less than 5 miles south west of Leeds city centre and less than 10 miles south east of Bradford, as seen in Map 2.1. Morley sits within the local authority of Leeds, which is a mixed composition of rural areas to the north and west, and densely populated city areas to the centre and the south. Morley is densely populated in comparison to the district of Leeds, as shown in Table 2.1, due to Leeds district also possessing large rural areas where fewer people live.

Map 2.1: Population density (number of residents per hectare, 2019)



Source: Mott MacDonald based on mid-year population estimates. ONS, 2019

Table 2.1: Total population, 2019

Area	Total population	% of total Leeds population	% of total West Yorkshire population	% of total Yorkshire and the Humber	Population density (persons per hectare)
Morley	31,600	4.0%	1.4%	0.6%	21.2

Area	Total population	% of total Leeds population	% of total West Yorkshire population	% of total Yorkshire and the Humber	Population density (persons per hectare)
Rothwell	21,200	2.7%	0.9%	0.4%	10.2
Wetherby	11,300	1.4%	0.5%	0.2%	10.0
Leeds	793,100	100.0%	34.0%	14.4%	14.4
West Yorkshire	2,332,500	-	100.0%	42.4%	11.5
Yorkshire and the Humber	5,503,000	-	-	100.0%	3.6
Great Britain	64,903,100	-	-	-	2.7

Source: Population Estimates, ONS, 2019, Mott MacDonald calculations

Note: LSOAs selected for Morley, Rothwell and Wetherby selected to ensure all population living in the towns are counted. As a result, the LSOA definition includes a significant amount of greenspace.

Within Leeds, Morley is a large town, shown by a population that is larger than the nearby towns of Rothwell and Wetherby. Morley also has a greater population density than these towns, signifying its role as the key satellite town to Leeds city centre.

2.2 Age profile

Morley's population, as in Leeds, has a greater proportion of adults aged 25-49 than the regional and national averages. This contributes to a working age (16-64) proportion that is 2.3% and 2.0% larger than Yorkshire & the Humber and Great Britain respectively.

Morley has a proportion of residents aged 0-15 that is broadly in line with the national average (18.7% compared to 19.0%). However, it has a much smaller young adult population (16-24), which at 9.0%, is 6.0% lower than the Leeds average, and lower than all other comparators. This implies that whilst the town struggles to retain some of its young population cohorts it is a relatively attractive location for working age households that still wish to have access to larger settlements for work and leisure.

A relatively large working age population means the town is well placed to contribute to the economy of Leeds and West Yorkshire. Despite the differences identified above, the largest three age cohorts in Morley are the same as for all the other comparator areas, meaning there are similarities in the demographic profile.

Table 2.2: Population age breakdown, as % of total, 2019

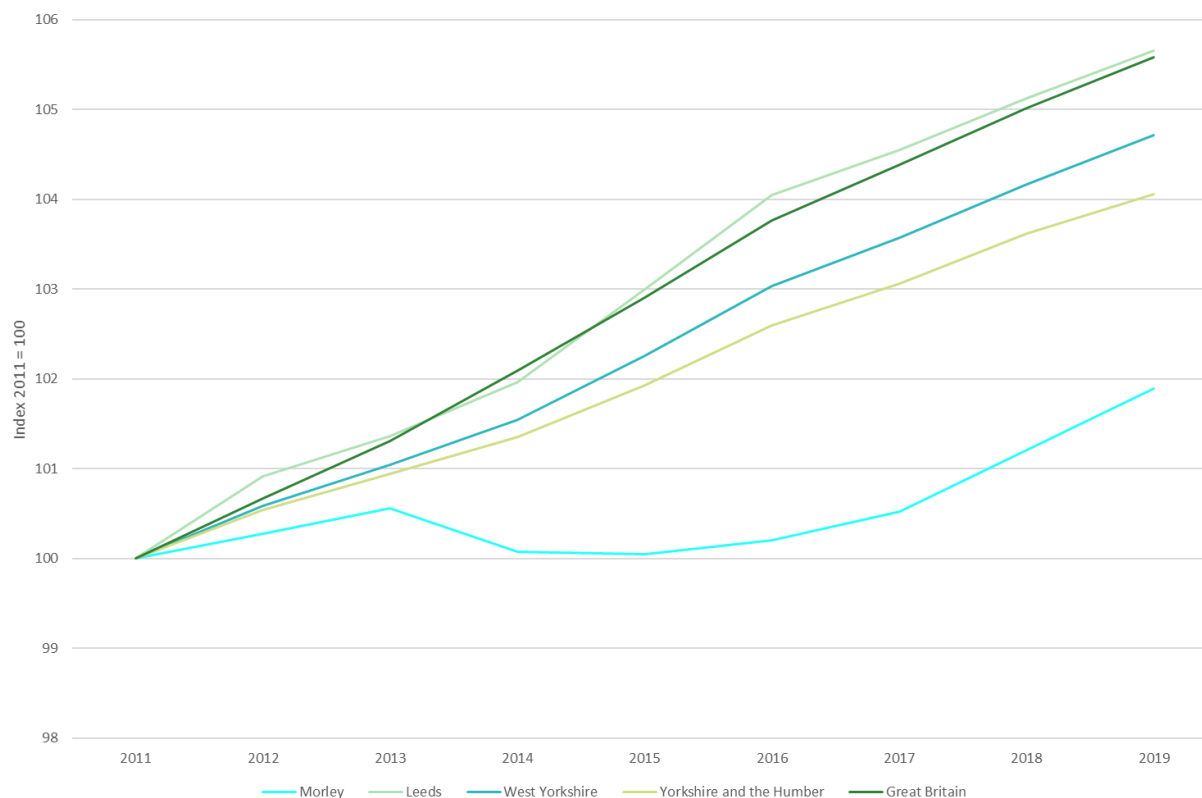
Age	Morley	Leeds	West Yorkshire	Yorkshire & the Humber	Great Britain
0-15	18.7%	19.4%	20.6%	19.1%	19.0%
16-24	9.0%	14.9%	11.9%	11.3%	10.6%
25-49	36.4%	33.6%	32.8%	31.6%	32.7%
50-64	19.0%	16.5%	18.1%	19.2%	19.2%
65+	16.9%	15.6%	16.7%	18.8%	18.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%
Working age population (16-64)	64.4%	65.1%	62.8%	62.1%	62.5%

Source: Population Estimates, ONS, 2018. Shading denotes top 3 age bands by area. Note totals do not add completely to 100% due to rounding within the dataset.

2.3 Population trends

Since 2011, population growth in Morley has lagged significantly behind Leeds, West Yorkshire, as well as regional and national rates. Growth in Morley's population slowed between 2012 and 2015 but has been increasing more rapidly in recent years, from a low base. The slowdown, shown in Figure 2.1 was relatively small, with the population growth falling by circa 100. The town's total population has increased by circa 400 since 2011.

Figure 2.1: Index of population growth, 2011-2019 (2011=100)



Source: Population Estimates, ONS, 2011-2019. Note: Morley LSOA data only available from 2011 As this was the inception of the LSOA boundary geography system used from the 2011 Census.

In contrast, Leeds has shown consistent population growth between 2011 and 2019, at or close to national/regional trends. As shown in Table 2.3 below however, population growth was slower during the recession in comparison to Great Britain and all other comparators.

Table 2.3: Population growth, 2000-2019, compound annual growth rate (CAGR)

Area	2011/19	2000/19	2007/2009 (recession)	2009/2019 (post-recession)
Morley	0.2%	-	-	-
Leeds	0.7%	0.6%	0.4%	0.6%
West Yorkshire	0.6%	0.6%	0.7%	0.6%
Yorkshire and the Humber	0.5%	0.5%	0.6%	0.5%
Great Britain	0.7%	0.7%	0.8%	0.7%

Source: Mid-year Population Estimates, ONS, 2000-2019 (Data not available for Morley pre-2011)

2.4 Population projections

Sub-national population projections (available at district level and above only) for England provide estimates of the future resident population based on the assumption that recent demographic trends continue, i.e. migration trends, birth and death rates. They are not forecasts as they do not attempt to predict the impact of national, regional, or local government policy, changing economic circumstances, or other factors that might impact on demographic behaviour.

Using the 2018-based projections, the total population in Leeds is anticipated to grow on average annually by 0.3% over 2018-2043, which is the same as the Yorkshire & the Humber average but marginally lower than national rates. Over time, a small difference in annual growth rates leads to a large difference in absolute change, with total growth in Leeds projected to be much lower than elsewhere. Still, almost 53,000 more people are projected to be needed to be accommodated in the authority by 2043.

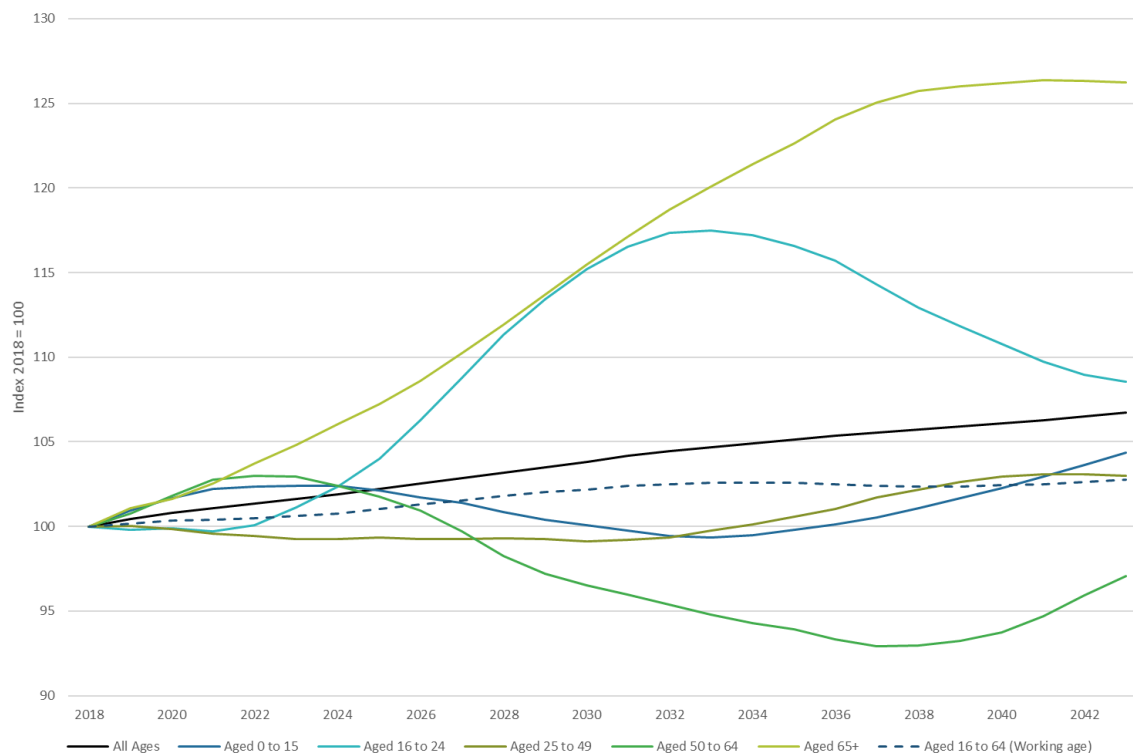
Table 2.4: Population projections, 2018-2043

Area	Total change	Absolute change, %	Annual Average Change (CAGR), %
Leeds	52,982	6.7%	0.3%
West Yorkshire	189,165	8.2%	0.3%
Yorkshire and the Humber	410,793	7.5%	0.3%
England	5,766,930	10.3%	0.4%

Source: Population Projections, ONS, 2018 based.

Chart 2.1 and Table 2.4 clearly show the 65+ age cohort in Leeds is anticipated to have the highest growth of all age segments over this period and will drive overall population growth in the future. This is compared to positive growth across most other age cohorts, with the exception of the 50-64 age bracket. As in many areas of the country, providing for the needs of an aging population, particularly in terms of health and access to services, will be a key challenge for Leeds, though the overall growth of over 65s is projected to be lower than elsewhere. Notably, the 16-24 age bracket is expected to grow rapidly in Leeds, before shrinking after circa 2034.

Chart 2.1: Population projections by age group, Leeds, 2018-2043



Source: Population Projections, ONS, 2018 based.

Table 2.5: Population projections, 2018-2043, compound annual growth rate (CAGR)

CAGR	All Ages	0 to 15	16 to 64	16 to 24	25 to 49	50 to 64	Aged 65+
Leeds	0.3%	0.2%	0.1%	0.3%	0.1%	-0.1%	0.9%
West Yorkshire	0.3%	0.0%	0.1%	0.2%	0.1%	0.2%	1.3%
Yorkshire and the Humber	0.3%	-0.1%	0.1%	0.1%	0.1%	0.0%	1.3%
England	0.4%	0.0%	0.1%	0.2%	0.1%	0.3%	1.5%

Source: Population Projections, ONS, 2018 based. Great Britain not available for this dataset.

2.5 Key points

- In 2019, Morley had a population of 31,600 people, representing 4.0% of Leeds' total.
- Morley's population, as in Leeds, has a greater proportion of adults aged 25-49 than the regional average. This contributes to a working age (16-64) proportion that is 2.3% and 2.0% larger than Yorkshire & the Humber and Great Britain respectively. As the town struggles to retain some of its young adult population cohorts (e.g. those aged 16-24 years old), this implies it is a relatively attractive location for working age households. A relatively large working age population means the town is well placed to contribute to the economy of Leeds and West Yorkshire.
- Morley's population growth has lagged behind all comparator areas since 2011. Morley's population fell slightly between 2012 and 2015 but has been increasing more rapidly in recent years. In contrast, Leeds has shown consistent, strong population growth, similar to the national rates, between 2011 and 2019.

- The 65+ age segment in Leeds is projected to have the highest growth of all age segments by 2043 and will drive overall population growth in the future, however growth in this age bracket is projected to be lower than comparators. This is compared to slightly positive growth across most age cohorts, with the exception of the 50-64 age bracket. As in many areas of the country, providing for the needs of an aging population, particularly in terms of health and access to services, will be a key challenge for Leeds.

3 Economy and business base

This section provides an overview of Morley's economy by exploring the employment and business base to understand the underlying economic structure and overall economic performance.

3.1 Economy snapshot

In 2018, Morley's population and employee numbers were approximately 31,600 people and 24,000 employees, representing 4.0% and 5.1% of the Leeds totals respectively. The total output of the Leeds economy, measured by Gross Value Added (GVA) (which is not available at lower geographies), was around £26.2bn, which represents around 35.7% of the West Yorkshire economy.

Productivity levels, measured by GVA per worker, are higher in Leeds than the national and regional levels, reflecting the economic structure which has more high-value professional services, such as Business services, Financial & insurance activities and Information and communication activities (see Table 3.9 below).

Table 3.1: Economic snapshot- key indicators

Indicators	Morley	Leeds	West Yorkshire	Yorkshire and the Humber	Great Britain
Core Indicators, 2018, 2019					
Population, 000s, 2019	31.6	793.1	2,332.5	5,503.0	64,903.1
Employees, 000s, 2018 (Workplace based)	24	467	1,066	2,398	29,758
Employment, 000s, 2018 (Workplace based)	24	478	1,097	2,490	30,815
GVA, total, £m, 2018	£1,348	£26,239	£73,576	£142,121	£3,616,968
GVA per worker, £, 2018	£53,218**	£53,311	£47,984	£46,869	£52,441
Labour market indicators, as % of residents aged 16-64, 2019					
Economic activity rate, %	-	77.9%	75.8%	77.2%	78.9%
Employment rate, %	-	74.6%	72.3%	73.7%	75.8%
Unemployment rate, %	-	4.2%	4.6%	4.5%	4.0%
Self-employment rate, %	-	10.4%	9.7%	9.4%	10.9%
% of residents qualified to NVQ4+	-	40.1%	33.2%	34.2%	40.3%
COVID-19 Labour market impact					
Claimant count, aged 16-64, August 2019	445	15,910	50,985	106,075	1,126,995
Claimant count, aged 16-64, August 2020	1,105	36,205	108,490	227,330	2,638,780
Change in claimant count, 2019-2020, %*	148%	128%	113%	114%	134%
Labour market indicators, as % of all resident based aged 16-74, 2011					
Economic activity rate, %	76.2%	69.5%	68.5%	68.4%	69.7%
Employment rate, %	69.8%	59.4%	59.7%	60.0%	61.9%

Indicators	Morley	Leeds	West Yorkshire	Yorkshire and the Humber	Great Britain
Unemployment rate, %	3.8%	4.8%	5.0%	4.8%	4.4%
Self-employment rate, %	7.2%	7.5%	8.1%	8.4%	9.7%
% of residents qualified to NVQ4+	23.3%	26.9%	23.8%	27.2%	23.3%

Source: Population Estimates, 2019; BRES, Subregional Productivity, Gross Value Added (balanced) by Industry, all 2018, Annual Population Survey 2019, Claimant Count, 2019-2020 and Census, 2011, all ONS.

Note: *Compares August 2019 and August 2020. ** Calculated by using Mott MacDonald high level estimate of GVA in Morley for the numerator and dividing by an estimate of Morley filled jobs. Morley filled jobs is estimated by applying Morley employees as a percentage of Leeds district employees multiplied by Leeds district productivity jobs. GVA per worker is driven by the sectoral mix, with the large Financial & insurance activities sector relative to total employment in Morley a primary cause for Morley's GVA per worker being comparable to Leeds district.

Overall, Leeds has a strong labour market with high levels of labour market participation, compared to West Yorkshire and regional rates, albeit slightly lower than national rates. Over 40.1% of working age residents in Leeds are qualified to NVQ Level 4+ (degree or above) which is slightly behind national rates but exceeds West Yorkshire.

Comparable data for Morley is only available from the 2011 Census and reveals that the economic activity and employment rates were above Leeds, West Yorkshire and national figures, whilst unemployment was lower than the comparators. The self-employment rate was lower for Morley than comparators. The same proportion of Morley residents are qualified to NVQ4+ and above as the national rate, but the proportion is lower than other comparators.

3.2 Employment

3.2.1 Employees by area

The total workplace employee⁶ base of Morley is around 24,000 employees, as shown in Table 3.2, and represents 2.3% and 1.0% of West Yorkshire and Yorkshire & the Humber employment respectively. Morley is clearly a major town within Leeds, shown by an employment base that is larger than other prominent towns, such as Rothwell and Wetherby. Morley's employee density is also much greater, at 16.1 employees per hectare, compared to 1.9 and 8.0 for Rothwell and Wetherby respectively.

Table 3.2: Employees by area, 2018

Area	Total employee numbers	% of total Leeds employees	% of total West Yorkshire employees	% of Yorkshire and the Humber employees	Employee density (employees per hectare)
Morley	24,000	5.1%	2.3%	1.0%	16.1
Rothwell	4,000	0.9%	0.4%	0.2%	1.9
Wetherby	9,000	1.9%	0.8%	0.4%	8.0
Leeds	467,000	100.0%	43.8%	19.5%	8.5
West Yorkshire	1,066,000	-	100.0%	44.5%	5.3

⁶ BRES is the primary source for employee and employment estimates at a detailed regional and industrial level by sector. The two variables differ as employment also measures self-employment, whereas employees do not. However, BRES does not cover the very small (self-employed) businesses that are not registered for Value Added Tax (VAT) or Pay As You Earn (PAYE), which make up a small part of the economy. Therefore, employees is used as a proxy for employment throughout this study.

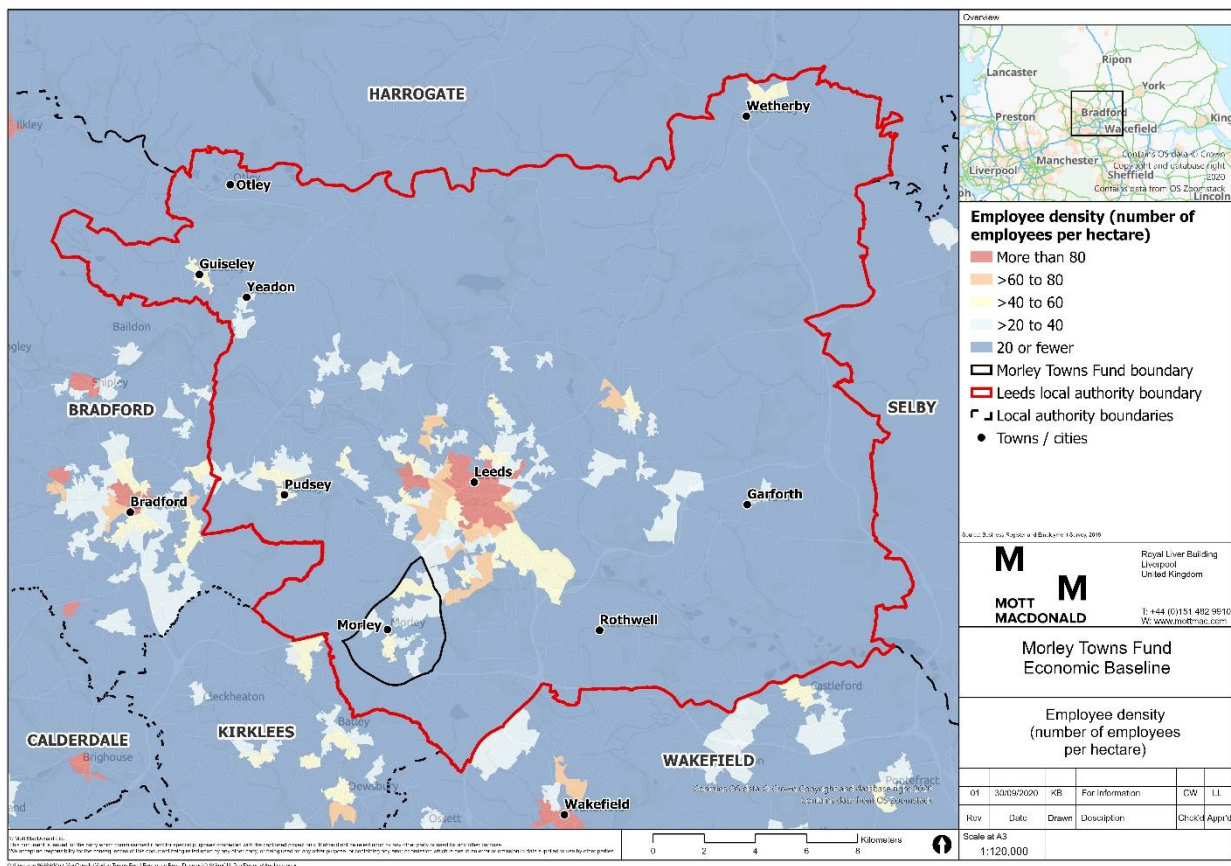
Area	Total employee numbers	% of total Leeds employees	% of total West Yorkshire employees	% of Yorkshire and the Humber employees	Employee density (employees per hectare)
Yorkshire and the Humber	2,398,000	-	-	100.0%	1.6
Great Britain	29,758,000	-	-	-	1.2

Source: BRES 2018, ONS. Employee density refers to employees per hectare.

As per population density, employee density is higher in Morley than Leeds as the Towns Fund study area does not include any agricultural land.

Map 3.1 gives a more calibrated presentation of employee density, showing that employees within Leeds are almost solely concentrated within the city centre. Outside of this area, the towns of Morley, Pudsey, Guiseley, Yeadon and Garforth offer smaller concentrations of employee numbers. This is a clear trend within the rural context of Yorkshire, with Bradford and Wakefield, amongst other towns, offering highly concentrated levels of employment. These towns, like Morley, act as satellite towns to Leeds for employment, as shown by the travel to work trends in Section 4.2.

Map 3.1: Employee density, 2018



Source: Mott MacDonald based on BRES, ONS, 2018

3.2.2 Employee numbers by type

Part time employees as a proportion of total in Morley, as shown in Table 3.3, is higher than all other comparator areas. This is caused by high proportions of part time employee levels (see Table 3.4) in Wholesale and retail trade, where Morley has a high proportion of total employee levels, and in Accommodation and food, where Morley's part time proportion is greater than Leeds and Great Britain. Public sector and Other services also show high proportions of part time employee numbers.

Table 3.3: Full time and part time employees, 2018

Area	Employees	As % of total employee numbers	
		Full-time employees	Part-time employees
Morley	24,000	66.7%	33.3%
Leeds	467,000	69.8%	30.2%
West Yorkshire	1,066,000	68.3%	31.7%
Yorkshire and the Humber	2,398,000	66.9%	33.1%
Great Britain	29,758,000	67.7%	32.3%

Source: BRES, ONS, 2018

Table 3.4: Full time and part time employees by sector, 2018

Sector	Morley			Leeds			Great Britain		
	Total (000s)	Part time	Full time	Total (000s)	Part time	Full time	Total (000s)	Part time	Full time
Production and manufacturing (A-E)	1.8	7.2%	92.8%	38.2	9.1%	90.9%	3,021.5	9.8%	90.2%
Construction (F)	1.1	9.1%	90.9%	17.0	11.8%	88.2%	1,402.0	14.9%	85.1%
Wholesale and retail trade (G)	6.5	46.2%	53.8%	56.0	41.1%	58.9%	4,504.0	41.6%	58.4%
Transport and storage (H)	2.1	28.6%	71.4%	22.5	20.0%	80.0%	1,428.0	16.1%	83.9%
Accommodation and food services (I)	1.5	60.0%	40.0%	28.0	60.7%	39.3%	2,237.0	56.4%	43.6%
Professional services (J-N)	7.7	24.4%	75.6%	170.8	23.6%	76.4%	8,033.0	24.1%	75.9%
Public sector (O-Q)	2.6	43.7%	56.3%	114.0	36.8%	63.2%	7,806.0	40.8%	59.2%
Other services (R-U)	0.5	47.6%	52.4%	19.0	47.4%	52.6%	1,330.0	48.0%	52.0%
Total (000s)	23.8	8.0	16.0	465.5	141.0	324.0	29,761.5	9,628.0	20,134.0

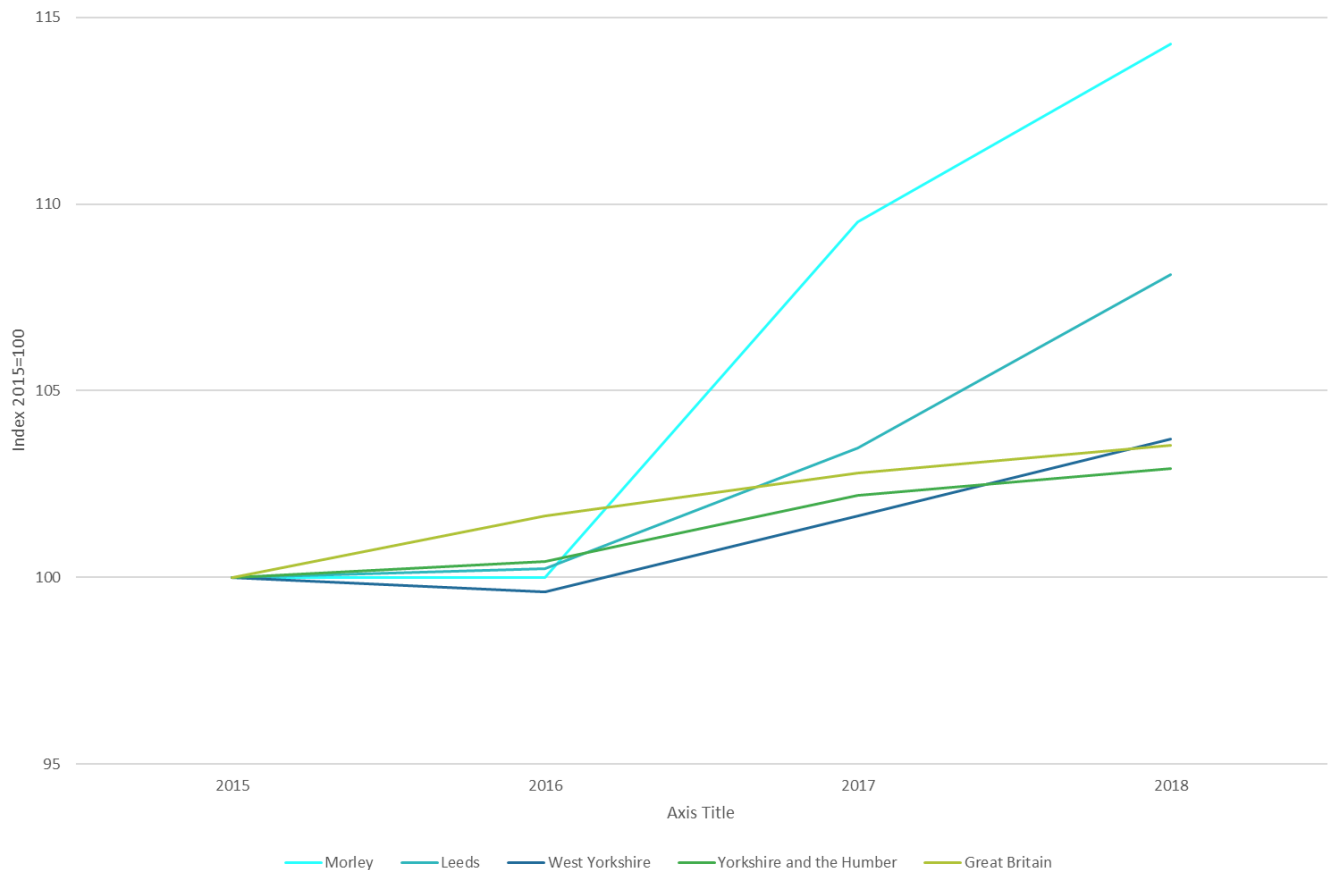
Source: BRES, ONS, 2018

The extent to which a full and part time split matters for economic policy is determined by the extent to which the workforce desires longer hours and needs a salary level commanded by full time employment to support family and lifestyle choices. Part time employment does offer a greater flexibility for workers that may be desirable for many. Introducing more jobs in higher productivity sectors will increase the overall GVA contribution of Morley and may assist the transition for some of the part time labour force into full time work.

3.3 Employment growth

Data on levels of employment are limited pre-2015 at lower geographies, such as for Morley. Since 2015 (see chart below), employee numbers increased by 3,000, or 14.3%, in Morley. In the same period, Leeds grew 8.1%, greatly outpacing regional and national levels in this period.

Chart 3.1: Employee numbers growth, 2015-18



Source: BRES, ONS, 2015-18. LSOA data for Morley only available from 2015.

In Morley, growth during this period was driven by Financial & insurance and Professional services, the former grew by 180.0% in size over three years to 2018. In Leeds, growth was similarly driven by Professional services, but also through Information & communication, Accommodation & food and the Public sector.

There is approximately 27ha of new employment land allocated throughout Morley and a large development south east of Morley at Capitol Park. Strategic aims for employment growth and enabling access to opportunities for everyone drive the requirement for good public transport connectivity to these areas. The local market and wider inward investment programmes need to target businesses offering good employment opportunities and skills development potential.⁷

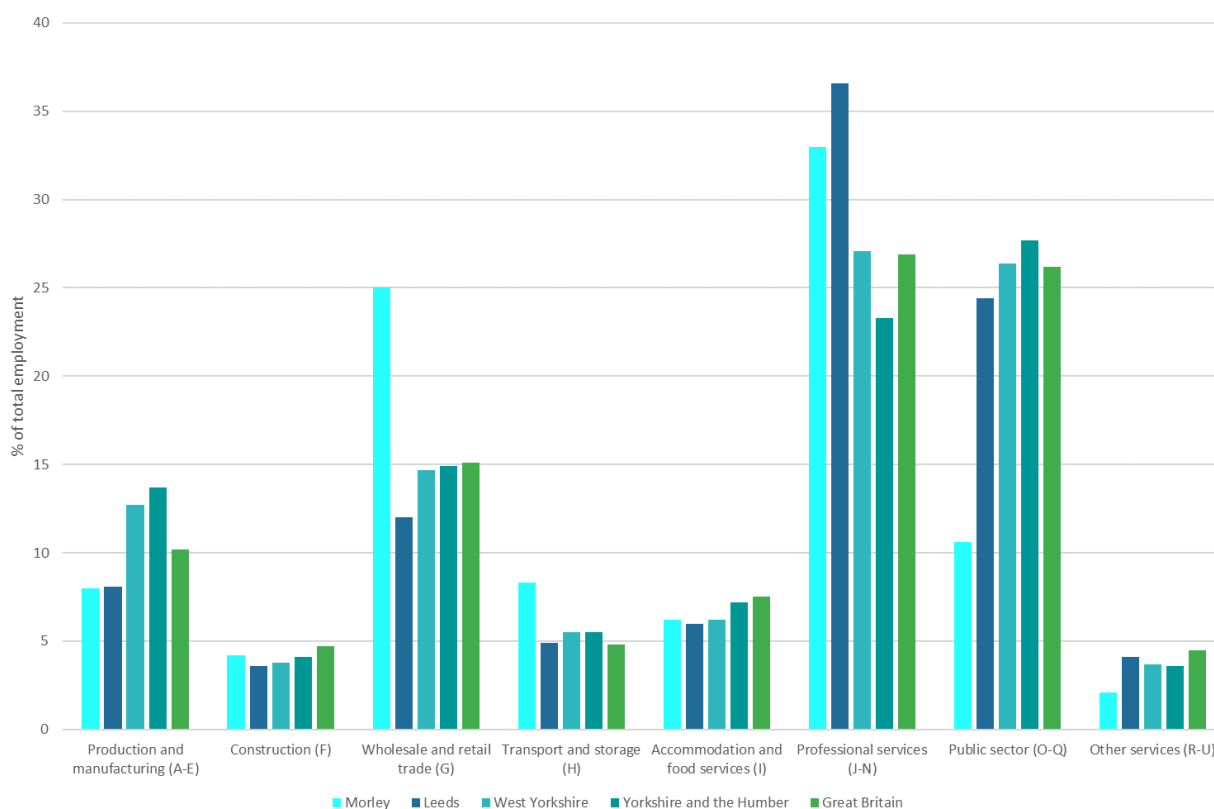
⁷ West Yorkshire Connectivity Plan – Leeds to Huddersfield Case for Change report (Mott MacDonald, 2020)

3.4 Employment by sector

In Morley, the key employee numbers by sectors are in Professional services (33.0%), Wholesale & retail trade (25.0%) and the Public sector (10.6%)⁸. Not including these sectors, only Transport & storage is overrepresented compared to the comparator areas. No other sectors represent more than 8.0% of employee numbers.

In comparison, Leeds' employee base is also reliant on Professional services (36.6%) but is more skewed towards the Public sector (24.4%) and comparatively less skewed to Wholesale & retail trade (12.0%) than Morley. Nonetheless, the employee structure is similar to Morley, with no other sector representing more than 9.0% of employee numbers. The employee structure reflects Leeds' role as a key service centre for public administration, retail and other key services for the surrounding metropolitan population, and due to its close proximity and relative size to Leeds, Morley also reflects these characteristics, playing a key role in the city economy.

Chart 3.2: Employees by broad sector, as % of total, 2018



Source: BRES, ONS, 2018. Note: Professional services includes Information and Communication, Financial and Insurance, Property, Professional, Scientific and Technical and Business Administration & Support Services. Public sector includes Public Administration and Defence, Education and Health

3.5 Detailed sector analysis

Exploring Morley's employment base in more detail, by 2-digit SIC Codes, as shown below in Table 3.5, reconfirms the town's important economic role as a key service centre for Retail and Wholesale trade, Financial services, Professional services and the Public sector. In particular,

⁸ Sourced from BRES, which is the primary source for employee and employment estimates at a detailed regional and industrial level by sector.

the retail sectors are driven by the White Rose shopping centre in Morley, which contains major retailers such as Debenhams, H&M, JD Sports, Primark and Zara. Morley also has key sectors of employment in Transport and storage services, Manufacturing and Specialised construction.

Table 3.5: Top 20 2-digit SIC codes, as % of total employee numbers, 2018

Sub-sector	As % of employees			Location Quotient
	Morley	Leeds	GB	Morley: GB
47 : Retail trade, except of motor vehicles and motorcycles	18.8%	7.1%	9.3%	2.0
66 : Activities auxiliary to financial services and insurance activities	7.3%	2.6%	1.4%	5.2
46 : Wholesale trade, except of motor vehicles and motorcycles	7.3%	3.6%	4.0%	1.8
64 : Financial service activities, except insurance and pension funding	7.3%	3.0%	1.6%	4.6
85 : Education	6.2%	9.2%	8.8%	0.7
70 : Activities of head offices; management consultancy activities	5.2%	3.2%	2.6%	2.0
56 : Food and beverage service activities	5.2%	5.4%	6.0%	0.9
52 : Warehousing and support activities for transportation	5.2%	1.3%	1.8%	2.9
81 : Services to buildings and landscape activities	2.9%	4.1%	2.4%	1.2
62 : Computer programming, consultancy and related activities	2.9%	4.1%	2.4%	1.2
43 : Specialised construction activities	2.5%	2.1%	2.5%	1.0
82 : Office administrative, office support and other business support activities	2.5%	2.1%	1.7%	1.5
25 : Manufacture of fabricated metal products, except machinery and equipment	2.1%	1.0%	1.1%	1.9
71 : Architectural and engineering activities; technical testing and analysis	1.7%	1.7%	1.8%	0.9
84 : Public administration and defence; compulsory social security	1.5%	3.2%	4.3%	0.3
45 : Wholesale and retail trade and repair of motor vehicles and motorcycles	1.5%	1.3%	1.8%	0.8
88 : Social work activities without accommodation	1.5%	3.6%	3.0%	0.5
53 : Postal and courier activities	1.5%	0.9%	0.8%	1.9
55 : Accommodation	1.2%	0.9%	1.5%	0.8
49 : Land transport and transport via pipelines	1.2%	1.9%	1.9%	0.6

Source: BRES, ONS, 2018. Shading denotes where Morley employment exceeds both district and national levels. Note: Totals do not sum to 100% due to rounding.

A location quotient (LQ) measures the relative specialisation of a sector in an area relative to a larger geographic unit, in this case the national average, with a value above one representing a degree of specialisation. Based on this measure Morley has clear specialisms in those sectors identified above as well as Warehousing, Office admin and Postal courier activities.

Of the sectors that are considered specialised, the Manufacturing, Financial services and Professional services sectors have been selected for a more detailed to reveal more granular details at the 4-digit SIC code level.

Manufacturing of fabricated metal is a key specialism for Morley with an LQ of 1.9. As shown in Table 3.6, as the subsectors of Manufacturing doors and windows of metal, Fabricated metal products and Machining are all well represented in the town. Morley itself is home to several metal fabricating businesses, such as JVD Engineering and JP fabrications, which support this specialism.

Table 3.6: Key manufacturing activities in Morley, employee numbers as % of total manufacturing in Morley, 2018

Manufacturing sub-sector	Morley	Leeds	GB
2512 : Manufacture of doors and windows of metal	50.0%	8.9%	5.8%
2599 : Manufacture of other fabricated metal products	25.0%	8.9%	9.8%
2562 : Machining	15.0%	27.8%	33.1%
2593 : Manufacture of wire products, chain and springs	10.0%	6.7%	2.5%
2511 : Manufacture of metal structures and parts of structures	2.0%	17.8%	17.8%
2561 : Treatment and coating of metals	2.0%	8.9%	7.1%

Source: BRES, ONS, 2018. Note: Totals do not sum to 100% due to rounding and suppression of small datapoints in the ONS data.

As presented in Table 3.7, and as mentioned previously, there has been significant employment growth in financial and professional services in Morley, with key growth in the sub-sectors of Auxiliary financial services, Other financial services, Management consultancy and Head offices employees since 2015.

Table 3.7: Key sector & sub-sector growth in Morley, financial & professional services

Sector	Year		2015 to 2018 change	
	2015	2018	% change	CAGR
K : Financial and insurance activities	1,250	3,500	180.0%	40.9%
M : Professional, scientific and technical activities	1,500	2,000	33.3%	10.1%
62 : Computer programming, consultancy and related activities	400	700	75.0%	20.5%
64 : Financial service activities, except insurance and pension funding	900	1,750	94.4%	24.8%
66 : Activities auxiliary to financial services and insurance activities	300	1,750	483.3%	80.0%
70 : Activities of head offices; management consultancy activities	1,000	1,250	25.0%	7.7%

Source: BRES, ONS, 2015 & 2018.

Table 3.8 below presents the key sub-sectors in the financial and professional services sectors. Alongside the established key sub-sector of Monetary intermediation, Morley now has a strong financial and professional service employee base, that has grown since 2015, through the presence of businesses such as HSBC, HMRC and WSP at the White Rose office park. Furthermore, Morley is a key logistical office for Hermes, located in the town centre.

Table 3.8: Key financial & professional services in Morley, employee numbers as % of total 4-digit sub-sector, 2018

Sub-sector	Morley	Leeds	GB
Financial service activities (LQ 4.6)			
6419 : Other monetary intermediation	57.1%	78.6%	74.7%
6492 : Other credit granting	45.7%	14.3%	9.7%
6499 : Other financial service activities, except insurance and pension funding	1.1%	2.5%	10.1%
Activities auxiliary to financial services and insurance activities (LQ 5.2)			
6619 : Other activities auxiliary to financial services, except insurance and pension funding	85.7%	50.0%	34.6%
6622 : Activities of insurance agents and brokers	5.7%	14.6%	28.0%
Activities of head offices (LQ 2.0)			
7010 : Activities of head offices	64.0%	53.3%	36.5%
7022 : Business and other management consultancy activities	28.0%	46.7%	60.4%
7021 : Public relations and communication activities	0.8%	3.3%	3.2%
Office admin and support (LQ 1.5)			
8299 : Other business support service activities	83.3%	36.4%	59.0%
8292 : Packaging activities	5.0%	1.4%	5.4%
8211 : Combined office administrative service activities	1.7%	11.4%	7.6%

Source: BRES, ONS, 2018. Note: Totals do not sum to 100% due to rounding.

3.6 GVA and productivity

GDP cannot be calculated at an individual business level as it is a broad aggregate measure of economic activity. GVA, the value of output (i.e. sales, turnover) minus the cost of bought in goods and services used in the production of that output (intermediate consumption), is used instead to measure sub-regional output, as is standard practice in economic analysis.

In 2018, as shown in Table 3.9, the Morley economy generated an estimated £1.3 billion⁹ of GVA, which was principally driven by Distribution & transport, Accommodation & food, Financial & insurance and Business services sectors. This represented 5.1% of total GVA generated by Leeds. This is the same figure as employees within Morley as a share of the Leeds district, implying Morley average productivity is similar to the Leeds average. Contrastingly, the main drivers of economic output in Leeds were the Public sector and Business services, with a similar specialism in Distribution & transport and Accommodation & food. The Financial & insurance activities sector in Leeds also accounts for a noticeably higher proportion of output at 10.8% of the total, compared to 6.8% and 7.2% regionally and nationally. Morley is over-represented in Financial and insurance activities and makes a greater contribution to Leeds' GVA within the sector at 27.2% compared to 6.8% and 7.2% regionally and nationally. This is driven by Morley's strong employment base in the sector, which accounts for around 13.0% of the total employee numbers.

⁹ Morley GVA figures are approximated by Mott MacDonald using Leeds' GVA by sector figures. This is by calculating a GVA per employee figure for each sector and using Morley's employees by sector to approximate a GVA figure for each sector in Morley. This gives a high level estimate for GVA in Morley, assuming that employees in Morley are as productive as the wider Leeds district average. As such, the estimate accounts for productivity differences coming from the differing Morley sectoral mix, not from differences in productivity within sectors.

Table 3.9: GVA by sector as % of total GVA, 2018

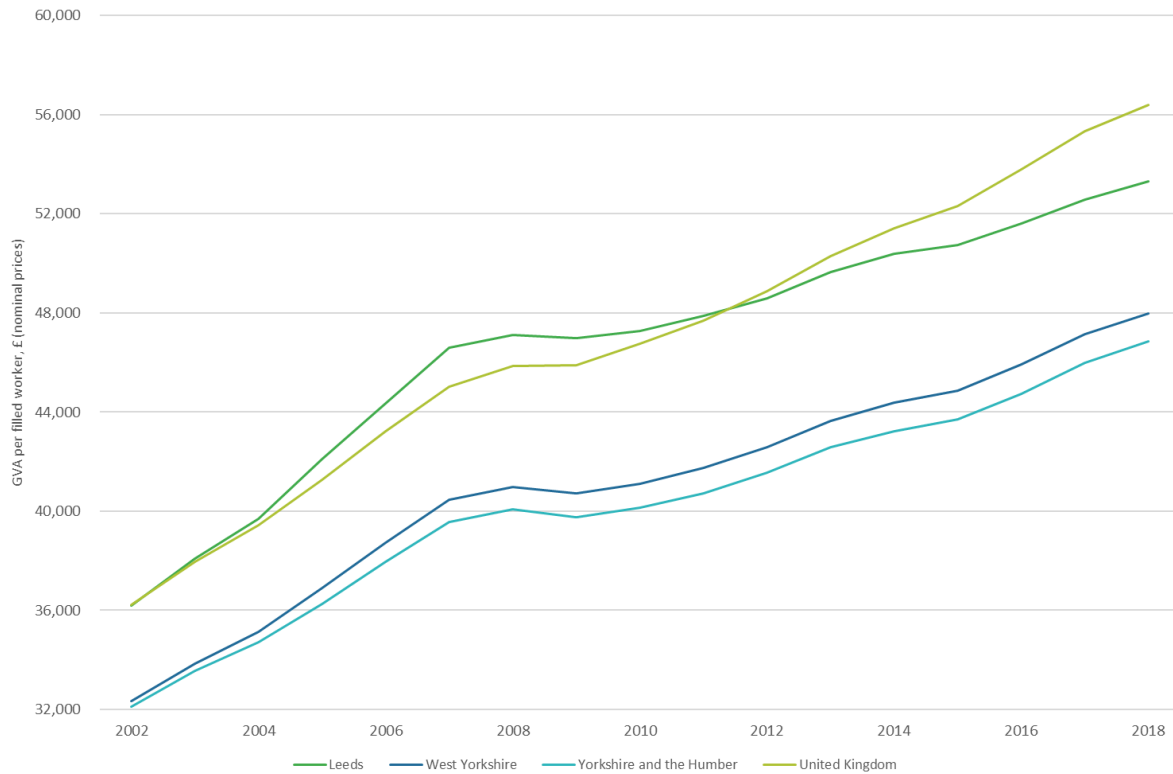
Sector	Morley*	Leeds	West Yorkshire	Yorkshire and the Humber	Great Britain
All sectors (£m)	£1,348	£26,239	£73,576	£142,121	£3,616,968
As a % of total					
Production (ABDE)	1.7%	4.6%	4.2%	7.1%	3.9%
Manufacturing (C)	6.9%	5.9%	12.3%	10.2%	9.9%
Construction (F)	6.3%	5.5%	5.8%	6.0%	6.1%
Distribution, transport, accommodation & food (GHI)	28.2%	16.3%	18.7%	17.1%	17.6%
Information & communication (J)	4.7%	8.2%	4.7%	4.3%	7.2%
Financial & insurance activities (K)	27.2%	10.8%	7.0%	6.8%	7.2%
Real estate activities (L)	4.0%	9.6%	12.0%	11.4%	13.4%
Business service activities (MN)	10.2%	16.5%	11.7%	11.0%	13.4%
Public administration, education & health (OPQ)	8.1%	18.6%	20.6%	22.8%	17.9%
Other services & household activities (RST)	2.1%	4.0%	3.1%	3.3%	3.5%

Source: Regional gross value added (balanced) by industry, BRES, ONS, 2018. Shading denotes the top 3 sectors in each area.

Note: *Morley GVA per sector figures for 2018 are approximated using Leeds GVA per sector and BRES employees per sector figures for Morley and Leeds.

In 2018 the productivity gap between Leeds and the UK average was approximately £3,100 per worker, as shown in Figure 3.1. Productivity in Leeds had previously been consistently higher than West Yorkshire and Yorkshire & the Humber, but fell behind the UK average in 2011, leading to a growing productivity gap. Lower productivity levels in West Yorkshire and Yorkshire & the Humber are due to much less representation in high value service sectors such as Business services, Finance & insurance activities, and Information & communication services.

Figure 3.1: Productivity (GVA per worker), 2002-2018, nominal prices



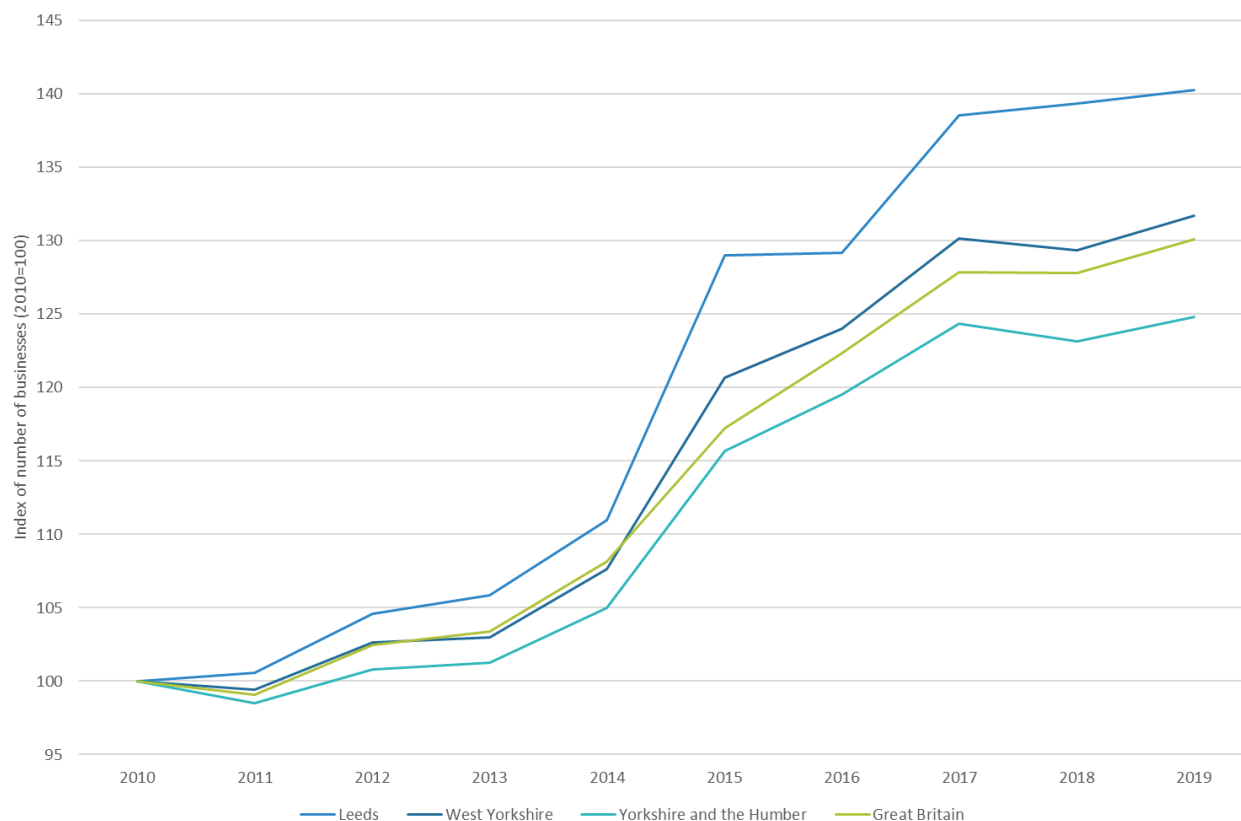
Source: GVA (B) per filled worker, Sub-regional productivity, ONS, 2002-2018

3.7 Business demography

Business base data is unavailable at geographies lower than the local authority (Leeds district) level. In 2019, according to the Inter-Departmental Business Register (IDBR), Leeds was home to around 28,600 businesses¹⁰, with the overall stock, as shown in Figure 3.2, growing rapidly since 2010. This growth pattern mirrors the comparator areas of West Yorkshire and Yorkshire & the Humber though Leeds growth has been stronger.

¹⁰ IDBR data covers the number of VAT/PAYE registered businesses in the UK.

Figure 3.2: Business stock, 2010-2019 (2010=100)



Source: IDBR, ONS, 2010-2019

3.7.1 Business size and sector

The UK economy is extremely reliant on small and medium sized enterprises (SMEs). An SME is defined as a firm which employs less than 250 employees or generates a turnover of less than £50 million. SMEs typically make a strong contribution within local economies.

As shown in Table 3.10, Leeds has a marginally higher prevalence of micro businesses employing nine or less employees (87.6%) when compared to the regional and UK averages (both 88.1 and 89.5%). In contrast, while there are just 165 Leeds based businesses that employ over 250 employees (0.6% of the total), this is a marginally higher share of business stock than in the comparators.

Table 3.10: Business stock by employment levels (percentage), 2019

Enterprise (number of employees)	Leeds	West Yorkshire	Yorkshire and the Humber	Great Britain
Micro (0 to 9)	87.6%	88.0%	88.1%	89.5%
Small (10 to 49)	9.9%	9.7%	9.7%	8.6%
Medium-sized (50 to 249)	1.9%	1.8%	1.8%	1.5%
Large (250+)	0.6%	0.5%	0.4%	0.4%
Total	100.0%	100.0%	100.0%	100.0%

Source: IDBR, ONS, 2019. Note totals do not add completely to 100% due to rounding within the dataset.

By examining the business base by sector, as shown in Table 3.11, the largest sectors for businesses in Leeds are in Professional, scientific & technical activities, Construction and Wholesale & retail trade, cumulatively accounting for 44.1% of Leeds' total businesses. Of these sectors, only Professional, scientific & technical activities has a higher proportion of businesses than the national average. Other key sectors for employment, such as Financial & insurance and Transport and storage, both have a higher proportion of businesses than the national average.

Table 3.11: Business base by broad sector, as % of total, 2019

Broad sector	Leeds	West Yorkshire	Yorkshire and the Humber	Great Britain
A: Agriculture, forestry & fishing	1.2%	1.9%	6.3%	5.0%
C: Manufacturing	5.1%	6.9%	6.6%	5.0%
B, D&E: Mining, electricity & water supply	0.5%	0.5%	0.6%	0.5%
F: Construction	11.5%	12.1%	12.6%	12.6%
G: Wholesale & retail trade; repair of motor vehicles & motorcycles	14.2%	17.4%	16.2%	14.3%
H: Transportation & storage	6.7%	5.8%	5.6%	4.1%
I: Accommodation & food service activities	6.0%	6.8%	7.1%	5.8%
J: Information and communication	8.5%	6.6%	5.4%	8.5%
K: Financial & insurance activities	2.8%	2.2%	2.0%	2.2%
L: Real estate activities	4.6%	3.9%	3.6%	3.7%
M: Professional, scientific & technical activities	18.3%	15.3%	14.2%	17.6%
N: Administrative & support service activities	8.9%	8.0%	7.4%	8.6%
Public sector (O,P&Q)	5.9%	6.4%	6.2%	5.7%
R: Arts, entertainment & recreation	2.1%	2.0%	2.2%	2.5%
S: Other service activities	3.9%	4.1%	4.1%	3.9%
TOTAL	100.0%	100.0%	100.0%	100.0%

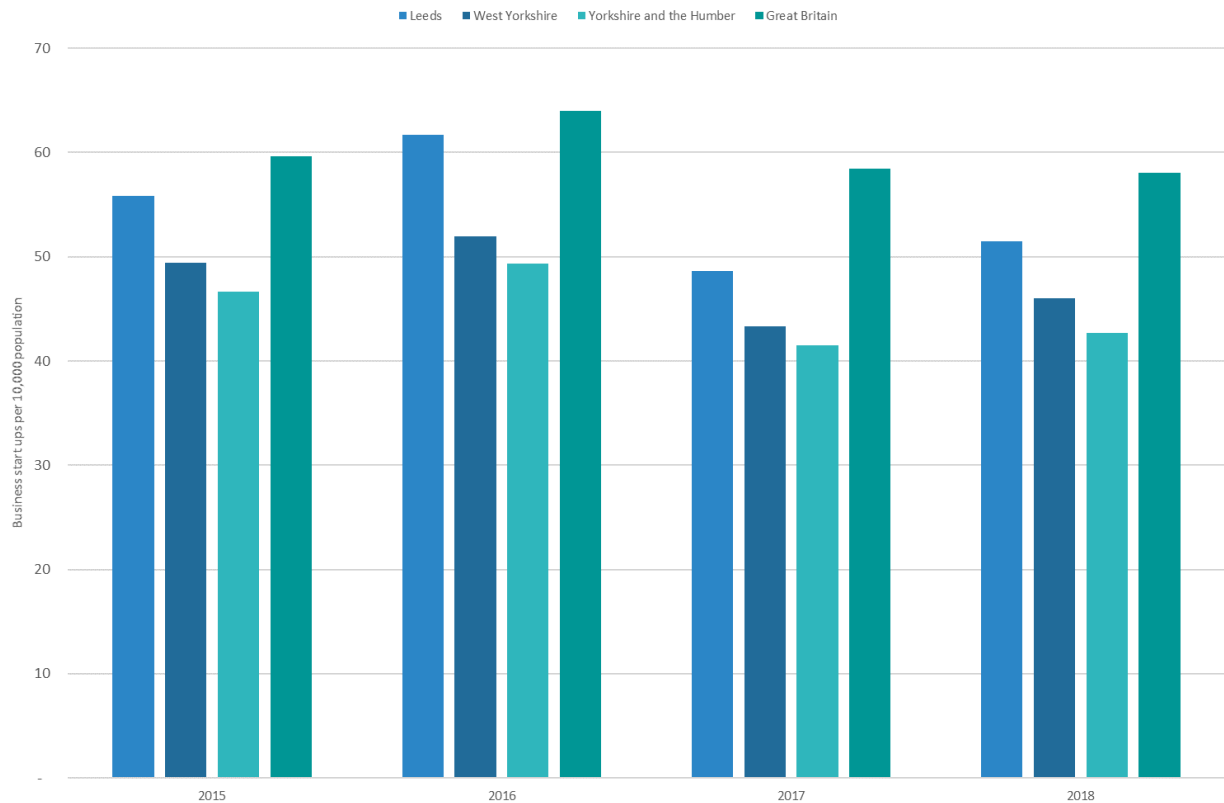
Source: IDBR, ONS, 2019. Note totals do not add completely to 100% due to rounding within the dataset. Shaded sectors are largest three sectors as a % of total.

3.8 Business dynamism

3.8.1 Business start ups

The ability to start and grow firms is an important indicator of a strong economy. Although business start-up rates in Leeds have consistently exceeded those in West Yorkshire and Yorkshire & the Humber over 2015-2018, the district rates have remained relatively stable at around 50 per 10,000 population. Rates in Leeds, at 51.5 per 10,000 population in 2018, are also considerably lower than national rates, at 58.0 per 10,000 population, and remained so throughout this period. This suggests factors are hindering entrepreneurial confidence in Leeds and the surrounding region.

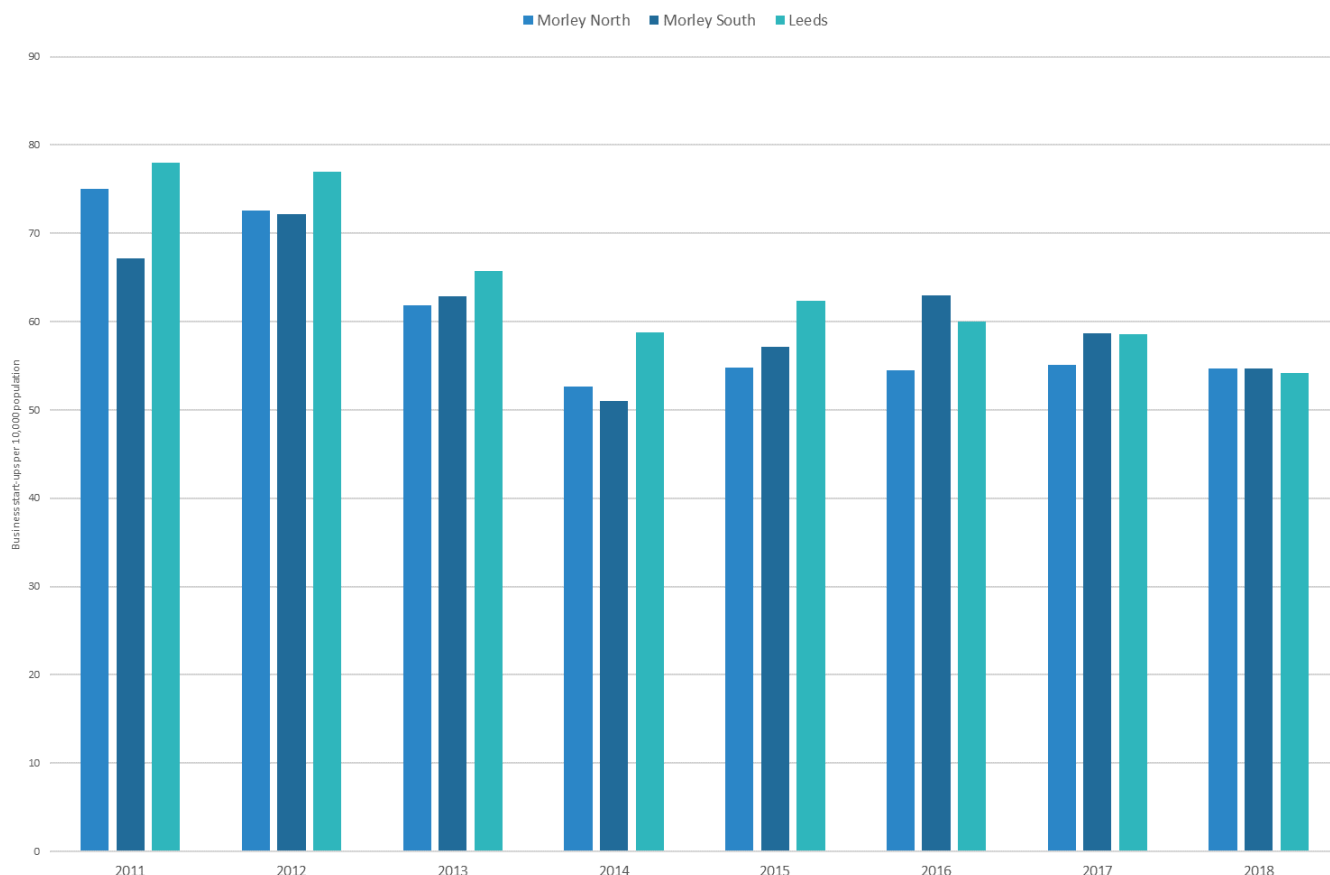
Chart 3.3: Business start-ups per 10,000 population, 2015-2018



Source: IDBR, ONS, 2015-2018

Bank Search data obtained by Leeds City Council shows the number of start-ups at lower geographies than the district level. In 2018, business start-ups are at 54.7 per 10,000 for both Morley North and South, which represents a slightly higher total than Leeds (54.2 per 10,000). Chart 3.4 shows that since 2014, business start-ups in Morley North and South have remained consistent after falling, on average, from 2011 to 2014, suggesting a relatively stable core business base. Leeds initially outperformed both Morley wards over this period but has since fallen slightly behind Morley North and South in the most recent period.

Chart 3.4: Business start-ups per 10,000 population, 2011-2018



Source: Bank Search, Companies House, 2011-2018, ONS

3.8.2 Business survival rates

Business survival rates for the period 2014 to 2018 are shown in Table 3.12 below. Leeds' new start business base showed considerable resistance in this period, exhibiting a survival rate of 51.2% in year 4, compared to 49.3% nationally. However, alongside Leeds' moderate start up rates, this might represent entrepreneurs in Leeds taking fewer risks, and therefore lower dynamism.

Table 3.12: Business survival rates by year after birth, 2014-2018

Area	Year 1	Year 2	Year 3	Year 4
Leeds	91.7%	77.0%	63.5%	51.2%
West Yorkshire	92.1%	75.9%	61.5%	49.8%
Yorkshire and the Humber	92.5%	76.5%	62.0%	49.9%
Great Britain	92.3%	75.9%	61.3%	49.3%

Source: IDBR, ONS

3.9 Key points

- In Morley, the key employment sectors are in Professional services (33.0%), Wholesale and retail trade (25.0%) and the Public sector (10.6%). The employment structure is similar to that of Leeds and reflects Morley's role as a key service centre for public administration,

retail and other key services for the surrounding metropolitan population, and as a satellite town for Leeds that plays an important and integrated role in the city's economy.

- Exploring Morley's employment base in more detail shows the town's important economic role as a key service centre for Retail and wholesale trade and the Public sector, but also shows substantial growth in employee numbers in Financial services and wider Professional services, which is now a key sector in Morley. The key, over-represented sectors (relative to the national rate) in Morley are:
 - Retail trade, except of motor vehicles and motorcycles.
 - Activities auxiliary to financial services and insurance activities.
 - Wholesale trade, except of motor vehicles and motorcycles.
 - Financial service activities, except insurance and pension funding.
 - Activities of head offices; management consultancy activities.
 - Warehousing and support activities for transportation.
 - Office administrative, office support and other business support activities.
 - Manufacture of fabricated metal products, except machinery and equipment.
 - Postal and courier activities.
- In 2018, the Morley economy generated an estimated £1.3 billion of GVA, which was principally driven by Distribution & transport, Accommodation & food, Financial & insurance and Business services sectors.
- Morley is over-represented in Financial and insurance activities and makes a greater contribution to Leeds' GVA within the sector at 27.2% as a percentage of Morley total GVA, compared to 6.8% and 7.2% regionally and nationally. This is driven by Morley's strong employment base in the sector.
- The Leeds economy has remained consistently more productive than West Yorkshire and Yorkshire & the Humber levels (per worker) since 2002 but has dipped below the national average with a widening productivity gap since 2011.
- In 2019, Leeds was home to around 28,600 businesses, and the business base is dominated by micro businesses. Enterprise levels are low with high survival rates highlighting a relatively static business base.

4 Labour market characteristics

This section gives an overview of Morley's labour market, in terms of participation rates, skills and occupations, travel to work patterns, and wages. This helps to understand its relative performance to the city.

4.1 Economic activity

Economic activity considers those within the labour market who are either working or looking for work (i.e. those who are employed or unemployed)¹¹. In 2019, the economic activity and employment rates in Leeds exceeded those in West Yorkshire and Yorkshire but fell slightly below those across Great Britain. Correspondingly, economic inactivity and unemployment rates are lower in Leeds than in West Yorkshire and Yorkshire & the Humber, and broadly in line with those across Great Britain¹².

Table 4.1: Economic activity, inactivity, employment and unemployment rates (as % of those aged 16-64), 2019

Type of activity	Leeds	West Yorkshire	Yorkshire and the Humber	Great Britain
Economic activity rate	77.9%	75.8%	77.2%	78.9%
Economic inactivity rate	22.1%	24.2%	22.8%	21.1%
Employment rate	74.6%	72.3%	73.7%	75.8%
Self-employment rate	10.4%	9.7%	9.4%	10.9%
Unemployment rate	4.2%	4.6%	4.5%	4.0%

Source: APS, ONS, 2019.

Using 2011 Census data to examine economic activity in Morley highlights that labour market participation rates were substantially higher than at the district and national levels with higher levels of employment and economic activity.

Table 4.2: Economic activity, inactivity, employment and unemployment rates (as % of those aged 16-74), 2011

Cohort	Morley	Leeds	West Yorkshire	Yorkshire and the Humber	England and Wales
Economic activity rate - aged 16-74	76.2%	69.5%	68.5%	68.4%	69.7%
Economic inactivity - aged 16-64	23.8%	30.5%	31.5%	31.6%	30.3%
Employment rate - aged 16-64	69.8%	59.4%	59.7%	60.0%	61.9%
% aged 16-74 who are self employed	7.2%	7.5%	8.1%	8.4%	9.7%
Unemployment rate - aged 16-74	3.8%	4.8%	5.0%	4.8%	4.4%

Source: Census 2011, ONS. Note: shading denotes where the percentage performs better than the national average.

¹¹ Recent labour market statistics on economic activity, skills and occupations are available at district level only (from APS). For Morley, only 2011 Census data is available to examine details on economic activity, skills and occupations. A further complication is that whilst APS uses a working age population aged 16-64 the Census considers one between 16-74, therefore the figures are comparable across the geographies but not between datasets.

¹² These economic activity figures represent the labour market in 2019 and do not consider the implications of the COVID-19 pandemic.

4.1.1 Economic inactivity

Broadly, the levels of economic inactivity in Morley are lower than district, regional and national comparators. While Morley has overall low levels of economic inactivity, the primary reason is retirement which accounts for 55.1% of the economically inactive working age population, compared to 45.6% nationally. Although retirement is the primary reason for economic inactivity across all geographies, the proportion of the economically inactive that are retired in Morley significantly exceeds that in Leeds¹³. This is also seen in the population breakdown, where Morley has a higher proportion in the 65+ age cohort than Leeds.

Conversely, the proportion of students in Morley is significantly lower than in all comparator geographies. Leeds is home to five universities, attracting a number of students to the city and therefore inflating the student population across the district. Long-term sickness or disability, accounts for 16.4% of the economically inactive population compared to 13.2% in Leeds and 13.8% nationally. This is also evidenced in the relatively higher rates of chronic disease covered in section 5.5.

Table 4.3: Economic activity by reason (as a % of those aged 16-74 who are economically inactive), 2011

Activity	Morley	Leeds	West Yorkshire	Yorkshire and the Humber	England and Wales
Economic inactivity rate	23.8%	30.5%	31.5%	31.6%	30.3%
Retired	55.1%	40.6%	42.8%	46.5%	45.6%
Student	11.2%	26.9%	19.9%	18.7%	19.2%
Looking after home or family	11.3%	12.0%	14.8%	13.6%	14.3%
Long term-sick or disabled	16.4%	13.2%	14.6%	14.2%	13.8%
Other	6.0%	7.3%	8.0%	7.0%	7.2%

Source: Census 2011, ONS. Note: shading denotes where the percentage exceeds the national average.

4.1.2 Unemployment

Based on the 2011 Census, the unemployment rate in Morley was 3.8%, lower than in all comparable geographies. This is supported by recent claimant count data¹⁴ which is an unemployment measure based solely on those claiming benefits principally for the reason of being unemployed (and therefore underestimates the true picture as not everyone unemployed and seeking work claims benefits).

As displayed in Table 4.4, in 2019 the proportion of working age claimants in Morley was 2.0%, which is lower than the average across Leeds (2.9%), regionally and nationally (2.7%), indicating low levels of unemployment¹⁵.

¹³ NB - As per the population data above, the proportion of the total population aged 65+ in Morley is slightly higher than in Leeds but much lower than the regional and national rates.

¹⁴ Claimant count data combines those claiming Jobseeker's Allowance and those claiming Universal Credit who are required to seek and be available for work.

¹⁵ This claimant count data is based on 2019 figures and therefore does not consider the impact of COVID-19 on unemployment rates.

Table 4.4: Claimant count as % of residents aged 16-64, 2019

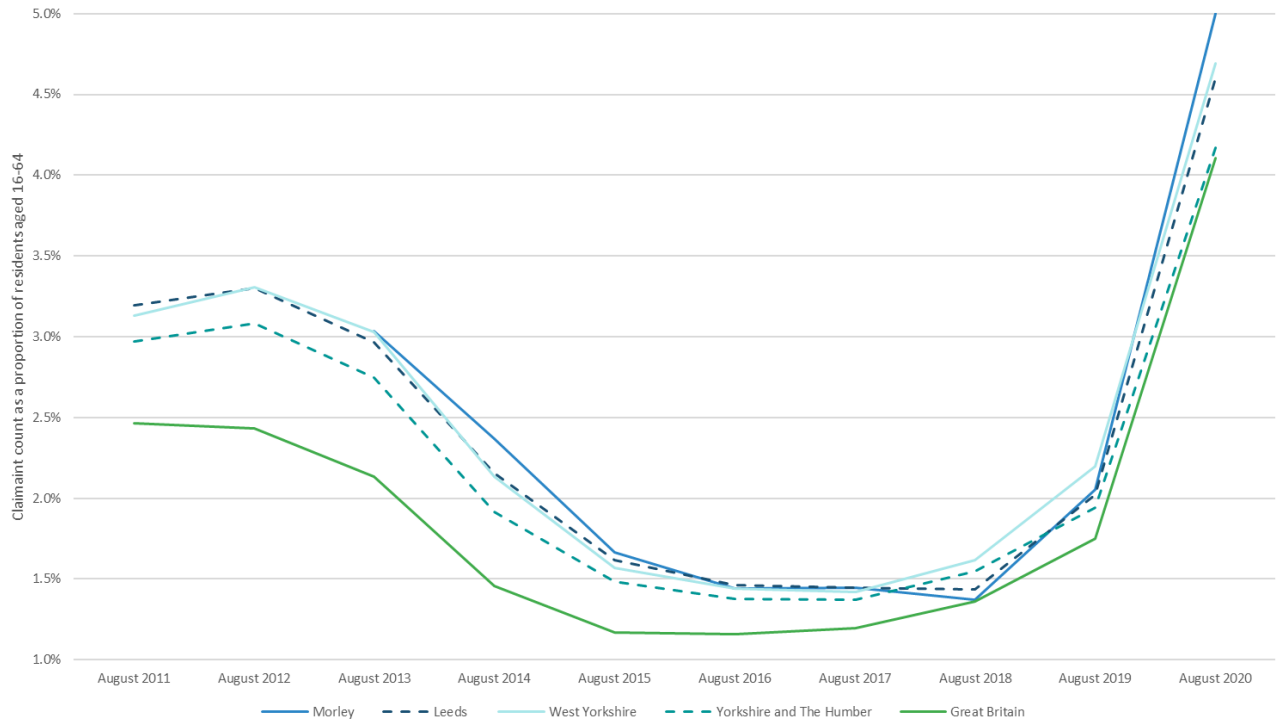
Unemployment by cohort	Morley	Leeds	West Yorkshire	Yorkshire and the Humber	Great Britain
Average claimant count 2019	2.0%	2.9%	3.3%	3.0%	2.7%
Claimants by ages, as a % of all claimants aged 16-64					
Aged 16-24	17.0%	19.2%	20.2%	20.3%	19.1%
Aged 25-49	59.3%	57.8%	56.4%	55.9%	55.6%
Aged 50-64	23.7%	23.0%	23.4%	23.8%	25.3%

Source: Claimant Count, ONS, 2019. Note: shading denotes where the percentage exceed the national figure.

Almost 60% of claimants in Morley were aged between 25 and 49, higher than the district (57.8%) and national (55.6%) figures indicating that unemployment for residents in this age range may be an issue in the town. Conversely, youth unemployment is comparatively low in the town suggesting good training and employment prospects for young people. However, the relatively very low share of residents in Morley in this age bracket (see population data above), suggests that Morley struggles to retain residents of this age meaning perhaps that they relocate rather than claiming unemployment benefits locally.

Claimant count proportions have risen significantly in 2020, as a result of the COVID-19 pandemic. The chart below presents the most recent claimant count data (August 2020) and assesses this in time series back to 2011 to view the trend. The chart shows rapid rises in claimant count proportions across all geographies, with Morley's rate rising from a low of 1.4% in August 2018 to 5.0% in August 2020. Interestingly, the claimant count proportion was increasing across all geographies in the period between 2018 and 2019, from the lowest levels seen between 2015 and 2018. Further analysis of COVID 19 impacts on employment can be found in Section 7.

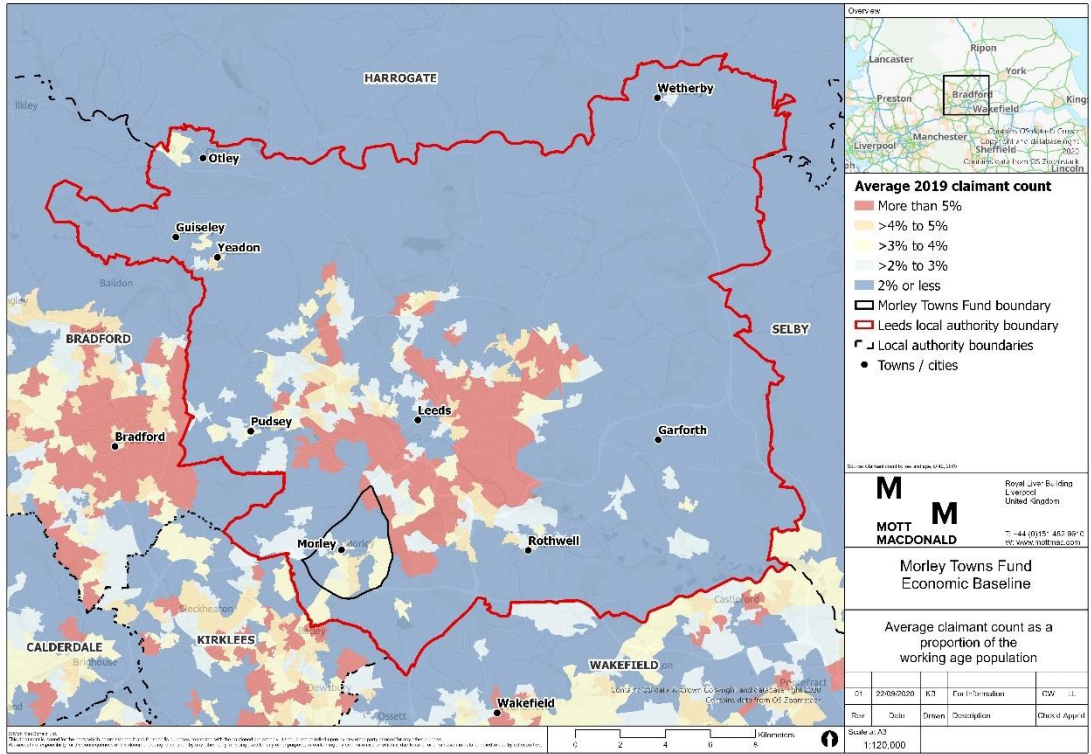
Chart 4.1: Claimant count as a proportion of working age population (16-64), 2011-2020



Source: ONS, 2011-2020. Note: Data for Morley available from 2013 only

Examining unemployment rates by location, as displayed in Map 4.1 below, demonstrates that there are significant disparities in the prevalence of claimants across Leeds district. The higher proportion of claimants are concentrated in the centre of the district, around Leeds City Centre and surrounding areas such as Headingley, Harehills and Beeston. Periphery towns such as Wetherby, Pudsey, Garforth and Otley have significantly lower levels of claimants.

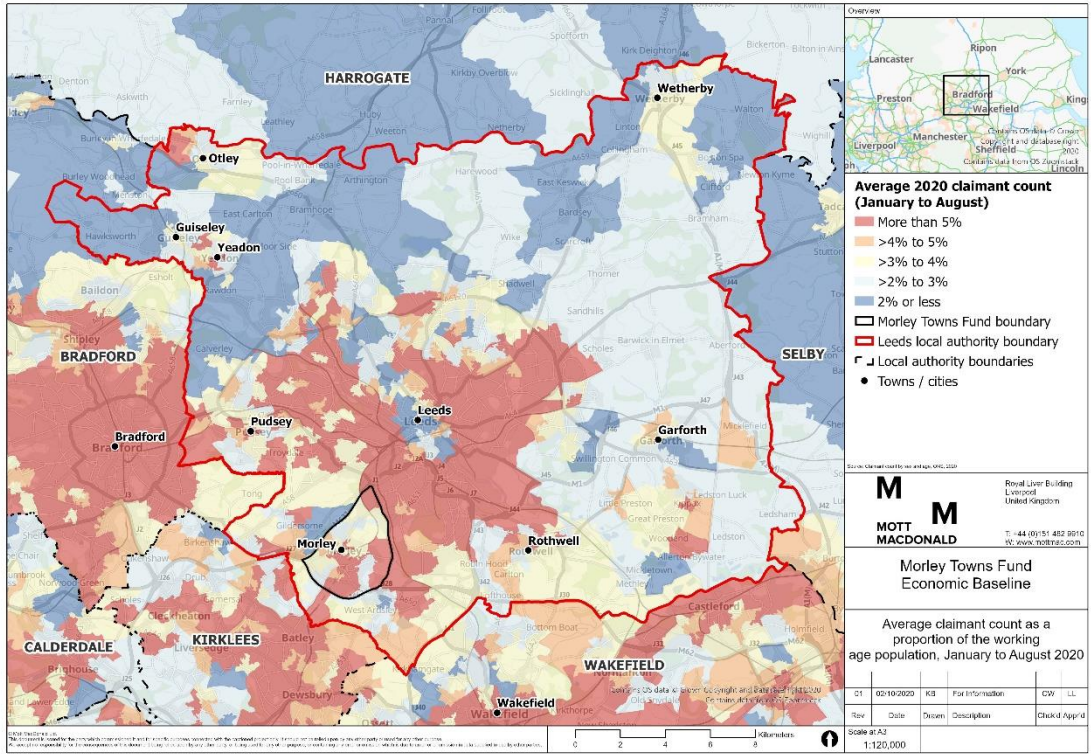
Map 4.1: Average claimant count as a proportion of the total working age population (16-64), 2019



Source: Mott MacDonald based on claimant count 2019 and mid-year population estimates, 2019

Map 4.2 below presents the average claimant count proportion for 2020, highlighting the impacts of rising employment from COVID-19. All areas of the District are experiencing rising levels of unemployment, with many of the urban areas now seeing levels of 5% and over.

Map 4.2: Average claimant count as a proportion of the total working age population (16-64), 2020

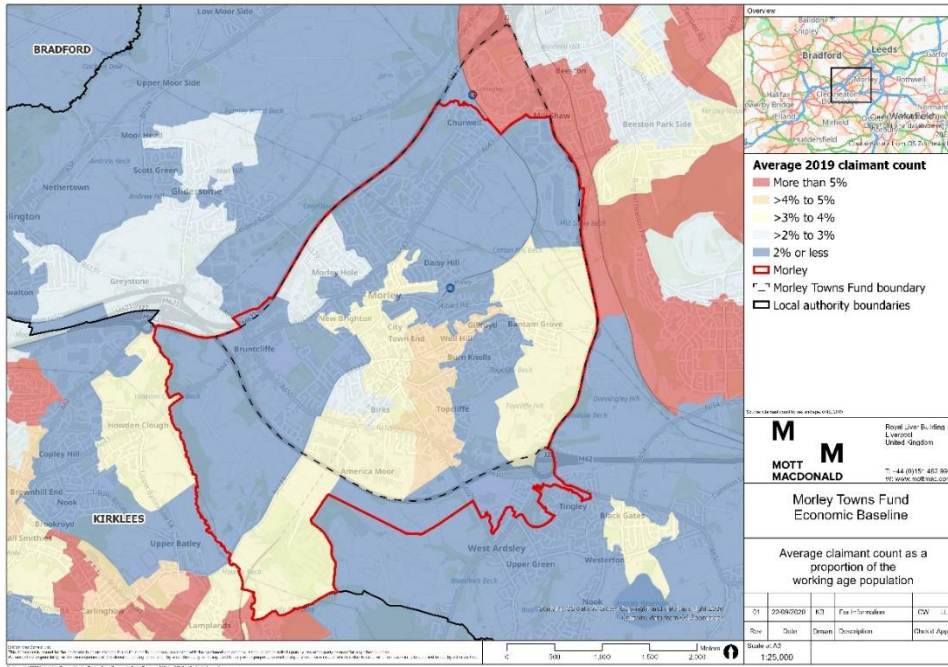


Source: Mott MacDonald based on claimant count 2020 and mid-year population estimates, 2019

Maps 4.3 and 4.4 below present this data at Morley level. Map 4.3 shows that in 2019, while the overall proportion of claimants within Morley was 2.0%, there are disparities between higher levels (3% or higher) in the centre and south of the town and lower levels to the north. Additionally, there is a clear divide along the A6110 between lower levels in Morley and higher levels in Beeston (in the north east of the below map).

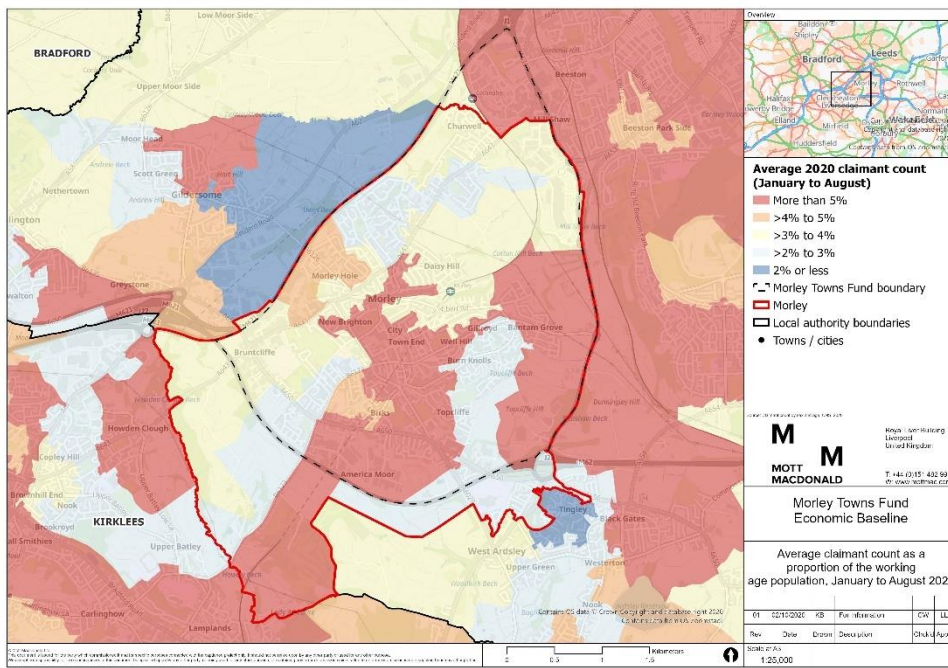
The spatial trend is similar in the 2020 map, with higher levels (5% or higher) in the centre and south of the town. Most areas have seen rises of between 2 and 3% in the last year.

Map 4.3: Average claimant count as a proportion of the total working age population (16-64) in Morley, 2019



Source: Mott MacDonald based on claimant count 2019 and mid-year population estimates, 2019

Map 4.4: Average claimant count as a proportion of the total working age population (16-64) in Morley, 2020



Source: Mott MacDonald based on claimant count 2020 and mid-year population estimates, 2019

4.2 Travel to work

Based on 2011 Census data (the most comprehensive recent data), both Morley and Leeds are net importers of labour, with significant in-commuting to the town and district from elsewhere. Given the status of Leeds as the economic and administrative hub of West Yorkshire and wider Leeds City Region, it is expected that people travel to work within the district from surrounding areas.

Table 4.5: Travel to work summary, 2011

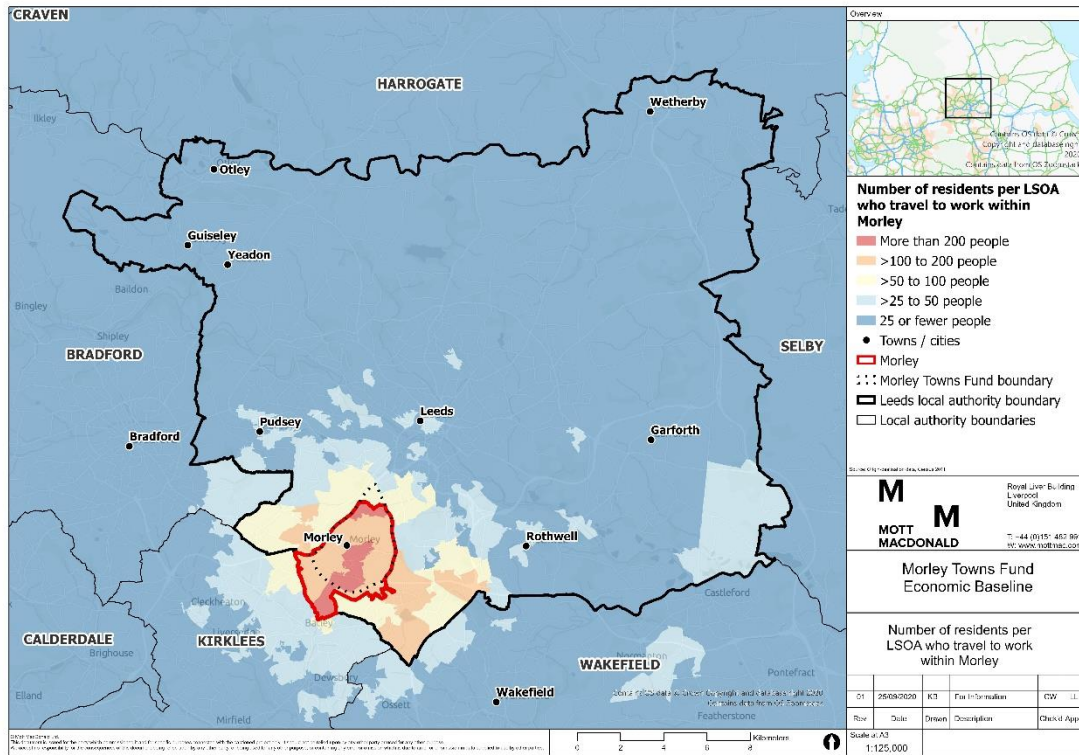
Journeys	Morley	Leeds	West Yorkshire	Yorkshire and Humber
Total journeys to work to	19,100	357,413	883,226	2,030,657
Total journeys to work from	10,900	301,695	859,031	2,029,907
Net commuting	8,200	55,718	24,195	750
Self-containment (live and work)	33.6%	66.1%	88.7%	94.5%

Source: Origin destination statistics, Census 2011, ONS

In 2011, there were approximately 8,000 more journeys into Morley than out of the town for work. This, as in Leeds, highlights that there is a high level of in-commuting from neighbouring areas for work. Approximately 33.6% of jobs in Morley were filled by Morley residents, with the remaining two-thirds filled by residents in neighbouring local areas such as Beeston, Gildersome, West Ardsley and Thorpe-on-the-Hill. This is highlighted in Map 4.5 and Map 4.6, which show the localised nature of the Morley labour market, and the reliance on Leeds city centre as an outbound work location. This map is based on 2011 data and therefore does not consider jobs in Morley created as part of the White Rose Shopping Centre expansion in 2015 and 2018 and additional tenants of the White Rose Office Park and Millshaw Industrial Estate. Data within the Morley redline boundary shows where commuters from outside Morley work within the town.

The areas with high numbers of residents commuting to work within Morley are within a 15-minute drive, as highlighted further in Section 5.3.

Map 4.5: Travel to work, inbound to Morley, 2011



Source: Mott MacDonald based on Census 2011, ONS

Map 4.6 displays the outbound labour flows from Morley into neighbouring towns and cities such as Leeds, Wakefield, Halifax and Huddersfield. Leeds city centre is the biggest attractor of workers with approximately 1,800 workers travelling to jobs there from within Morley. As discussed further in Section 5.3, Morley is well connected by public transport and the motorway network to towns and cities such as Leeds, Bradford and Huddersfield, making it an attractive commuter town for residents.. However, it is clear that for the majority of residents in Morley, their employment falls either in Morley or Leeds, with only small concentrations of employment elsewhere, in Wakefield, Normanton and Huddersfield. Data within the Morley redline boundary shows where residents that live in Morley and commute out live.

For residents travelling outbound from Morley into Leeds city centre for work¹⁶, 39% of these journeys were made by public transport while 56% of journeys were made by car, either as the driver or as a passenger.¹⁷ Conversely, for journeys made from the wider Leeds local authority into Morley for work, only 17% of these were by public transport and 66% were by car. Additionally, for journeys into Morley from the Leeds local authority, 15% of these were by active travel modes (bicycle or on foot) compared to only 3% of journeys from Morley to Leeds city centre. As discussed in Section 5.3.2, passenger numbers at Morley and Cottingley stations have seen significant growth over recent years and therefore the proportion of journeys made by public transport is likely to have increased since the Census was conducted in 2011. The

¹⁶ Due to data availability, MSOA's were used to determine Morley and Leeds rather than LSOA's. The MSOA's which have been used for Morley are E02002422, E02002424, E02002431, E02002433, E02002435. The MSOA's for Leeds City Centre are E02006875 and E02002392.

data does not consider the impact of COVID-19 and the potential move to home working for some of the workforce. At present, it is not possible to determine the long-term impact the pandemic will have on commuting patterns into and out of the town.

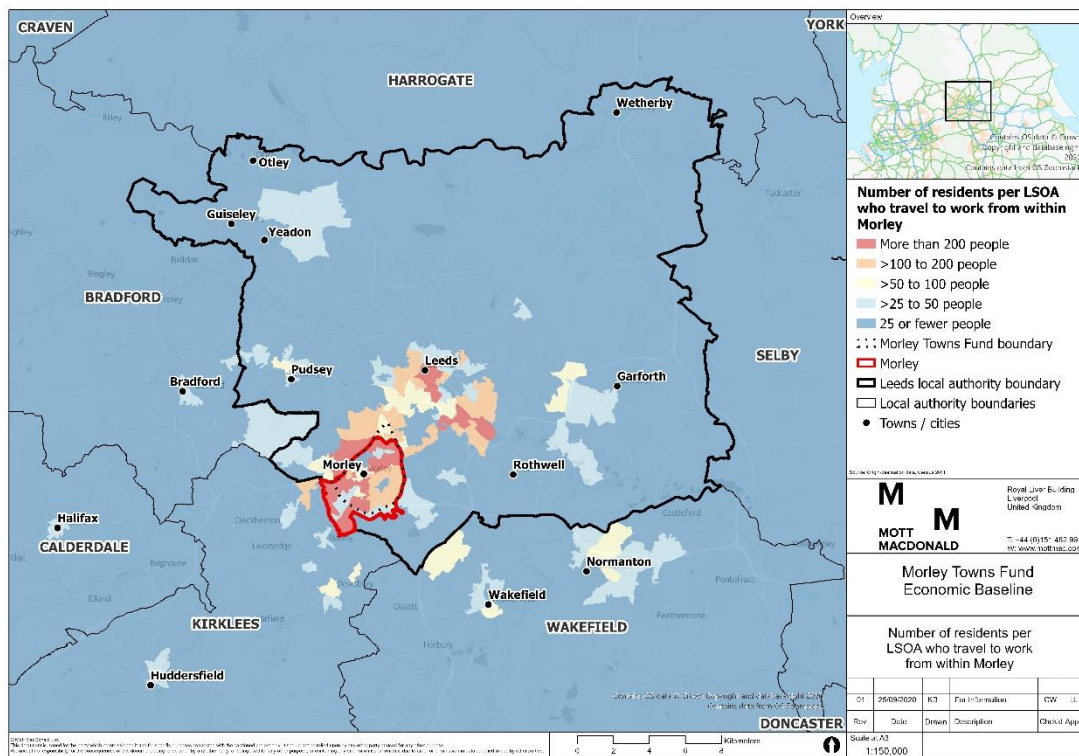
Public transport brings about benefits relating to the environment, cost and inclusivity while travel by car can have environmental, affordability and other journey quality impacts such as frustration due to heavy congestion. Benefits relating to commuting are weighted more heavily towards residents travelling out of the town rather than for those travelling in and accessing employment within the town.

Table 4.6: Travel by mode for journeys into Leeds city centre and into Morley

	Car (driver or passenger)	Public transport	Active travel
Travelling to Leeds city centre from Morley	56%	39%	3%
Travelling to Morley from the wider Leeds local authority	66%	17%	15%

Source: Mott MacDonald based on Census 2011 origin-destination data

Map 4.6: Travel to work, outbound from Morley, 2011



Source: Mott MacDonald based on Census 2011, ONS

The presence of White Rose Shopping Centre & Industrial Park, and Capitol Park, as major employment sites, have a major role in travel to work patterns. By removing the LSOAs

corresponding to these sites¹⁸, as shown in Table 4.7, total journeys to work to and from Morley are greatly reduced. However, Morley still remains a net importer of labour, and possesses a self-containment rate of 25.6%.

Table 4.7: Travel to work Morley comparison, 2011

Journeys	Morley	Morley (without White Rose and Capitol Park)	Difference
Total journeys to work to	19,100	11,700	8,564
Total journeys to work from	10,900	9,800	2,190
Net commuting	8,200	1,800	6,374
Self-containment	33.6%	25.6%	4.8%

Source: Origin destination statistics, Census 2011, ONS.

Note: Self-containment difference is a percentage point difference.

4.3 Wages

As shown in Chart 4.2 below, average workplace-based earnings in 2019 in Leeds are around £1,700 higher than residence-based earnings. This demonstrates that workers travel into the district for work and reside elsewhere, and that those who travel into the district for work have better paid work than those who live in Leeds (on average). This is not an unusual situation and reflects the trade-off where people are prepared to travel longer distances to secure higher paid work. The Leeds Adopted Core Strategy acknowledges that there are more people travelling to work within Leeds rather than out, with an estimated 100,000 people travelling to work within the city¹⁹. Leeds is the economic hub of the West Yorkshire; Leeds City Region²⁰ and the wider region, and significant employment opportunities are available within the city and district.

Despite this, the resident-based wage for those in Leeds is broadly in line with or higher than average wages across wider West Yorkshire and Yorkshire & the Humber, though is lower than the average annual national wage of £37,600. This national figure considers highly paid jobs in London and the South East and therefore a more comparable figure is that across Yorkshire & the Humber, which Leeds compares favourably to.

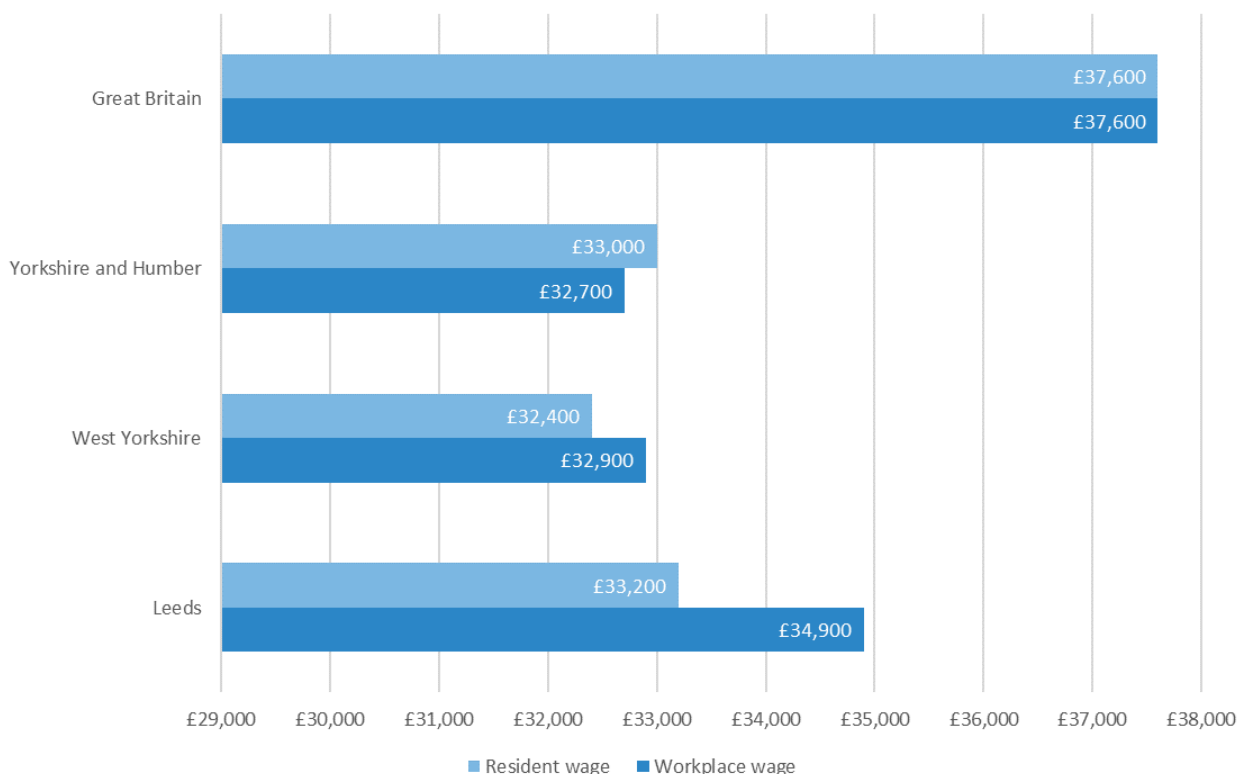
Wages are also closely linked to occupation and qualification levels, where those in higher skilled/higher paid professions are more likely to find appropriate employment in larger centres such as within Leeds city centre, so long as they are willing to travel. Accessibility by public transport and car to the city centre is good, attracting Morley residents and cementing the town as an attractive commuter town with lower house prices and good accessibility to surrounding employment centres. Leeds city centre can be accessed within 15 minutes by car and within 30 minutes by public transport from Morley town centre, demonstrating the excellent commuter links to and from the town.

¹⁸ LSOAs excluded are

¹⁹ Leeds City Council, 2019, Leeds Local Plan Core Strategy (as amended by the Core Strategy Selective Review 2019)

²⁰ Leeds City Region comprised of the five local authorities within West Yorkshire, plus Barnsley, Craven, Harrogate, Selby and York local authorities.

Chart 4.2: Resident and workplace wages (annual), 2019



Source: Annual Survey of Hours and Earnings, ONS, 2019. Refers to mean full-time gross annual wages.

4.4 Skills and qualifications

4.4.1 Qualifications

Qualifications within Leeds are high with those qualified to degree level or above (NVQ4+) higher than in West Yorkshire and Yorkshire & the Humber at 40.1% but in line with national rates (as shown in the recent APS data, in Section 3). Based on 2011 data, qualification levels within Morley are comparatively low, with 23.3% of the population qualified to NVQ Level 4 or higher, compared to 26.9% in Leeds and 27.2% in Yorkshire & the Humber. This figure is, however, in line with that across West Yorkshire and England & Wales. Correspondingly, the proportions of residents qualified to NVQ Level 1 (GCSEs grades D-G), NVQ Level 2 (five GCSEs A*-C) or those with no qualifications is higher in Morley than in Leeds.

Table 4.8: Highest level of qualification, as a proportion of the population aged 16-64, 2011

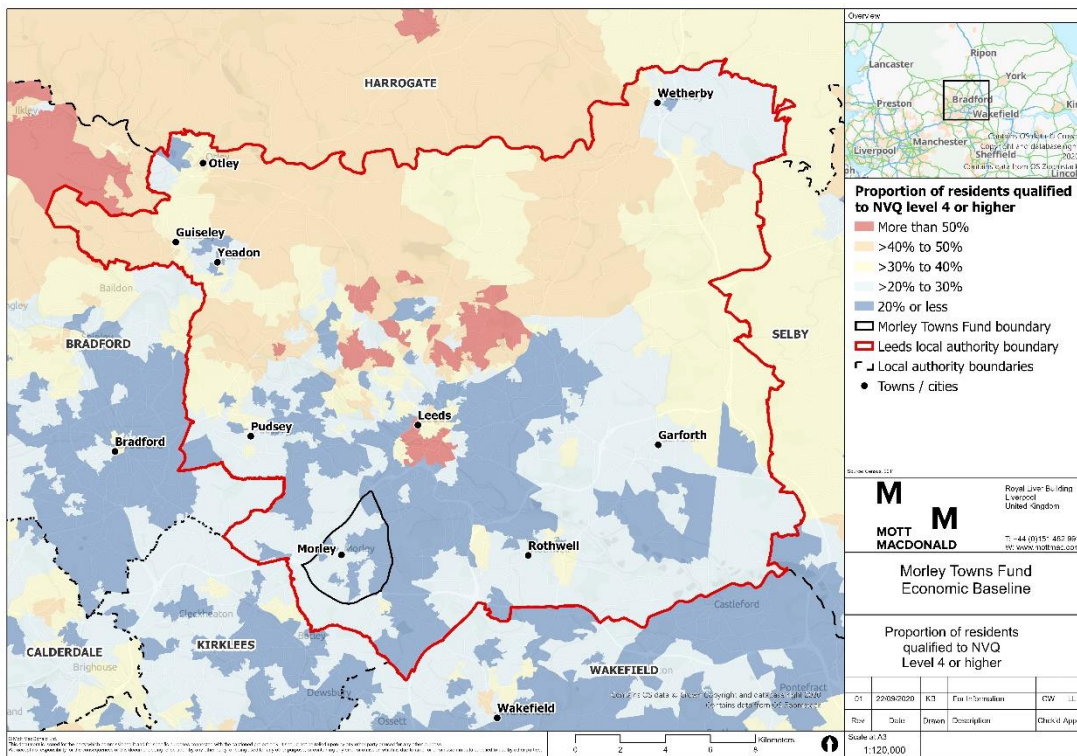
	Morley	Leeds	West Yorkshire	Yorkshire and Humber	England and Wales
No qualifications	24.4%	23.2%	25.9%	22.7%	25.8%
NVQ Level 1 qualifications	15.1%	12.6%	13.4%	13.3%	13.6%
NVQ Level 2 qualifications	16.2%	14.1%	14.9%	15.3%	15.5%
NVQ Level 3 qualifications	12.4%	14.7%	12.7%	12.3%	12.8%
NVQ Level 4 qualifications and above	23.3%	26.9%	23.8%	27.2%	23.3%

	Morley	Leeds	West Yorkshire	Yorkshire and Humber	England and Wales
Apprenticeship and other qualifications	8.7%	8.4%	9.3%	9.2%	9.1%

Source: Census, 2011. Note: shading denotes where the percentage exceeds or is equal to the national average.

As shown in Map 4.7, there is a very clear divide between northern areas of the city which have higher proportions of residents qualified to NVQ Level 4 or higher while fewer residents in southern areas are qualified to this level. An exception is within Leeds city centre where highly qualified professionals working in the city centre reside.

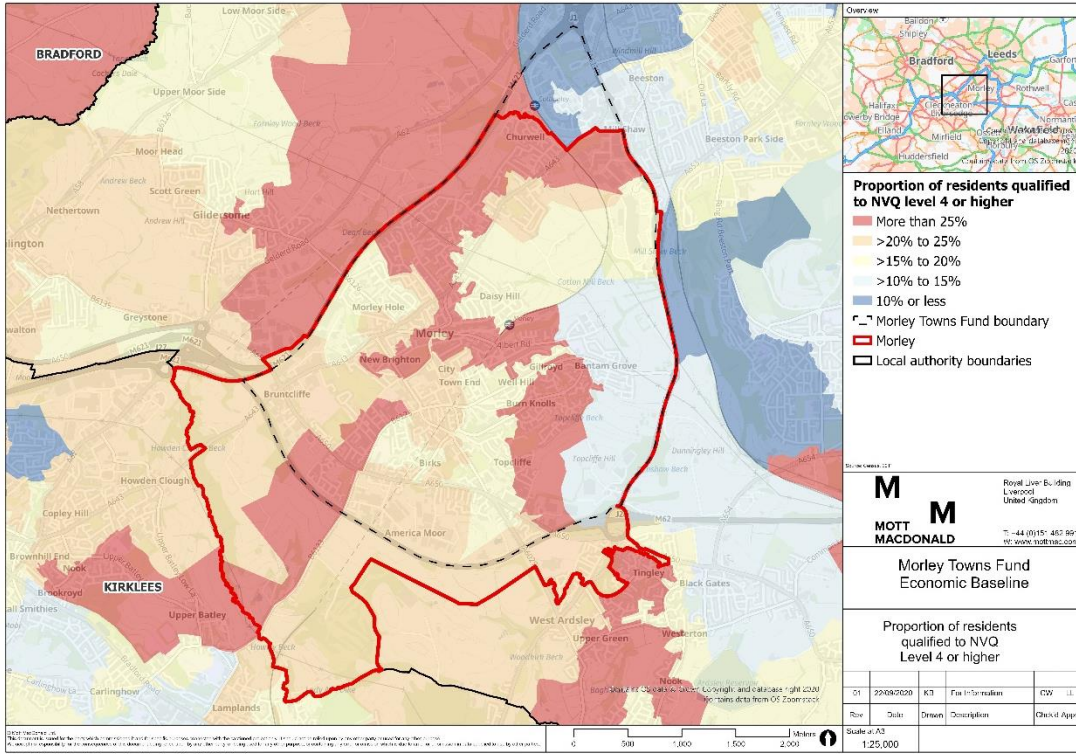
Map 4.7: Proportion of all residents (aged 16-64) qualified to NVQ Level 4 or higher, 2011



Source: Mott MacDonald based on Census 2011

Map 4.6 displays the distribution of residents qualified to NVQ Level 4 or higher across Morley. Areas where there are high proportions of residents qualified to NVQ Level 4 or higher are in the central area including the town centre, around Burn Knolls and Topcliffe to the east, Churwell to the north and New Brighton to the south and west. The area surrounding Bantam Grove to the east had particularly low levels of residents qualified to NVQ Level 4 or higher in 2011, at around 12%. While there are some spatial disparities within the town, the proportion of residents across the whole town who are qualified to NVQ Level 4 or higher is below wider comparator areas.

Map 4.8: Proportion of all residents (aged 16-64) qualified to NVQ Level 4 or higher in Morley, 2011



Source: Mott MacDonald based on Census 2011

On 29th September 2020, the Government announced funding for free adult education courses for those without A-Levels or equivalent qualifications. The proportion of residents in Morley who, in 2011, were educated to NVQ level 3 or higher (A Levels or equivalent) fell below that across Leeds, indicating a skills gap across the two geographies. Across Morley, approximately 56% of adult residents could benefit from this new scheme.

4.4.2 Occupations

Leeds, given the higher qualifications of its residents, also has a relatively high proportion of residents working within higher skilled occupations. For instance, based on 2011 data, 18.5% of residents in employment are in professional occupations compared to 15.4% in Yorkshire & the Humber and 17.4% nationally. The top three skilled occupations represent 41.1% of all residents employed in Leeds which is higher than in Yorkshire & the Humber at 36.7% but broadly in line with the national figure of 40.9%.

This contrasts to Morley where there are fewer residents in the most highly skilled occupations (SOC major groups 1-3) and a higher proportion of administrative and secretarial occupations (14.3%), sales and customer service occupations (10.3%) and process, plant and machine operatives (7.8%) compared to Leeds and nationally. This reflects the economic structure of the town and surrounding area which is more geared towards administrative support, retail and sales. The White Rose Shopping Centre and Office Park and Millshaw Park Industrial Estate located towards the north east of the town and Howley Park Industrial Estate to the south

contribute significantly to the retail and sales, administrative and secretarial and process, plant and machine operative occupations within the town.

Table 4.9: Occupation structure as a proportion of total employment, 2011

Occupation	Morley	Leeds	West Yorkshire	Yorkshire & the Humber	England and Wales
1. Managers, directors and senior officials	9.6%	9.5%	9.8%	9.9%	10.8%
2. Professional occupations	15.5%	18.5%	16.0%	15.4%	17.4%
3. Associate professional and technical occupations	13.8%	13.1%	11.9%	11.4%	12.7%
4. Administrative and secretarial occupations	14.3%	12.0%	11.6%	10.9%	11.4%
5. Skilled trades occupations	11.4%	10.1%	11.4%	12.3%	11.5%
6. Caring, leisure and other service occupations	7.4%	9.1%	9.5%	9.7%	9.4%
7. Sales and customer service occupations	10.3%	9.4%	8.9%	9.1%	8.4%
8. Process, plant and machine operatives	7.8%	6.6%	8.7%	8.8%	7.2%
9. Elementary occupations	10.0%	11.6%	12.2%	12.5%	11.1%

Source: Census 2011, Note: shading means over-represented compared to England and Wales

4.5 Deprivation

MHCLG's 2019 Index of Multiple Deprivation (IMD) measures relative deprivation at LSOA level and is based on seven domains of deprivation²¹, all of which are weighted differently to provide a combined deprivation score. It is important to recognise that IMD is a measure of relative deprivation, not affluence, and that not every resident in a highly deprived area will themselves be deprived and vice versa, there will be some deprived residents in less deprived areas²².

The IMD ranks Leeds the 55th most deprived local authority in England out of a total of 317²³, indicating relatively high levels of overall deprivation. While Leeds has high levels of overall deprivation, as shown in Table 4.10, the proportion of residents in the most deprived quintile in Morley is 21.1%, below the figures across Leeds and the wider Yorkshire and the Humber region, but broadly in line with the figure nationally. Additionally, there are fewer people living in the least deprived areas compared to Leeds, Yorkshire and the Humber and nationally.

Table 4.10: Proportion of residents per deprivation quintile, 2019

Quintile	Morley	Leeds	West Yorkshire	Yorkshire and Humber	England
Most deprived quintile	21.2%	33.9%	36.8%	30.8%	20.0%
Second quintile	27.2%	13.2%	19.0%	17.5%	20.6%
Third quintile	21.3%	19.5%	16.7%	17.7%	20.3%
Fourth quintile	21.6%	19.2%	17.0%	18.8%	19.7%
Least deprived quintile	8.7%	14.3%	10.5%	15.2%	19.4%

Source: MHCLG Indices of Multiple Deprivation 2019 and 2019 mid-year population estimates, 2019

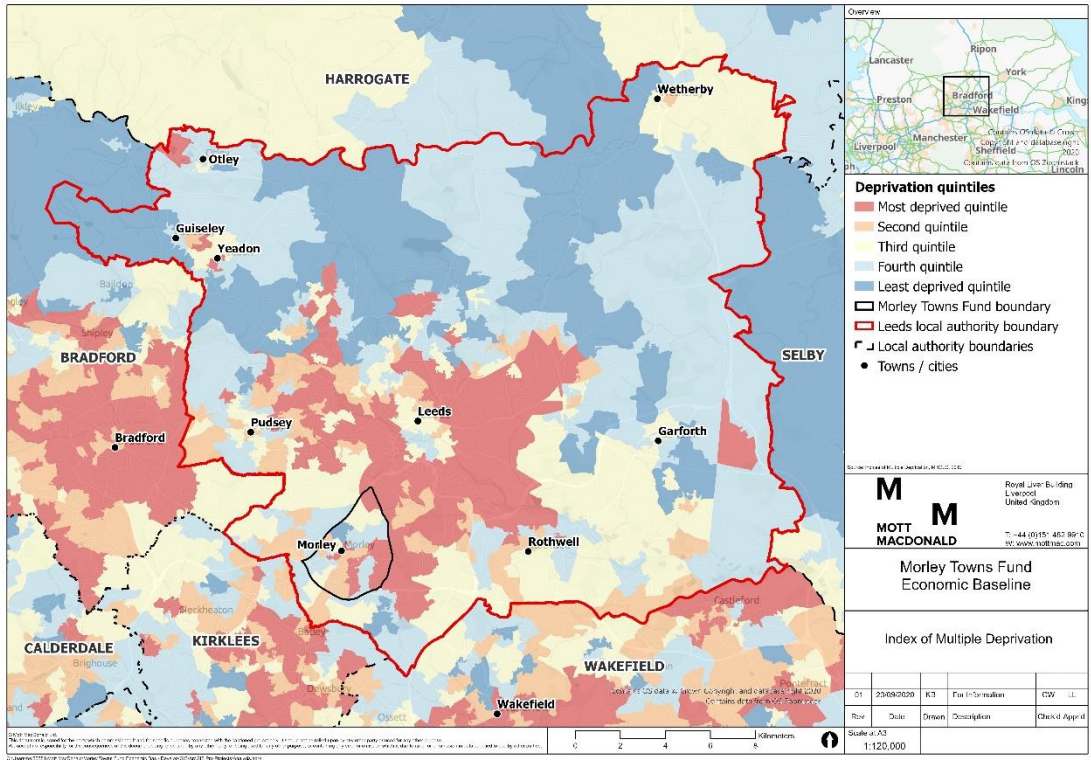
²¹ These include income, employment, education, skills & training, health & disability, crime, barriers to housing and services and living environment deprivation.

²² MHCLG, 2019, Index of Multiple Deprivation.

²³ Based on a rank of the average IMD score.

Map 4.9 below shows that there are clear disparities between the less deprived north and east of Leeds district and the more deprived southern, western and central areas. These more deprived areas broadly align with the areas with higher proportions of unemployment claimants and lower proportions of residents with NVQ Level 4 qualifications or higher.

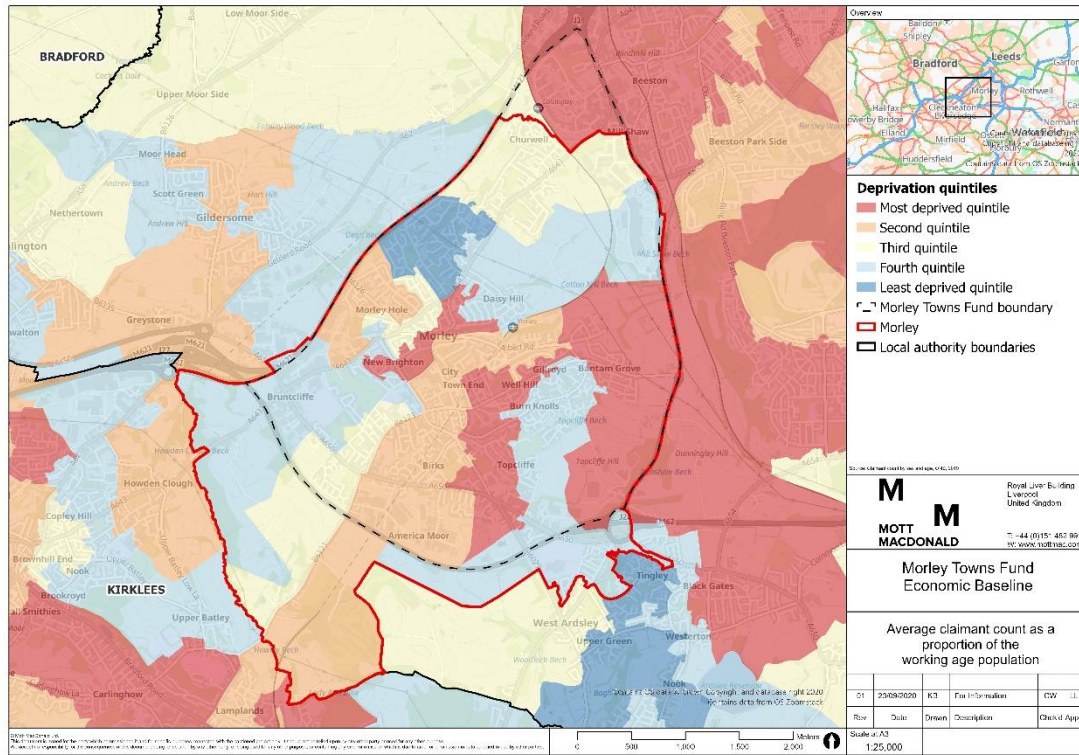
Map 4.9: Index of Multiple Deprivation, Leeds, 2019



Source: Mott MacDonald based on Indices of Multiple Deprivation, MHCLG, 2019

As displayed in Map 4.10, there are disparities in deprivation levels across Morley, with some central and eastern areas among the 20% most deprived LSOAs nationally whilst areas to the west are amongst the 20% least deprived LSOAs nationally.

Map 4.10: Index of Multiple Deprivation, Morley, 2019



Source: Mott MacDonald based on Indices of Multiple Deprivation (IMD), MHCLG, 2019

4.6 Key points

- Overall, economic activity and employment rates in Leeds are broadly in line with those across England and Wales, while those in Morley are substantially higher (based on 2011 data). Equally, the proportion of the population who are economically active is lower in Morley. While the overall economic inactivity rate is lower in Morley, for those residents who are economically inactive, retirement is the primary reason, accounting for 55% of residents compared to 41% in Leeds and 46% nationally.
- In 2019, unemployment rates across the town (as measured by the proportion of claimants) were lower in Morley than in Leeds or nationally. Within those who were claimants, the proportion of those aged between 16-24 was lower than in comparator areas and the proportion of those in the 25-49 age group was higher than all comparator areas.
- For 2020, the unemployment position has worsened in Morley as it has across the country. Prior to the economic crisis, no area in Morley saw a claimant count rate greater than 5%. Now the south and south west of the town has much higher claimant rates, with most areas of the town increasing by 2-3%.
- Morley, as well as Leeds, is a net importer of labour, with more people travelling into the area for work than travelling out for work. Journeys into Morley for work tend to originate from a localised area around the town in the south west of the district. Journeys out are more sporadic, with particularly high out-commuting flows to Leeds city centre, and lower out-commuting flows to surrounding areas such as Huddersfield and Normanton.

- The skills and qualification profile of the town indicates that there are fewer residents employed in the most highly skilled (SOC 1-3) jobs compared to England and more people employed in administrative & secretarial and sales & retail jobs. This aligns with the qualification profile of the town in which fewer residents are qualified to NVQ Level 4 or higher.
- Deprivation levels in the town are mixed with the proportion of residents in the most deprived, middle and second least deprived quintiles broadly in line with the national figure. Leeds is the 55th most deprived local authority, with approximately 33% of its residents living within the 20% most deprived LSOA's in England. This compares to Morley where approximately 21% of residents are within the 20% most deprived LSOAs in the country. The southern and eastern parts of Morley are more deprived than the northern and western, in broad terms, and Morley has one point where one of the most deprived LSOAs in England shares a boundary with one of the least deprived LSOAs.

5 Housing, health and quality of life

This section gives an overview of Morley's housing stock, condition, and prices; transport accessibility to/from the town; and, the health position of residents.

5.1 Housing

5.1.1 Housing stock and condition

Data from this sub-section is derived from the 2020 Morley Housing Market Assessment. According to the latest Valuation Office Agency (VOA) data, in 2020 there are around 17,000 dwellings in the Morley area. Of these dwellings, the majority are terraced and semi-detached housing, which cumulatively account for 59.9% of the housing stock. Table 5.1 shows that there is a breadth of affordable housing, with 40.9% of housing in council tax band A, and 65.8% in tax band A or B.

Table 5.1: Dwelling type by council tax band, Morley

Dwelling type	Council Tax Band				Total
	A	B	C-E	F+	
Terraced house	21.9%	8.4%	4.6%	0.0%	34.9%
Semi-detached houses	6.1%	9.4%	9.5%	0.0%	25.0%
Detached houses	0.0%	0.0%	13.7%	0.7%	14.4%
Flat	12.0%	6.4%	0.1%	0.0%	18.6%
Bungalow	0.9%	0.7%	5.6%	0.0%	7.1%
Total	40.9%	24.9%	33.5%	0.7%	100.0%

Source: Morley Housing Market Assessment, 2020

Table 5.2 shows that over three-quarters (76.8%) of Morley's housing stock are either 2-bedroom or 3-bedroom dwellings, with only 10.9% larger than 3-bedrooms. Overall, 30.8% of dwellings are council tax band A properties with 1 or 2 bedrooms, 24.3% are band B with 2 or 3 bedrooms and 27.8% are band C with 3 or more bedrooms.

Table 5.2: Number of bedrooms by council tax band, Morley

Number of bedrooms	Council Tax Band				Total
	A	B	C-E	F+	
1	11.8%	0.4%	0.0%	0.0%	12.2%
2	19.0%	11.7%	5.7%	0.0%	36.3%
3	9.8%	12.6%	18.1%	0.0%	40.5%
4 or more	0.3%	0.3%	9.7%	0.7%	10.9%

Source: Morley Housing Market Assessment, 2020

The English Housing Survey (EHS)²⁴ produces national data on dwelling condition. In the absence of local stock condition data, applying national trends to the stock profile of Morley provides an estimate for the quality of housing stock in Morley²⁵. This analysis would suggest that around 19.5% of dwelling stock is non-decent, which is similar to the national average of

²⁴ Leeds City Council, 'Morley Housing Market Assessment' (2020).

²⁵ Analysis completed by Leeds City Council.

20.6%. The number of dwellings likely to fail the minimum standard of decent homes criteria is estimated to be 10.9% (compared with 11.9% nationally).

5.1.2 Housing stock

2011 Census data can be used for comparison of Morley's housing market to comparator areas. Based on 2011 Census data, as shown in Table 5.3, there were approximately 14,100 dwellings in Morley, which at that time reflected 4.4% of all dwellings in Leeds.

Average household size, at 2.2 residents and 4.9 rooms per household, is slightly smaller, but broadly in line with the average levels seen in Leeds. This is despite contrasting housing types, with a higher proportion of detached and terraced housing in Morley, compared to a higher proportion of semi-detached housing and flats in Leeds.

Table 5.3: Housing Stock, 2011

Dwelling type	Morley	Leeds	West Yorkshire	Yorkshire and the Humber	England and Wales
Total number of dwellings	14,100	320,600	922,500	2,224,100	23,366,000
Household size (residents per dwelling)	2.2	2.3	2.4	2.3	2.4
Average number of rooms per household	4.9	5.2	5.2	5.4	5.4
Housing type (as % of total dwellings)					
Detached house or bungalow	18.9%	14.7%	16.7%	20.8%	22.7%
Semi-detached house or bungalow	32.7%	37.5%	36.6%	37.2%	31.3%
Terraced house or bungalow	31.9%	26.5%	30.4%	27.5%	24.6%
Flat, maisonette or apartment	16.4%	20.9%	15.9%	14.2%	20.7%
Caravan or other mobile or temporary structure	0.0%	0.1%	0.1%	0.2%	0.4%
Shared dwelling	0.0%	0.3%	0.3%	0.2%	0.3%

Source: Census 2011, ONS. Shading denotes where value exceeds national average. Great Britain not available for Census data.

Within Morley, as shown in Table 5.4, owner occupied housing accounts for 67.0% of all housing tenures, which is marginally greater than regional and national averages and considerably greater than in Leeds. Rented housing is more prevalent across Leeds, where there is a much higher level of social rented properties (22.0%) compared to national rates (17.6%), and to Morley (14.0%) at a town level.

Table 5.4: Housing tenure, 2011

Tenure type	Morley	Leeds	West Yorkshire	Yorkshire and The Humber	England and Wales
Owned	67.0%	58.2%	62.9%	64.1%	63.6%
Shared ownership (part owned and part rented)	0.4%	0.4%	0.5%	0.4%	0.8%
Social rented	14.0%	22.0%	18.8%	18.1%	17.6%
Private rented	17.3%	17.9%	16.4%	15.9%	16.7%
Living rent free	1.4%	1.5%	1.5%	1.5%	1.4%

Source: Census 2011, ONS. Great Britain not available for Census data.

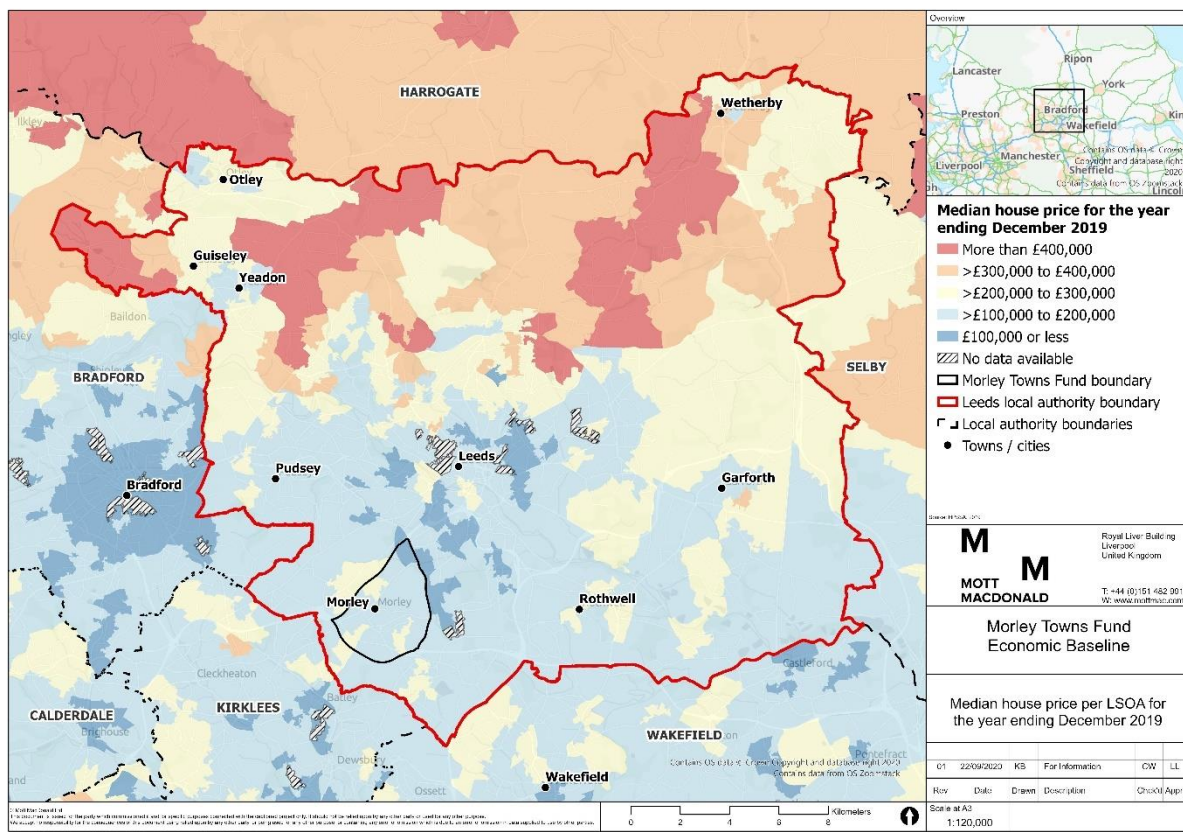
5.1.3 Housing growth²⁶

Housing growth emphasises the need to improve public transport connectivity to these areas and existing communities, to enable access to employment opportunities for everyone. There are approximately 960 dwellings on sites allocated for development throughout Morley with a large development located to the north. This emphasises the need for good transport options connecting businesses to potential employees and custom within Morley. Housing growth will bring population growth also and with that comes potential trade for businesses in Morley town centre.

5.1.4 House prices

In general, house prices within Morley are generally between £100,000 and £200,000, with some pockets of higher priced housing to the south and west, and lower priced housing to the north of the town. Across Leeds, house prices vary considerably, with higher prices found in areas to the north of Leeds district, where the landscape is more rural, and on the edge of the Yorkshire Dales. These align with the findings from Section 4, which also shows a north south divide in the district's skills base and deprivation levels.

Map 5.1: Median house price for the year ending December 2019

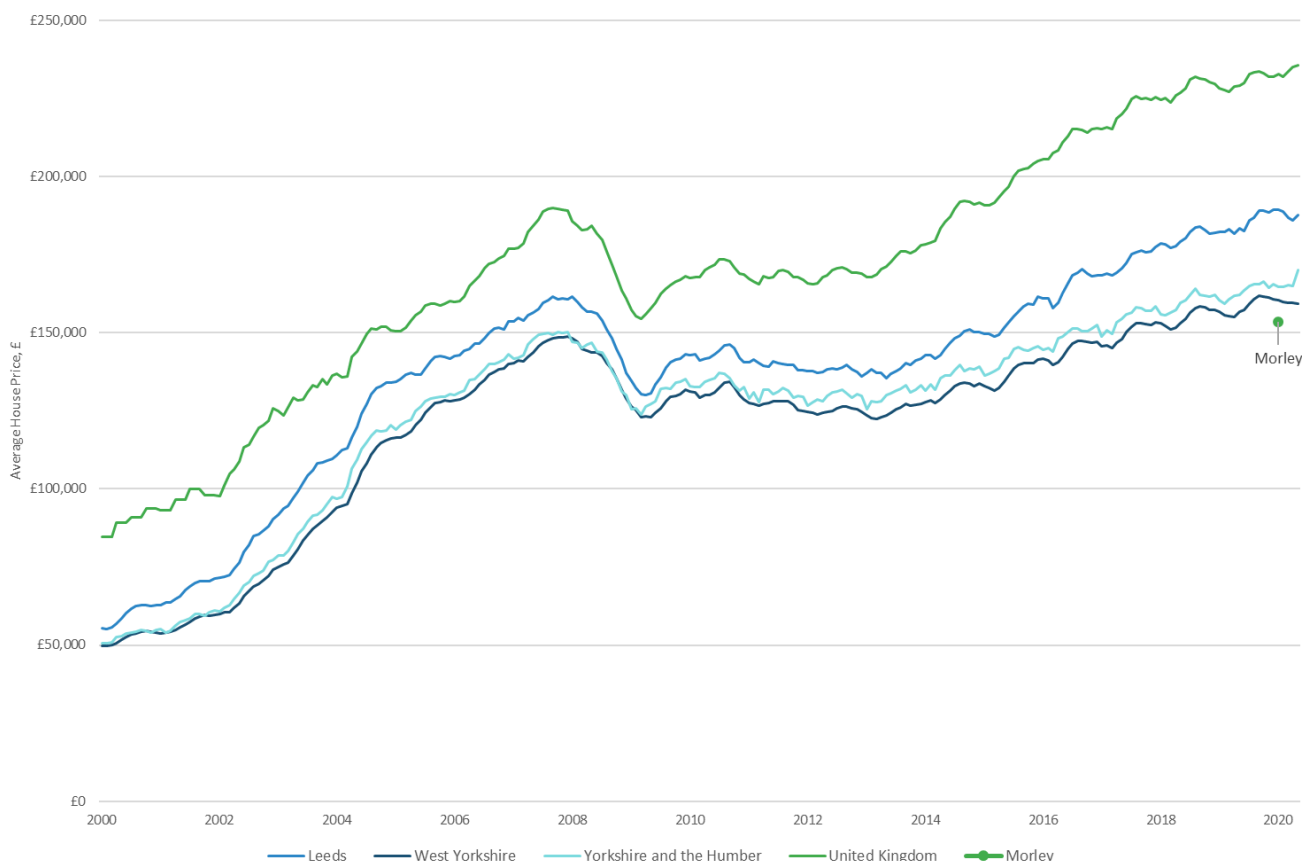


Source: Mott MacDonald based on HPSSA, ONS, 2019

²⁶ West Yorkshire Connectivity Plan – Leeds to Huddersfield Case for Change report (Mott McDonald, 2020)

In 2020, average house prices in Morley (available for 2020 only), as shown in Chart 5.1, were approximately £153,400, which is considerably lower than the Leeds average of £187,700 in the same period. It is also lower than the West Yorkshire and Yorkshire & the Humber levels, at £159,800 and £166,000 respectively. Since 2000, Leeds' average house price has remained considerably lower than national averages, at £46,100 lower than the United Kingdom level in 2020. House price movements are broadly in line with one another in terms year-on-year change with limited long term convergence or divergence.

Chart 5.1: Average house prices, 2000-20



Source: House Price Index, 2000-2020, HM Land Registry, 2020, both ONS. Great Britain not available for HPI data.

5.2 Planned development

As per the Leeds Local Plan²⁷, there are a number sites allocated for development in Morley. These are:

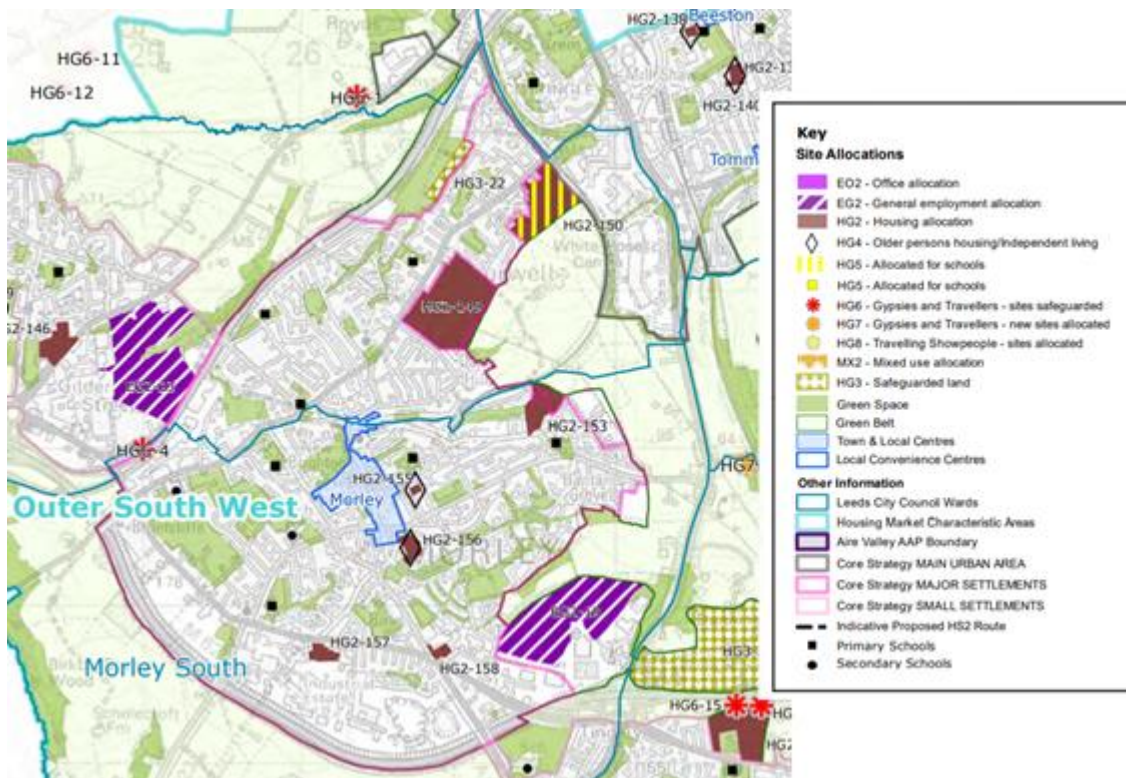
- 1. Residential** - Site HG2-149, Lane Side Farm, 20.6 Hectares for 542 dwellings, Currently greenfield land
- 2. Residential** – Site HG2-155, Joseph Priestly College, 0.4 hectares for 14 dwellings. Currently a brownfield site.

²⁷ Leeds Local Plan Development Plan Document Adopted July 2019, Site Allocations Plan Section 3: Proposals For The 11 Housing Market Characteristic Areas 10.Outer South West
<https://www.leeds.gov.uk/Local%20Plans/Site%20Allocations%20Plan/11%20SAP%20Adopted%20Plan-%20Outer%20South%20West%20HMCA.pdf>

3. **Residential** – Site HG2-156, Rod Mills Lane. 1.8 hectares for 15 dwellings. Currently brownfield land.
4. **Residential** – Site HG2-157 Britannia Road. 1.7 hectares for 63 dwellings on greenfield land.
5. **Residential** – Site HG2-158 Tingley Mills, Tingley Common. 1 hectare for 100 dwellings on brownfield land
6. **Employment** – Site EG2-19 Land Off Topcliffe Lane, Morley and to The North of Capitol Park. 26.8 hectares allocated for employment land.

The location of these sites is shown in the figure below.

Figure 5.1: Leeds Local Plan Allocated Sites - Outer South West



Source: <https://www.leeds.gov.uk/Local%20Plans/Site%20Allocations%20Plan/11%20SAP%20Adopted%20Plan-%20Outer%20South%20West%20HMCA.pdf>

Further analysis would be needed to identify barriers to development on each site and the potential interventions that could help overcome these barriers. At this juncture we have not assessed if any of these sites have been developed or are under construction presently.

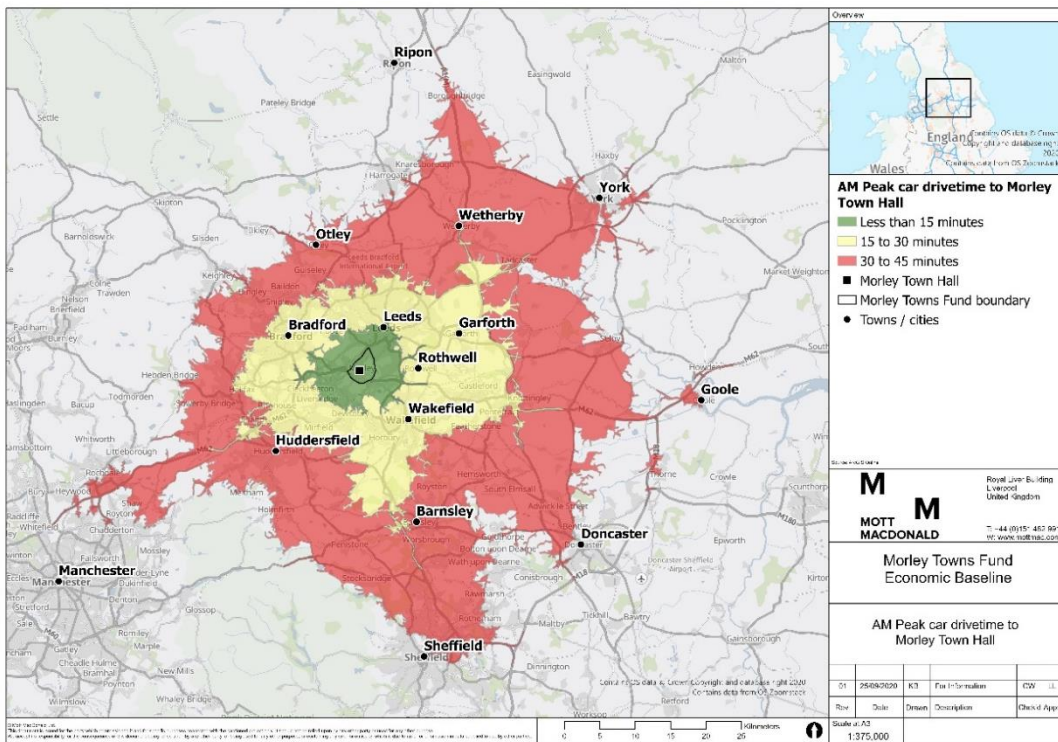
5.3 Transport and accessibility

5.3.1 Drive time analysis

Map 5.2 displays drive time bands by car towards Morley town centre during the AM peak period. Major surrounding towns and cities such as Leeds, Wakefield and Bradford are all accessible within 30 minutes from Morley while other towns such as Huddersfield, Doncaster, Barnsley, Goole and southwest areas of York are accessible within 45 minutes.

Residents within Bradford and Wakefield are able to access Morley town centre within 30 minutes by car during the AM peak period, indicating that for these residents, a commute into Morley town centre by car would be in line with the average commute by car across the UK²⁸. Morley town centre is easily accessible by car for residents in surrounding towns and cities for retail, leisure and employment.

Map 5.2: Drive time accessibility from Morley during the AM peak period



Source: Mott MacDonald based on ArcGIS Online

5.3.2 Public transport accessibility

Map 5.3 displays the public transport accessibility towards Morley town centre during the AM peak period. The town is well connected by both bus and rail connections to neighbouring towns and cities. Leeds city centre is accessible within 30 minutes, Bradford and Wakefield within 45 minutes and Huddersfield within 60 minutes. Direct rail links to Huddersfield run once per hour (a 26-minute journey) with direct links to Leeds running approximately every 30 minutes (an approximate 12-minute journey).

Office of Rail and Road (ORR) station usage figures between 2002 and 2018 indicates a 545% growth for Morley station and a 533% growth for Cottingley station, making them the second and third highest growth stations in the region behind Brighouse. In the 2017-2018 period, annual station usage was approximately 352,000 for Morley and 97,000 for Cottingley, compared to 55,000 and 15,000 in 2002-2003, respectively. Additionally, Leeds station had a 176% growth in the same time period. Growth in passenger usage could be attributed to an

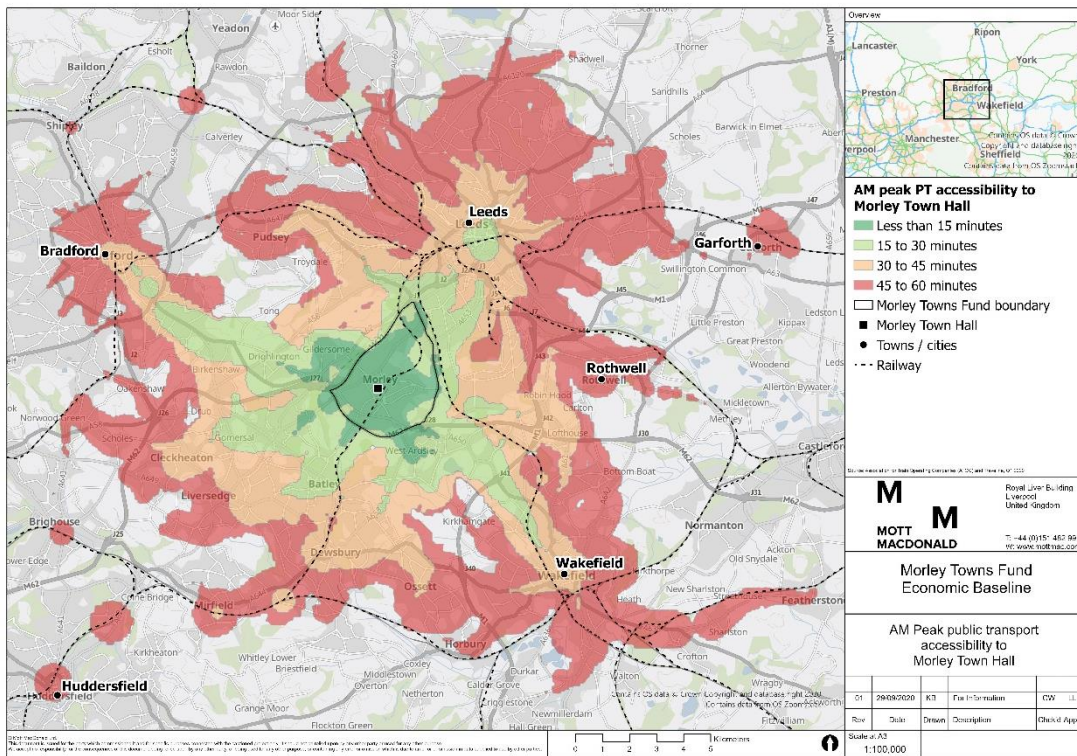
²⁸ The mean travel time between home and work for the UK is 29 minutes - Average commute and percentage travelling by car for the UK and constituent countries, 2017, ONS

increase in commuting journeys or journeys for retail and leisure purposes. It remains to be seen whether this growth trend will reverse as a result of COVID-19 impacts.

As discussed in Section 4.2, Morley acts a commuter town, predominantly for those travelling to Leeds city centre, but also other towns such as Bradford, Wakefield and Huddersfield. A 12-minute journey time into Leeds city centre by rail acts as an attractor for residents living within Morley.

While Morley town centre is well served by rail connections, planning permission has also been granted for the development of a station at the White Rose Shopping Centre and Office Park. Currently all public transport accessibility to the site is by bus or via Cottingley rail station. The station is approximately 1 mile from the White Rose shopping centre and Office Park and provides rail services to the same locations and at the same frequency as Morley. Consultation activity is currently ongoing looking at the implications of the new station for Cottingley station²⁹. A dedicated bus station within the White Rose Shopping Centre provides regular services to Leeds, Bradford, Wakefield and Huddersfield.

Map 5.3: Public transport accessibility towards Morley during the AM peak period



Source: Mott MacDonald based on Association of Train Operating Companies (ATOC) and Traveline, Quarter 1 2020

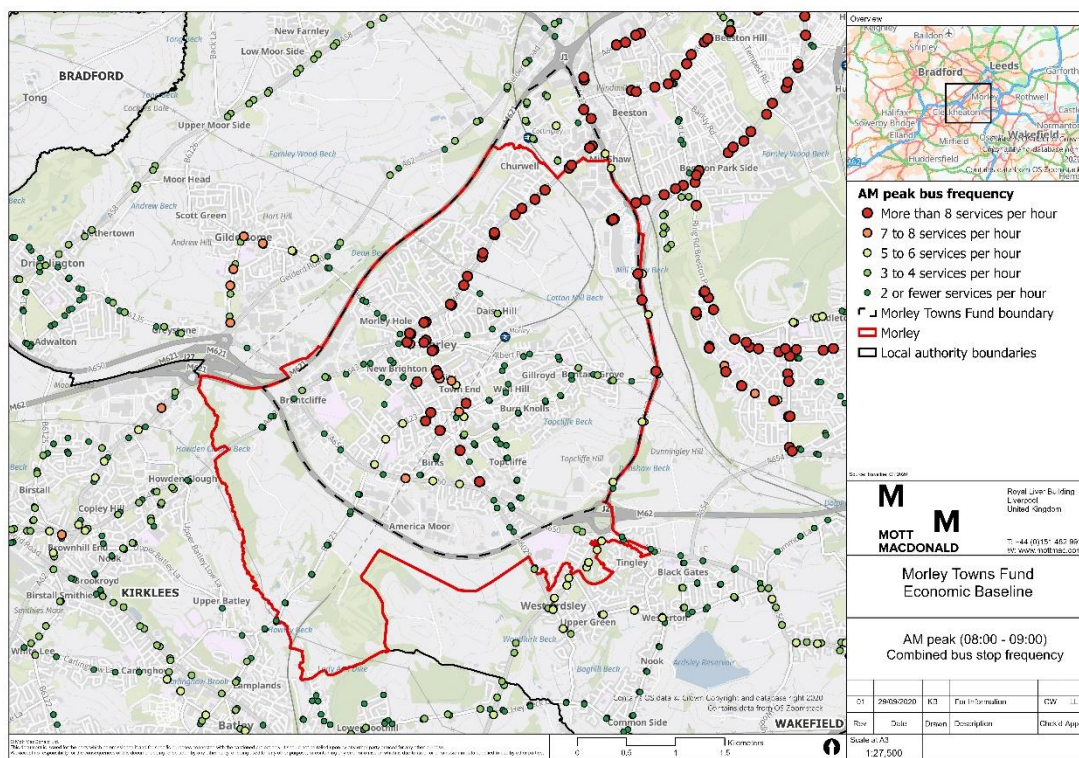
Map 5.4 presents the frequency of bus services within Morley and surrounding areas during the AM peak period. Stops within Morley Town Centre such as Queensway and Morley Town Hall are the best served, with almost 20 services per hour during the AM peak period. Additionally, there are frequent services along the A643 to the north of Morley to and from the White Rose Shopping Centre and Moortown, via Leeds

²⁹ <https://www.yourvoice.westyorks-ca.gov.uk/whiteroserailstation>

The White Rose Shopping Centre and nearby Office Park is well served by frequent bus connections, with around 60 arrivals or departures from 11 routes at the dedicated bus station per hour with destinations including Leeds, Huddersfield, Cleckheaton, Wakefield, Horsforth, Roundhay and Heckmondwike.

As discussed in Section 4.2, Morley is a net importer of labour with a large number of people travelling into the town for work. The frequent bus connections in the town centre, the White Rose Shopping Centre and Office Park and towards the south around Howley Park Industrial Estate make the town and key employment sites accessible for residents, however data in section 4.2 shows the car is still relied upon for the majority of journeys and active modes are a less popular option.

Map 5.4: Frequency of bus services during the AM peak period



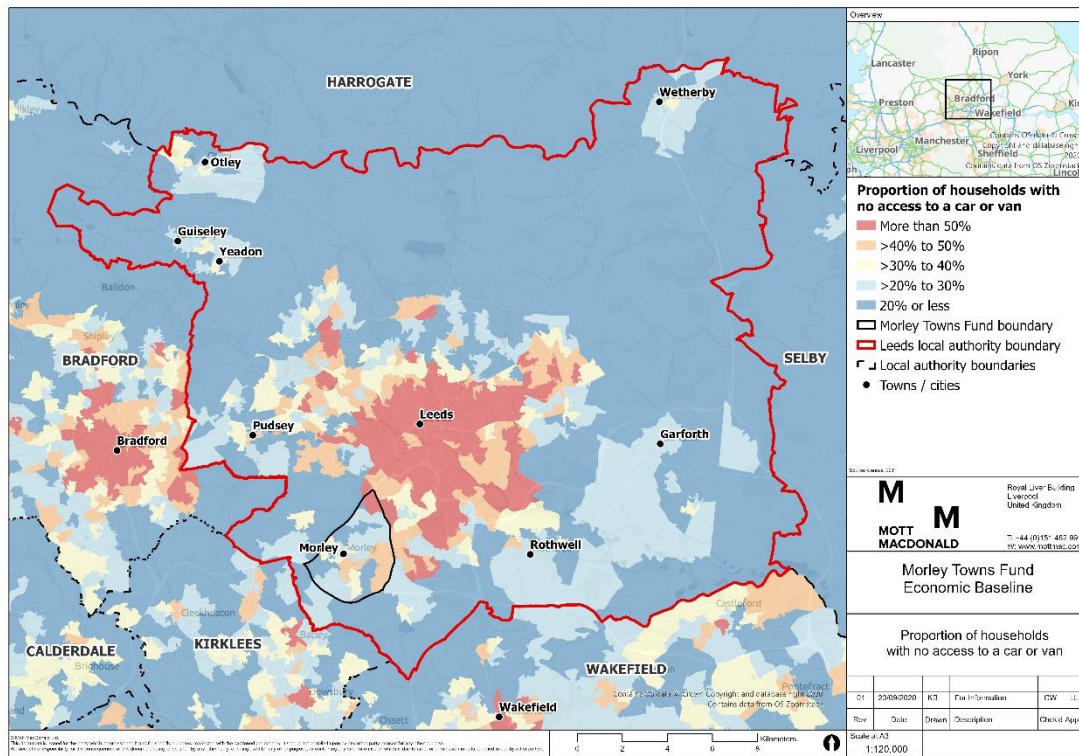
Source: Mott MacDonald based on Traveline, Quarter 1 2020

5.3.3 Car ownership levels

As shown in Map 5.5, there are disparities between the city centre and suburban areas of Leeds, and the rural areas of the district. Low levels of car ownership are likely to be associated with good public transport and accessibility within Leeds and its surrounding areas, alongside typically high insurance and parking costs for private vehicles within a city and issues around income levels, affordability and deprivation..

Ensuring that key employment areas are connected by good public transport links in both peak and off-peak time periods will enable people to access employment without owning a car. A high-quality integrated transport system will also encourage people to choose to travel by public transport rather than car which is key to meeting carbon reduction targets.

Map 5.5: Proportion of households with no access to a car, 2011



Source: Mott MacDonald based on Census 2011, ONS

The table below shows that a lower proportion of Morley’s households have a private vehicle than Leeds, West Yorkshire and Yorkshire & the Humber, but a higher proportion than the national average. This is due to the more suburbanised setting of Morley, where public transport links are more limited, and connectivity to jobs outside of Morley and Leeds may be much easier via car.

Table 5.5: Proportion of households with no car or van in household, 2011

Area	Proportion of households
Morley	26.4%
Leeds	32.1%
West Yorkshire	29.4%
Yorkshire and the Humber	27.6%
England and Wales	25.8%

Source: Census 2011, ONS

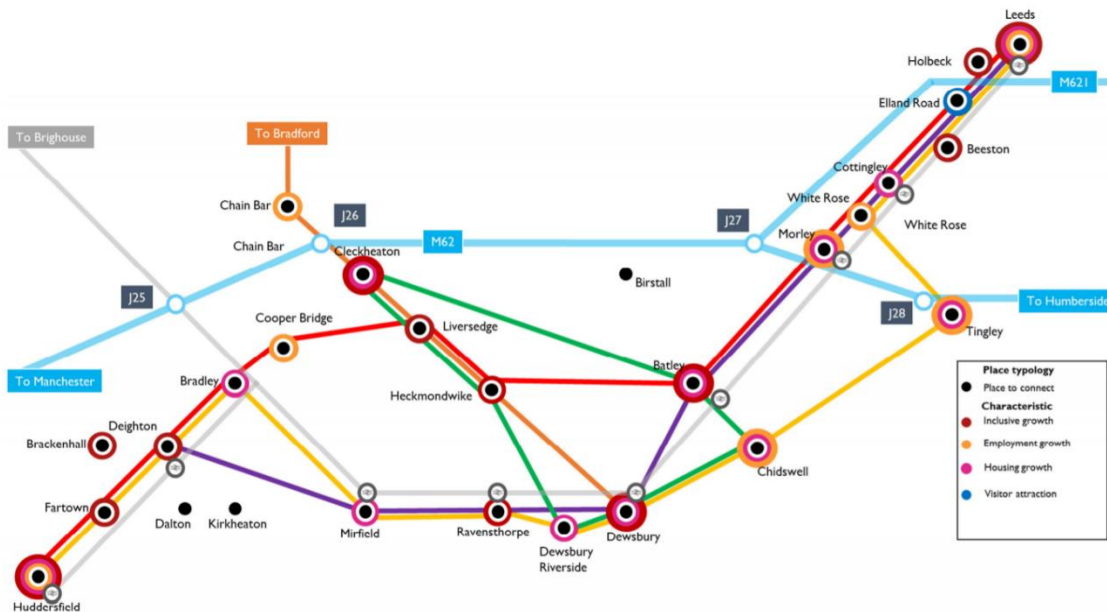
5.3.4 West Yorkshire Connectivity Plan – Leeds to Huddersfield³⁰

This Case for Change report³⁰ identified an economic area of focus between Leeds and Huddersfield and within this, several key places to connect one of which is Morley. Based on feedback from partners and the spatial analysis (which together provide an assessment of the current transport network and issues, future development plans and investment programmes),

³⁰ West Yorkshire Connectivity Plan – Leeds to Huddersfield Case for Change report (Mott MacDonald, 2020)

several “connectivity concepts” have been defined across the economic area, to demonstrate the need for improved connectivity between key places. At this stage, connectivity concepts do not relate to a specific transport mode or a specific route alignment. However, they do enable a strategic appraisal of whether there is merit in connecting people and places, as well as helping to define spatial priorities within the area. Four connectivity concepts have been defined for the Leeds to Huddersfield corridor. Both the red and purple routes connect with Morley as seen in Figure 5.1 below.

Figure 5.1: Connectivity Concepts Leeds to Huddersfield



Source: West Yorkshire Connectivity Plan - Leeds to Huddersfield Case for Change

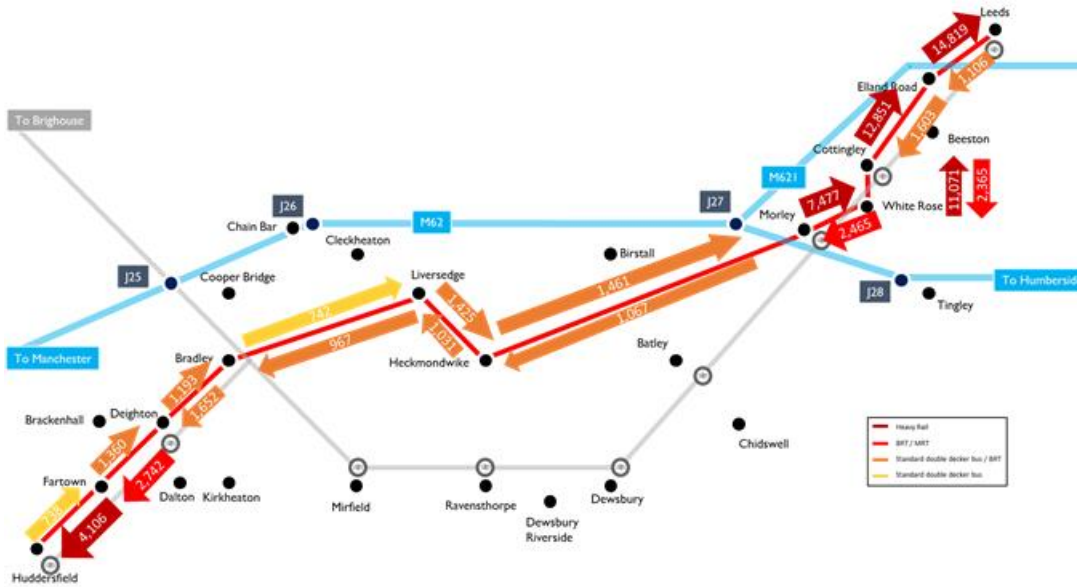
The appraisal process (summarised in 3.4.1 of the Case for Change report) also identified the red and purple routes as priorities and identified the greatest benefit for interventions as they address connectivity requirements to and within the corridor. Delivering improved connectivity along these connectivity concepts will help to increase travel horizons which have previously been limited and help achieve inclusive growth across the Leeds City Region.

5.3.4.1 Demand³⁰

An assessment has been undertaken using the West Yorkshire Combined Authority’s Urban Dynamic Model (UDM) to estimate the total peak hour trip demand along each of the prioritised connectivity concepts. A mode technology framework developed by the Combined Authority has then been used to identify what mode of transport might be appropriate based on having a suitable capacity per hour.

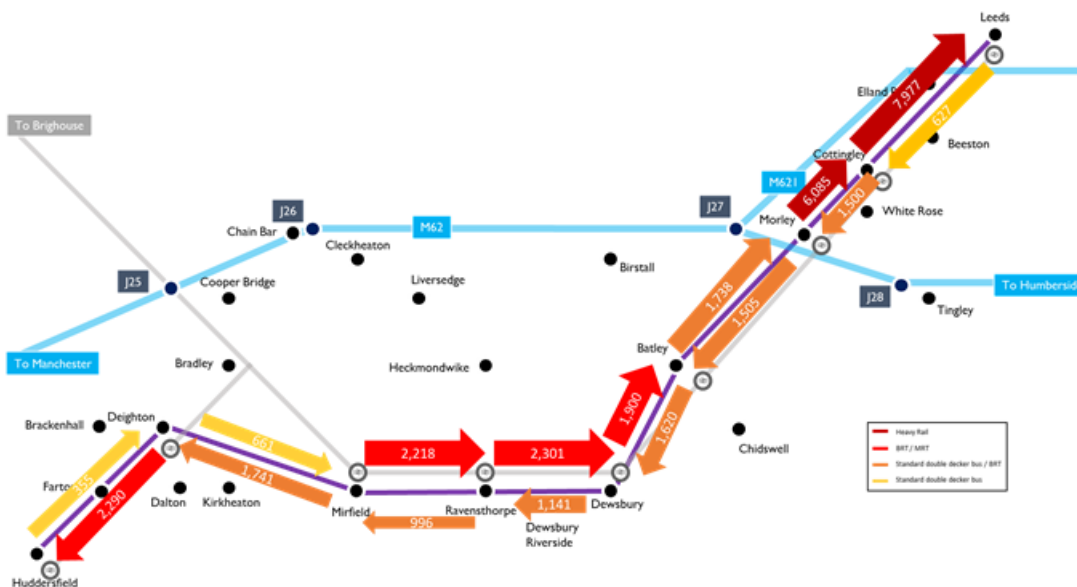
Figure 5.2 and Figure 5.3 show demand between Huddersfield and Leeds the red and purple concepts in 2033. This shows a high enough number of people travelling from Morley and Leeds to require heavy rail infrastructure. Rail infrastructure already exists here so potentially measures could be taken to increase capacity, develop new stations or improve existing stations. In most other locations along the route, demand is lower, indicating that BRT or a standard double decker bus would be a better solution.

Figure 5.2: Red route – demand 2033



Source: Urban Dynamic Model (UDM)

Figure 5.3: Purple route – demand 2033



Source: Urban Dynamic Model (UDM)

5.4 Digital connectivity

Digital connectivity and digital skills will become more important for accessing well paid jobs, especially if home working becomes more prominent in a post COVID-19 environment (explored further in Section 6). Exploring digital connectivity across Leeds indicates that the district has excellent broadband coverage in comparison to national rates, especially for coverage of

ultrafast broadband at 28.1% greater coverage compared to a national average of 54%. This is expected due to the metropolitan nature of Leeds district. Mobile services also receive better coverage compared to nationally, and only 4.7% of adults are non-internet users, compared to 9.0% nationally. This implies there are less issues in terms of existing digital skills. More localised data would be needed to draw a further conclusion for Morley beyond assuming it is aligned to Leeds level findings.

Table 5.6: Broadband coverage availability and performance and internet usage, 2019 and 2020

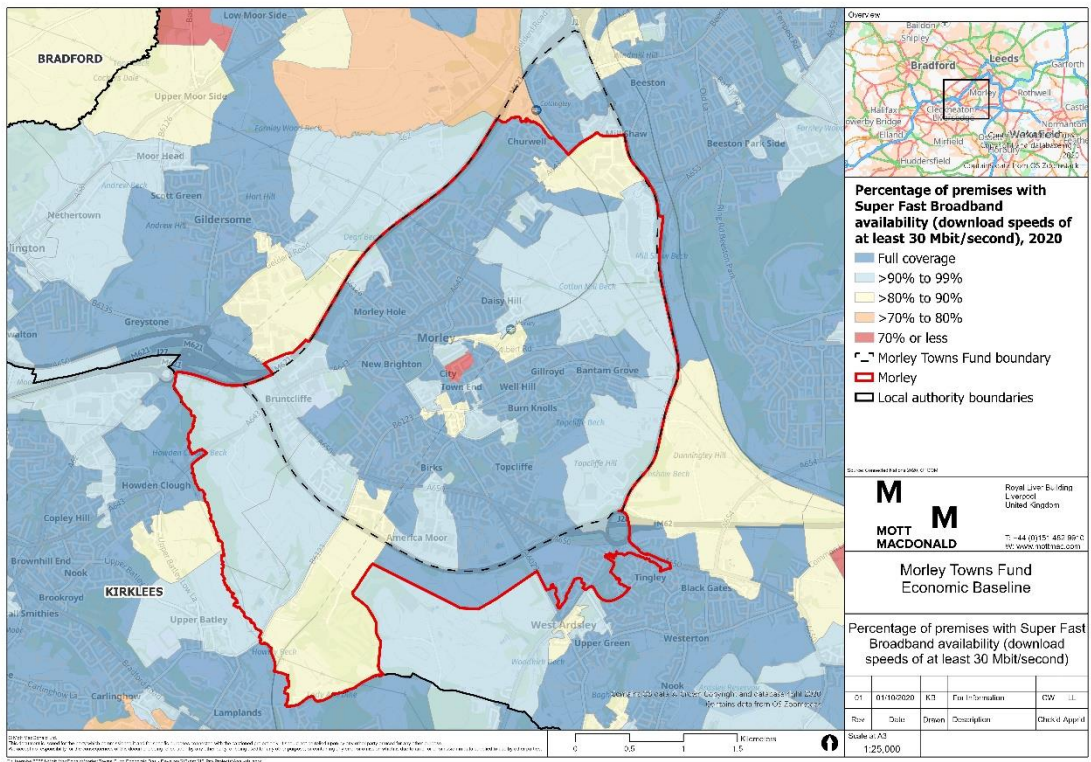
Network coverage	Leeds	United Kingdom
Broadband coverage (% of premises)		
Access to a download speed of 30Mbit/s or higher (superfast)	97.4%	95.0%
Access to a download speed of 300Mbit/s or higher (ultrafast)	82.1%	54.0%
Access to full fibre services	35.0%	12.0%
Unable to access a download speed of 10Mbit/s and an upload speed of 1Mbit/s (Universal Service Obligation minimum)	0.4%	2.0%
Mobile services		
% of premises (indoor) covered by all 4G operators	87.3%	81.0%
Internet usage		
% of internet used over 3 months ago/ never used (of persons aged 16 and over)	4.7%	9.0%

Source: Connected Nations Update; Spring 2020 dashboard, Ofcom, 2020 and Internet Users, ONS, 2019.

While coverage at the Leeds level is strong, local level connectivity is patchier, as shown in Map 5.6 and Map 5.7 below. This suggests targeted interventions in Morley to improve digital connectivity might add value.

Across Morley, in the majority of areas, at least 90% of premises have superfast broadband (SFBB) accessibility (download speeds of at least 30Mbit/second), with full availability in some areas. Despite this, there are some areas around the town centre where availability is more limited with the percentage of premises with SFBB ranging between 63% to 84% in the main town centre and to the south, and around 89% in the area surrounding Morley rail station.

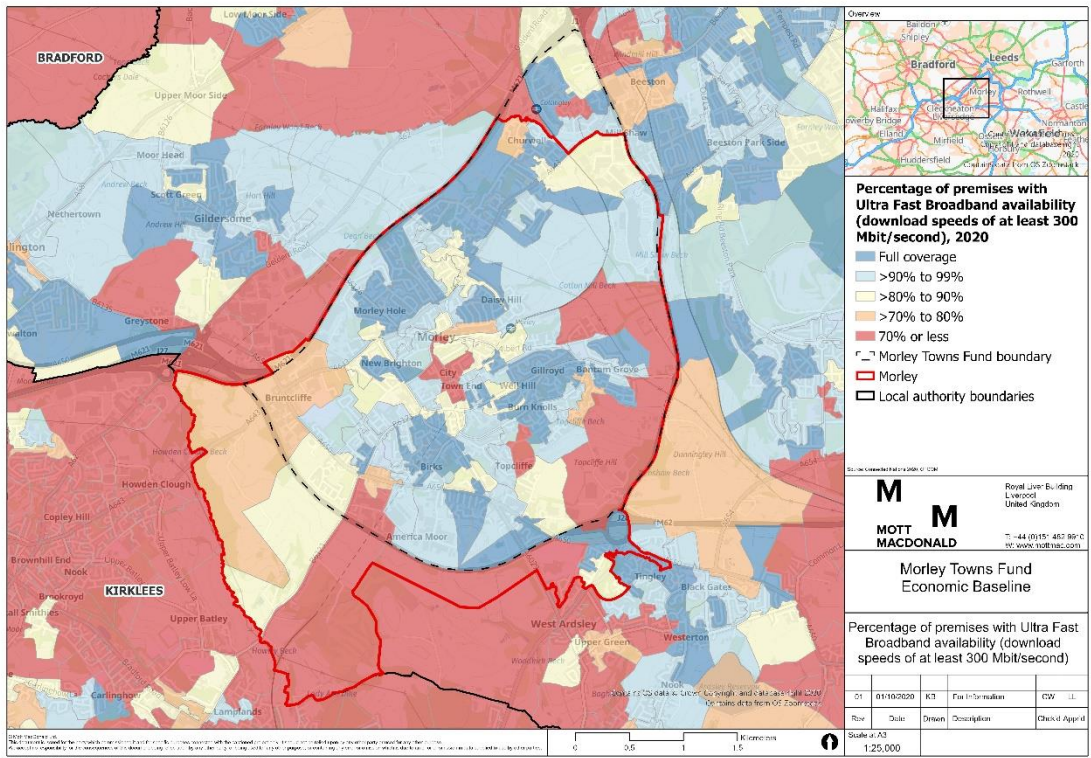
Map 5.6: Superfast broadband availability, Morley 2020



Source: Mott MacDonald based on Connected Nations, 2020

The percentage of premises with Ultrafast broadband (UFBB) accessibility (download speeds of at least 300Mbit/second) is significantly more limited within Morley compared to SFBB. The main town centre has more limited access with between 50% and 85% of premises able to access UFBB while towards the periphery of the town, availability improves.

Map 5.7: Ultrafast broadband availability, Morley, 2020



Source: Mott MacDonald based on Connected Nations, 2020

5.5 Health and wellbeing

Across the public health indicators, there is a clear relationship between deprivation and the specific health indicator. The more deprived wards within Leeds experience higher rates of GP recorded³¹ adult smoking, adult obesity, diabetes, Chronic Obstructive Pulmonary Disorder (COPD) and Coronary Heart Disease (CHR) as well as lower life expectancies at birth for both males and females. Interestingly, cancer rates appear to be lower in the more deprived areas with increased rates in the less deprived areas.

A summary of all the wards across Leeds is presented in Appendix B while Table 5.7 displays the indicators for Morley North and South³² compared to the Leeds average.

Both Morley North and Morley South have GP reported adult obesity rates and cancer rates which are higher than the Leeds average. Additionally, Morley South performs worse than Leeds in recorded COPD and CHR rates and both males and females born between 2014 and 2016 have a lower life expectancy than those born in Morley North or in Leeds.

³¹ GP recorded data only considers those residents who have presented at a GP surgery within the time period specified. It is acknowledged that some residents may choose not to visit their doctor therefore GP data does not represent the entire picture.

³² Wards have been used rather than LSOA's as health data is not available at a small area level.

Table 5.7: Public health indicators in Morley and Leeds³³

Ward	Deprivation rank†	GP recorded adult smoking rate*	GP recorded adult obesity rate*	GP recorded diabetes rate*	GP recorded COPD rate*	GP recorded coronary heart disease*	GP recorded cancer rate*	Male life expectancy at birth	Female life expectancy at birth
Time period	2019	2018 Q3	2018 Q3	2018 Q3	2017 Q4	2017 Q4	2017 Q4	2014 - 2016	2014 - 2016
Morley South	16	18,094	26,882	5,970	2,907	4,203	4,074	78.9	81.1
Morley North	30	14,771	25,742	5,578	2,369	3,853	4,128	79.6	83.1
Leeds	-	18,319	23,696	6,225	2,592	3,873	4,030	79.1	82.7

Source: Leeds Data Observatory and MHCLG Indices of Multiple Deprivation, various dates. Green shading indicates the ward performs better than the Leeds figure while red shading shows the ward performs worse than Leeds.

5.6 Air Quality and Carbon³⁴

Air quality has also been highlighted as an issue in Leeds with proposals being developed for a Leeds Clean Air Zone (CAZ). The Leeds CAZ will be introduced in 2021 at the earliest to help reduce air pollution and protect the health of everyone in Leeds. This includes Leeds City Centre and in an arc to the north from west to and east; Farsley, Headingley, Roundhay, Harehills, Cross Gates and Temple Newsam.

The City Region is in the process of collating evidence to determine the scale of the challenge in targeting a zero-carbon economy. The North and West Yorkshire Emission Reduction Pathways study is the current focus of work on decarbonisation.

Initial results from emissions reductions pathways modelling suggest that rapid emissions reduction cannot be achieved with low carbon technology alone and significant demand reduction and modal shift will be required from private vehicles to rail, bus, cycling and walking - which will require substantially increased capacity of public transport modes and a significant uplift in the provision and quality of cycling and walking facilities for shorter journeys, to accommodate the projected modal shift. To reach carbon emission targets, the City Region must reduce emissions by 53% by 2036, with transport emissions a major component. To achieve this a focus on having sustainable and reliable transport options is paramount. Facilitating sustainable modes of transport will reduce car use, enabling a consequent reduction in traffic congestion and the associated emissions that cause air pollution and poor air quality.

There is one Air Quality Management Area located in Morley which covers Chapel Hill and Main Street.

5.7 Accidents

Map 5.8 displays the location and severity of reported road accidents³⁵ in Morley and the surrounding area in the five-year period from 2015 to 2019, inclusive. In the Morley area³⁶, there

³³*Age standardised rate per 100,000 people created with the 2013 European Standard Population. † Deprivation data is not available at ward level and has been calculated based on the number of LSOA's in each ward per deprivation decile. Green shading indicates the ward performs better than the Leeds figure while red shading shows the ward performs worse than Leeds.

³⁴ West Yorkshire Connectivity Plan – Leeds to Huddersfield Case for Change report (Mott MacDonald, 2020)

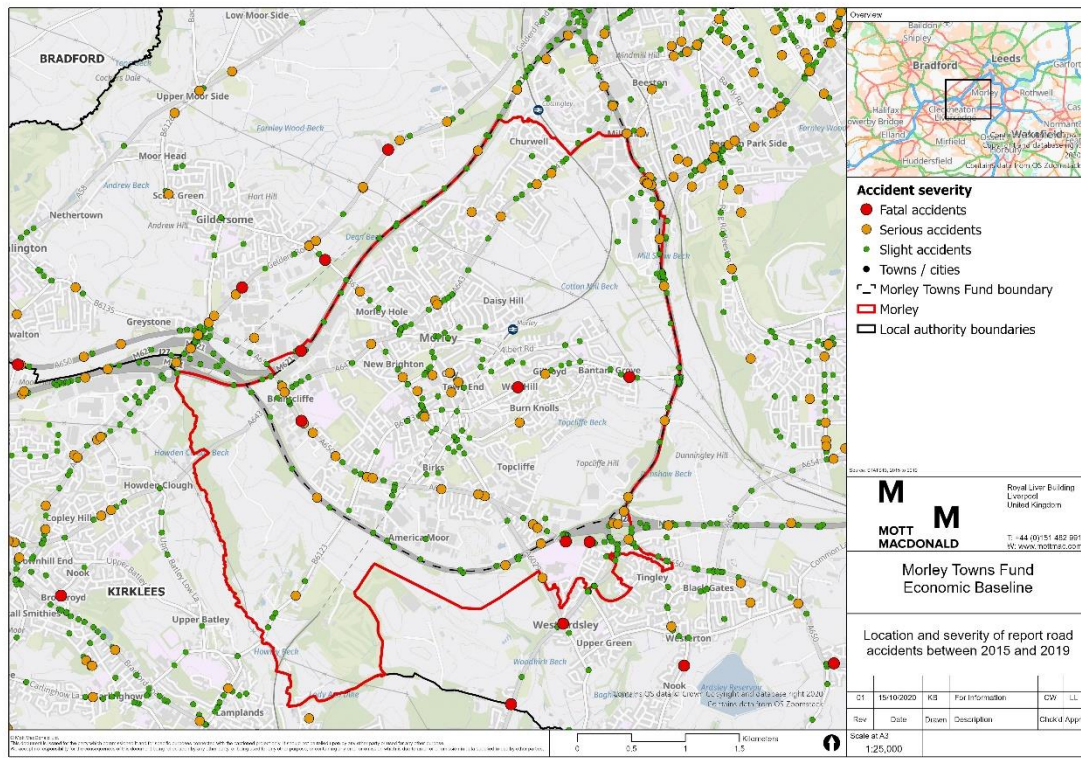
³⁵ Based on STATS19 data, This data only considers Personal Injury Accidents and does not consider damage only accidents and therefore is not a complete representation of all accidents and collisions.

³⁶ Defined here as the combination of the Morley Towns Fund boundary and the LSOA's included in analysis throughout

have been six accidents which have resulted in at least one death within 30 days of the accident, 51 serious accidents whereby one or more persons involved have suffered serious injuries as a result of the accident and 261 accidents resulting in slight injury. Of the 318 total accidents in the area, 129 of these occurred on motorways with 129 occurring in the inner residential areas.

There have been three fatal accidents on the A650, two on Tingley Common and one on the Bruntcliffe Road at the entrance to the Shell petrol station. Two fatal accidents occurred on the B6123, one on the Wide Lane/Bedale Street and one on the Middleton Road/Clough Street junction. An additional fatal accident occurred on the M621 on the approach to the M62/M621 Gildersome interchange. In addition to the six fatal accidents, there have been 51 serious accidents, six of these concentrated in and around the main town centre. The A643 and A650 both have high proportions of accidents, accounting for 35 (11%) and 44 (14%) of accidents all accidents within Morley over the five-year period, respectively

Map 5.8: Location and severity of reported road accidents between 2015 and 2019



Source: Mott MacDonald based on 2015-2019 STATS19 data

As demonstrated in Table 5.8, the proportion of fatal accidents is higher in Morley than across Leeds and Great Britain, while the proportion of serious accidents is slightly lower in Morley. The proportion of slight accidents is 82% across all geographical areas. The increased rate of fatal accidents indicates that there may be scope for road safety improvements within the town.

Table 5.8: Proportion of accidents by severity, 2015-2019

	Fatal	Serious	Slight
Morley	1.9%	16%	82%

	Fatal	Serious	Slight
Leeds	0.9%	17%	82%
Great Britain	1.3%	17%	82%

Source: Mott MacDonald based on STATS19, 2015 to 2019 **Error! Reference source not found.****Error! Reference source not found.**

5.8 Key points

- In 2020 there were around 17,000 dwellings in the Morley area. Of these dwellings, the majority are terraced and semi-detached housing, which cumulatively account for 59.9% of the housing stock.
- Morley is relatively affordable as a place to live. In 2020, average house prices in Morley are lower than Leeds, West Yorkshire and Yorkshire & the Humber, reflecting the north-south divide in house prices across the district of Leeds and its relative affordability in the area. Average house prices in Leeds are lower than national rates but higher than regional rates, reflecting its role as a major city, but also its geographical location within the north of England.
- Morley is well connected. It has good road connectivity, with many major neighbouring towns and cities such as Leeds, Huddersfield, Barnsley and Doncaster accessible within 45 minutes. The town is also well served by public transport with hourly direct rail services to Huddersfield and twice hourly direct services to Leeds. Bus connections in the city are also strong with frequent services in and out of the town centre, along key corridors such as the A643 and to key employment site such as the White Rose Shopping Centre and Office Park to the north and Howley Park Industrial Estate to the south.
- Across Morley, access to Superfast broadband is generally good although there are some areas within the town centre with more limited availability. In general Leeds residents benefit from good digital connectivity, with the district performing better across all indicators than the United Kingdom. There are fewer adults in Leeds who have never used the internet or used it more than 3 months ago compared to nationally, indicating that there may be fewer issues relating to existing digital skills.
- Health indicators are poor within Morley, this may be linked to deprivation levels and the older age profile of the area. Across Morley North and Morley South, GP reported adult obesity and cancer rates exceed the average across Leeds, indicating potential health problems for these residents. Morley South performs worse than Morley North and Leeds on the health indicators considered, with the exception of rates of smoking and diabetes, where it performs better.
- The proportion of fatal accidents within Morley is higher than the local and national average at 1.9%, compared to 0.9% in Leeds and 1.3% across Great Britain. Within Morley, five of the six fatal accidents were on two roads, the A650 and the A6123, indicating scope for road safety improvements in these areas.

6 Heritage assets

This section highlights the heritage offer within Morley, through exploring the current use of Grade I and II listed buildings. This section also analyses trends in district and regional data for the visitor economy, and the attractions on offer to tourists in Morley.

6.1 Heritage assets current status

Morley's main visitor offer is around 'pleasant parks, a pedestrianised high street, indoor market and plenty of cafes and restaurants'³⁷. There are several key attractions and listed buildings located in Morley. Most prominent of Morley's cultural offer is Morley Town Hall, a Grade I listed building located on Queen Street and a key visitor attraction within Morley. It was originally built in 1895 and retains many of its original features including the clock tower, courtroom and holding cells. The hall regularly hosts events for the Leeds International Concert Season and is at the heart of community celebrations for Halloween, Bonfire Night, Christmas and throughout the year³⁸.

There are also several Grade II listed buildings in Morley Town Centre, of which some are now in alternative use. There are clusters of these architecturally important buildings, for example around the town hall, and also around the junction of Brunswick Street, Chapel Hill and Queen Street. The Grade II listed buildings are as follows:

Table 6.1: Grade II listed buildings in Morley town centre

Site	Status	Current use
The Public Library	Occupied	In original use.
War Memorial	In use	In original use.
Morley Hall	Occupied	Now private residence on Dawson Hill, Morley, Leeds.
Dawson House	Occupied	Now a restaurant, 'Mumbai Village' on Dawson Hill, Morley, Leeds.
National Westminster Bank	Occupied	Now a NatWest bank, on Queen St, Morley, Leeds.
Lloyds Bank;	Occupied	Dating back to 1891, still in use by Lloyds bank.
Midland Bank (now HSBC)	Occupied	Still in original use as a bank, now under ownership of HSBC.
Barclays Bank and Figure Fitness Centre	Occupied	Co-operative shop premises; now a bank with health club on first floor.

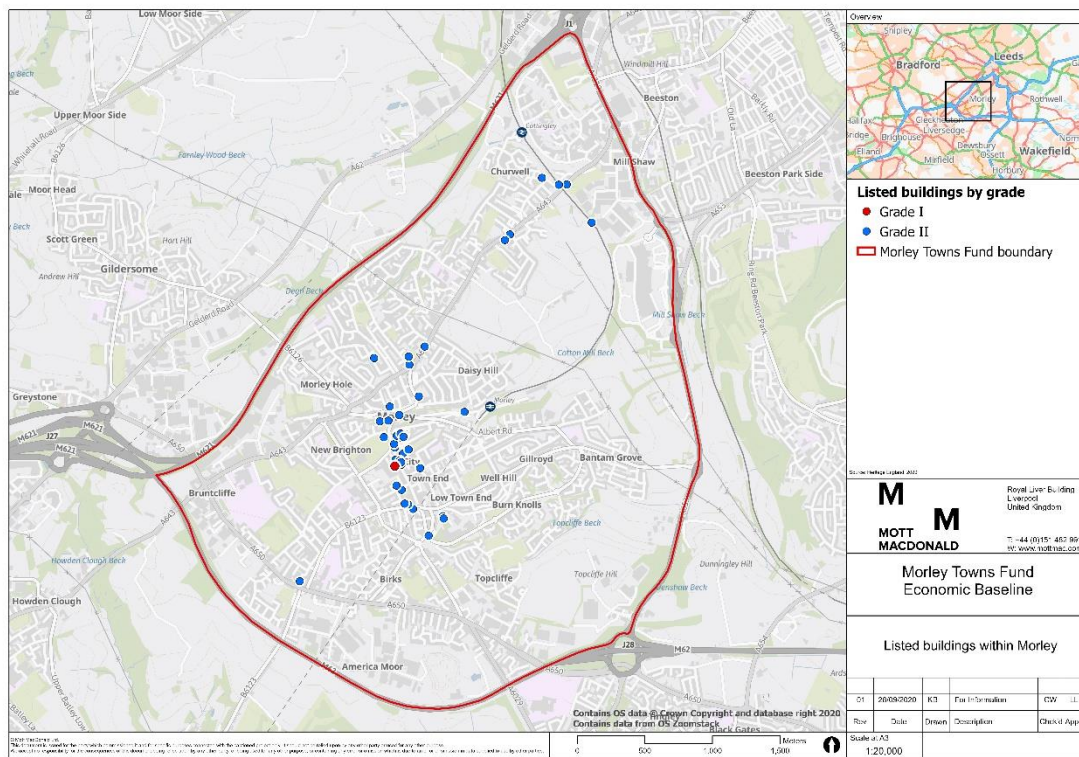
Source: Historic England; Morley archives, both 2020.

A summary of the listed buildings within Morley can be found in Appendix B. As shown in the figure below, heritage buildings are primarily focused in the town centre.

³⁷ Visit Leeds, Morley Town Hall - <https://www.visitleeds.co.uk/explore-further/local-areas/morley/>

³⁸ Visit Leeds, Morley Town Hall - <https://www.visitleeds.co.uk/things-to-do/live-music/morley-town-hall/>

Figure 6.1: Listed Buildings within Morley town centre



Source: Mott MacDonald based on Heritage England

Morley's arts offer is centred around Morley Arts Festival, which is held every year in September and October and presents art, live music, spoken word, performance and special events in locations throughout Morley including the Town Hall.

6.2 Tourism, arts and culture

Data produced by Visit England showed that there were an estimated 9,550,000 visitors to Yorkshire & the Humber from Great Britain in 2019, representing 9.6% of all domestic trips to England. However, this represented a reduction by approximately 930,000 from 2018. Domestic tourists to Yorkshire & the Humber spent approximately £1.7bn in 2019, representing 8.7% of the total spend of £19.4bn in England, but this was also a slight reduction on 2018 expenditure³⁹.

Table 6.2 details tourism figures for Leeds up to 2017⁴⁰. In 2017, an estimated 29 million tourists visited Leeds, of which 1.6m stayed overnight from the UK, on average for one night. 300,000 visitors also came from overseas. Visitor numbers and days have been gradually increasing since 2013, however, overnight stays have fallen slightly, and overseas visitors have stagnated, highlighting the importance of day trips to Leeds.

³⁹ Visit England - <https://www.visitengland.com/>

⁴⁰ Visit England - <https://www.visitengland.com/>; Visit Britain - <https://www.visitbritain.org/>; Global Tourism Solutions Ltd.

Table 6.2: Visitor economy, 2013-2017, Leeds

Leeds	2013	2014	2015	2016	2017
Tourists					
Visitor days (m)	27.5	29.6	29.0	30.2	-*
Visitor numbers (m)	24.9	26.8	26.2	27.3	29.0
Domestic overnight visitors (m)	1.7	1.5	1.5	1.5	1.6
Overseas inbound visitors (m)	0.3	0.4	0.3	0.3	0.3
Average domestic length of stay (days)	0.9	0.9	1.1	1.1	1.1
Economic impact					
Direct expenditure (£m)	93.0	101.8	102.9	110.1	117.1
Economic impact (£m)	138.5	151.5	153.2	164.0	174.5
Total employment FTE	17,600	18,500	18,300	18,900	20,000
<i>Of which:</i>					
Direct employment FTE	12,200	12,800	12,600	13,000	13,800
Indirect employment FTE	5,400	5,700	5,700	5,900	6,200

Source: Global Tourism Solutions Ltd, Visit England, Visit Britain, 2013-2017.

Note: *2017 visitor days omitted as shows an improbable increase in visitors to Leeds by 300 million compared to a small change in visitor numbers, and therefore has been excluded from this analysis.

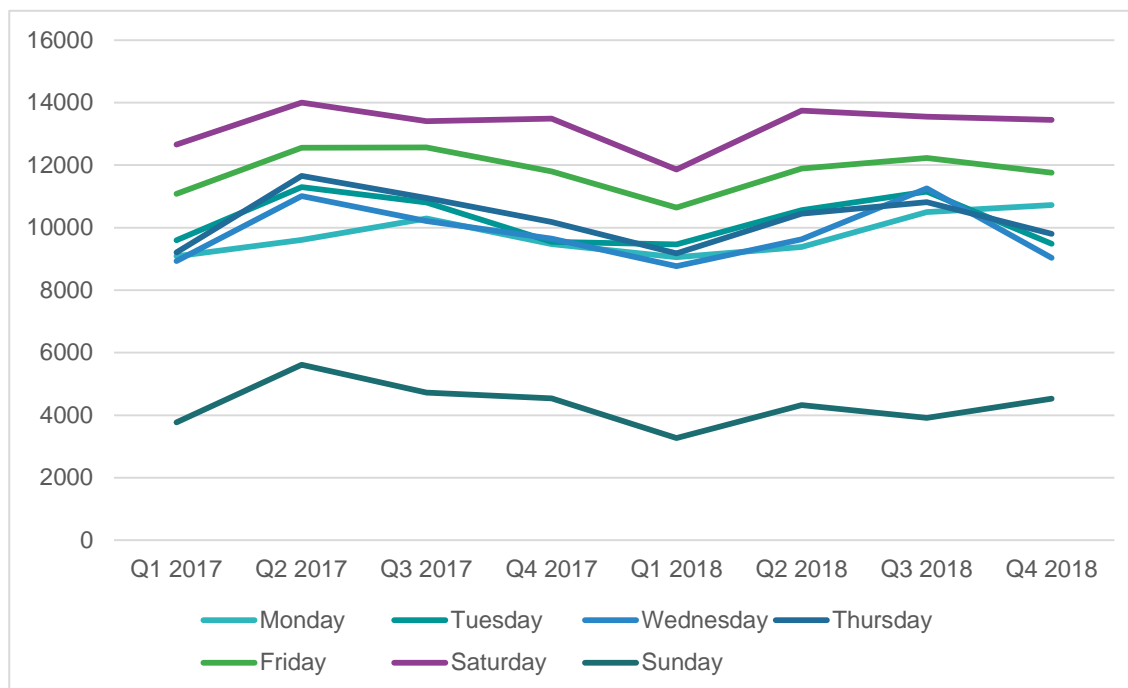
Leeds' visitor economy was growing in size prior to the introduction of COVID-19 restrictions, shown by an increase in direct expenditure by £24.1m from 2013 to 2017. This trend can also be seen in the growth in total economic impact and total employment over the same period, highlighting the increasing importance of the sector to the Leeds workforce.

Little data on Morley's visitor numbers was identified, however the large visitor economy in Leeds and the wider region gives an indication of the potential market size that the town could tap into if the town's offer were strengthened.

An examination of pedestrian footfall data⁴¹ indicates fluctuations in the average number of pedestrians across the week. As displayed in Chart 6.1, there is a notable reduction in footfall numbers on Sundays compared to other days, with Friday and Saturday seeing the highest numbers. The pedestrian counter was situated on Queen Street, home to a number of retail and hospitality premises which could explain increased numbers on Friday and Saturday, with more people accessing these leisure services. The average number of visitors across the time period remained relatively stable with slightly lower numbers in Quarter 1 2017 and Quarter 1 2018, potentially owing to reduced disposable income following the Christmas period, or more adverse weather conditions, and therefore fewer visitors to the retail and leisure services.

⁴¹ Although the pedestrian counter was in place from January 2017 to January 2019, the 2019 data was not included as it was not a full quarter.

Chart 6.1: Pedestrian footfall numbers, Quarter 1 2017 to Quarter 4 2018.



Source: Mott MacDonald based on Leeds City Council pedestrian counts

6.3 Tourism economy⁴²

In 2018, tourism in Morley supported approximately 1,800 jobs, and represented 7.5% of the total workforce. This represented 2.8% and 2.3% less than the Leeds and West Yorkshire totals for tourism, representing Morley’s low provision of tourism related activities and subsequent employment.

Table 6.3: Tourism employees, 2018

Industry	Morley	Leeds	West Yorkshire	Yorkshire and the Humber	Great Britain
Tourism	1,800	48,000	104,000	255,000	3,404,000
as a % of total employees	7.5%	10.3%	9.8%	10.6%	11.4%

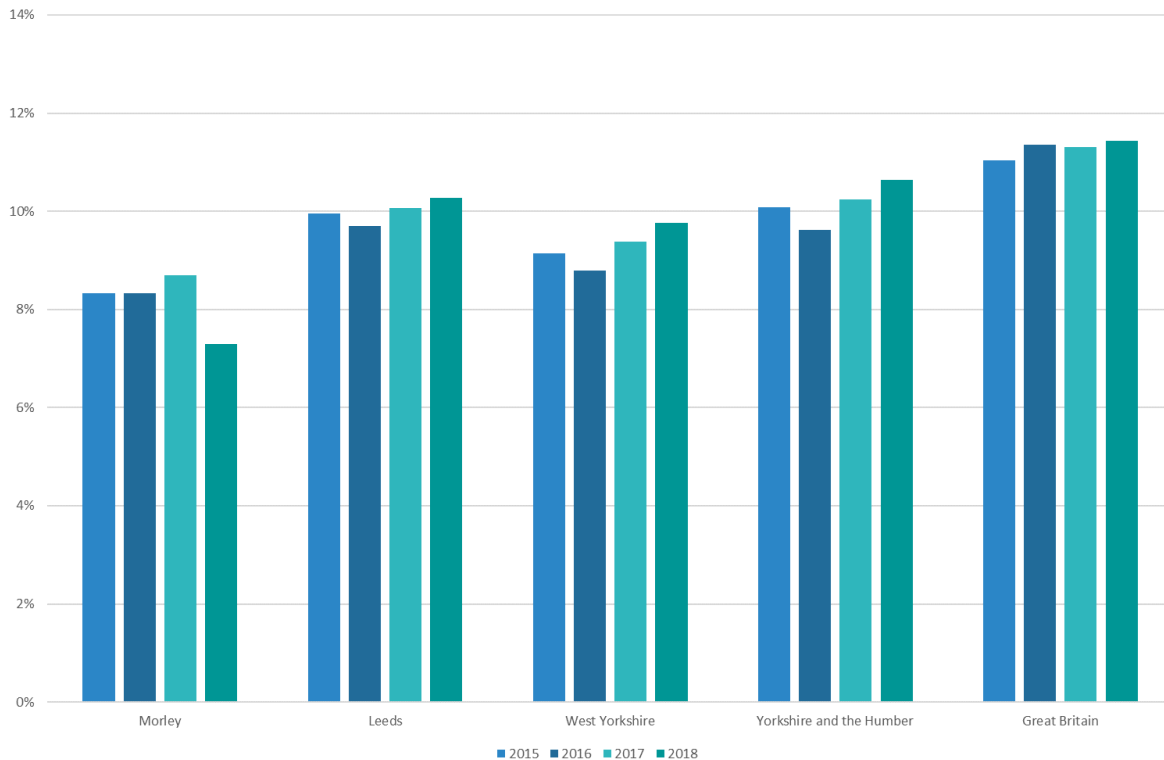
Source: BRES, ONS, 2018

Note: totals shown do not add up to disaggregated totals of each subsector due to rounding error in BRES.

Since 2015, as shown by Chart 6.2, the tourism sector in Morley shrank in 2018, falling by 1.4% (250 employees) between 2017 and 2018. The overall outlook for Morley is a stagnating industry, whilst other sectors, such as professional and financial services increase in size. This contrasts with the comparator regions, notably Leeds, West Yorkshire and Yorkshire & the Humber, which all show an increasing employment base since 2016.

⁴² As defined by the Department for Culture, Media and Sport (DCMS). A total list of SIC codes included can be found in Table A.2

Chart 6.2: Tourism sector, as % of total, 2015-2018



Source: BRES, ONS, 2015-2018

6.4 Key Points

- Morley is well served by heritage sites, with a Grade I listed town hall and many Grade II listed buildings. The quality of these clusters of buildings and places could be better leveraged to enhance the visitor experience. All of these buildings remain occupied, however some are not in their original use suggesting potential to repurpose these buildings in order to maximise the tourist potential and heritage offer within Morley.
- Morley's arts offer is centred around Morley Arts Festival, which is held every year in September and October.
- In 2019, there were 9,550,000 visitors to Yorkshire and the Humber from Great Britain in 2019, representing 9.6% of all domestic trips to England. Domestic tourists to Yorkshire and the Humber spent approximately £1.7bn in 2019, representing 8.7% of the total spend of £19.4bn in England.
- Leeds' visitor economy is growing in size, with a reliance on day trips for visitors. Direct expenditure and total employment is increasing, highlighting the growing importance of the sector for Leeds. The large visitor economy gives an indication of the potential market size of which Morley could take advantage.
- Morley's tourism sector accounts for a smaller proportion of employment than Leeds and national rates and is stagnating whilst the sector is expanding in the comparator areas.

7 Potential impacts of COVID-19

As well as the tragic human consequences COVID-19 will have unprecedented economic and social costs. This section provides a broad overview of recent data for Leeds and Morley and how economic trends and patterns may change and the likely impact for local economies.

7.1 COVID-19 macro impact

The overall macro outlook is changing weekly but there is now wide consensus in the UK that recovery from COVID-19 is likely to be U-shaped rather than V-shaped (a form of recovery more widely discussed in the early stages, April/March). The outbreak and measures designed to tackle it have led to a very large and rapid decline in economic activity that is without precedent in recent times. This includes temporary business closures, reduced activity that disrupts complex supply chains and the resultant sharp fall in incomes, jobs and profits has further hit demand. Uncertainty has also risen sharply, given worries over further job losses and companies facing risk of failure.

Recently released figures by ONS show GDP is estimated to have fallen by a record 20.4% in Quarter 2 (Apr to June) 2020. This marks the second consecutive quarterly decline after a fall of 2.2% in Quarter 1 (Jan to Mar) 2020⁴³, indicating that the UK is now in a recession. Further measures restricting movement and introducing curfews in anticipation of a “second wave” of COVID-19, introduced towards the end of September, are likely to lead to low, possibly negative growth for the rest of 2020 and early 2021.

Estimates by the ONS of the unemployment rate between May to July 2020 was 4.1% unemployed; 0.3 percentage points higher than a year earlier and 0.2 percentage points higher than the previous quarter⁴⁴. With the furlough scheme set to end in October 2020, this is likely to rise further in response to the aforementioned reinstated restrictions put in place. Unemployment (using the LFS measure) is projected to reach 8% in 2020, before falling to 7% in 2021 and 4% in 2022. The upcoming Job Support Scheme should however cushion some of the blow for businesses heavily reliant upon the previous arrangements⁴⁵.

As the crisis continues, the Bank of England (BoE) anticipates a relatively slow recovery, reflecting a persistently high level of uncertainty and caution among households and businesses over major spending decisions. It is felt likely that this could create a lasting preference for greater financial resilience, stronger balance sheets and less debt than in the pre-COVID period. The costs associated with a relatively slow recovery are considered substantial, not just from the economy operating with spare capacity for a longer period but also the increased long-term costs to the economy from hysteresis and scarring, which could be caused by⁴⁶:

- Cutbacks in investment, R&D and training.

⁴³ GDP first quarterly estimate, UK: April to June 2020, ONS, 2020. Available at: [https://www.ons.gov.uk/economy/grossdomesticproductgdp/bulletins/gdpfirstquarterlyestimateuk/apriltojune2020#:~:text=UK%20gross%20domestic%20product%20\(GDP,22.1%25%20in%20Quarter%202%202020](https://www.ons.gov.uk/economy/grossdomesticproductgdp/bulletins/gdpfirstquarterlyestimateuk/apriltojune2020#:~:text=UK%20gross%20domestic%20product%20(GDP,22.1%25%20in%20Quarter%202%202020)

⁴⁴ Labour market overview, UK: September 2020. Available at: <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/bulletins/uklabourmarket/september2020#:~:text=Estimates%20for%20May%20to%20July%202020%20show%20an%20estimated%201.40.more%20than%20the%20previous%20quarter>

⁴⁵ Rishi Sunak unveils emergency jobs scheme, BBC, 24 September 2020 - <https://www.bbc.com/news/business-54280966>

⁴⁶ COVID-19 and monetary policy, Bank of England Speech, 28 May 2020

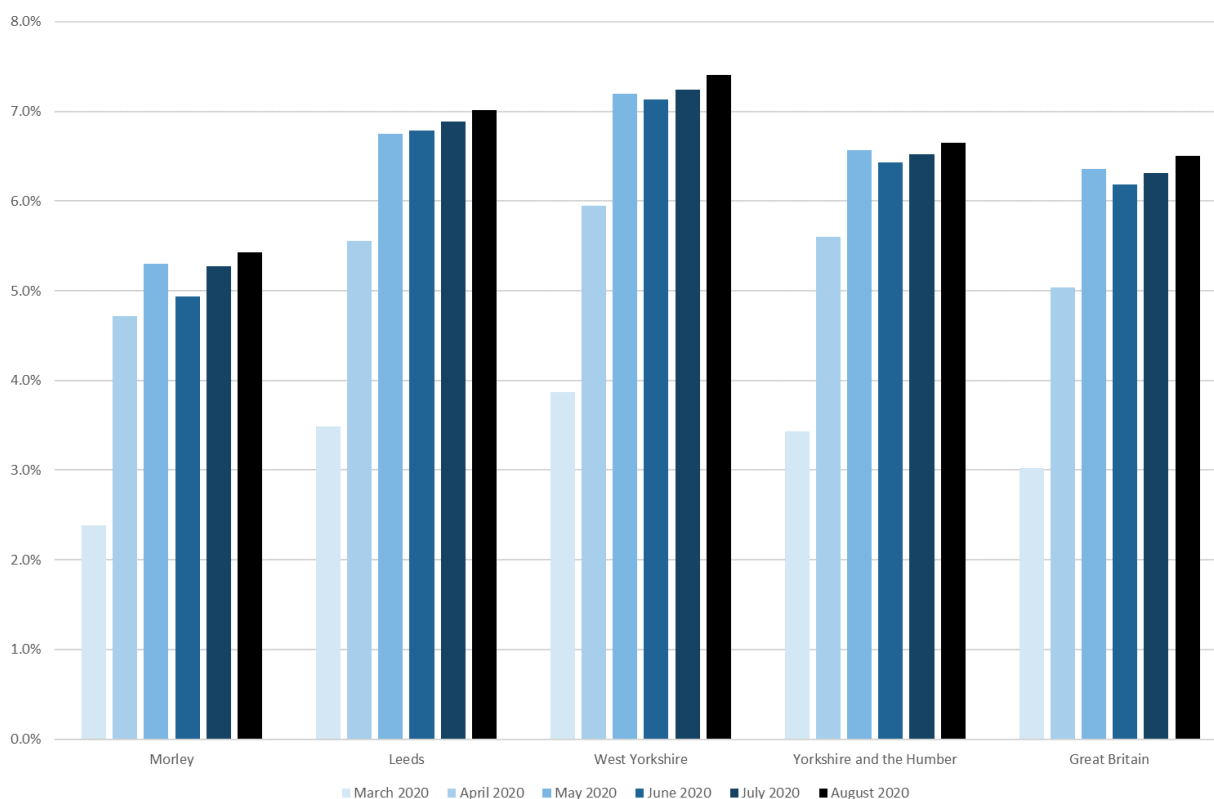
- Increased capital scrapping as firms fail (due to credit availability and cashflow issues). Recessions are often followed by lower growth of the capital stock and capital services in future years.
- Deteriorating credit availability is also likely to inhibit new business formation, slowing the pipeline of firms that will take the lead in future expansions.
- Reluctance of people to switch jobs which hinders the reallocation of employment from less productive to more productive firms.
- Persistently high unemployment is likely to become embedded into a higher equilibrium jobless rate and discouraged job-seekers tend to become less engaged with the workforce (especially among young and older age groups). A lengthy period of unemployment will exacerbate these adverse effects.

7.2 Local impacts – emerging data

The claimant count provides insights into how COVID-19 is impacting on the labour market in Leeds and Morley with all other local data only published annually.

As shown in the chart below, COVID-19 is having a significant impact across Morley with a sharp increase in the claimant count rate as of August 2020, standing at 5.4% of all working age residents in August compared to 2.4% in March. A similar increase is shown in Leeds, which has increased to 7.0% and is greater than national rates. Interestingly, around the time of relaxed lockdown measures, claimant count proportions reduced across all comparators as employment rebounded. The general theme of increasing claimant counts is common and widespread across all other comparator areas given how COVID-19 is impacting across the national economy.

Chart 7.1: Total claimant counts, as a proportion of all residents aged between 16 and 64, March to August 2020



Source: Claimant count for residents aged between 16 and 64, January to August 2020 and 2019 mid-year population estimates

Examining the growth in claimant count by age year-on-year between August 2019 and August 2020, as shown in Table 7.1, shows that Morley saw the largest increase in claimant count of the comparator areas, though from a lower base. This increase has been mostly acutely felt in the older town residents with higher growth in claimants in the higher age brackets (age 50+). This seems not to have been inevitable as comparator areas saw a larger increase in claimants among younger cohorts, with those aged 50+ seeing a much smaller increase. Of the working age population cohorts, young adults (16-24%) were least affected in Morley, with the other age groups increasing by circa 50% each from 2019. This contrasts with Leeds, where the young adult population experienced the largest rise in claimant counts.

Table 7.1: Claimant count by age, August 2019 and 2020

Increase in claimants - August 2019 to 2020	Morley	Leeds	West Yorkshire	Yorkshire and the Humber	Great Britain
Age 16+	670	20,465	58,100	122,640	1,528,935
Aged 16-24	100	4,710	13,125	27,085	303,080
Aged 25-49	380	12,300	34,120	70,565	899,910
Aged 50+	180	3,455	10,850	24,980	325,880
Aged 65+	10	170	595	1,385	17,150

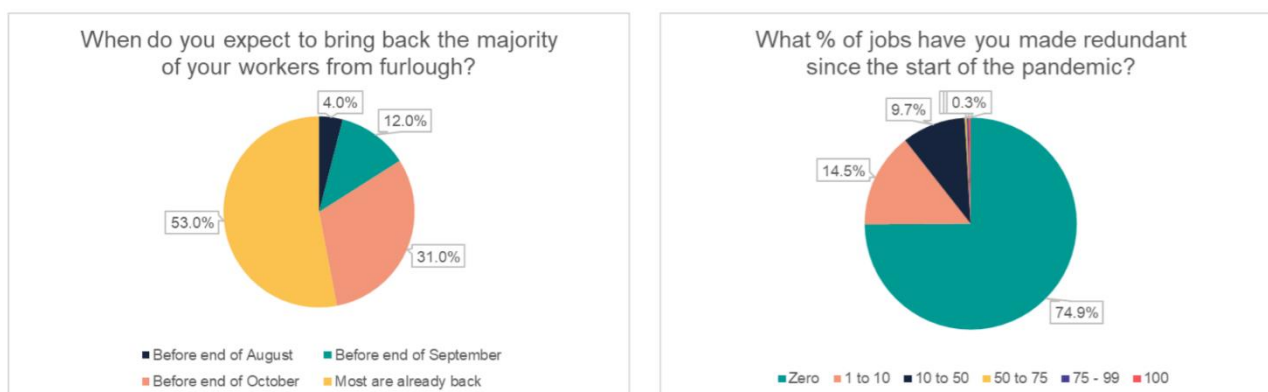
% Change					
Age 16+	149%	128%	113%	115%	135%
Aged 16-24	125%	152%	127%	124%	139%
Aged 25-49	149%	133%	118%	118%	143%
Aged 50-64	148%	92%	87%	95%	110%
Aged 65+	200%	162%	186%	216%	233%

Source: Claimant count for residents, August 2019 and August 2020; 2019 mid-year population estimates, all ONS.

West Yorkshire Combined Authority releases a fortnightly insights report in response to the COVID-19 pandemic⁴⁷ which details changes in local variables and provides analysis on factors relating to COVID-19. The data for September shows a very gradual return to work in Leeds City Region, reflected in early results from the Quarterly Economic Survey. Whilst half (53%) of businesses had already brought the majority of workers back from furlough when the survey was carried out in mid-to-late-August, most of those who were still using the scheme extensively anticipated their workers wouldn't come back until October. A quarter of respondents also said they had made some redundancies since the start of the pandemic. Though in most cases this was less than 10% of the workforce, 10% of businesses had made 10-50% of their workforce redundant.

The responses were similar when businesses were asked about their plans for redundancies when the furlough scheme ends. The results of the survey can be seen in more detail below.

Chart 7.2: Quarterly Economic Survey, Leeds City Region, 2020



Source: Leeds City Region Quarterly Economic Survey, Chambers of Commerce, Q3 2020

Leeds City Council's Inclusive Growth Strategy 2018-2023 details the steps they have taken to tackle a recession should it arise. If there is a recession, such as the one triggered by COVID-19, Leeds City Council will work with the LEP and other partners to support with interventions such as:

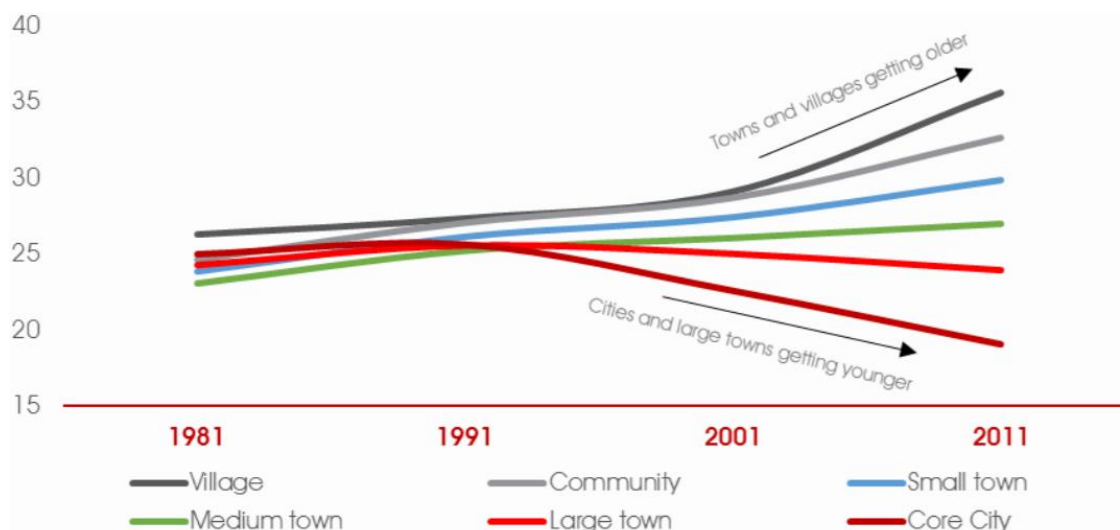
- Creating a standing taskforce to provide support for businesses facing pressures and the risk of closures and redundancies;
- Developing a fund and an initiative to provide training, employment support and jobs brokerage for people that have been made redundant to help them get new jobs or start their own businesses;

⁴⁷ West Yorkshire Combined Authority, 'COVID-19 Fortnightly Insights Report', (2020). Available at: <https://www.westyorks-ca.gov.uk/media/5074/fortnightly-economic-transport-report-2020-09-18-final-002.pdf>

- Maintaining momentum on development and regeneration projects and kick-starting progress on stalled sites through funding; and
- Investing in infrastructure and regeneration to provide an economic stimulus.

A recent study conducted by Centre for Towns, analysed the effect of the COVID-19 pandemic specifically on the towns and cities of Great Britain. This analysis includes trends for the old age dependency ratio⁴⁸, which shows how towns, villages and communities have grown “older” whilst cities have got younger, as shown in Figure 7.1. This then leads to smaller communities becoming more vulnerable to COVID-19 as it is known the effects of the virus are stronger in older populations. Morley, classed as a medium size town⁴⁹, is less vulnerable than smaller towns and communities due to its working age population accounting for a relatively high 64.4% (compared to national rates) of the population, which will lead to a lower old age dependency ratio. However, a high proportion of over 65s, at 16.9%, which is larger than Leeds (15.6%), signals a vulnerability to COVID-19 in Morley.

Figure 7.1: Old age dependency ratio, 1981-2011



Source: Centre for Towns, 1981-2011

7.3 Sector impacts – broad analysis

7.3.1 Adverse and short-term impacts

Mott MacDonald conducted a review of the effects of COVID-19 to ascertain short-term (to spring 2021) and medium-term (to 2024) adverse effects of COVID-19 on the UK economy and labour market, and what action may be needed to mitigate them. It concludes that locally specific action is needed to:

- Support the worst-affected industries;
- Expand health and social care, logistics and ICT; and
- Transition to a green economy, supporting a decisive switch to sustainable ways of working and commuting.

⁴⁸ Old age dependency ratio is the ratio of Over 65's to the working age population.

⁴⁹ Centre for Towns classifies a medium town as a place with a population between 30,000 and 75,000 inhabitants.

The analysis finds that, given economic activity is likely to be below its pre-COVID-19 level in early 2021, sectors across the economy will on average experience a fall in demand, with exceptions including health & social care, logistics and information & communications technology⁵⁰.

There will also be supply-side effects, chiefly because of social distancing, which will reduce the capacity of industries such as food and beverage services, public transport, and events and performances (including sport), and 'scarring', arising from the demise of businesses during the epidemic. For example, restaurants will have to implement distancing measures, and some will go out of business, reducing capacity on both counts. More positively, scarring may be partly offset by positive results from 'creative destruction', as entrepreneurs speed the adoption of new ways of working in response to economic difficulty.

The consequences for employment of supply-side effects will vary by industry. In food and beverage services, employment is likely to fall broadly in line with capacity. In contrast, public transport may require as many workers as before even though capacity is reduced, driving a reduction in productivity.

Industries less obviously affected by supply-side difficulties will also face challenges, for instance, call centres where floorspace per employee is low. Both demand-side and supply-side difficulties are potentially severe, and new ways of working will be needed to mitigate their effects and get the economy working smoothly once more. Considering the sectors likely to be impacted over the slightly longer term (i.e. beyond those impacted by physical distancing alone) there are likely to be a number of other sectors particularly vulnerable to COVID-19, particularly in 2021 due to:

- Continued social distancing;
- Scarring - resulting from the closures of fundamentally viable businesses that are unable to survive the 2020 epidemic and related effects;
- The slowdown in capital goods investment (including consumer investment in cars) due to the recession and resulting uncertainty; and
- Acceleration of the trend towards online shopping and away from bricks and mortar stores.

Alongside this COVID-19 is also likely to raise growth in other industries, particularly healthcare, social work and residential care, whilst greater online purchasing is likely to benefit telecoms, postal and delivery services, and warehousing.

7.3.2 Vulnerable sectors

Mott MacDonald undertook analysis on behalf of several clients at the beginning of the pandemic to identify the most vulnerable sectors to COVID-19. These are presented in Table 7.2. Vulnerable sectors are highlighted against their relative importance to Morley, Leeds and nationally (note this excludes self-employment so underestimates the totals). Overall, the selected vulnerable sub-sectors account for 33.5% of employee numbers in Morley, in line with national averages but a slightly higher proportion than for Leeds (29.9%). This is mainly due to retail trade, which operates in the town, that will struggle to deal with social distancing restrictions and downturns in consumer spending. While the concentration of food and beverage service activities is lower in Morley, they still represent a large number of employees vulnerable to COVID-19 related restrictions.

⁵⁰ Analysis conducted by Mott MacDonald.

Table 7.2: Employee numbers, as % of total in selected vulnerable sub-sectors, 2018

Sector (SIC code)	Morley	Leeds	GB
29 : Automotive manufacturing	0.2%	0.1%	0.6%
41 : Construction of buildings	0.6%	1.1%	1.5%
43 : Specialised construction activities	2.5%	2.1%	2.5%
45 : Wholesale and retail trade of motor vehicles	1.5%	1.3%	1.8%
47 : Retail trade, except of motor vehicles and motorcycles	18.8%	7.1%	9.3%
51 : Air transport	0.0%	0.6%	0.3%
55 : Accommodation	1.2%	0.9%	1.5%
56 : Food and beverage service activities	5.2%	5.4%	6.0%
68 : Real estate activities	0.6%	1.5%	1.7%
78 : Employment activities	0.7%	4.5%	3.3%
79 : Travel agency, tour operators	0.3%	0.2%	0.3%
90 : Creative, arts and entertainment activities	0.1%	0.3%	0.3%
93 : Sports, amusement and recreation activities	0.6%	1.3%	1.5%
96 : Other personal service activities	1.2%	0.5%	1.0%
303 : Aircraft manufacturing	0.0%	0.0%	0.3%
854 : Higher education	0.0%	3.0%	1.7%
Total	33.5%	29.9%	33.6%

Source: BRES, ONS, 2018

7.3.3 Sectors with good prospects

Mott MacDonald's analysis also identified the sectors with good prospects during and post-COVID as highlighted in Table 7.3 below, for Morley, Leeds and nationally. Morley also has a lower proportion of sectors with good prospects, at 10.0% compared to Leeds (14.9%) and Great Britain (16.4%). This is unsurprising because Morley lacks the provision of healthcare facilities due to the close proximity of Leeds General Infirmary in the city centre, which is likely to attract the majority of this sectors' employment within Leeds. A larger share of Warehousing and support activities for transportation in Morley is promising as the sector became integral for ensuring goods reached consumers during the pandemic as online retail purchases increased rapidly.

Table 7.3: Employee numbers as % of total in selected sub-sectors with good prospects, 2018

Sector (SIC code)	Morley	Leeds	GB
52 : Warehousing and support activities for transportation	5.2%	1.3%	1.8%
53 : Postal and courier activities	1.5%	0.9%	0.8%
61 : Telecommunications	0.2%	0.7%	0.7%
86 : Human health activities	0.9%	6.9%	7.6%
87 : Residential care activities	0.7%	1.5%	2.5%
88 : Social work activities without accommodation	1.5%	3.6%	3.0%
Total	10.0%	14.9%	16.4%

Source: BRES, ONS, 2018

7.4 Longer term trends

There are several longer-term trends that COVID-19 is likely to impact upon, and in many cases accelerate. There is a high degree of uncertainty as to how these will play out, but they are considered for Morley and Leeds below. Importantly, local differences with the UK are likely to be substantial given the different sectoral composition and labour markets whilst local action to provide economic mitigation is likely to be critical. Policy makers should be cautious when actioning such analysis as there is a high degree of unavoidable uncertainty inherent in the current unprecedented situation.

Table 7.4: Longer term trends and potential implications

Potential trend	Key implications
Potential change in workplace patterns	<ul style="list-style-type: none"> ● Potentially a golden opportunity to embed new ways of working in the economy. ● More home working and video conferencing will be needed to avoid an upsurge in car use and adverse consequences for congestion and emissions, resulting from reduced public transport capacity. ● The type of work will potentially shift away from industries, such as high street retailing, and hotels and restaurants, towards the care industries, logistics, ICT, and the green economy. ● The balance of these changes will depend on local patterns and occupations, skills, training resources, adequacy of transport infrastructure and other factors. ● Leeds and Morley may lose out from this trend given it currently prioritises good accessibility to employment opportunities within the city and district. Accessibility may become less of an issue as home and flexible working becomes the new norm.
Retail and leisure market	<p>The following trends were occurring before and are anticipated to be accelerated by COVID-19:</p> <ul style="list-style-type: none"> ● Retail and leisure sectors across the country are undergoing fundamental changes. ● Greater spending online is reducing spending power of shoppers on the high street. ● At the same time property and staffing is becoming more costly, while the operating environment is becoming more competitive. ● Out of town retail spaces are also capturing shopper spend, while town centre values increase due to demand on the property market from housing. ● For leisure, the demand for experiential leisure, and a modern offer is significantly affecting the demand profile with more diverse and changing consumer demands. ● For some time, these trends have been impacting on the market resulting in increased vacancy in town centres, and business closures. ● Anticipated that following COVID-19 many retailers and leisure operators will be unable to continue trading and unlikely to reopen following the lock down period. ● Fashion retailers anticipated to be the most strongly impacted. ● Local and ethical shopping is likely to become more important as a result of the prolonged lockdown. More consumers are looking to support local independent retailers who have helped them. ● COVID-19 has led to a revival of community spirit with better prospects for community ownership.
Changing role/ repurposing of town centres	<p>The impact of COVID-19 is being felt keenly in towns such as Morley. The crisis will bring the long-standing economic debate about the future of high streets and retail centres into more focus. Genuine change will be essential as many town centre businesses are now probably terminally damaged.</p> <ul style="list-style-type: none"> ● The levelling up agenda is likely to focus on towns rather than regions, powerhouses etc. in order to sustain town centre businesses. ● For town centres there are three key strategies to tackling issues associated with a failing or over supplied retail markets, including: <ul style="list-style-type: none"> ● Improving the draw of the town centre to shoppers – Improving the town centre environment; the diversity, type and quality of retail and leisure offer; and improving access to the town centre from a larger catchment area can increase visitation and spending in the town. This can help to support existing retail uses however there may have negative impacts on other town centres without the same support. ● Decreasing retail / leisure floorspace through repurposing – Where town centres have a significant oversupply of retail and leisure uses and high and long-term vacancies, repurposing these uses to other active use may support the overall vibrancy of the remaining retail and leisure market. This will reduce competition, focus spending and activity in remaining areas, and increase activity from repurposed uses, which may be in the form of residential, office, industrial, or community (health, education, services etc). ● Increasing the population – aligned with the above repurposing strategy, increasing the town centre population can increase footfall, activity, vibrancy, and spending in the town centre. This can benefit existing town centre retail and leisure uses.

Potential trend	Key implications
Logistic and supply chain strategies	<ul style="list-style-type: none"> ● COVID-19 has revealed the fragility of modern supply chains and diverse sourcing and digitisation will be the key to building stronger, smarter supply chains and ensuring a lasting recovery. ● Changes in consumer behaviour and shift to digital e-commerce will be accelerated as many individuals experiment with or become reliant on online shopping (e.g. the elderly). Anticipated that many will permanently shift to e-commerce. ● These shifts are likely to require greater inventories at final mile distribution points.
Digital connectivity and technological factors	<ul style="list-style-type: none"> ● Growing role of technology is likely to be one of the most pronounced long-term impacts from the crisis. ● COVID-19 crisis increases the strategic importance of digital infrastructure to allow everyone who can work from home to do so effectively through access to digital applications, services and data. ● Digital connectivity and revolutionary power of video/web conferencing could help with re-localising work. Digital skills will become ever more important. ● Technologies such as cloud computing will accelerate making businesses more flexible. ● Robotics will see exponential growth to reduce human to human contact. ● Leeds' strong digital connectivity places it well to welcome this long-term shift.
Unemployment and skills	<ul style="list-style-type: none"> ● Unemployment is likely to be one of the key characteristics of the recession faced and will affect certain groups more adversely. ● Young people, especially young women, are highly represented in sectors that will be worst hit by the crisis (hospitality and tourism). ● Will also impact on lower occupations and the lower paid. Many working in these sectors are also not geographically mobile (often due to housing tenancy issues) and already experience relatively high unemployment. These factors will be most severe for those in elementary occupations, which accounted for 10.0% of Morley's population in the 2011 Census. ● Job creation and fiscal stimulus will need to target these groups. ● Potential for long term under investment in human capital to be addressed and need to invest in sectors such as green infrastructure but also teaching, care work and nursing. ● Existing structures such as further education colleges, job centres and higher education institutions will need to be used but become faster and more intuitive. There will be more importance centred on skills matching local markets to ensure the labour market is more fluid. ● Important element of the levelling up agenda as differences in skills are one of the drivers of regional inequality between regions. ● Furthermore, if a carefully locally specific approach is taken to retraining, information, advice and guidance and other support for people with limited financial and other resources, it may be possible to mitigate the rise in unemployment. E.g. this could be in relation to how those in industries worst impacted (retail, hotels and catering) are moved to growing industries (e.g. administration roles and health).
Net zero carbon emissions by 2050 (government commitment)	<ul style="list-style-type: none"> ● COVID-19 may favour the achievement of net zero if medium term economic growth is reduced and remote working becomes the norm for those who can, reducing transport emissions. ● Opportunities for reskilling and retraining, greener housing and better green infrastructure have the potential to employ many workers and offset adverse economic effects, as well as to mitigate climate change.

Source: Mott MacDonald analysis

7.5 Key points

- The COVID-19 crisis will have unprecedented economic impacts for the UK and unemployment has risen significantly. Predictions and forecasts over future growth are changing weekly as the country has begun to re-enter lockdown and social distancing measures.
- Morley, like many towns, is likely to be significantly impacted given the high proportion of economic activities within the retail industries. Morley also lacks strong employment in sectors with good prospects, such as healthcare, that ensure employment in hospitals, though a high level of employment within the warehousing sector is beneficial.
- Unemployment, based on the claimant count measure, has already risen steeply, but has stayed below district and national levels, and must be monitored closely in the near future. Morley has seen a higher increase in the relative size of its claimant count than other comparators, with the increase higher for older residents.

- COVID-19 is already accelerating many existing retail and leisure trends, including the shift to greater online spending and changing demands around a modern leisure offer, which may fundamentally change the role of town centres moving forwards. Strategies could include improving the draw of the town centre to shoppers (particularly by improving the town centre environment), repurposing uses to other active uses (e.g. residential, office or community) to improve overall vibrancy and increasing the town centre to increase footfall.
- Confidence can be taken from a very gradual return to work in Leeds City Region, reflected in early results from the Quarterly Economic Survey. In terms of redundancies, in most cases this was less than 10% of the workforce, and only 10% of businesses had made 10-50% of their workforce redundant. However, the return to some lockdown measures in late September is likely to dampen this impact of returning to work and the end of the furlough scheme may lead to further redundancies.

8 Conclusions and recommendations

The socio-economic baseline has provided a detailed overview of the socio-economic characteristics, constraints and opportunities of the town, set within the wider functional economic geography. Understanding the current role and economic performance of the town and its wider catchment area will benefit the suite of work aligned to the Towns Fund, directly supporting the rationale for interventions required in the town in a post-COVID-19 scenario.

8.1.1 Morley

Morley is a medium sized town, located less than 5 miles south-west of Leeds within the metropolitan borough of the City of Leeds. The metropolitan district is comprised of the administrative centre and city of Leeds, alongside smaller towns and villages, including Morley. Morley is one of eight main towns within Leeds alongside Garforth, Guiseley, Otley, Pudsey, Rothwell, Wetherby and Yeadon.

In 2018, Morley's population and employment was approximately 31,600 people and 24,000 employees, representing 4.0% and 5.1% of the Leeds totals respectively. Morley's population, as in Leeds, has a working age (16-64) proportion that is larger than Yorkshire and the Humber and Great Britain respectively. Whilst the town struggles to retain some of its young population cohorts, this implies it is an attractive location for working age households. Infrastructure that supports entry level skills development could help Morley to retain a greater share of its young adults (16-24 year olds).

8.1.2 Key employment sectors

Morley's employment base is largely structured around retail, financial and professional services. Exploring Morley's employment base in more detail shows the town's important economic role as a key service centre for Retail and Wholesale trade and the Public sector, but also shows substantial sub-sector employment growth in Financial services and Professional services. This employment is based around key logistical offices for Hermes, and offices for HSBC, WSP and HMRC at the White Rose office park, and retail services at White Rose shopping centre, both located in Morley.

In 2018, the Morley economy generated an estimated £1.3 billion of GVA, which was principally driven by Distribution & transport, Accommodation & food, Financial & insurance and Business services sectors. An estimated 27.2% of Morley's GVA is produced within the Financial & insurance activities sector, which has grown rapidly in recent years. Reviewing how this sector can be further complemented could help the growth to last longer, but it is important that the Morley town does not become overly reliant upon one sector.

8.1.3 Labour market characteristics

Overall, economic activity and employment rates in Morley are higher than Leeds, England and Wales (based on 2011 data). While the overall economic inactivity rate is lower, for those residents who are economically inactive, retirement is the primary reason, accounting for 55% of residents compared to 41% in Leeds and 46% nationally. In 2019, unemployment rates across the town (as measured by the proportion of claimants) was lower in Morley than Leeds and nationally.

Morley, as well as Leeds, is a net importer of labour, with more people travelling into the area for work than travelling out for work. Journeys into Morley for work tend to originate from a localised area around the town in the south west of the district. Journeys out are more concentrated, with particularly high out-commuting flows to Leeds city centre, and lower out-commuting flows to surrounding areas such as Huddersfield and Normanton.

The skills and qualification profile of the town indicates that there are fewer residents employed in the most highly skilled (SOC 1-3) jobs. This aligns with the qualification profile of the town in which fewer residents are qualified to NVQ Level 4 or higher.

Deprivation levels in the town are mixed with the proportion of residents in the most deprived, middle and second least deprived quintiles broadly in line with the national figure. In Morley, approximately 21% of residents are within the 20% most deprived LSOAs in the country.

Tentative conclusions from this include:

- Ensuring that local resident's skills match the needs of local employers (particularly the fast growing financial & insurance activities sector) would help the town to maximise the value created locally and reduce deprivation within the town.
- Delivering housing that meets the needs of workers within high skilled occupations would help to ensure the town can attract residents with high incomes to spend locally, without necessarily squeezing out the existing resident population.

8.1.4 Housing, health and connectivity

According to the Morley Housing Market Assessment, in 2020 there were around 17,000 dwellings in the Morley area. Of these dwellings, the majority are terraced and semi-detached housing, which cumulatively account for 59.9% of the housing stock.

Morley benefits from good road connectivity with Leeds, Huddersfield, Barnsley and Doncaster accessible within 45 minutes. The town is also well served by public transport with hourly direct rail services to Huddersfield and twice hourly direct services to Leeds (that are 12 minutes in duration). Bus connections in the city are also strong with frequent services in and out of the town centre, along key corridors such as the A643 and to key employment sites. This gives Morley an opportunity to further benefit from its strategic location close to Leeds and other major settlements with interventions that improve access to/from major transport infrastructure.

In the district of Leeds, there is good digital connectivity, with the district performing better across all indicators than the United Kingdom. Yet in Morley, there are pockets with very low access to higher speed internet connections (30Mbit/s and/or 300Mbit/s) which could limit resident's potential to participate in the digital economy (e.g. video calling, transferring of large files, etc). Given shifts in the economy as a result of COVID-19, commuting is anticipated to be less frequent, thereby raising the importance of digital connectivity to residential and commercial properties.

Both Morley North and Morley South have GP reported adult obesity rates and cancer rates which are higher than the Leeds average. Additionally, Morley South performs worse than Leeds in recorded COPD and CHR rates. Both males and females born in Morley South between 2014 and 2016⁵¹ have a lower life expectancy than those born in Morley North or in Leeds. Interventions that support healthy outcomes such as parks and greenspace, as well as community wellbeing centres could help to address the weaker health indicators.

⁵¹ This data is reported as a rolling three-year period, this is the most recent data available at ward level.

Morley is well served by heritage sites, with a Grade I listed town hall and many Grade II listed buildings. Morley also has a strong arts offer, centred around Morley Arts Festival, which is held every year in September and October. Only some of the heritage assets are utilised for the visitor economy, these assets could be better used to boost the visitor economy. A range of interventions could uplift or synthesise these areas more effectively, for example better street and public realm design to enhance visitor experience, encourage walking and cycling, and leverage private sector investment in nearby properties. Enhancing the offer of the already popular local market could also attract more visitors to the town centre.

8.1.5 COVID-19 impacts

Morley is likely to be significantly impacted given the high proportion of economic activities within the retail industry. Morley also lacks strong employment in sectors with good prospects, such as healthcare, that ensure employment in hospitals. Unemployment, based on the claimant count measure, has already risen steeply, with the percentage increase in Morley higher than comparator areas, yet the percentage of claimants as a proportion of the total working age population has stayed below district and national levels.

COVID-19 is already accelerating many existing retail and leisure trends, including the shift to greater online spending and changing demands around a modern leisure offer, which will fundamentally change the role of town centres moving forwards. Strategies could include improving the draw of the town centre to shoppers (particularly by improving the town centre environment), repurposing uses to other active uses (e.g. residential, office or community) to improve overall vibrancy and increasing the town centre to increase footfall.

Interventions should be flexible, given the high level of uncertainty, and be robust to a rapidly environment. There could be demand for more agile working as people base themselves in corporate offices less and have more time at home with an option for a local agile office space on an ad-hoc basis. The pedestrianisation of towns has been a common feature of towns and cities following COVID-19, as the requirement for direct roads through towns and high streets is no longer deemed necessary. Targeted temporary/permanent expansion of pedestrianised could be considered. Open public space has become increasingly important given COVID and that many town residents will not have access to private gardens.

8.1.6 Summary indicators

Table 8.1: Economic snapshot- key indicators

Indicators	Morley	Leeds	West Yorkshire	Yorkshire and the Humber	Great Britain
Core Indicators, 2018, 2019					
Population, 000s, 2019	32	793	2,333	5,503	64,903
Employees, 000s, 2018 (Workplace based)	24	467	1,066	2,398	29,758
Employment, 000s, 2018 (Workplace based)	24	478	1,097	2,490	30,815
GVA, total, £m, 2018	£1,348	£26,239	£73,576	£142,121	£3,616,968
GVA per worker, £, 2018	-	£53,311	£47,984	£46,869	£52,441
Labour market indicators, as % of residents aged 16-64, 2019					
Economic activity rate, %	-	77.9%	75.8%	77.2%	78.9%
Employment rate, %	-	74.6%	72.3%	73.7%	75.8%

Indicators	Morley	Leeds	West Yorkshire	Yorkshire and the Humber	Great Britain
Unemployment rate, %	-	4.2%	4.6%	4.5%	4.0%
Self-employment rate, %	-	10.4%	9.7%	9.4%	10.9%
% of residents qualified to NVQ4+	-	40.1%	33.2%	34.2%	40.3%
COVID-19 Labour market impact					
Claimant count, aged 16-64, August 2019	445	15,910	50,985	106,075	1,126,995
Claimant count, aged 16-64, August 2020	1,105	36,205	108,490	227,330	2,638,780
Change in claimant count, 2019-2020, %*	148%	128%	113%	114%	134%
Labour market indicators, as % of all resident based aged 16-74, 2011					
Economic activity rate, %	76.2%	69.5%	68.5%	68.4%	69.7%
Employment rate, %	69.8%	59.4%	59.7%	60.0%	61.9%
Unemployment rate, %	3.8%	4.8%	5.0%	4.8%	4.4%
Self-employment rate, %	7.2%	7.5%	8.1%	8.4%	9.7%
% of residents qualified to NVQ4+	23.3%	26.9%	23.8%	27.2%	23.3%

Source: Population Estimates, 2019; BRES, Subregional Productivity, Gross Value Added (balanced) by Industry, all 2018, Annual Population Survey 2019, Claimant Count, 2019-2020 and Census, 2011, all ONS.
Note: *Compares August 2019 to August 2020.

8.2 Recommendations

Based on the socio-economic evidence base an assessment of the potential types and scope of project interventions that may fit with the Morley Towns Fund has been undertaken. These are emerging recommendations based on the study team's⁵² experience of economic development and regeneration across the UK, and particularly as part of the FHSF and Towns Fund process and work undertaken for local authorities to help them with understanding and mitigating against the adverse impacts of COVID-19.

Potential interventions that could be explored are considered below in Table 8.2, under a number of key themes:

Table 8.2: Potential interventions for Morley – emerging thoughts

Theme	Potential intervention	Details
Urban regeneration, planning and land use	Pocket parks and designed space	<ul style="list-style-type: none"> • Pocket parks and designed space with areas for people to dwell, rest and meet can enhance personal fulfilment of an area. • More access to green and open spaces is linked to improved health and wellbeing outcomes both physically and mentally. • This can be particularly appreciated by older people, young families and young people. • This will support the wider placemaking interventions and support extended dwell time in the town centre thereby supporting the retail sector. • Open public space has become increasingly important given COVID and that many town residents will not have access to private gardens. • More analysis of employment and housing land supply/demand needed to identify sites for development (if appropriate)

⁵² Mott MacDonald's Economic and Social Development (ESD) team who have undertaken this socio-economic assessment.

Economy	Skills infrastructure	<ul style="list-style-type: none"> • Morley has a low proportion of working age inhabitants qualified to NVQ4+ and above. Simultaneously, Morley should look to upskill its residents and retain them and attract graduates and post-graduates from the Leeds universities to businesses in Morley. • Morley would require accessible training programmes for adults and the provision of graduate level roles, possibly created by businesses within the White Rose office park, to diversify the employment offer. This would help Morley take advantage of its expanding employment sectors, such as Financial and Professional services, and move away from sectors vulnerable to COVID-19. • Supporting entry level training schemes will help Morley to retain a greater share of its young adults (16-24 year olds). • Provision of training to meet growing sector needs (e.g. financial services).
	Enterprise infrastructure	<ul style="list-style-type: none"> • There is some success in survival rates of new enterprise start-ups, but this likely reflects that start up rates are generally low, with the exception of skilled labour transitioning from years of experience in a particular field with another organisation. Interventions to support and encourage business entrepreneurship could help boost the start-up rates.
	Flexible/ remote working	<ul style="list-style-type: none"> • In a post-COVID-19 era there could be demand for more agile working as people base themselves in corporate offices less and have more time at home with an option for a local agile office space on an ad-hoc basis. • Providing this offer within Morley could prove attractive to homeworkers where the home working set-up is not efficient, and to people starting out as entrepreneurs. • This could also attract higher skilled residents to Morley who historically may have located to those areas in Leeds city centre with better accessibility to major employment centres.
Local Transport	Cycling and walking	<ul style="list-style-type: none"> • Improved cycling and walking infrastructure could provide a feasible and healthy commuting option to Leeds city centre, for example, in the form of a dedicated cycling corridor to Leeds. This would, in tandem, meet the connectivity objective of the Towns Fund. • Active modes may help improve Morley resident health outcomes which are a key issue for the town. • The pedestrianisation of towns has been a common feature of towns and cities following COVID-19, as the requirement for direct roads through towns and high streets is no longer deemed necessary. Targeted temporary/permanent expansion of pedestrianised could be considered. • Local transport interventions should support getting around Morley and to/from key strategic transport infrastructure (road and rail) as well as key employment sites to help the town build on its strategic location.
Arts, culture and heritage	Heritage	<ul style="list-style-type: none"> • Morley has a Grade I listed Town Hall and several Grade II listed buildings in the town centre and the surrounding streets that could better articulate and display the history and heritage of Morley. A range of interventions could uplift or synthesise these areas more effectively, for example better street and public realm design to enhance visitor experience, encourage walking and cycling, and leverage private sector investment in nearby properties. • Morley is home to an historic and popular indoor market which draws in visitors locally and could be supported to deliver an improved visitor experience to enhance the attraction through quality retail and modernised food and drink offer. • Consider other leisure attractions into the town centre – e.g. museums/event space
Digital connectivity	Infrastructure	<ul style="list-style-type: none"> • Broadband connectivity strong in Leeds relative to national position, however, coverage in Morley is less comprehensive. • Exploring barriers and need for digital infrastructure to ensure businesses and residents have access to fast reliable broadband.

Source: Mott MacDonald

A. Statistical definitions

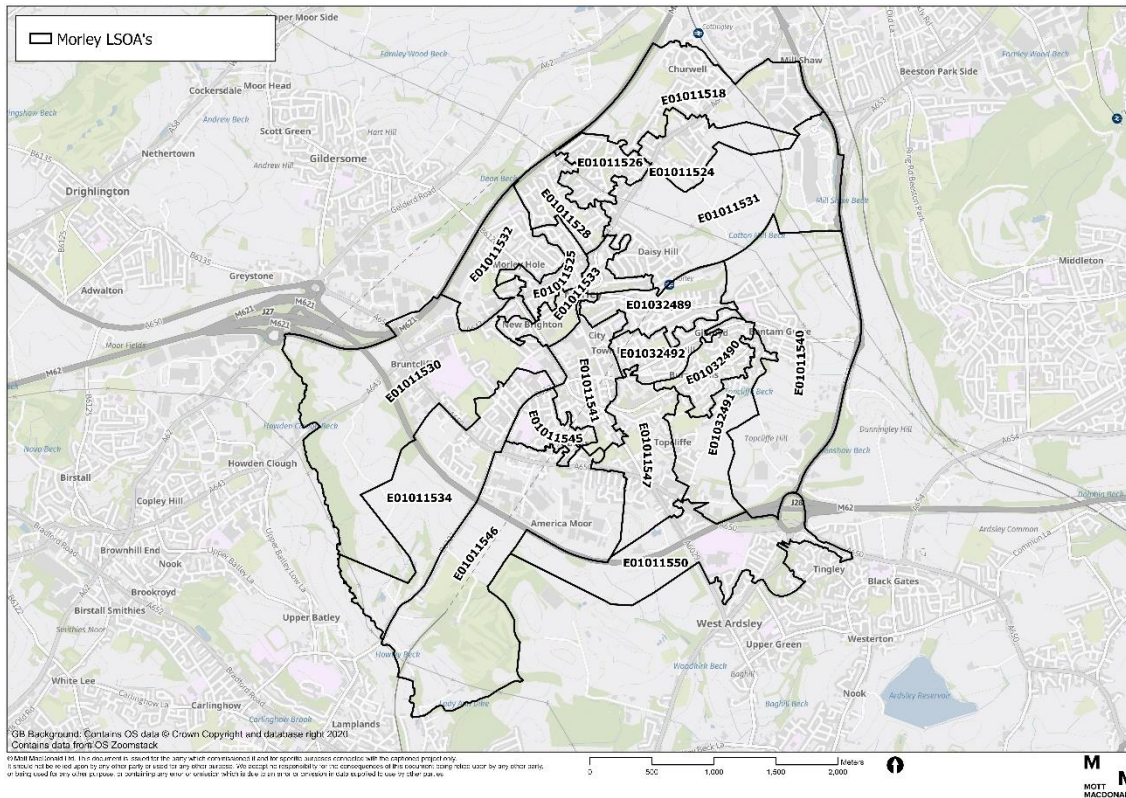
Table A.1 outlines the best fit LSOAs used to define Morley town centre and are also presented visually in Figure A.1. LSOAs to the north of Morley were excluded as they are not considered part of Morley town centre.

Table A.1: Morley best fit LSOAs

LSOA code	LSOA name
E01011518	Leeds 093A
E01011524	Leeds 093B
E01011526	Leeds 093C
E01011531	Leeds 093D
E01011525	Leeds 095C
E01011528	Leeds 095D
E01011532	Leeds 095E
E01011540	Leeds 102B
E01032489	Leeds 102F
E01032490	Leeds 102G
E01032491	Leeds 102H
E01032492	Leeds 102I
E01011533	Leeds 104A
E01011541	Leeds 104B
E01011545	Leeds 104C
E01011547	Leeds 104D
E01011530	Leeds 106A
E01011534	Leeds 106B
E01011546	Leeds 106C
E01011550	Leeds 106E

Source: Mott MacDonald

Map A.1: Morley best fit LSOAs



Source: Mott MacDonald

Table A.2 shows the breakdown of SIC codes used to define the tourism industry in Section 6.3. This definition is taken from the Department for Culture, Media & Sport’s (DCMS) definition of tourism.

Table A.2: Tourism economy SIC codes

SIC code
4910 : Passenger rail transport, interurban
4932 : Taxi operation
4939 : Other passenger land transport n.e.c.
5010 : Sea and coastal passenger water transport
5030 : Inland passenger water transport
5110 : Passenger air transport
6820 : Renting and operating of own or leased real estate
7711 : Renting and leasing of cars and light motor vehicles
7721 : Renting and leasing of recreational and sports goods
7734 : Renting and leasing of water transport equipment
7735 : Renting and leasing of air transport equipment
791 : Travel agency and tour operator activities
799 : Other reservation service and related activities
823 : Organisation of conventions and trade shows

SIC code

9001 : Performing arts
9002 : Support activities to performing arts
9003 : Artistic creation
9004 : Operation of arts facilities
9102 : Museum activities
9103 : Operation of historical sites and buildings and similar visitor attractions
9104 : Botanical and zoological gardens and nature reserve activities
9311 : Operation of sports facilities
9319 : Other sports activities
9321 : Activities of amusement parks and theme parks
9329 : Other amusement and recreation activities
9512 : Repair of communication equipment
55 : Accommodation
56 : Food and beverage service activities
92 : Gambling and betting activities

Source: DCMS, 2020

B. Supplementary data

Table B.3: Public health indicators

<i>Time period</i>	Deprivation rank†	GP recorded adult smoking rate*	GP recorded adult obesity rate*	GP recorded diabetes rate*	GP recorded COPD rate*	GP recorded coronary heart disease*	GP recorded cancer rate*	Male life expectancy at birth	Female life expectancy at birth
	2019	2018 quarter 3	2018 quarter 3	2018 quarter 3	2017 quarter 4	2017 quarter 4	2017 quarter 4	2014 - 2016	2014 - 2016
Gipton & Harehills	1	24,880	28,024	11,396	3,891	4,825	3,555	76.5	81.2
Burmantofts & Richmond Hill	2	28,209	27,229	7,681	4,838	4,580	3,842	72.8	76.9
Killingbeck & Seacroft	3	27,400	29,341	7,751	4,262	4,847	3,980	74.9	81.2
Middleton Park	4	27,659	30,887	7,775	5,312	4,858	4,168	76.5	77.8
Hunslet & Riverside	5	26,168	24,877	8,938	#N/A	#N/A	#N/A	#N/A	#N/A
Armley	6	27,199	27,047	7,343	3,384	4,300	3,257	75.0	79.9
Chapel Allerton	7	19,103	22,482	8,883	2,565	3,823	3,549	79.1	82.0
Bramley & Stanningley	8	23,821	28,245	6,873	3,748	4,207	3,904	78.0	82.5
Farnley & Wortley	9	23,303	27,463	6,452	3,149	4,126	3,975	77.9	80.9
Beeston & Holbeck	10	24,473	26,905	7,484	4,166	4,277	3,955	76.6	79.6
Temple Newsam	11	19,107	24,654	5,676	2,726	3,785	3,969	78.8	83.4
Kirkstall	12	22,670	23,887	6,614	3,387	4,325	3,838	77.1	83.5
Cross Gates & Whinmoor	13	19,643	28,162	6,395	2,916	4,090	4,138	78.5	83.3
Little London & Woodhouse	14	22,446	21,674	8,701	#N/A	#N/A	#N/A	#N/A	#N/A
Alwoodley	15	11,535	20,671	5,941	1,304	3,417	4,126	82.8	88.2

	Deprivation rank†	GP recorded adult smoking rate*	GP recorded adult obesity rate*	GP recorded diabetes rate*	GP recorded COPD rate*	GP recorded coronary heart disease*	GP recorded cancer rate*	Male life expectancy at birth	Female life expectancy at birth
<i>Morley South</i>	<u>16</u>	<u>18,094</u>	<u>26,882</u>	<u>5,970</u>	<u>2,907</u>	<u>4,203</u>	<u>4,074</u>	<u>78.9</u>	<u>81.1</u>
Weetwood	17	14,594	19,671	5,214	1,622	3,297	3,918	82.5	85.2
Adel & Wharfedale	18	11,021	18,592	4,340	1,029	3,231	4,453	85.0	87.1
Moortown	19	11,364	20,266	6,565	1,647	3,726	4,325	79.2	82.0
Pudsey	20	16,856	26,288	5,609	2,622	3,615	4,244	79.2	83.0
Roundhay	21	12,388	18,614	6,313	1,671	3,458	4,263	79.8	82.7
Ardsley & Robin Hood	22	15,031	25,632	6,160	2,082	4,065	3,804	81.4	85.4
Calverley & Farsley	23	12,694	22,691	5,531	2,081	3,534	4,188	80.3	82.9
Garforth & Swillington	24	13,721	26,058	5,475	1,982	3,799	4,383	80.2	84.6
Guiseley & Rawdon	25	12,183	20,913	5,028	1,657	3,353	4,250	81.2	84.3
Harewood	26	9,617	17,715	3,580	1,121	3,082	4,333	84.7	87.8
Headingley & Hyde Park	27	21,782	18,861	7,026	#N/A	#N/A	#N/A	#N/A	#N/A
Horsforth	28	11,642	18,916	4,210	1,740	3,294	4,337	81.6	86.5
Kippax & Methley	29	15,923	28,282	5,828	2,429	3,736	4,224	79.2	82.0
<i>Morley North</i>	<u>30</u>	<u>14,771</u>	<u>25,742</u>	<u>5,578</u>	<u>2,369</u>	<u>3,853</u>	<u>4,128</u>	<u>79.6</u>	<u>83.1</u>
Otley & Yeadon	31	15,774	22,854	5,440	1,972	3,540	4,118	80.7	84.1
Rothwell	32	15,972	24,058	5,517	2,417	3,651	4,294	80.9	83.3
Wetherby	33	11,939	19,915	3,968	1,503	3,419	4,080	83.2	85.6
Leeds	-	18,319	23,696	6,225	2,592	3,873	4,030	79.1	82.7

Source: Source: Leeds Data Observatory. Note: N/A refers to wards which have changed boundaries between 2017 and 2018

Table B.4: Listed buildings within Morley

Grade	Building
I	THE TOWN HALL
II	PUBLIC LIBRARY
II	MORLEY HALL
II	MILESTONE APPROXIMATELY 30 METRES NORTH EAST OF SIX ARCHES VIADUCT
II	4 DOGS GROOMING CENTRE
II	MIKES CARPET WAREHOUSE
II	MANOR HOUSE FARMHOUSE
II	55 57 AND 59, QUEEN STREET
II	CRANK MILLS
II	CHURCH OF ST MARY IN THE WOOD (CONGREGATIONAL)
II	GROUP OF 6 RAISED SLABS CLOSE TO SOUTH BUTTRESS OF NAVE OF CHURCH OF ST MARY
II	GROUP OF 9 RAISED SLABS APPROXIMATELY 6 METRES SOUTH EAST OF CHURCH OF ST MARY
II	GROUP OF 3 RAISED TOMBS APPROXIMATELY 10 METRES NORTH OF SCATCHERD MAUSOLEUM
II	PAIR OF SLABS TO MARTHA BALMFORTH 1795 AND BENJAMIN HOPPERTON 1785 APPROXIMATELY 20 METRES EAST OF CORNER OF NORTH TRANSEPT OF CHURCH OF ST MARY
II	CHEST TOMB TO ANNE LISTER 1735 AND RAISED GRAVE SLAB TO WILLIAM HAVDEN 1699 APPROXIMATELY 10 METRES NORTH WEST OF CORNER BUTTRESS OF CHURCH OF ST MARY
II	CROFT HOUSE
II	ST MARY'S IN THE WOOD CHURCH HALL
II	SWINDON HOUSE YEW TREE COTTAGE
II	PARK HOUSE
II	BARCLAYS BANK AND FIGURE FITNESS CENTRE
II	LLOYDS BANK
II	FORMER COACH HOUSE TO REAR OF HOUSE OCCUPIED AS OFFICES BY RENTOKIL LIMITED
II	SCATCHERD MAUSOLEUM (ST MARYS CHURCHYARD)
II	RAISED SLAB TO ELIZABETH REYNER APPROXIMATELY 8 METRES NORTH OF NORTH WEST CORNER OF SCATCHERD MAUSOLEUM
II	GROUP OF 3 CHEST TOMBS TO ELIZABETH ELLIS 1723 WILLIAM ROBUCK 1720 AND JOSEPH HALL 1739 APPROXIMATELY 20 METRES EAST OF EAST WINDOW OF CHURCH OF ST MARY
II	PAIR OF CHEST TOMBS TO THE ASQUITH FAMILY C1827 AND 1854 APPROXIMATELY 25 METRES NORTH WEST OF WEST DOOR OF CHURCH OF ST MARY
II	TABLE TOMB TO SARAH JUBB APPROXIMATELY 1 METERS EAST OF NORTH EAST CORNER OF CHURCH
II	ST PETERS SUNDAY SCHOOL
II	CHURCH OF ST PETER
II	OLD POOR HOUSE
II	MORLEY CENTRAL METHODIST CHURCH
II	10, WESLEY ROAD
II	GROUP OF 5 TOMBS APPROXIMATELY 8 METRES EAST OF CANTED BAY ON EAST END OF CHURCH OF ST MARY
II	GROUP OF 3 RAISED TOMB SLABS SET BETWEEN CENTRAL BUTTRESSES TO NORTH AISLE OF CHURCH OF ST MARY
II	MILESTONE IN FRONT OF FAIRMEAD

Grade	Building
II	GROUP OF 4 RAISED SLABS SET ROUND NORTH EAST CORNER OF SCATCHERD MAUSOLEUM
II	WAR MEMORIAL
II	2-6, CHAPEL HILL
II	NATIONAL WESTMINSTER BANK
II	COMMERCIAL STREET MILL AND ATTACHED CHIMNEY
II	DAWSON HOUSE AND WARHOUSE
II	MOUNT ZION CHAPEL OCCUPIED BY WALLACE AND COMPANY UPHOLSTERERS AND ATTACHED COTTAGE NUMBER 65
II	PHILLIPS AUCTION ROOMS
II	37, HIGH STREET
II	MIDLAND BANK
II	HOUSE OCCUPIED AS OFFICES BY RENTOKIL LIMITED
II	SPRINGFIELD HOUSE
II	CROSS HALL-WEST AND CROSS HALL-EAST
II	Railway underbridge MDL1/39, Churwell Bridge
II	Railway viaduct MDL1/40, Churwell Viaduct
II	Railway underbridge MDL1/35, Howley Mill Lane

